REVIEW OF GOLF IN NORTHERN IRELAND IN 2014
Research Results Presentation
March 2015
STATE OF GOLF IN THE UK
ROUND Pak PLAYED YEAR TO DATE - NATIONAL

Average number of Rounds Played per course in each month - 2010 - 2014

- 3.5% increase from 2013 to 2014
2014 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.

Two year rolling average = 6.4% 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.

2014 = 1,514,000 = 46% of full course users
2013 = 1,521,000 = 45% of full course users

Regular (12-51 times)  Avid (52 times +)

Two year rolling average
NITB GOLF TOURISM MONITOR

Championship courses to conquer
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

1. Evaluation of the Golf Tourism Market in Northern Ireland;
2. Strategic insight into the golf tourist travelling to Northern Ireland;
3. Understanding what golfers thought of their trip to Northern Ireland;
4. Understanding how likely golfers are to return both as players and spectators;
5. Identifying Key Markets or Opportunities for tourism growth.
THE PROGRAMME

- The tourism monitor is comprised of three main sources of measurement.
  - Visitor Interviews
  - Monitor of Rounds Played
  - Benchmark Study

- What have we done?
  - Gathered information on:
    - Clubs and Facilities
    - Visitors and Rounds Played
    - Golf Holiday trends
    - Expenditure on golf tourism
THE PROGRAMME

- Benchmark Questionnaires
  - 23 of 32 Submitted
  - Questionnaires filled out by clubs and compiled by the NITB
  - Used to sense check submitted rounds and also for the calculation of average green fees.

- Rounds Played
  - Between 19-21 clubs submitted data for the peak golfing season.
  - This represents an increase compared to 2013, when the maximum number of responses was 17.
  - Data was submitted either online at www.nitbgolf.net or via an SMS INC spreadsheet emailed to courses.
THE PROGRAMME

- 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 at courses within their own country at which they are not members.
  - 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 2014 remaining in Northern Ireland is:
  
  £33,200,000  
  (2013 = £27,000,000)

- The number of golfing visitors to Northern Ireland is:
  
  139,300  
  (2013 = 134,268)
KEY FINDINGS

- The Economic Impact of golf tourism from non-domestic golfers for Northern Ireland in 2014 is:
  
  £24,600,000
  
  (2013 = £22,400,000)

- The number of non-domestic golfing visitors to Northern Ireland is:
  
  22,293
  
  (2013 = 20,484)
KEY FINDINGS

- North America is crucial to the total economic impact of golf tourism in Northern Ireland.

- The feedback from North American visitors is very positive and a high proportion are return visitors who show every intention of returning to the country again in the future.

- Higher proportions of golfers than in 2013 testifying to flying to Belfast Airport and visiting only Northern Ireland.

- There has also been an encouraging increase in the proportion of domestic golfers taking overnight golf breaks in Northern Ireland.

- Awareness of N.I major champions was the third most important factor in decisions of North American visitors to come to Northern Ireland.
VOLUME & VALUE OF GOLF TOURISM
BREAKDOWN OF OVERNIGHT VS DAY VISITOR REVENUE

OVERNIGHT VISITOR TOTAL EXPENDITURE

2013 - £22,400,000

£26,900,000

DAY VISITOR TOTAL EXPENDITURE

2013 - £4,600,000

£6,300,000
TOTAL EXPENDITURE 2014 – 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>2,714,000</td>
<td>7,900</td>
</tr>
<tr>
<td>ROI</td>
<td>1,779,000</td>
<td>4,100</td>
</tr>
<tr>
<td>Rest of UK</td>
<td>2,931,000</td>
<td>4,200</td>
</tr>
<tr>
<td>Europe</td>
<td>2,792,000</td>
<td>2,000</td>
</tr>
<tr>
<td>North America</td>
<td>15,596,000</td>
<td>8,200</td>
</tr>
<tr>
<td>Rest of World</td>
<td>1,119,000</td>
<td>400</td>
</tr>
</tbody>
</table>

Note: Number of visitors for North America is multiplied by 4 compared to the other regions.
2014 PERIODIC ANALYSIS
• On average 7,817 rounds of golf were played by visitors (including domestic visitors) at each participating venue throughout 2014.

