GOLF TOURISM IN NORTHERN IRELAND | 2017

Results Presentation – March 2018
STATE OF GOLF IN THE GREAT BRITAIN
ROUNDS PLAYED YEAR TO DATE – GREAT BRITAIN

Average number of Rounds Played per course in each month ~2013-2017

- 2013
- 2014
- 2015
- 2016
- 2017

End of year: Down 0.5%

Q1: Up 9%
Q2: Down 4%
Q3: Down 4%
Q4: Down 11.4%
TOURISM NORTHERN IRELAND: 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
FULL YEAR: 2017

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

- 24 clubs submitted data for the peak golfing season.
  - This is more than in 2016
- Data was submitted either online at www.nitbgolf.net or via an SMS INC spreadsheet emailed to courses.

Visitor Interviews

- 312 interviews were conducted among out of state visitors at clubs during the prime golfing season. (See next slide for a list of clubs)
- 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
## VISITOR INTERVIEWS

- Between 10 and 20 interviews were carried out at each of the following clubs. This is consistent with 2016:

<table>
<thead>
<tr>
<th>Clubs</th>
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</thead>
<tbody>
<tr>
<td>Ardglass</td>
</tr>
<tr>
<td>Ballycastle</td>
</tr>
<tr>
<td>Ballymena</td>
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<tr>
<td>Bangor</td>
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<tr>
<td>Belvoir Park</td>
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<tr>
<td>Bushfoot</td>
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<tr>
<td>Cairndhu</td>
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<tr>
<td>Carrickfergus</td>
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<tr>
<td>Downpatrick</td>
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<tr>
<td>Edenmore</td>
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<tr>
<td>Galgorm Castle</td>
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<tr>
<td>Holywood</td>
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<tr>
<td>Kilkeel</td>
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<tr>
<td>Lisburn</td>
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<tr>
<td>Lough Erne</td>
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<tr>
<td>Malone</td>
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<tr>
<td>Masserene</td>
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<tr>
<td>Moira</td>
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<tr>
<td>Portstewart</td>
</tr>
<tr>
<td>Rockmount</td>
</tr>
<tr>
<td>Royal Portrush</td>
</tr>
<tr>
<td>Temple</td>
</tr>
<tr>
<td>Warrenpoint</td>
</tr>
<tr>
<td>Whitehead</td>
</tr>
</tbody>
</table>
KEY FINDINGS
KEY FINDINGS

- The Economic Impact of golf tourism for Northern Ireland in 2017 is:

  - 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:

  - 2017 = 123,200
  - 2016 = 122,200
  - 2015 = 139,300
  - 2014 = 139,300
KEY FINDINGS

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

- The number of non-domestic overnight golfing visitors to Northern Ireland is:
  
  2017 = 16,900  
  2016 = 21,800  
  2015 = 17,400  
  2014 = 18,900
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 has been dropping over the past few years and so it’s encouraging that the number of visitors from Northern Ireland has increased on last year.

North America is crucial to the total economic impact of golf tourism in Northern Ireland, and the number of visitors from North America has dropped slightly, but with an increased spend, the economic impact from this group has increased.

The number of UK and European visitors increased considerably in 2016 and this year that has not been sustained. Golfers from the UK and Europe visited Northern Ireland for golf, although, those who did visit are playing more golf than before and staying longer.

Visitors from “The Rest of The World” are taking longer trips, but are playing golf as part of a wider trip.
VOLUME AND VALUE OF GOLF TOURISM
BREAKDOWN OF OVERNIGHT VS DAY VISITOR REVENUE

OVERNIGHT VISITOR TOTAL EXPENDITURE
- 2014: £26,900,000
- 2015: £25,600,000
- 2016: £28,600,000
- 2017: £31,000,000

DAY VISITOR TOTAL EXPENDITURE
- 2014: £6,300,000
- 2015: £6,500,000
- 2016: £7,000,000
- 2017: £8,900,000
TOTAL EXPENDITURE PER COUNTRY

OVERNIGHT VISITOR TOTAL EXPENDITURE

- N.I: £1,150,000
- R.O.I: £8,688,000
- UK: £2,341,000
- Europe: £206,000
- N. Am: £2,711,000
- R.O.W: £0
- Other: £4,867,000
- Total: £18,299,000

DAY VISITOR TOTAL EXPENDITURE

- N.I: £0
- R.O.I: £0
- UK: £0
- Europe: £8,688,000
- N. Am: £0
- R.O.W: £206,000
- Total: £8,894,000
TOTAL EXPENDITURE 2015 - 2017 – OVERNIGHT VISITORS

