

GOLF TOURISM IN NORTHERN IRELAND | 2017

Results Presentation – March 2018



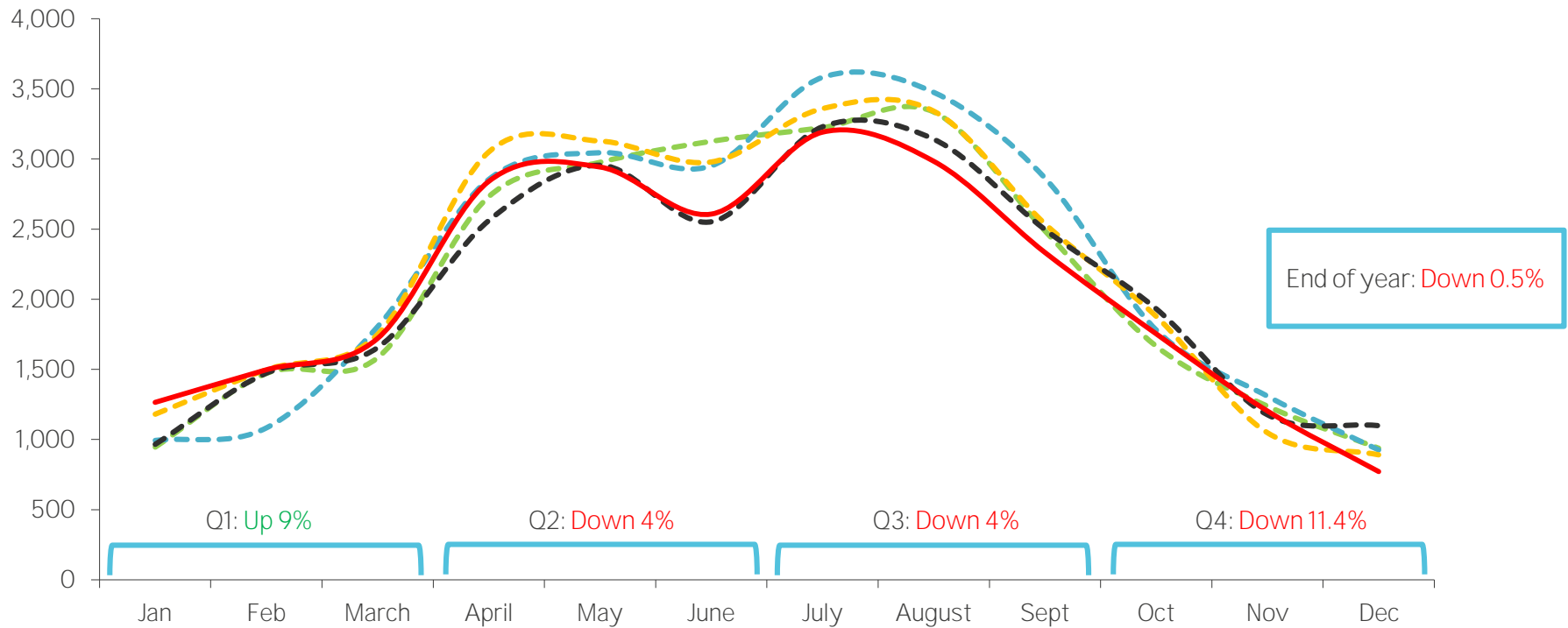
STATE OF GOLF IN THE GREAT BRITAIN



ROUNDS PLAYED YEAR TO DATE – GREAT BRITAIN

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

--- 2013 - - - 2014 - - - 2015 - - - 2016 - - - 2017



SPORTS MARKETING SURVEYS INC.

TOURISM NORTHER IRELAND: GOLF TOURISM MONITOR

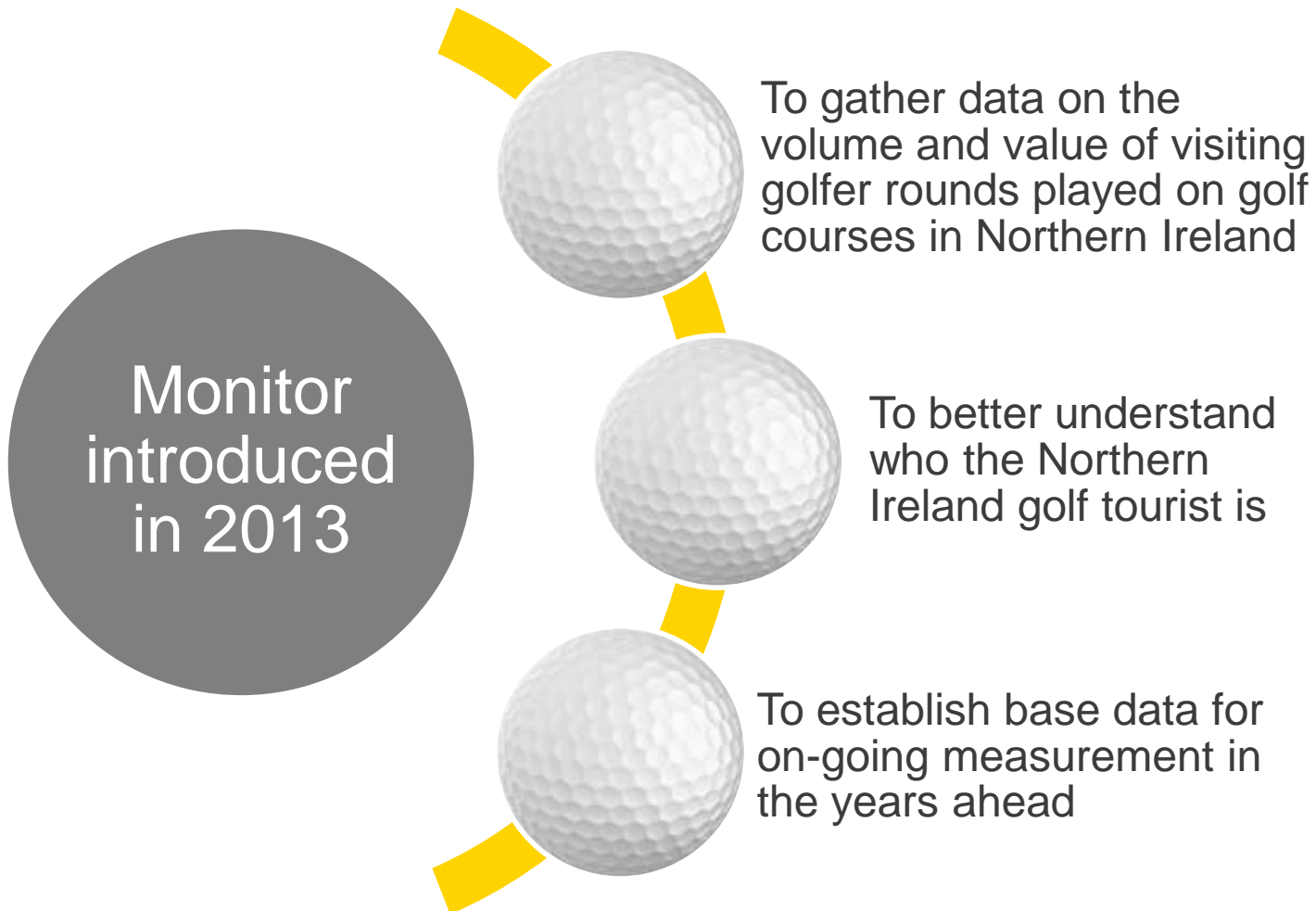


tourism
northernireland



March 9, 2018

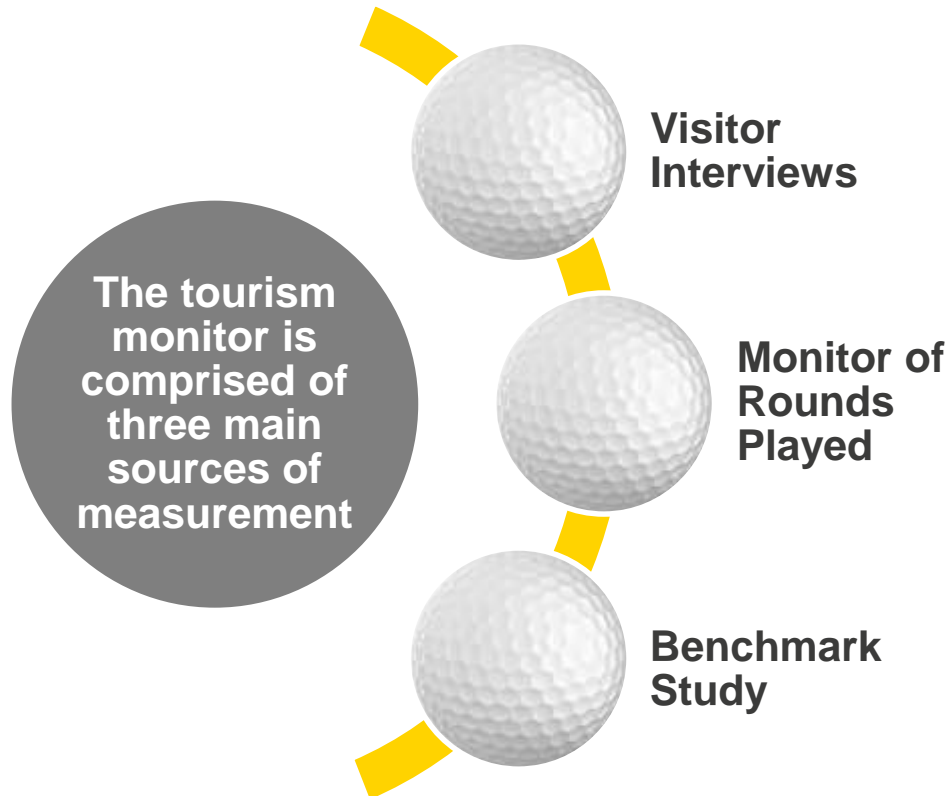
OVERVIEW OF THE PROJECT



AIMS



THE PROGRAMME FULL YEAR: 2017



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 the following clubs. This is consistent with 2016:
 - Ardglass
 - Ballycastle
 - Ballymena
 - Bangor
 - Belvoir Park
 - Bushfoot
 - Cairndhu
 - Carrickfergus
 - Downpatrick
 - Edenmore
 - Galgorm Castle
 - Holywood
 - Kilkeel
 - Lisburn
 - Lough Erne
 - Malone
 - Masserene
 - Moira
 - Portstewart
 - Rockmount
 - Royal Portrush
 - Temple
 - Warrenpoint
 - Whitehead

KEY FINDINGS



tourism
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KEY FINDINGS

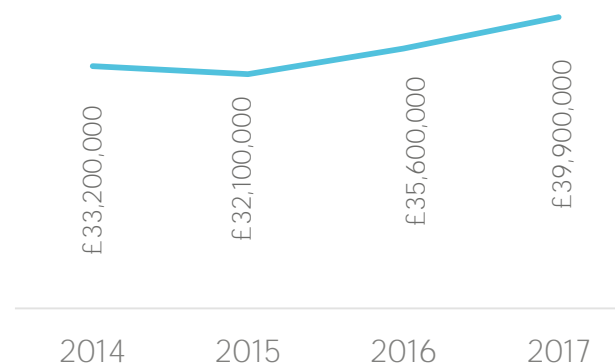
- The Economic Impact of golf tourism for Northern Ireland in 2017 is:

2017 = £39,900,000

2016 = £35,600,000

2015 = £32,100,000

2014 = £33,200,000



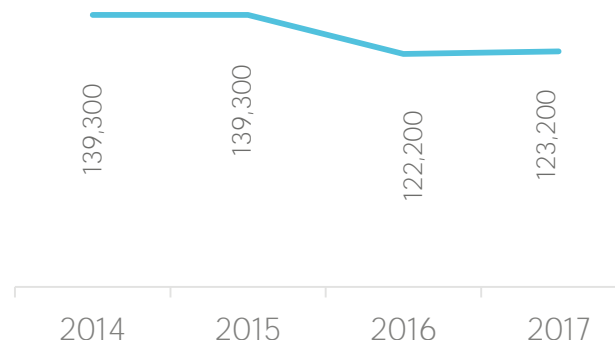
- The number of golfing visitors to Northern Ireland is:

2017 = 123,200

2016 = 122,200

2015 = 139,300

2014 = 139,300



KEY FINDINGS

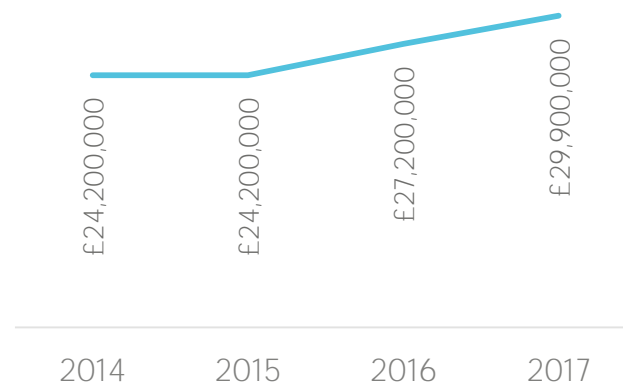
- The Economic Impact of golf tourism from **non-domestic golfers overnight** for Northern Ireland in 2017 is:

2017 = £29,900,000

2016 = £27,200,000

2015 = £24,200,000

2014 = £24,200,000



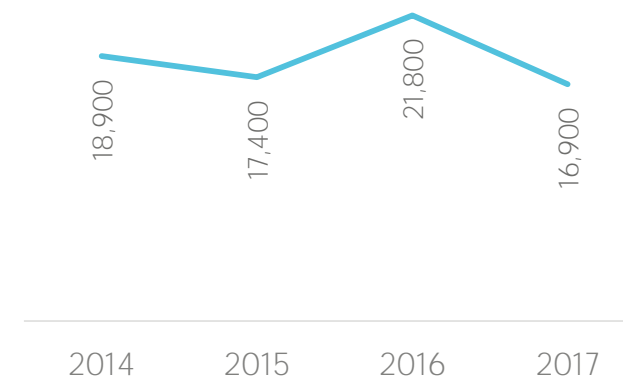
- The number of **non-domestic overnight** golfing visitors to Northern Ireland is:

2017 = 16,900

2016 = 21,800

2015 = 17,400

2014 = 18,900



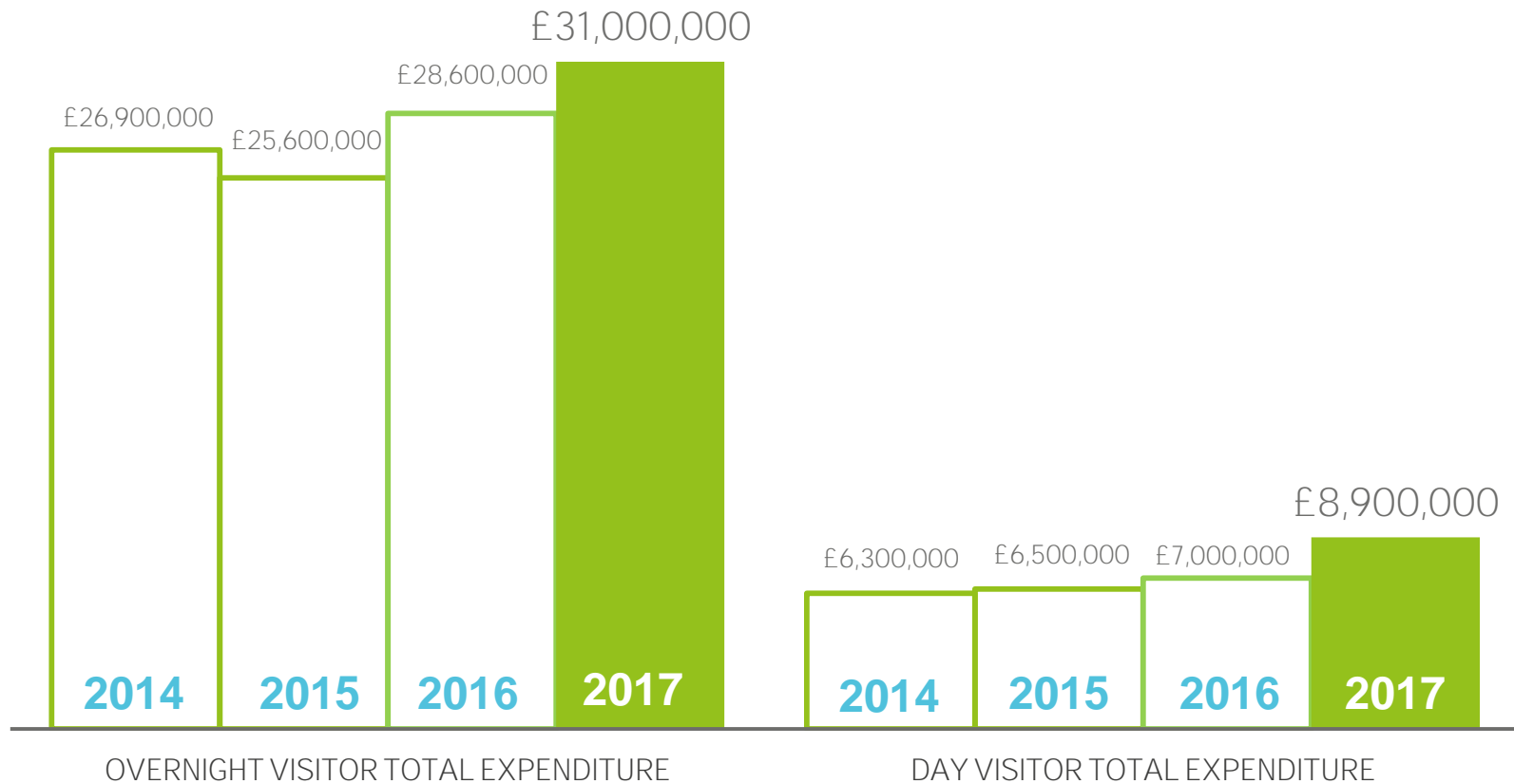
KEY FINDINGS

- 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 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.