Northern Ireland | R.O.I | UK | Europe | N. Am | R.O.W

2015
- £1,386,000
- £1,279,000
- £1,892,000

2016
- £1,397,000
- £2,832,000
- £3,958,000
- £4,533,000
- £975,000

2017
- £1,150,000
- £2,341,000
- £2,711,000
- £4,867,000
- £4,867,000
- £1647,000

Total:
- £18,299,000

TOTAL VISITORS 2015 - 2017 – OVERNIGHT VISITORS

Northern Ireland  R.O.I  UK  Europe  N. Am  R.O.W

<table>
<thead>
<tr>
<th>Year</th>
<th>Northern Ireland</th>
<th>R.O.I</th>
<th>UK</th>
<th>Europe</th>
<th>N. Am</th>
<th>R.O.W</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>5,100</td>
<td>2,600</td>
<td>4,300</td>
<td>1,800</td>
<td>270</td>
<td>200</td>
</tr>
<tr>
<td>2016</td>
<td>7,200</td>
<td>5,500</td>
<td>5,400</td>
<td>2,800</td>
<td>300</td>
<td>400</td>
</tr>
<tr>
<td>2017</td>
<td>9,400</td>
<td>4,300</td>
<td>3,300</td>
<td>2,100</td>
<td>400</td>
<td>670</td>
</tr>
</tbody>
</table>
ORIGIN OF TOTAL ROUNDS PLAYED BY QUARTER - EXCLUDING DOMESTIC

1st Quarter:
- R.O.I: 1,400
- UK: 1,400
- Europe: 600
- N. Am: 1,600
- R.O.W: 38

2nd Quarter:
- R.O.I: 4,800
- UK: 4,300
- Europe: 4,300
- N. Am: 1,300

3rd Quarter:
- R.O.I: 5,900
- UK: 6,800
- Europe: 5,100
- N. Am: 800

4th Quarter:
- R.O.I: 2,900
- UK: 1,600
- Europe: 1,500
- N. Am: 70

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CONSUMER FEEDBACK
CONSUMER FEEDBACK | Interviewee Profile

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

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

- Individual green fee: 54%
- Guest of a member: 18%
- Small Society (less than 10 players): 16%
- Large Society (over 20 players): 7%
- Medium Society (10-20 players): 5%

**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 Northern Ireland

Q: Have you played golf in Northern Ireland before?

- Yes within the last year: 77% (ROI 65, Rest of UK 109, Europe 28, USA/Canada 87, Rest of World 21, Overall 310)
- Yes within the last 5 years: 62% (ROI 29, Rest of UK 33, Europe 32, USA/Canada 29, Rest of World 29, Overall 36)
- Yes more than 5 years ago: 41% (ROI 41, Rest of UK 29, Europe 19, USA/Canada 13, Rest of World 5, Overall 14)
- Never: 8% (ROI 7, Rest of UK 8, Europe 4, USA/Canada 1, Rest of World 5, Overall 14)
Q: Do you know how your booking was made?

Online Tee Times was the most popular online booking website used, with over 60% of respondents using it. 20% of respondents used Teeofftimes.co.uk.
CONSUMER FEEDBACK | Accommodation

Q: What type of accommodation are you staying in?

- 4* or more hotel: 30%
- With friends/family: 21%
- 3* hotel: 15%
- Bed & Breakfast: 12%
- Guest House: 8%
- House (rented): 6%
- Resort: 5%
- Motor home: 2%
- Self-catering: 1%
- Own Holiday home: 1%
## CONSUMER FEEDBACK | Accommodation

<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>4* or more hotel</td>
<td>6%</td>
<td>11%</td>
<td>46%</td>
<td>64%</td>
<td>43%</td>
</tr>
<tr>
<td>With friends/ family</td>
<td>25%</td>
<td>28%</td>
<td>7%</td>
<td>13%</td>
<td>29%</td>
</tr>
<tr>
<td>3* hotel</td>
<td>12%</td>
<td>23%</td>
<td>7%</td>
<td>8%</td>
<td>14%</td>
</tr>
<tr>
<td>Bed &amp; Breakfast</td>
<td>28%</td>
<td>10%</td>
<td>21%</td>
<td>1%</td>
<td>-</td>
</tr>
<tr>
<td>Guest House</td>
<td>15%</td>
<td>12%</td>
<td>7%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>House (rented)</td>
<td>5%</td>
<td>4%</td>
<td>4%</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>Resort</td>
<td>3%</td>
<td>10%</td>
<td>7%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Motor home</td>
<td>-</td>
<td>2%</td>
<td>-</td>
<td>4%</td>
<td>-</td>
</tr>
<tr>
<td>Self- catering</td>
<td>3%</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>
CONSUMER FEEDBACK | Rounds & Courses Played

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Courses Visited</th>
<th>Rounds Played</th>
</tr>
</thead>
<tbody>
<tr>
<td>ROI</td>
<td>2.3</td>
<td>3.9</td>
</tr>
<tr>
<td>Rest of UK</td>
<td>2.7</td>
<td>4.2</td>
</tr>
<tr>
<td>Europe</td>
<td>3.4</td>
<td>4.7</td>
</tr>
<tr>
<td>North America</td>
<td>3.5</td>
<td>4.7</td>
</tr>
</tbody>
</table>

Average length of stay:
- ROI: 3.7 Days
- Rest of UK: 4.5 Days
- Europe: 8.0 Days
- North America: 8.8 Days
Q: Regarding this course, how would you rate the following 5 areas? (On a scale of 1-5 where 1 is Very Poor and 5 is Excellent)

- **Ease of booking**: 4.8, 84% Excellent, 12% Good, 4% Average, 3% Poor, 3% Very Poor
- **Customer service**: 4.8, 82% Excellent, 15% Good, 3% Average, 3% Poor, 6% Very Poor
- **Value for money**: 4.7, 74% Excellent, 23% Good, 3% Average, 6% Poor, 6% Very Poor
- **Overall course facilities**: 4.6, 71% Excellent, 22% Good, 6% Average, 7% Poor, 24% Very Poor
- **Overall clubhouse facilities**: 4.6, 68% Excellent, 24% Good, 7% Average, 6% Poor, 6% Very Poor
CONSUMER FEEDBACK  |  Returning to Northern Ireland

Q: On a scale of 1 to 5 where 1 is “Not at all likely” and 5 is “Very likely”, 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 or more years

<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 or more years</th>
</tr>
</thead>
<tbody>
<tr>
<td>ROI</td>
<td>4.6</td>
<td>4.7</td>
<td>4.6</td>
</tr>
<tr>
<td>UK</td>
<td>4.1</td>
<td>4.6</td>
<td>4.8</td>
</tr>
<tr>
<td>Europe</td>
<td>4.3</td>
<td>2.5</td>
<td>17</td>
</tr>
<tr>
<td>USA/Canada</td>
<td>4.2</td>
<td>3.1</td>
<td>2.4</td>
</tr>
<tr>
<td>Rest of World</td>
<td>2.1</td>
<td>2.7</td>
<td>3.4</td>
</tr>
</tbody>
</table>
CONSUMER FEEDBACK  |  Rating the golf

Q: How would you rate your golf experience overall in NI? (On a scale of 1-5 where 1 is Very Poor and 5 is Excellent)
CONSUMER FEEDBACK | Rating the golf break overall

Q: How would you rate your golf break in NI overall? (On a scale of 1-5 where 1 is Very Poor and 5 is Excellent)
CONSUMER FEEDBACK | NI – Value for Money

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

- Wales: 43% NI is much better, 27% NI is a little better, 14% About the same, 15% NI is a little worse, 1% NI is much worse, 20% Don't know
- England: 21% NI is much better, 37% NI is a little better, 20% About the same, 19% NI is a little worse, 2% NI is much worse, 10% Don't know
- Portugal: 58% NI is much better, 20% NI is a little better, 26% About the same, 10% NI is a little worse, 2% NI is much worse, 2% Don't know
- ROI: 24% NI is much better, 26% NI is a little better, 15% About the same, 11% NI is a little worse, 2% NI is much worse, 3% Don't know
- Spain: 18% NI is much better, 36% NI is a little better, 19% About the same, 14% NI is a little worse, 3% NI is much worse, 1% Don't know
- Scotland: 19% NI is much better, 22% NI is a little better, 22% About the same, 14% NI is a little worse, 1% NI is much worse, 5% Don't know
- USA: 37% NI is much better, 15% NI is a little better, 23% About the same, 19% NI is a little worse, 5% NI is much worse, 2% Don't know

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CONSUMER FEEDBACK | NI – Enjoyment

Q: How would you rate the overall enjoyment of your golf break in NI?