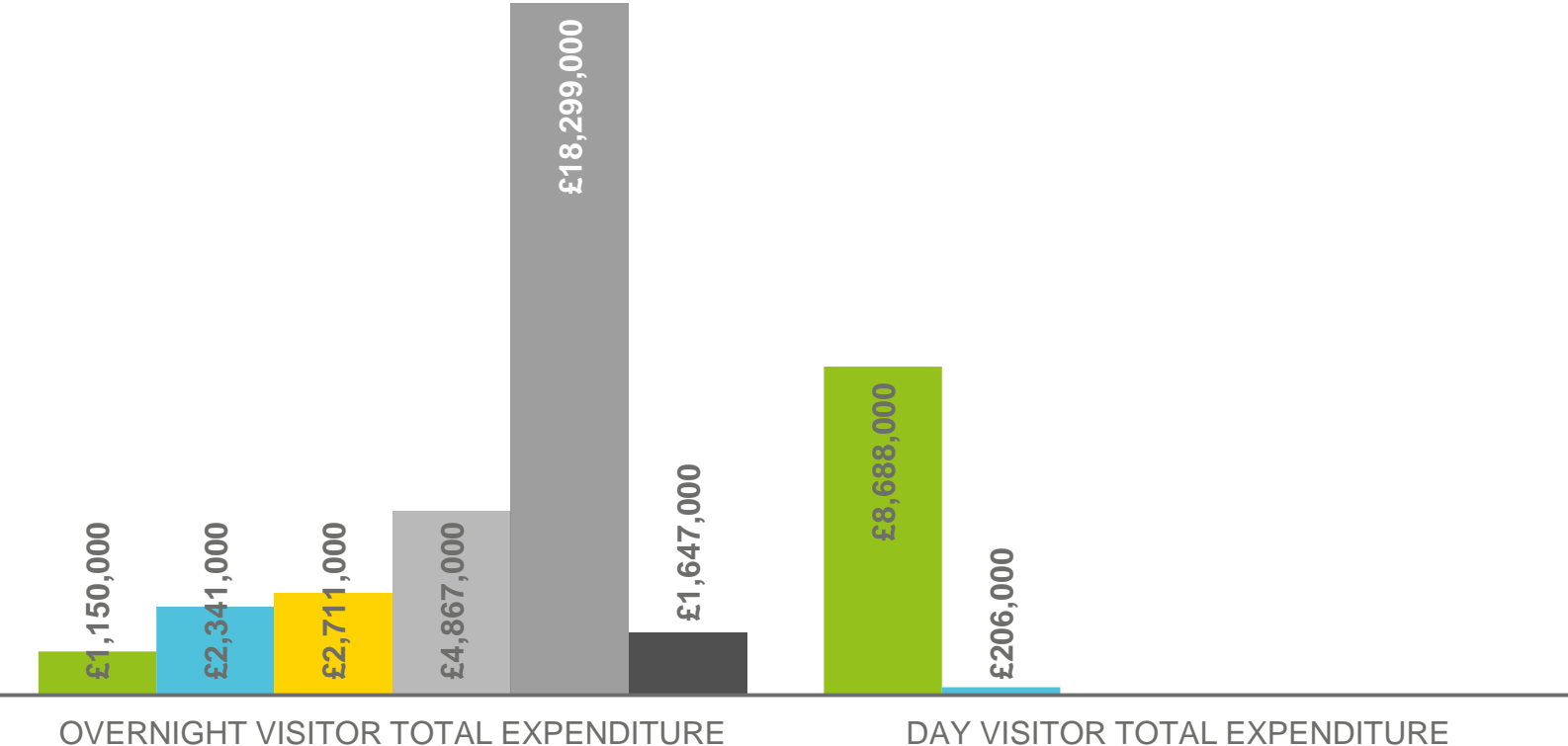
VOLUME AND VALUE OF GOLF TOURISM



BREAKDOWN OF OVERNIGHT VS DAY VISITOR REVENUE

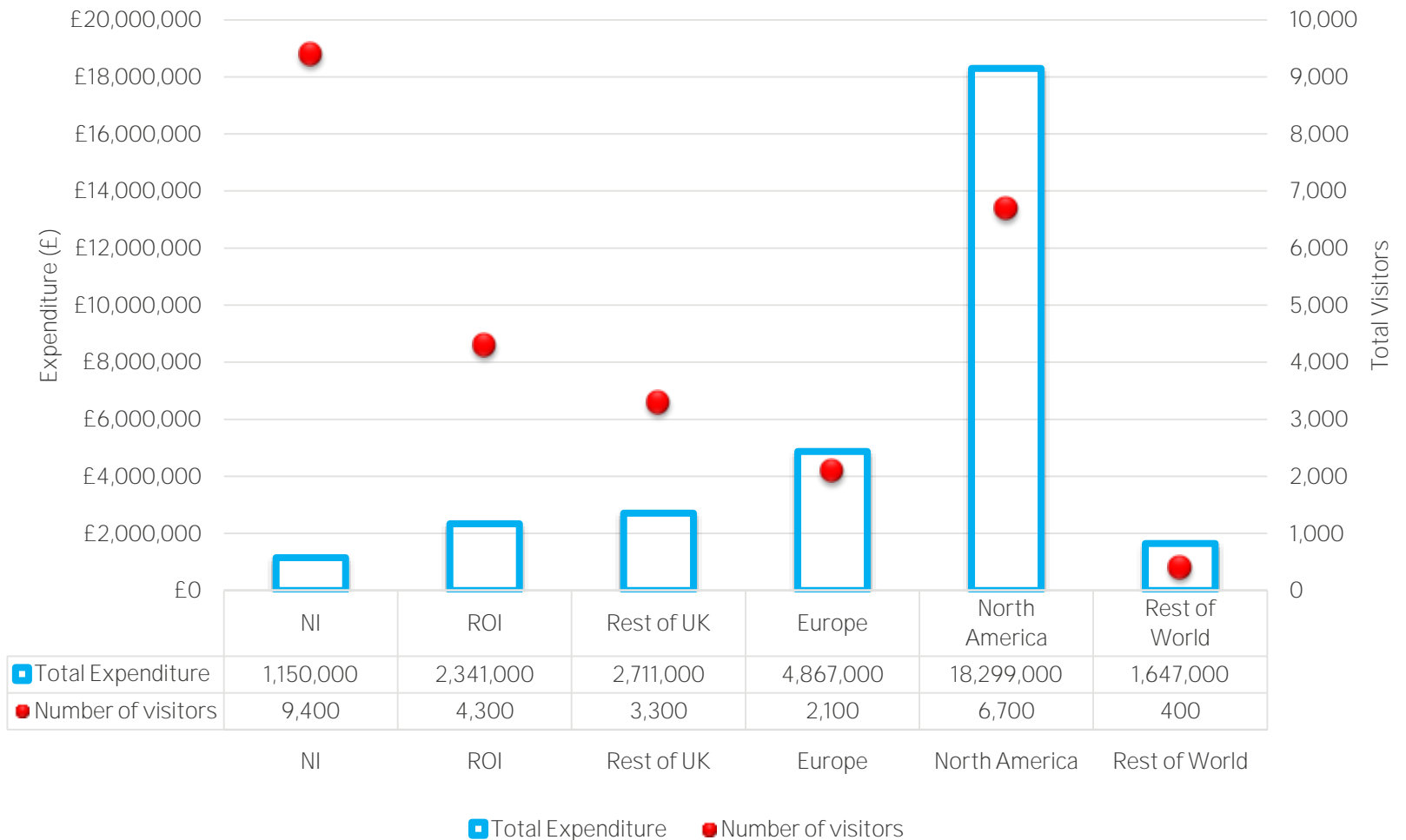


TOTAL EXPENDITURE PER COUNTRY

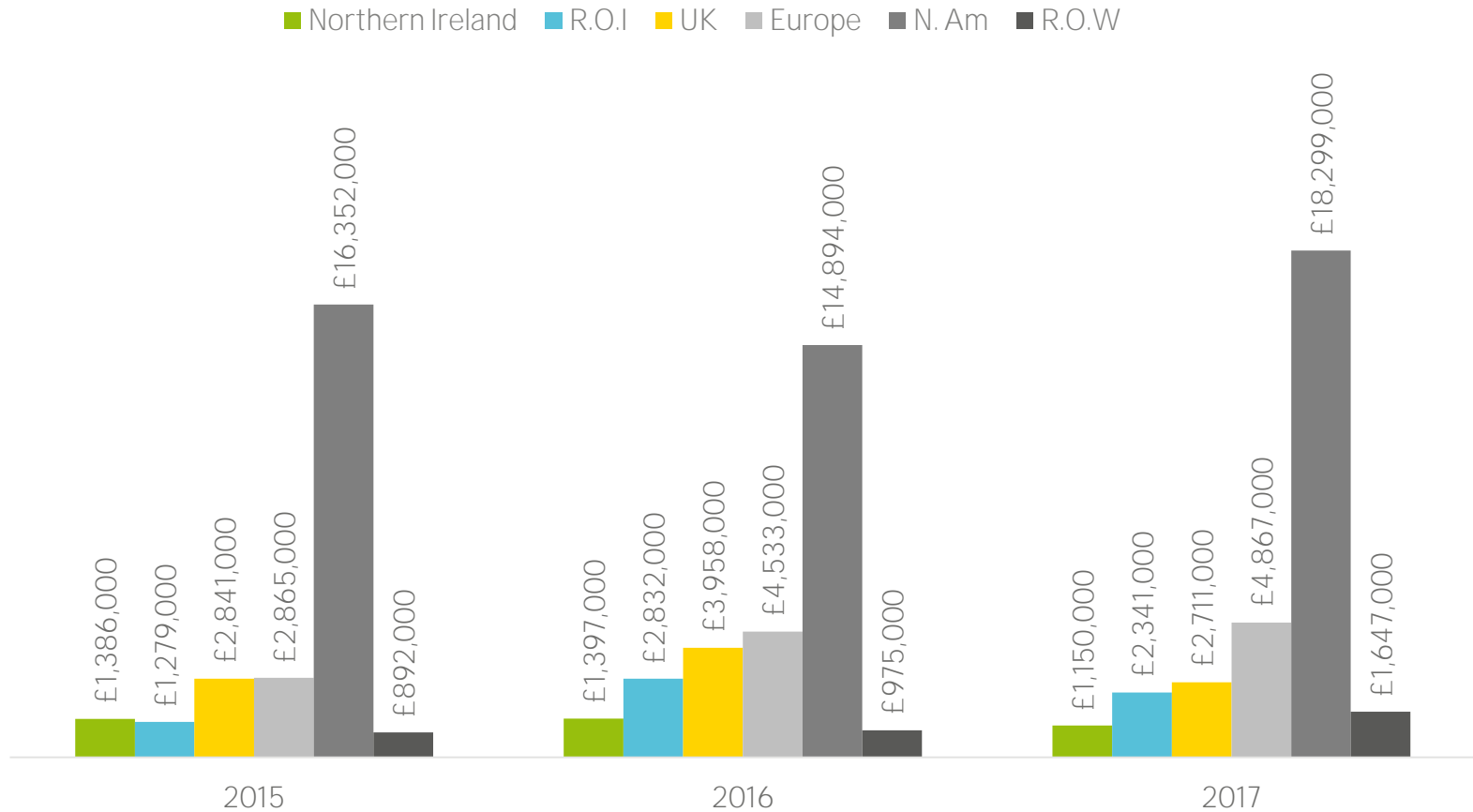


■ N.I. ■ R.O.I. ■ UK ■ Europe ■ N. Am ■ R.O.W

TOTAL EXPENDITURE 2017 – OVERNIGHT VISITORS

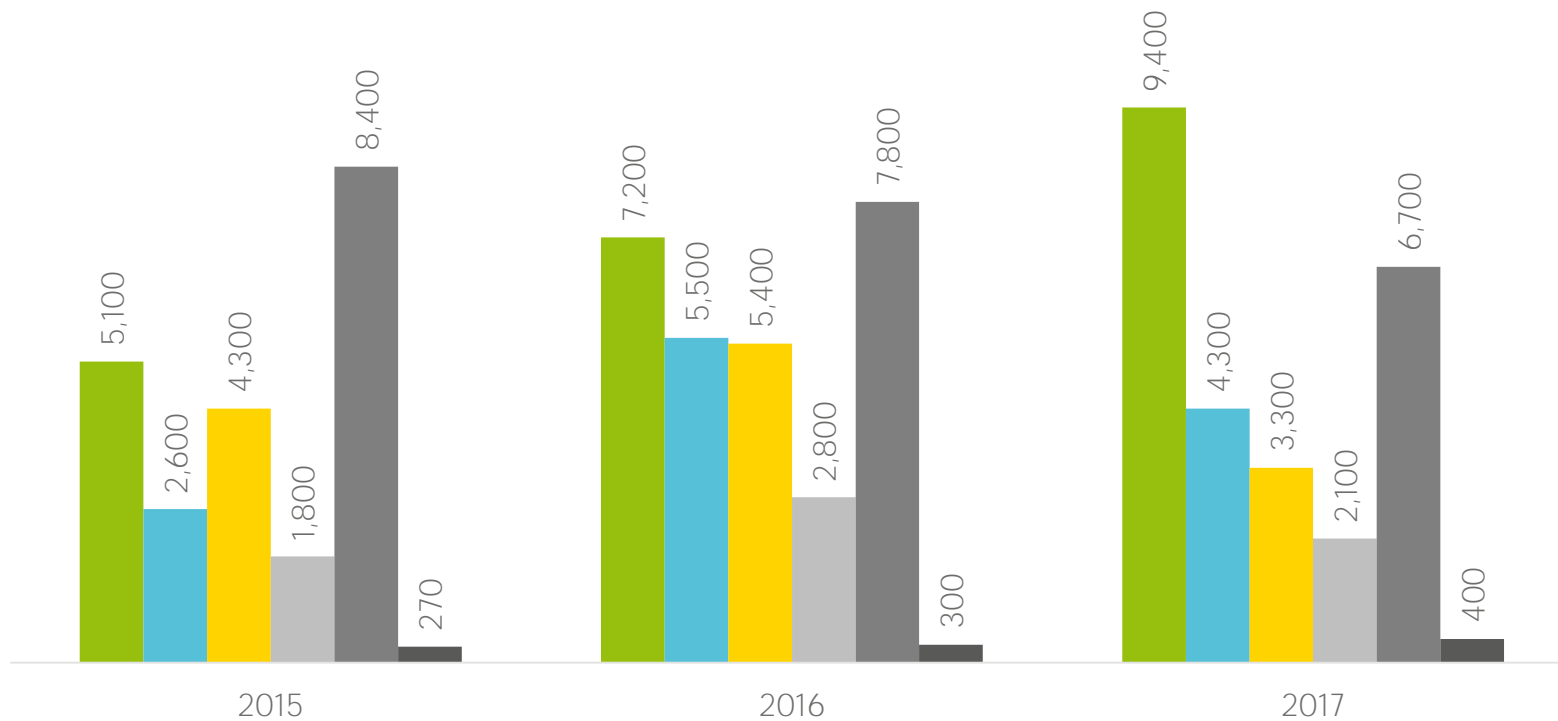


TOTAL EXPENDITURE 2015 - 2017 – OVERNIGHT VISITORS

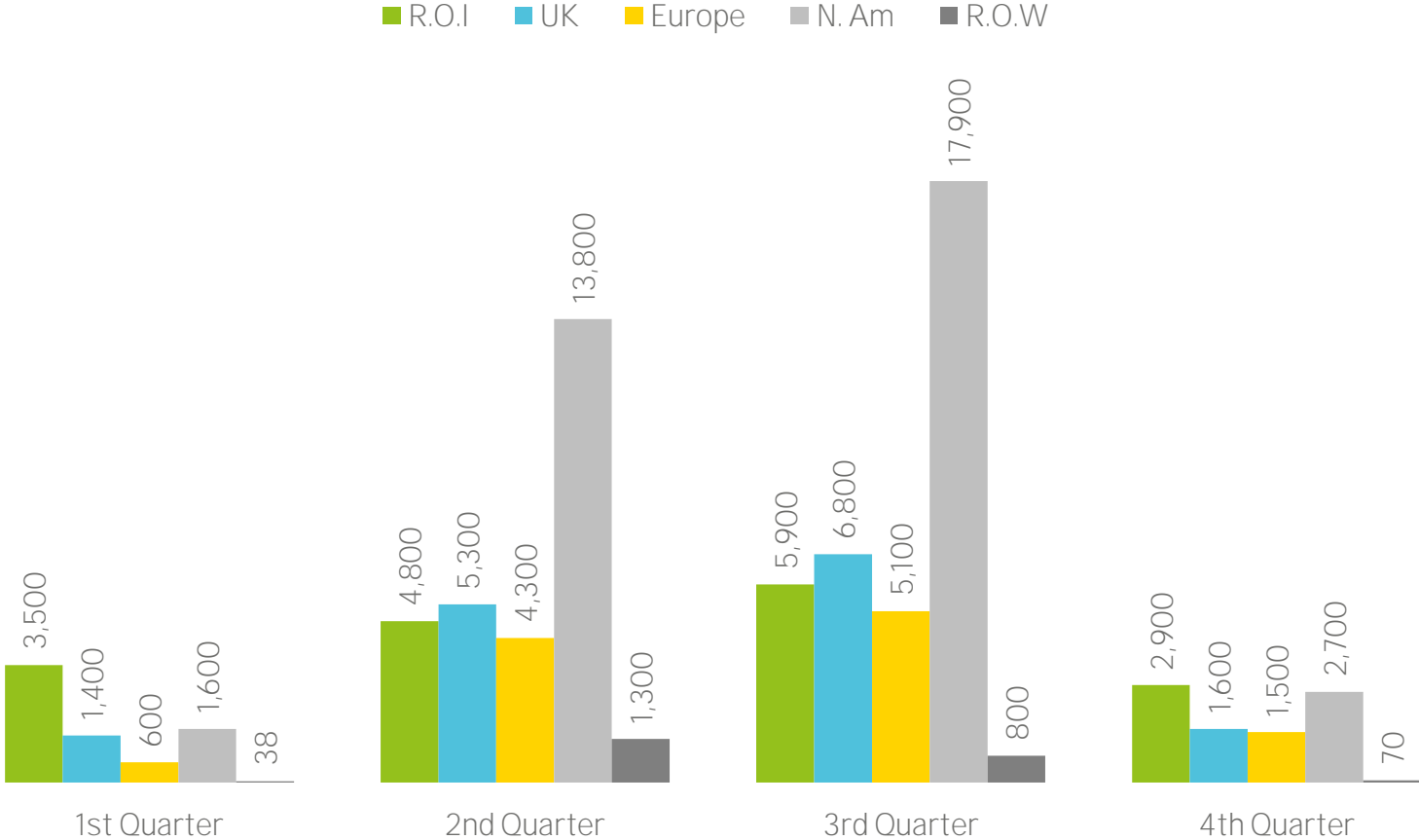


TOTAL VISITORS 2015 - 2017 – OVERNIGHT VISITORS

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



ORIGIN OF TOTAL ROUNDS PLAYED BY QUARTER - EXCLUDING DOMESTIC



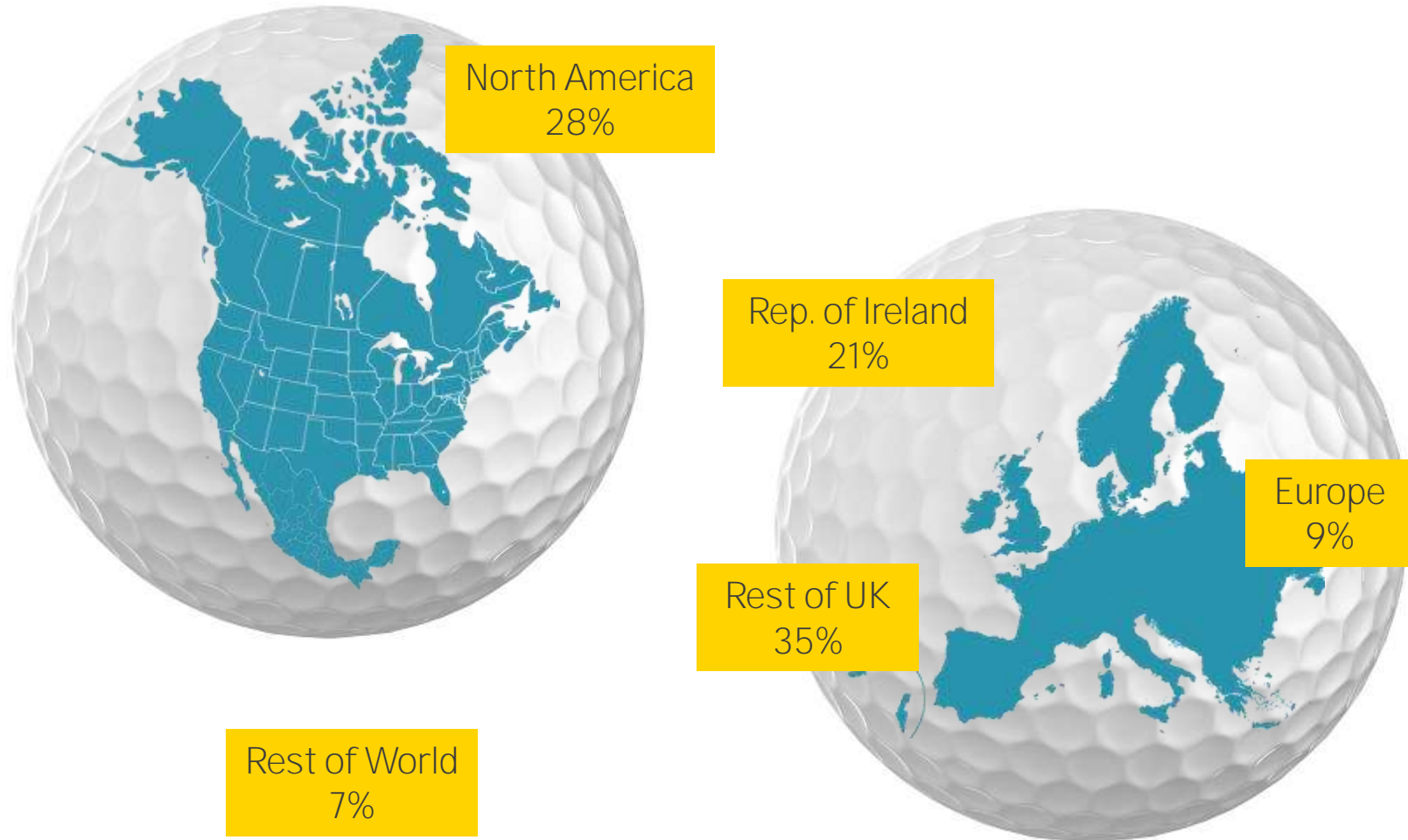
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CONSUMER FEEDBACK



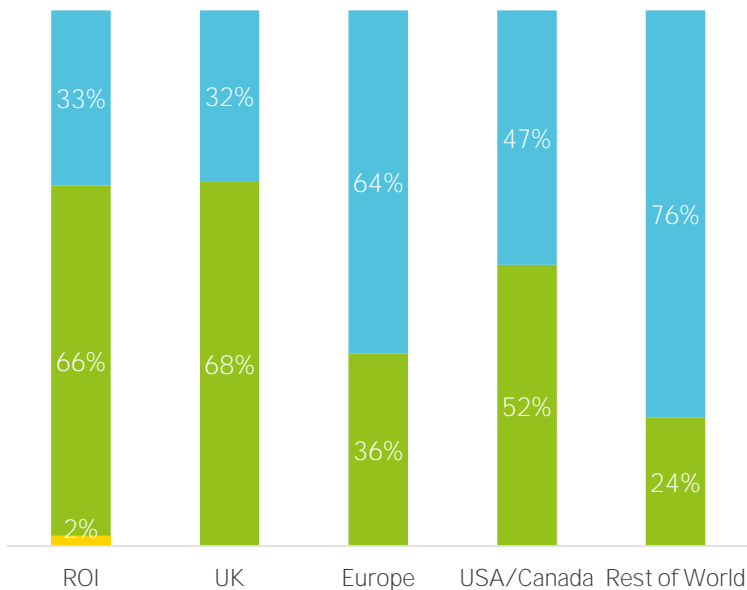
March 9, 2018

CONSUMER FEEDBACK | Interviewee Profile

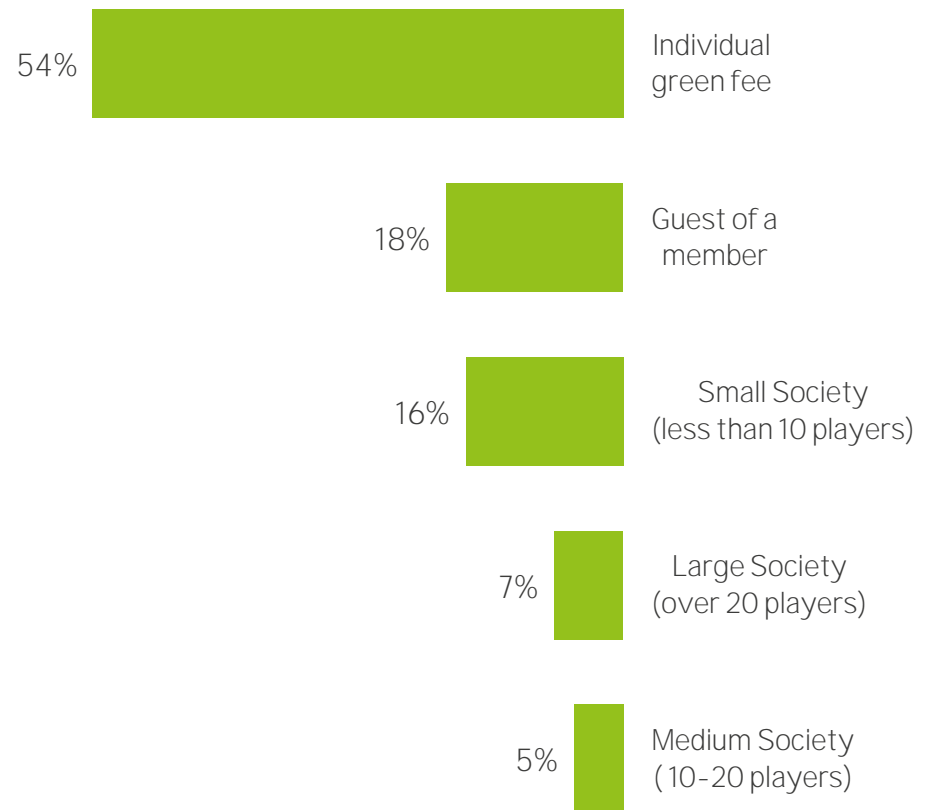


CONSUMER FEEDBACK | Visitor Type

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

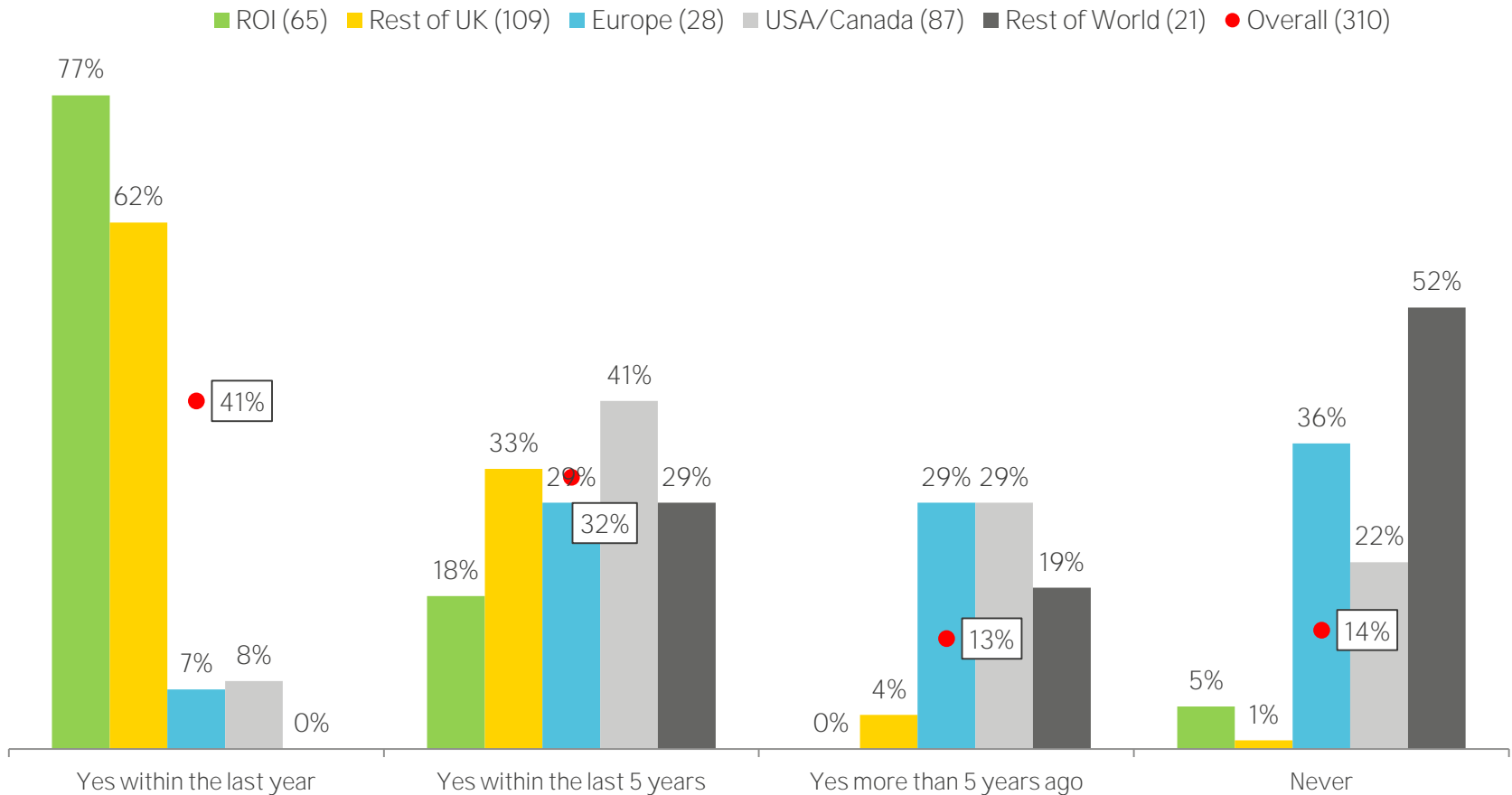


- On a short break/holiday where golf is part of the trip
- On a short break/holiday where the main purpose is to play golf
- Day Visitor (coming from home)



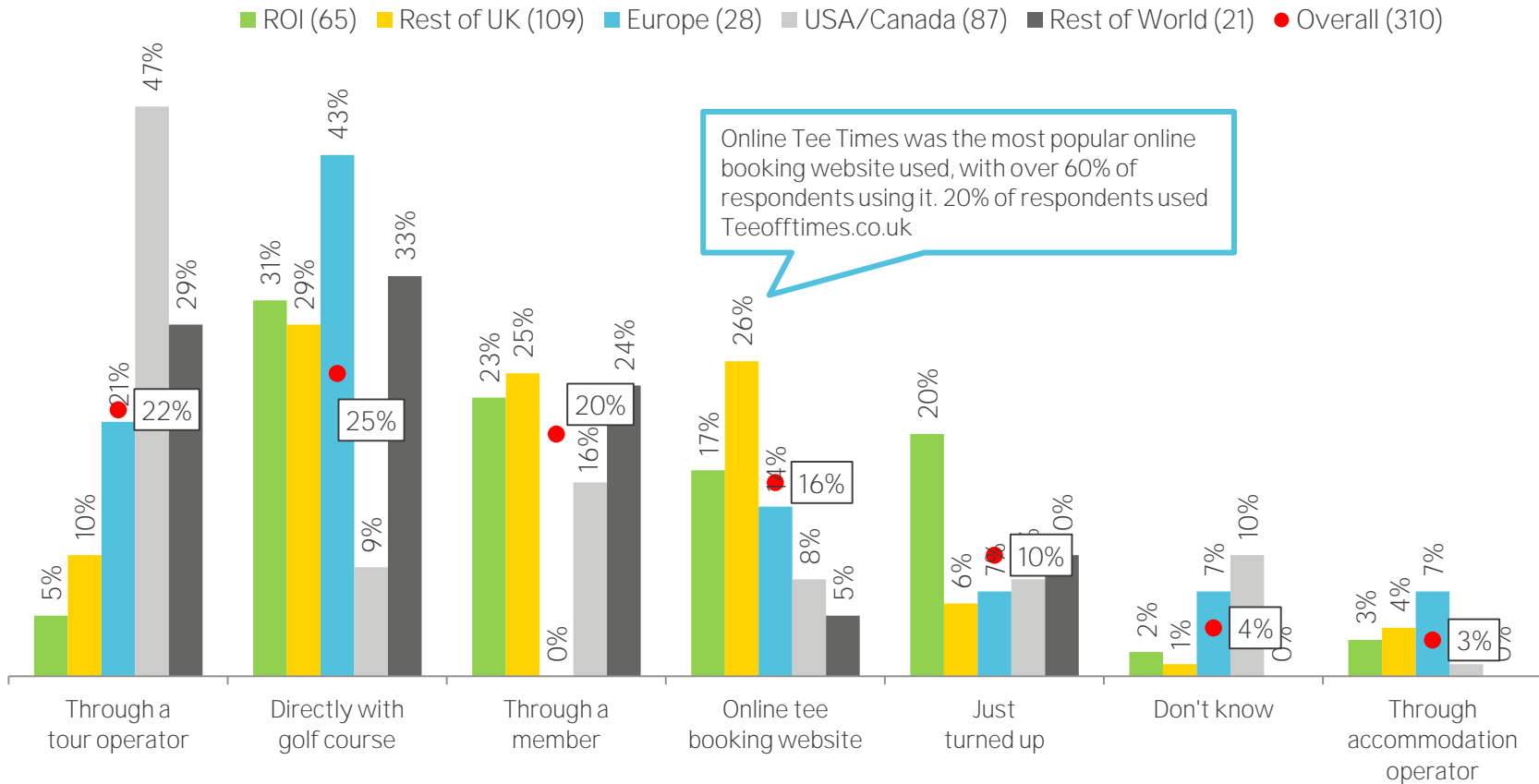
CONSUMER FEEDBACK | Playing in Northern Ireland

Q: Have you played golf in Northern Ireland before?