<table>
<thead>
<tr>
<th>Country</th>
<th>Enjoyment Rating</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>4.4</td>
<td>21%</td>
</tr>
<tr>
<td>Spain</td>
<td>4.3</td>
<td>51%</td>
</tr>
<tr>
<td>Portugal</td>
<td>4.3</td>
<td>57%</td>
</tr>
<tr>
<td>Wales</td>
<td>4.2</td>
<td>43%</td>
</tr>
<tr>
<td>USA</td>
<td>4.1</td>
<td>38%</td>
</tr>
<tr>
<td>Scotland</td>
<td>4.0</td>
<td>18%</td>
</tr>
<tr>
<td>ROI</td>
<td>4.0</td>
<td>23%</td>
</tr>
</tbody>
</table>

- **Dont know**: England (10%), Spain (6%), Portugal (6%), Wales (9%), USA (9%), Scotland (11%), ROI (7%)
- **NI is much better**: England (18%), Spain (6%), Portugal (5%), Wales (18%), USA (15%), Scotland (32%), ROI (28%)
- **NI is a little better**: England (5%), Spain (5%), Portugal (5%), Wales (5%), USA (5%), Scotland (2%), ROI (4%)
- **About the same**: England (18%), Spain (6%), Portugal (5%), Wales (18%), USA (15%), Scotland (32%), ROI (28%)
- **NI is a little worse**: England (6%), Spain (6%), Portugal (5%), Wales (9%), USA (9%), Scotland (11%), ROI (7%)
- **NI is much worse**: England (5%), Spain (5%), Portugal (5%), Wales (9%), USA (9%), Scotland (11%), ROI (7%)

Mean scores:
- England: 4.4
- Spain: 4.3
- Portugal: 4.3
- Wales: 4.2
- USA: 4.1
- Scotland: 4.0
- ROI: 4.0

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CONSUMER FEEDBACK | Visiting Tourist Attractions

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

Overall

- Yes: 60%
- No: 20%
- Don't know: 20%

By Region:

- ROI: 38% Yes, 40% No, 22% Don't know
- Rest of UK: 43% Yes, 32% No, 25% Don't know
- Europe: 85% Yes, 15% Don't know
- North America: 85% Yes, 12% Don't know
CONSUMER FEEDBACK | NI Golf Pass

Q: If you were returning to Northern Ireland for a Golf Holiday, would you be interested in purchasing a Northern Ireland Golf Pass?

- ROI: 42% Yes, 29% Maybe, 29% No
- Rest of UK: 45% Yes, 29% Maybe, 26% No
- Europe: 14% Yes, 46% Maybe, 39% No
- North America: 38% Yes, 30% Maybe, 31% No

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

- Courses included: 57%
- Price: 56%
- Food/drink included: 25%
- Quality of accommodation: 23%
- None of these factors: 14%
- A mix of course types: 12%
- Inclusion of non-golf activities: 8%
CONSUMER FEEDBACK | Choosing NI

Q: Do you know what influenced you / the decision organiser to choose Northern Ireland?

- Good courses: 45%
- Awareness of NI major champions: 43%
- NI hosting The Open: 42%
- Hospitality / people: 40%
- Previous experience: 30%
- Good facilities: 22%
- Visit Family & friends: 22%
- Accessibility: 20%
- Good literature / media advertising: 18%
- Good value: 15%
- Word of Mouth / Recommendation: 15%
- Internet: 13%
- Saw at an exhibition / golf event: 6%
- Coastal amateur tournament participation: 6%
- Other Competition / Corporate Day / Society: 4%
- "Time to play" ad campaign: 3%
- Don't Know: 1%
- Holiday: 1%
<table>
<thead>
<tr>
<th>CONSUMER FEEDBACK</th>
<th>Choosing NI: Top 10</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ROI</td>
</tr>
<tr>
<td>Good courses</td>
<td>42%</td>
</tr>
<tr>
<td>Awareness of NI major champions</td>
<td>27%</td>
</tr>
<tr>
<td>NI hosting the Open</td>
<td>33%</td>
</tr>
<tr>
<td>Hospitality / people</td>
<td>23%</td>
</tr>
<tr>
<td>Previous experience</td>
<td>35%</td>
</tr>
<tr>
<td>Good facilities</td>
<td>18%</td>
</tr>
<tr>
<td>Visit Family &amp; friends</td>
<td>26%</td>
</tr>
<tr>
<td>Accessibility</td>
<td>30%</td>
</tr>
<tr>
<td>Good literature / media advertising</td>
<td>11%</td>
</tr>
<tr>
<td>Good value</td>
<td>17%</td>
</tr>
</tbody>
</table>
CONSUMER FEEDBACK  |  Trip Highlights