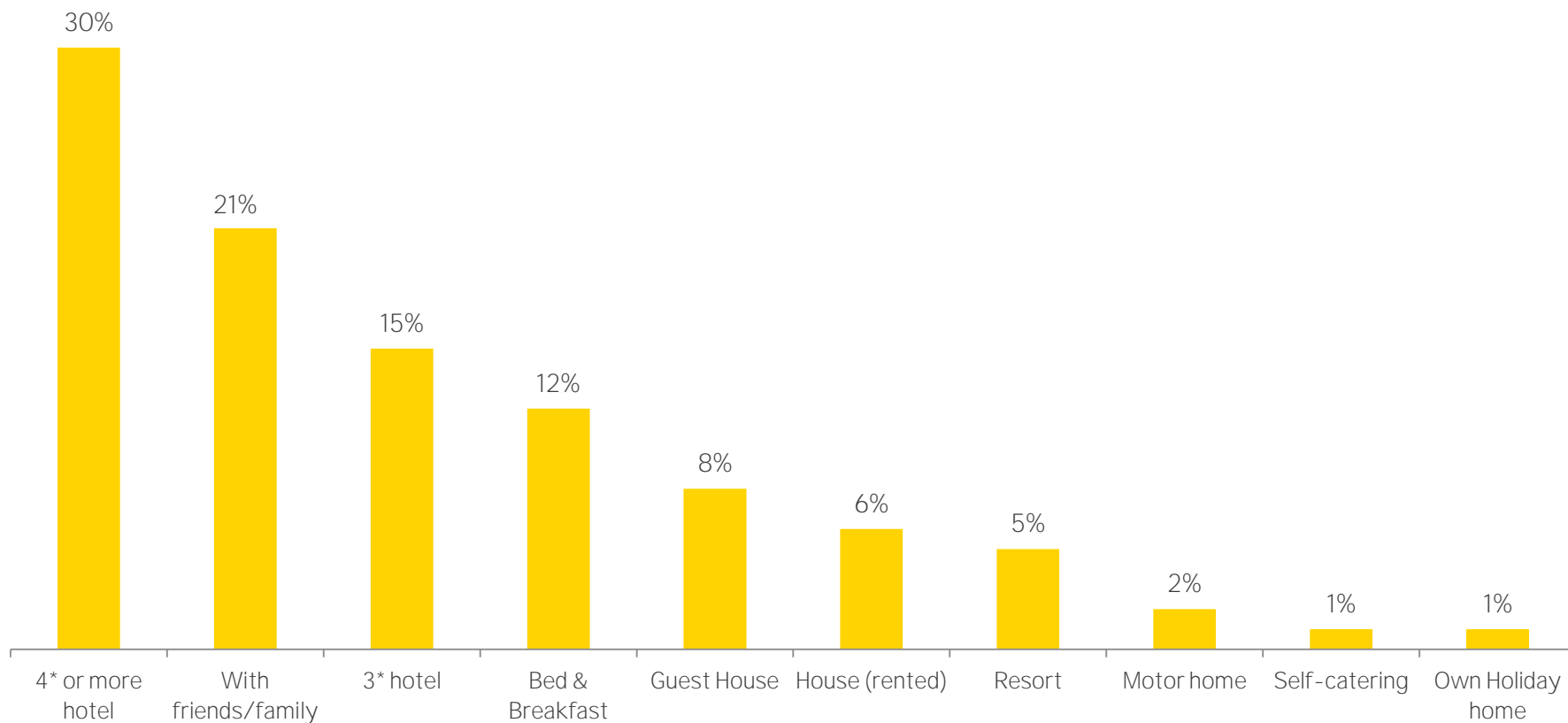
CONSUMER FEEDBACK | Booking Today's Round

Q: Do you know how your booking was made?



CONSUMER FEEDBACK | Accommodation

Q: What type of accommodation are you staying in?



CONSUMER FEEDBACK | Accommodation

	ROI	UK	Europe	USA / Canada	R.O.W
4* or more hotel	6%	11%	46%	64%	43%
With friends/family	25%	28%	7%	13%	29%
3* hotel	12%	23%	7%	8%	14%
Bed & Breakfast	28%	10%	21%	1%	-
Guest House	15%	12%	7%	-	-
House (rented)	5%	4%	4%	11%	5%
Resort	3%	10%	7%	-	-
Motor home	-	2%	-	4%	-
Self-catering	3%	-	-	-	-

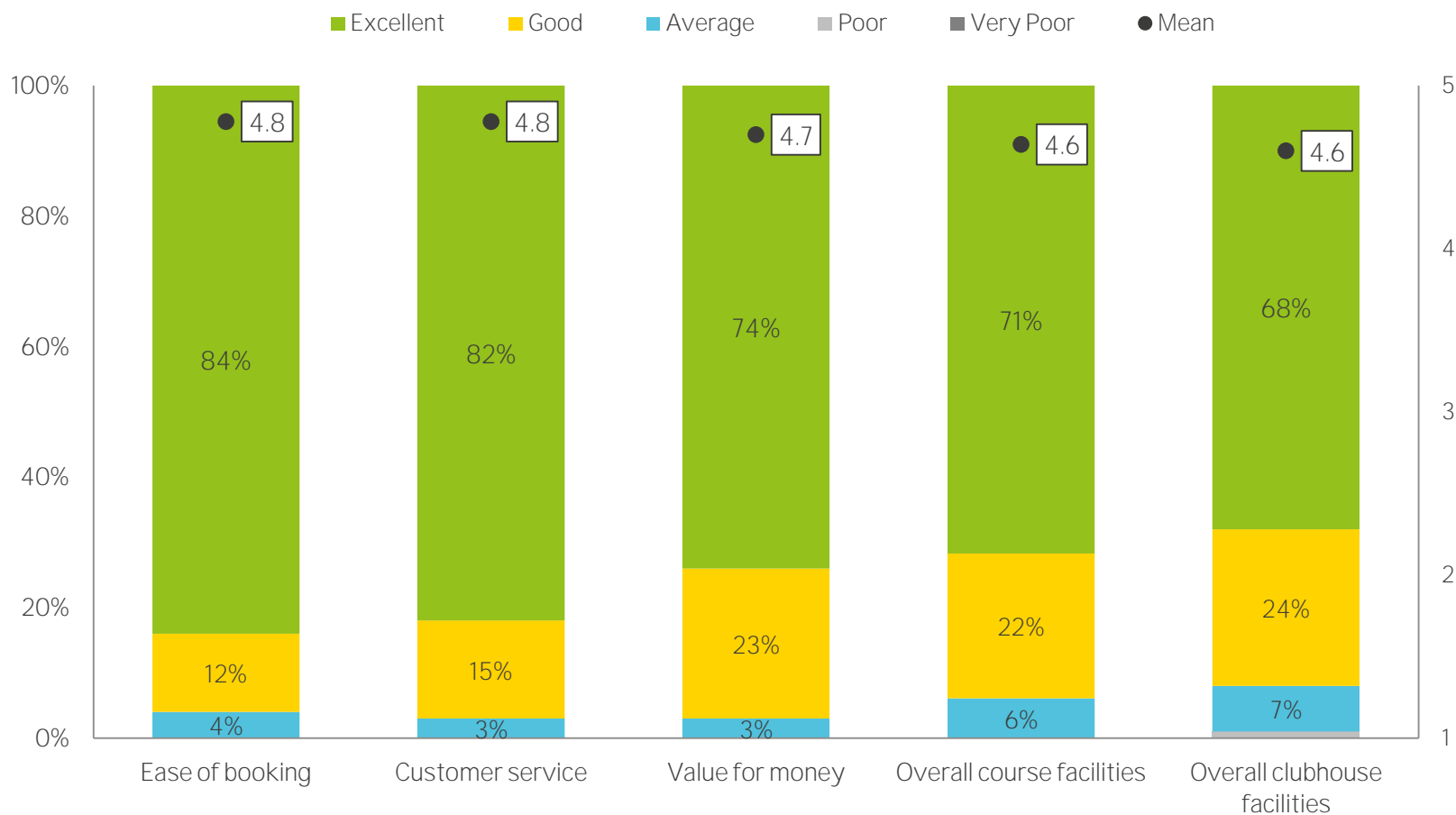
CONSUMER FEEDBACK | Rounds & Courses Played

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



CONSUMER FEEDBACK | Course Ratings

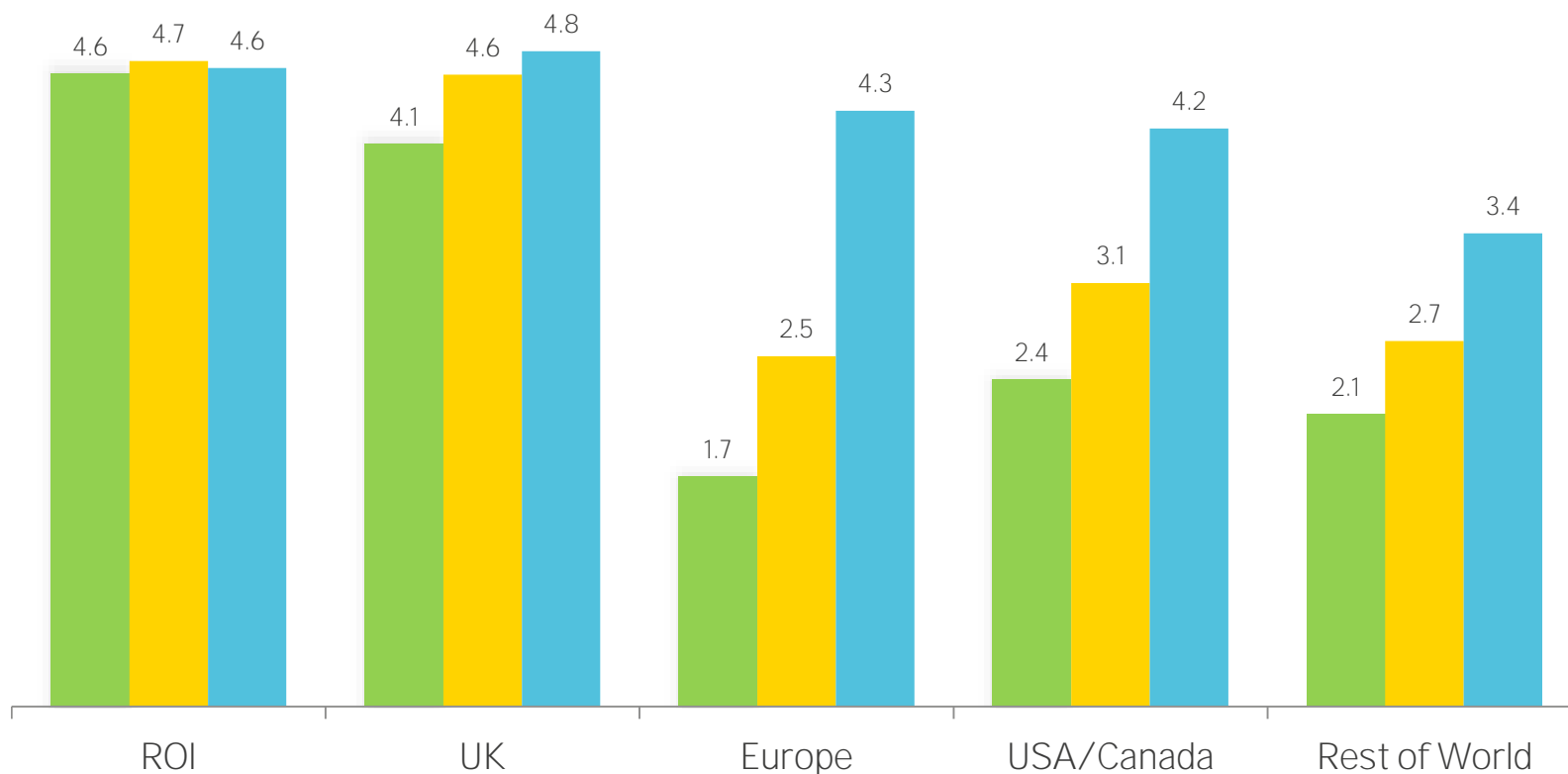
Q: Regarding this course, how would you rate the following 5 areas? (On a scale of 1-5 where 1 is Very Poor and 5 is Excellent)



CONSUMER FEEDBACK | Returning to Northern Ireland

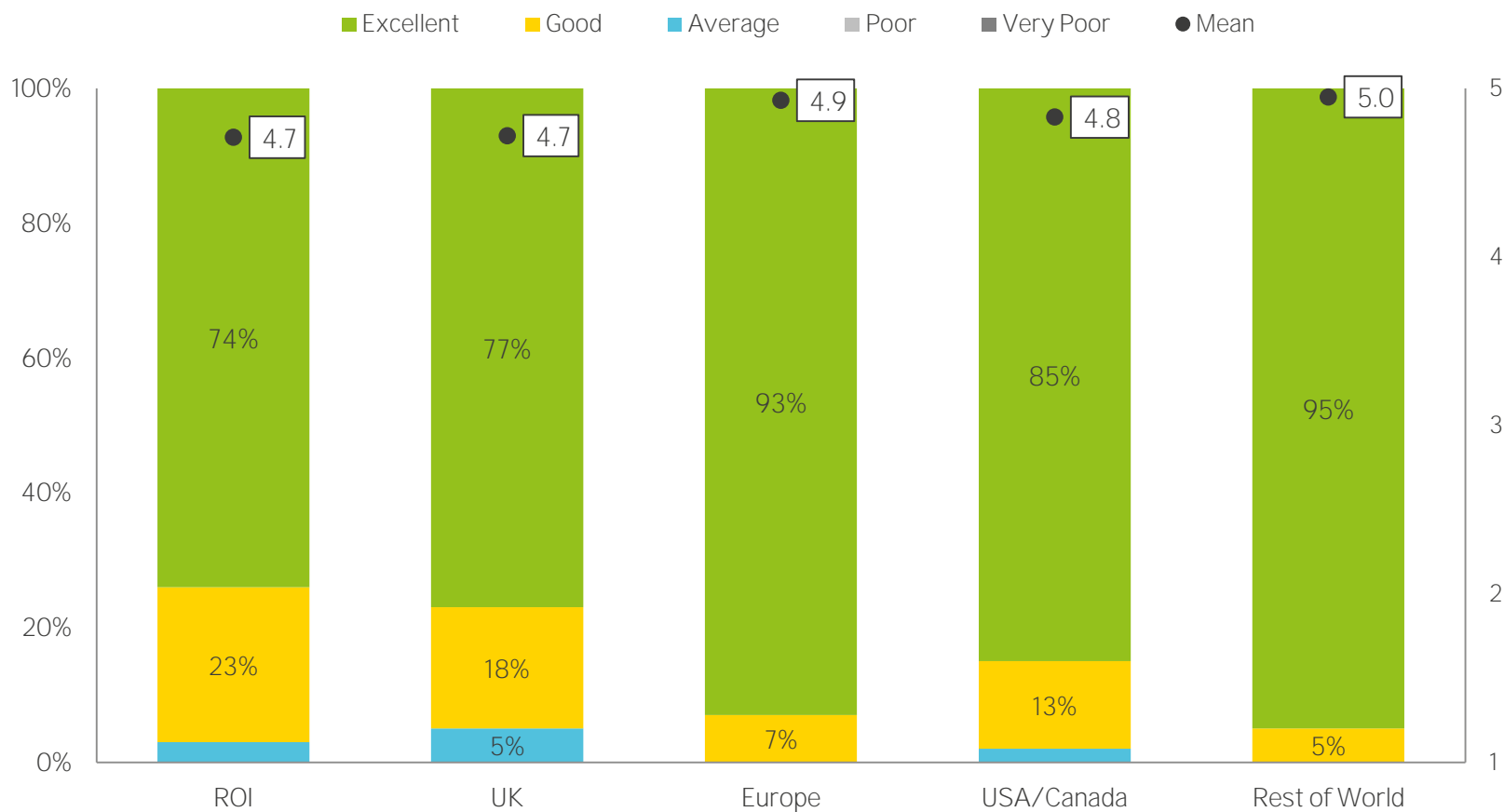
Q: On a scale of 1 to 5 where 1 is "Not at all likely" and 5 is "Very likely", how likely is it that you will return to NI for golf...

- In the next year
- In the next 2-3 years
- In the next 3 or more years



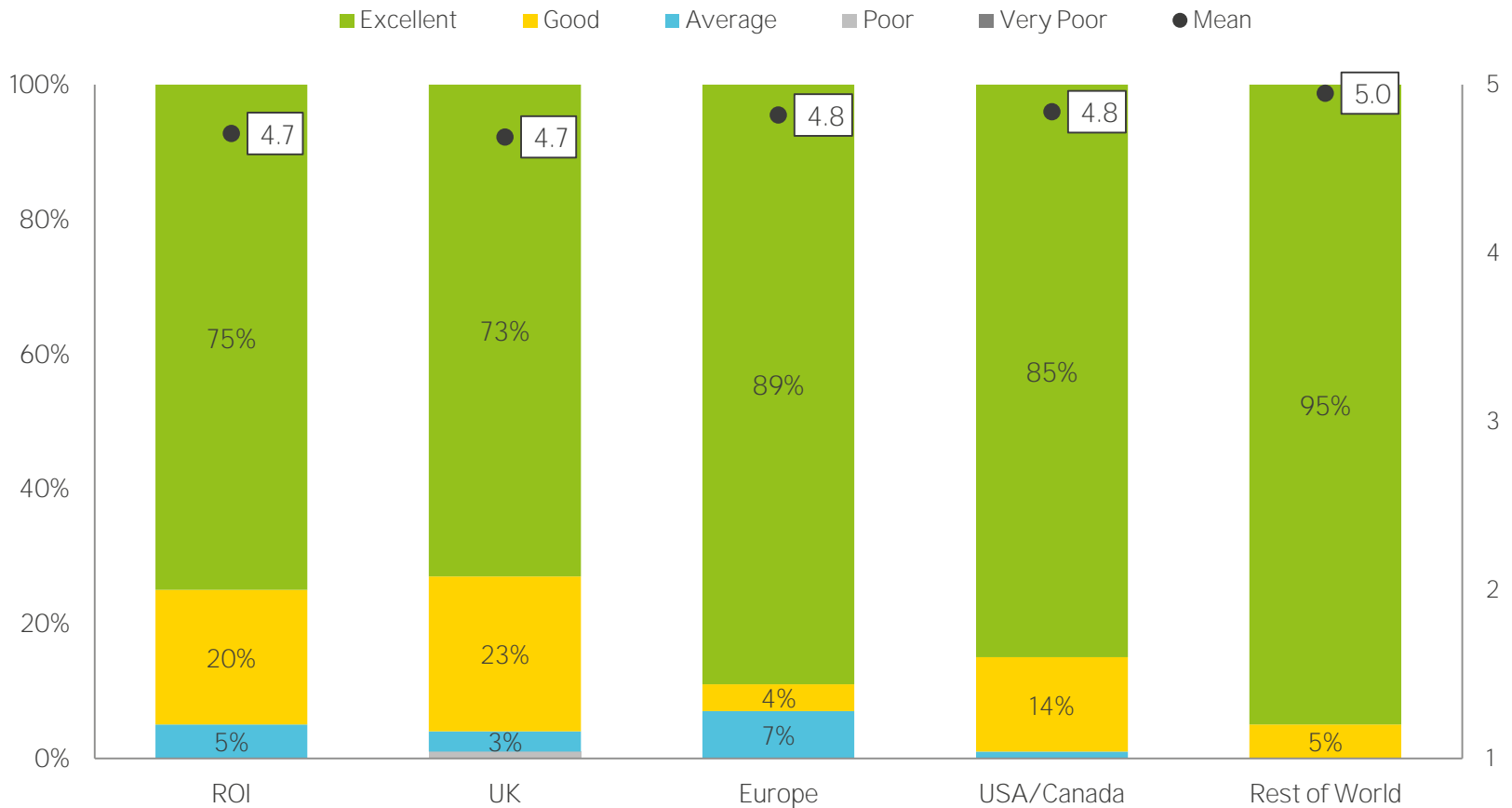
CONSUMER FEEDBACK | Rating the golf

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)



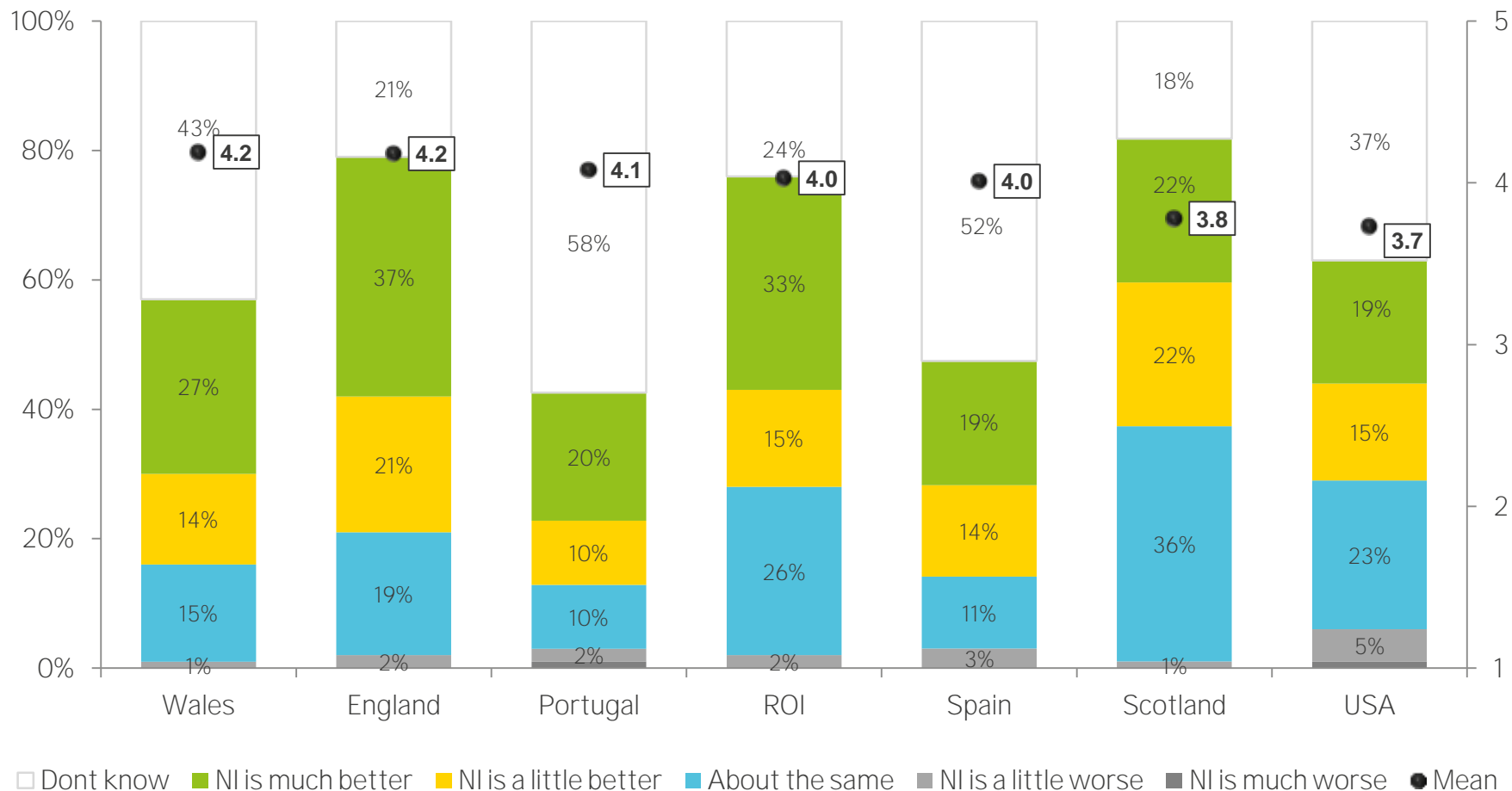
CONSUMER FEEDBACK | Rating the golf break overall

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)