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

- Scenery: 56%
- Irish hospitality: 48%
- Irish Drinks: 47%
- Chance to see non golf landmarks: 40%
- Staff Friendliness: 39%
- Venue of the Irish Open: 39%
- Courses that NI champs played & grew up on: 39%
- Good food: 36%
- Chance to play a course on the European Tour: 33%
- Chance to play a future Open venue: 31%
- Links courses: 26%
- Welcome: 24%
- Short flight from rest of UK: 15%
- Good value for money: 11%
- Other: 3%
## CONSUMER FEEDBACK | Trip Highlights: 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>Scenery</td>
<td>44%</td>
<td>54%</td>
<td>82%</td>
<td>57%</td>
<td>71%</td>
</tr>
<tr>
<td>Irish hospitality</td>
<td>15%</td>
<td>49%</td>
<td>71%</td>
<td>60%</td>
<td>62%</td>
</tr>
<tr>
<td>Irish Drinks</td>
<td>23%</td>
<td>51%</td>
<td>71%</td>
<td>48%</td>
<td>62%</td>
</tr>
<tr>
<td>Chance to see non golf landmarks</td>
<td>24%</td>
<td>24%</td>
<td>79%</td>
<td>54%</td>
<td>62%</td>
</tr>
<tr>
<td>Staff Friendliness</td>
<td>44%</td>
<td>37%</td>
<td>46%</td>
<td>33%</td>
<td>43%</td>
</tr>
<tr>
<td>Venue of the Irish Open</td>
<td>32%</td>
<td>38%</td>
<td>64%</td>
<td>33%</td>
<td>62%</td>
</tr>
<tr>
<td>Courses that NI champs played &amp; grew up on</td>
<td>35%</td>
<td>39%</td>
<td>50%</td>
<td>39%</td>
<td>43%</td>
</tr>
<tr>
<td>Good food</td>
<td>38%</td>
<td>39%</td>
<td>32%</td>
<td>33%</td>
<td>38%</td>
</tr>
<tr>
<td>Chance to play a course on the European Tour</td>
<td>23%</td>
<td>37%</td>
<td>46%</td>
<td>29%</td>
<td>38%</td>
</tr>
<tr>
<td>Chance to play a future Open venue</td>
<td>27%</td>
<td>31%</td>
<td>61%</td>
<td>24%</td>
<td>38%</td>
</tr>
<tr>
<td>Chance to play a future open venue (2016)</td>
<td>31%</td>
<td>21%</td>
<td>34%</td>
<td>25%</td>
<td>28%</td>
</tr>
</tbody>
</table>
CONSUMER FEEDBACK | Royal Portrush 2019

Q – Will the fact that The Open is being held at Royal Portrush have an influence on...?

<table>
<thead>
<tr>
<th>Activity</th>
<th>No influence</th>
<th>Very little influence</th>
<th>Neither</th>
<th>Quite a bit of influence</th>
<th>A lot of influence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting Northern Ireland</td>
<td>44%</td>
<td>15%</td>
<td>16%</td>
<td>9%</td>
<td>17%</td>
</tr>
<tr>
<td>Playing Royal Portrush</td>
<td>38%</td>
<td>22%</td>
<td>22%</td>
<td>10%</td>
<td>17%</td>
</tr>
<tr>
<td>Attending The Open in 2019</td>
<td>42%</td>
<td>14%</td>
<td>16%</td>
<td>9%</td>
<td>17%</td>
</tr>
<tr>
<td>Overall UK Golfers</td>
<td>60%</td>
<td>14%</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Visiting Northern Ireland</td>
<td>51%</td>
<td>15%</td>
<td>25%</td>
<td>10%</td>
<td>15%</td>
</tr>
<tr>
<td>Playing Royal Portrush</td>
<td>56%</td>
<td>10%</td>
<td>25%</td>
<td>10%</td>
<td>15%</td>
</tr>
<tr>
<td>Attending The Open in 2019</td>
<td>56%</td>
<td>15%</td>
<td>25%</td>
<td>10%</td>
<td>15%</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 £2,228 on their golf break, an average of £253 per day.
DISCUSSION: MOVING FORWARD 2018
Have you been to Northern Ireland for a golfing holiday?

14% (UK: 3941)  
14% (France: 704)  
12% (Sweden: 2598)  
11% (Germany: 1804)

How interested would you be in taking a holiday to Northern Ireland in the next 3 years?

- Very interested: 3.4 (UK), 3.3 (France, Sweden), 3.2 (Germany)
- Interested: 38%, 35%, 33%, 35%
- Neither: 14%, 14%, 12%, 16%
- Not very interested: 22%, 28%, 30%, 25%
- Not at all interested: 8%, 9%, 10%, 13%
- Mean: 3.3, 3.3, 3.3, 3.2

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