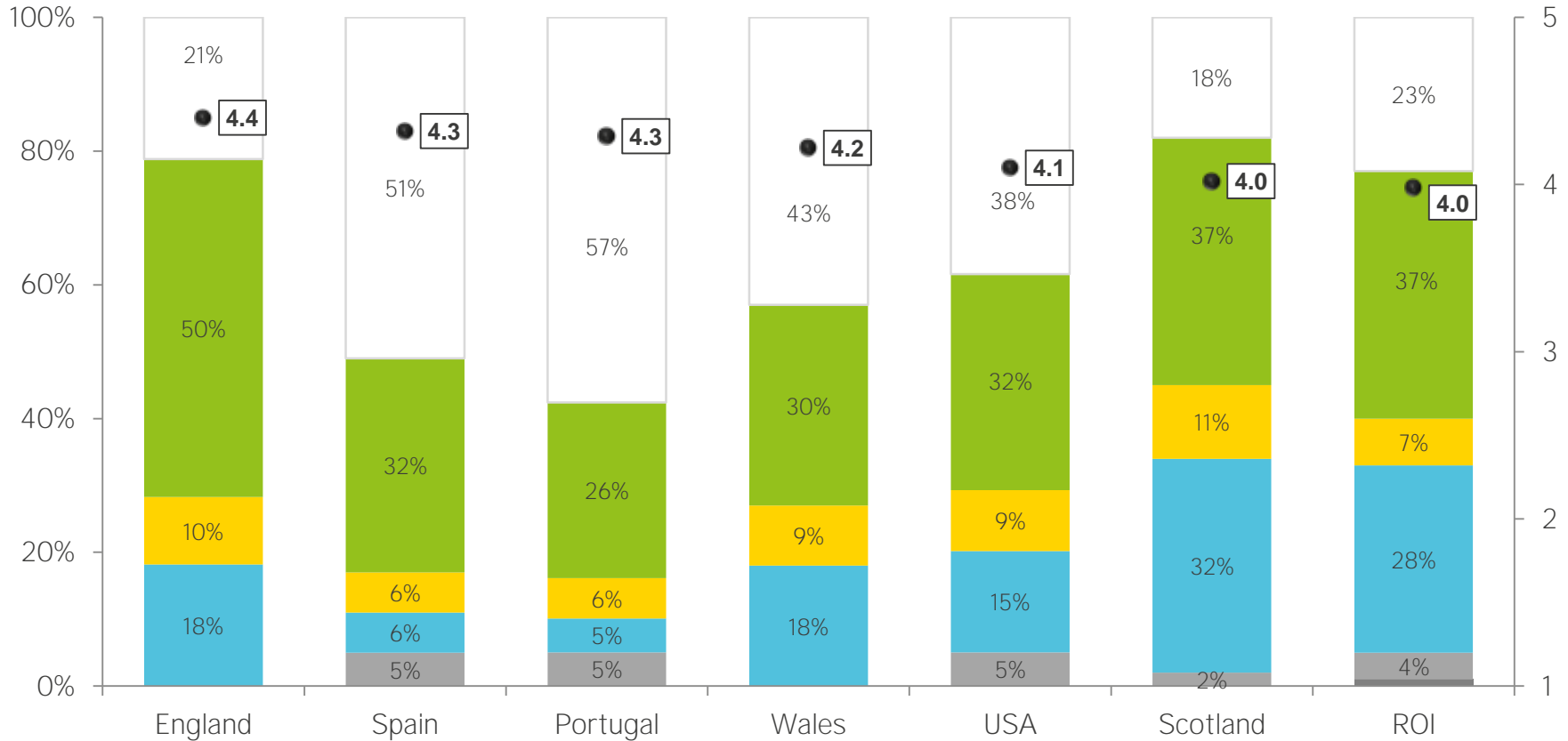
CONSUMER FEEDBACK | NI – Value for Money

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



CONSUMER FEEDBACK | NI – Enjoyment

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

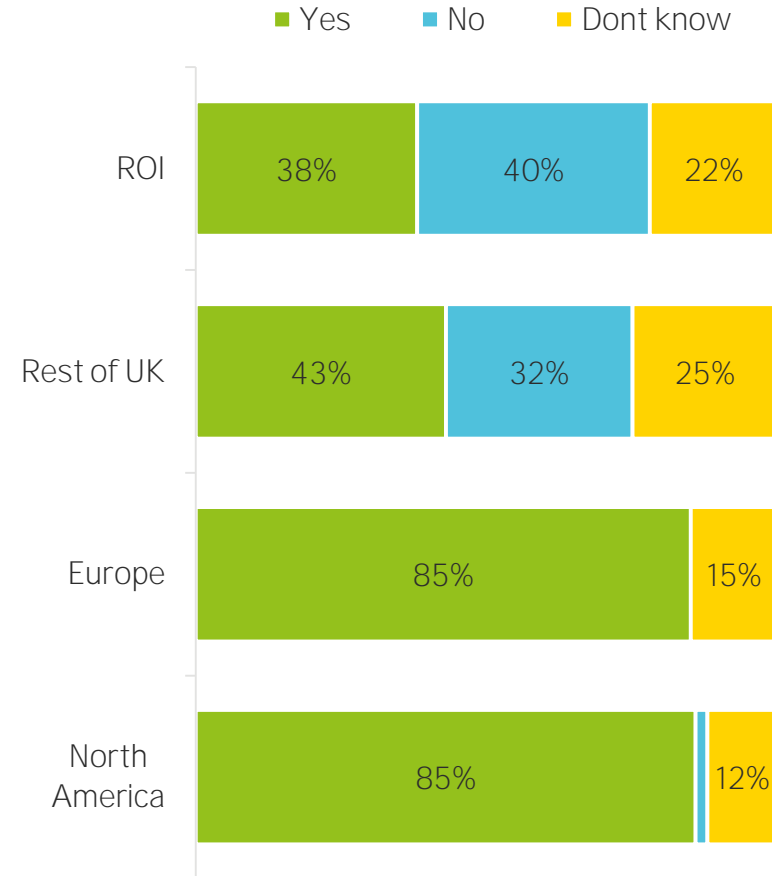
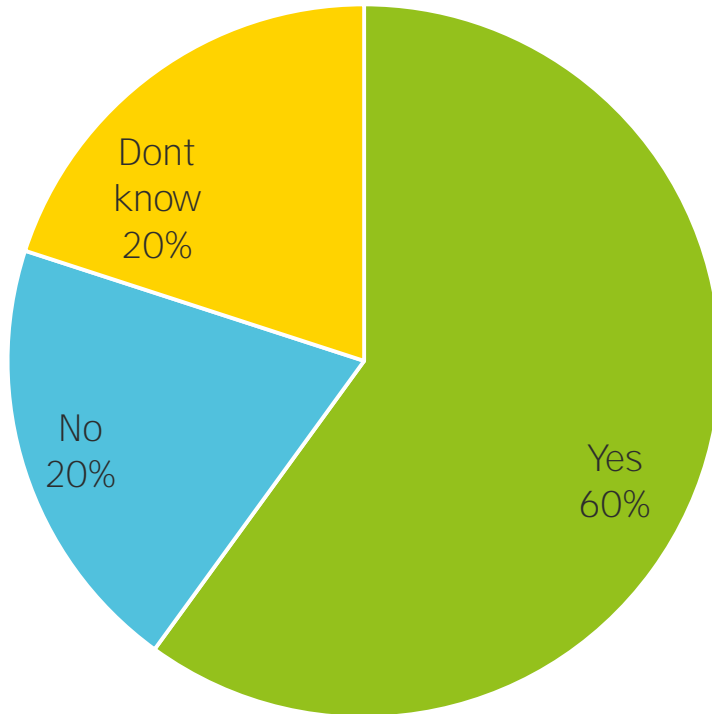


□ Dont know
 ■ NI is much better
 ■ NI is a little better
 ■ About the same
 ■ NI is a little worse
 ■ NI is much worse
 ● Mean

CONSUMER FEEDBACK | Visiting Tourist Attractions

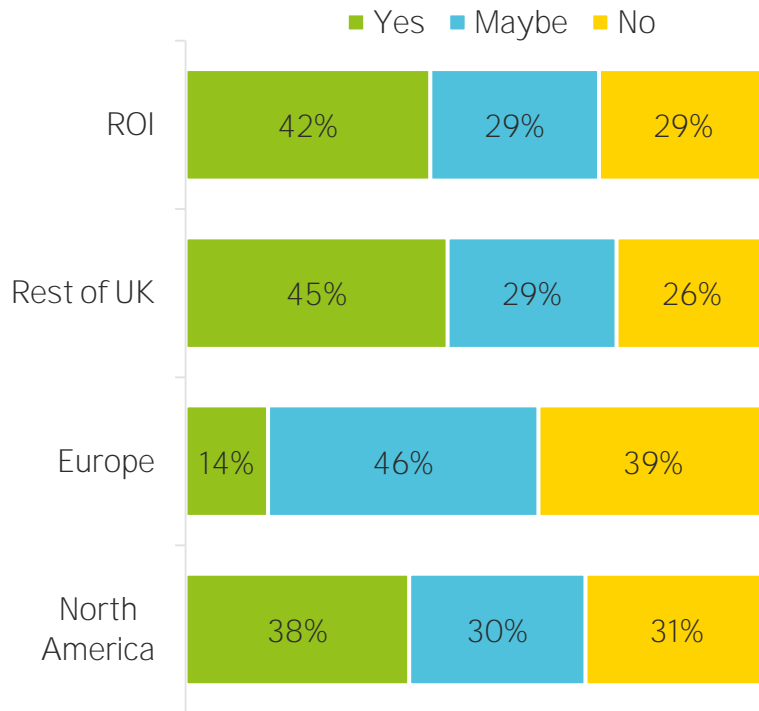
Q: Do you intend to visit any tourist attractions whilst in Northern Ireland?

Overall

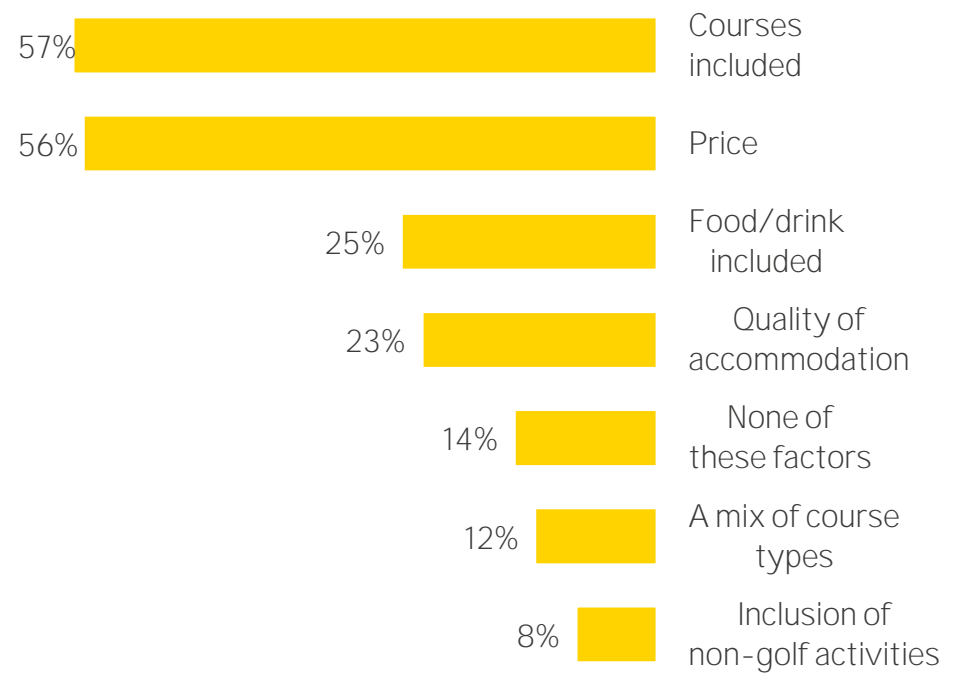


CONSUMER FEEDBACK | NI Golf Pass

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

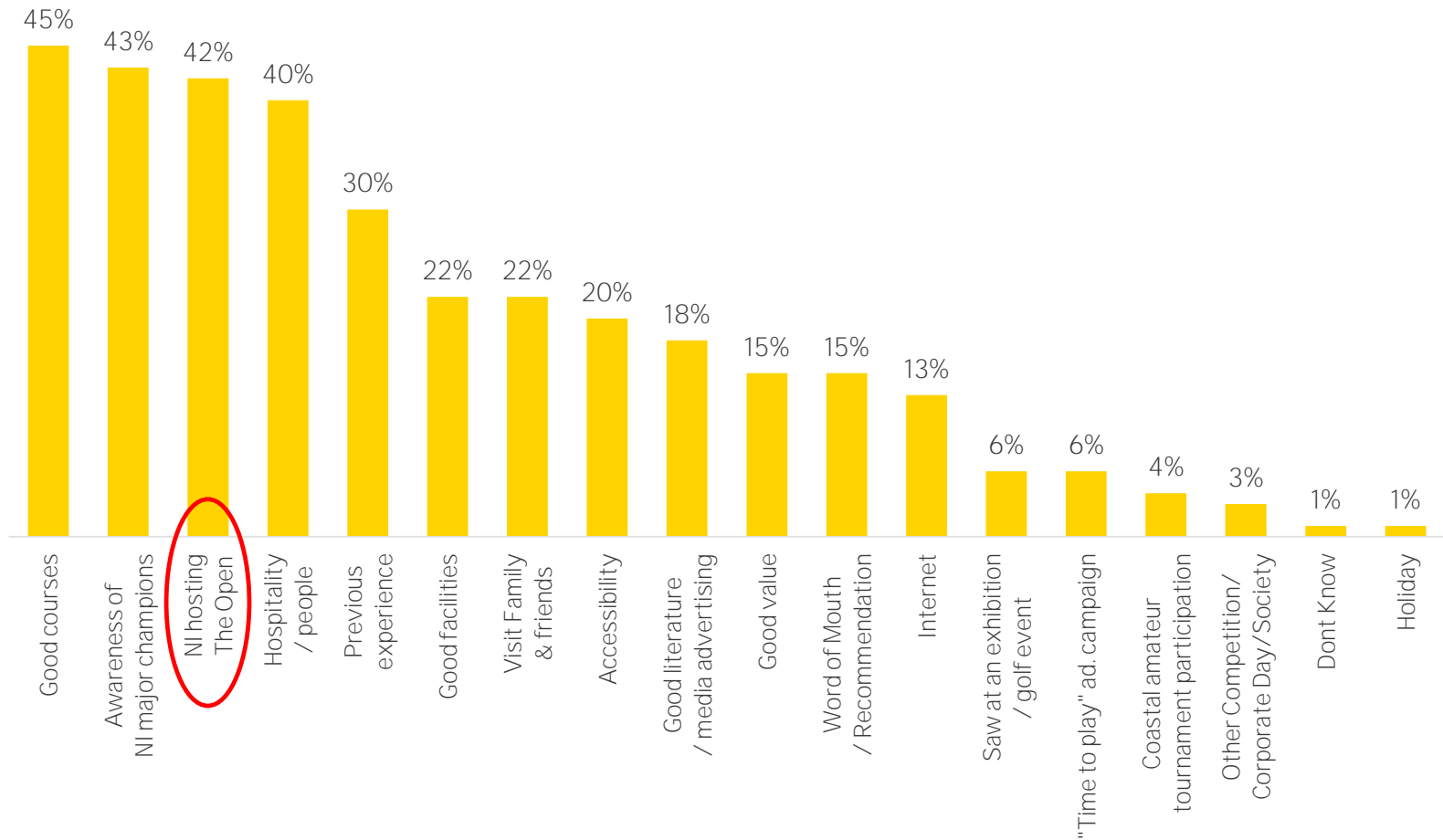


Q: If you were buying a Northern Ireland Golf Pass or Golf Cluster Pass, what would be the main factors in your decision?



CONSUMER FEEDBACK | Choosing NI

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

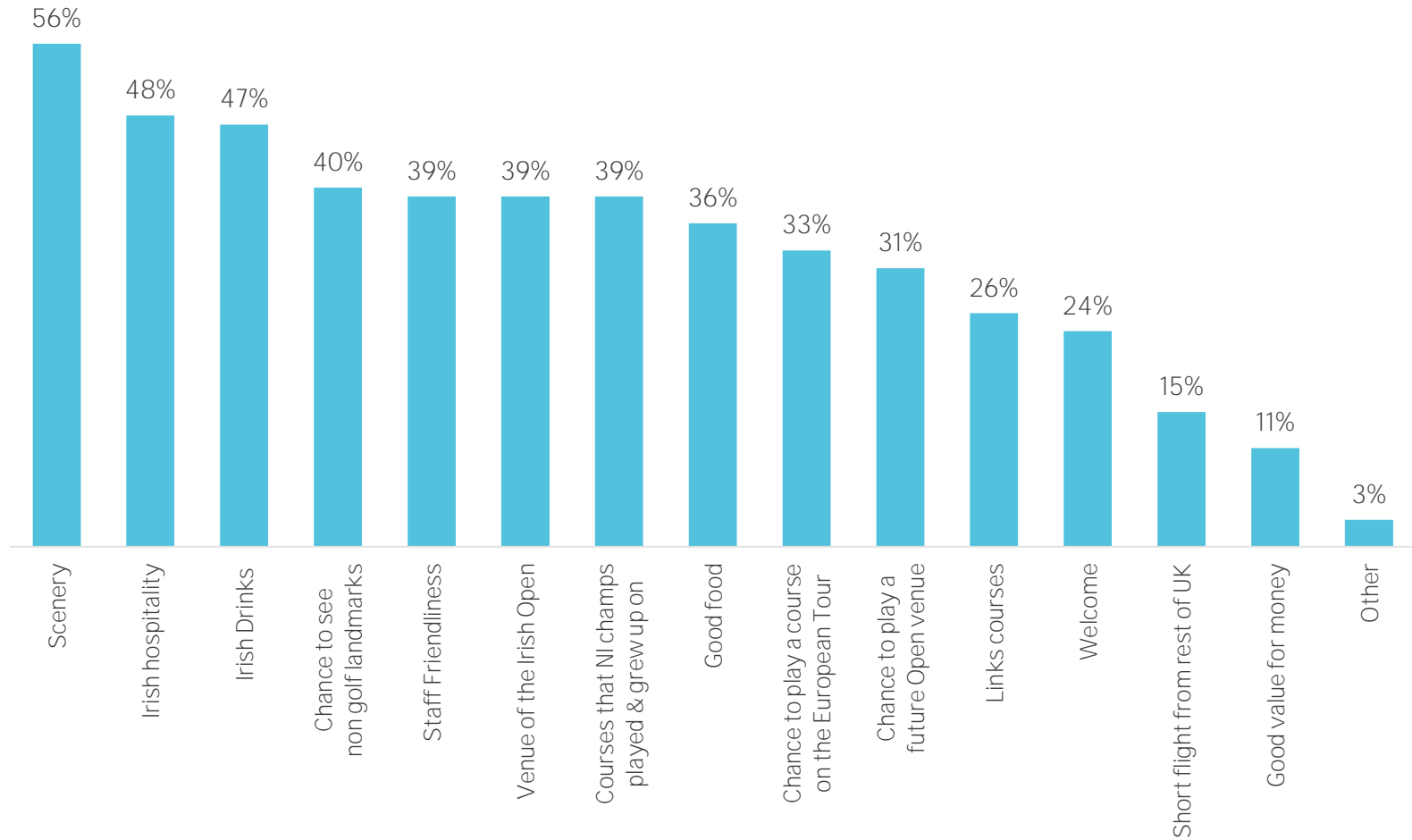


CONSUMER FEEDBACK | Choosing NI: Top 10

	ROI	UK	Europe	USA / Canada	R.O.W
Good courses	42%	43%	39%	50%	43%
Awareness of NI major champions	27%	41%	61%	48%	52%
NI hosting the Open	33%	43%	64%	37%	48%
Hospitality / people	23%	45%	46%	43%	48%
Previous experience	35%	38%	14%	27%	10%
Good facilities	18%	28%	21%	22%	5%
Visit Family & friends	26%	25%	4%	19%	33%
Accessibility	30%	29%	14%	8%	-
Good literature / media advertising	11%	16%	25%	19%	38%
Good value	17%	13%	7%	21%	-

CONSUMER FEEDBACK | Trip Highlights

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



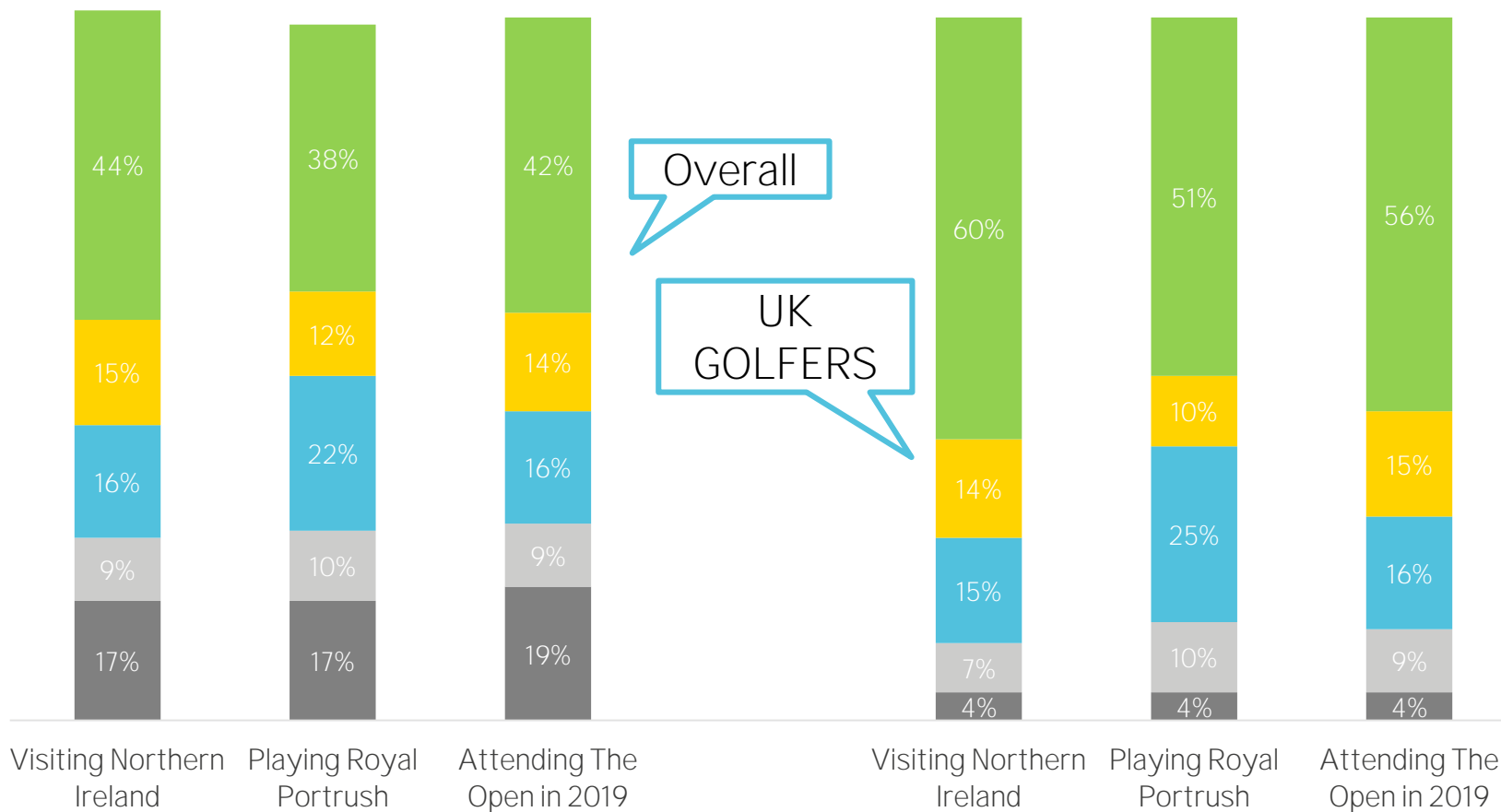
CONSUMER FEEDBACK | Trip Highlights: Top 10

	ROI	UK	Europe	USA / Canada	R.O.W
Scenery	44%	54%	82%	57%	71%
Irish hospitality	15%	49%	71%	60%	62%
Irish Drinks	23%	51%	71%	48%	62%
Chance to see non golf landmarks	24%	24%	79%	54%	62%
Staff Friendliness	44%	37%	46%	33%	43%
Venue of the Irish Open	32%	38%	64%	33%	62%
Courses that NI champs played & grew up on	35%	39%	50%	39%	43%
Good food	38%	39%	32%	33%	38%
Chance to play a course on the European Tour	23%	37%	46%	29%	38%
Chance to play a future Open venue	27%	31%	61%	24%	38%
Chance to play a future open venue (2016)	31%	21%	34%	25%	28%

CONSUMER FEEDBACK | Royal Portrush 2019

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

No influence
 Very little influence
 Neither
 Quite a bit of influence
 A lot of influence



THE TYPICAL OUT OF STATE VISITOR

- Takes between 1 and 2 golf holidays a year.
- Books golf rounds through 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



INTERNATIONAL TOURISM RESEARCH

Have you been to Northern Ireland for a golfing holiday?



14%



14%

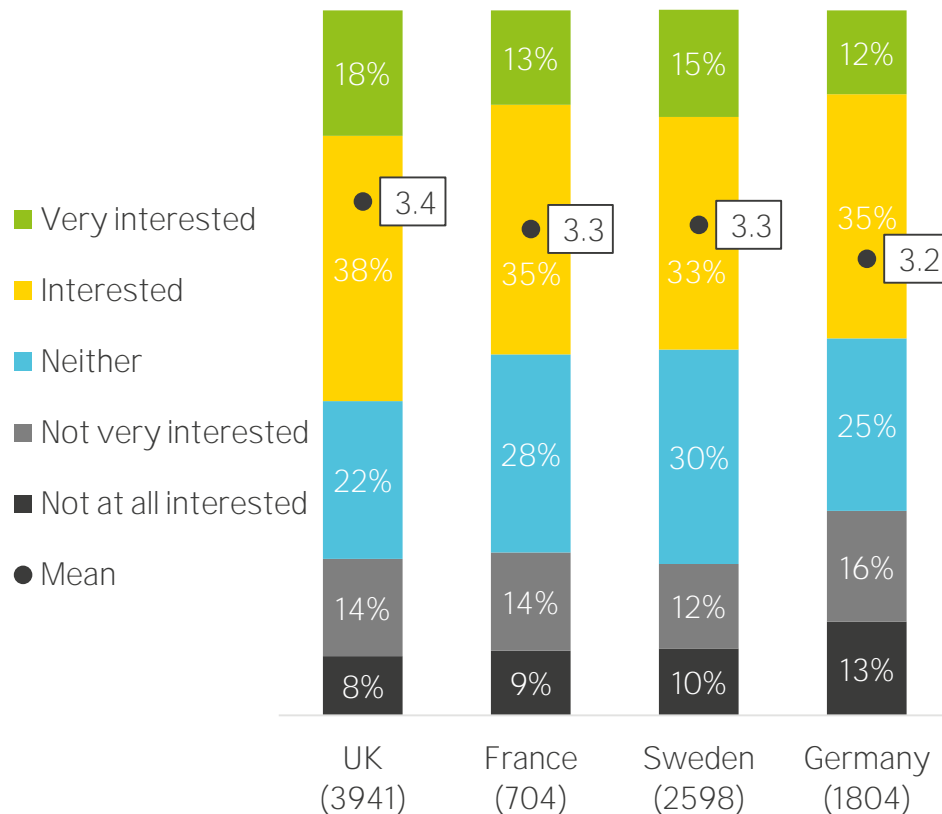


12%



11%

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



CONTACT DETAILS



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INVESTIGATION

INSIGHT

ACTION

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