• August, as in 2013, was the month with the highest average number of rounds.
TOTAL VISITORS BY QUARTER – DAY VS OVERNIGHT

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Day</th>
<th>Overnight</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Quarter</td>
<td>15,376</td>
<td>2,234</td>
</tr>
<tr>
<td>2nd Quarter</td>
<td>38,897</td>
<td>8,840</td>
</tr>
<tr>
<td>3rd Quarter</td>
<td>43,339</td>
<td>12,733</td>
</tr>
<tr>
<td>4th Quarter</td>
<td>14,898</td>
<td>3,020</td>
</tr>
</tbody>
</table>
TOTAL REVENUE BY QUARTER – DAY VS OVERNIGHT

1st Quarter: £1,379,044
   - Day: £855,559
   - Overnight: £523,485

2nd Quarter: £8,635,625
   - Day: £2,171,352
   - Overnight: £6,464,273

3rd Quarter: £14,203,808
   - Day: £2,435,423
   - Overnight: £11,768,385

4th Quarter: £2,711,990
   - Day: £831,906
   - Overnight: £1,880,084
ORIGIN OF TOTAL ROUNDS PLAYED BY QUARTER
ORIGIN OF TOTAL ROUNDS PLAYED BY QUARTER - EXCLUDING DOMESTIC

[Bar chart showing the origin of total rounds played by quarter for different regions (R.O.I, UK, Europe, N. Am, R.O.W). The bars are color-coded for easy identification.]

- 1st Quarter
- 2nd Quarter
- 3rd Quarter
- 4th Quarter
CONSUMER INTERVIEWS
VISITOR TYPE

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

- Day Visitor: 19.7%
- On a short break/holiday where the main purpose is to play golf: 3.7%
- On a short break/holiday where golf is part of the trip: 76.6%
INTERVIEWEE PROFILE - OUT OF STATE

North America – 37%

ROI – 24%

Europe – 10%

Rest of UK – 24%

Rest of World – 5%
PLAYING GOLF IN NORTHERN IRELAND

Q – Have you played golf in Northern Ireland before?

- Yes within the last year
  - Republic of Ireland: 69%
  - Rest of UK: 38%
  - Europe: 35%
  - USA/Canada: 18%
  - Overall: 63%

- Yes within the last 5 years
  - Republic of Ireland: 36%
  - Rest of UK: 24%
  - Europe: 35%
  - USA/Canada: 10%
  - Overall: 35%

- Yes more than 5 years ago
  - Republic of Ireland: 12%
  - Rest of UK: 24%
  - Europe: 7%
  - USA/Canada: 7%
  - Overall: 18%

- Never
  - Republic of Ireland: 8%
  - Rest of UK: 19%
  - Europe: 19%
  - USA/Canada: 20%
  - Overall: 17%
WHY DID YOU CHOOSE NORTHERN IRELAND?

Survey results showing factors that were considered when choosing Northern Ireland: Good Courses, Hospitality / People, Good Value, Good Facilities, Previous Experience, Awareness of NI Major Champions, Word of Mouth/Recommendation, Other Competitors/Corporate Day/Society. The chart indicates varying percentages across different regions and overall.
TODAY’S GOLF - BOOKING

- Through a tour operator: 68%
- Just turned up: 45%
- Through a member: 24%
- Online tee booking website: 25%
- Directly with golf course: 22%
- Through accommodation operator: 2%

ROI: 31%
Rest of UK: 17%
Europe: 15%
North America: 25%
Total: 10%
COURSES & ROUNDS IN NORTHERN IRELAND OUT OF STATE 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?

N.B: figures for rounds played are taken as a two year rolling average in keeping with calculations used to estimate the economic impact. Figures for courses represent 2014’s results only.
PLEASE RATE THE FOLLOWING ASPECTS OF YOUR COURSE ON A SCALE OF 1-5 (1= VERY POOR, 5 = EXCELLENT)
DO YOU INTEND TO RETURN TO THE COURSE (WHERE YOU WERE INTERVIEWED) IN THE FUTURE?

- Yes on this visit: 4%
- Yes would hope to do so in the future: 14%
- Undecided - no plans as yet: 19%
- No: 63%

Base: 309
Northern Ireland vs. Other Countries – Golf Course Quality

Q – How would you rate the quality of the courses you have played in Northern Ireland compared with the following countries?

1 - Northern Ireland is much worse
2 - Northern Ireland is a little worse
3 - About the same
4 - Northern Ireland is a little better
5 - Northern Ireland is much better

Spain (161)
England (257)
Wales (162)
Republic of Ireland (248)
USA (202)
Scotland (274)
NORTHERN IRELAND VS. OTHER COUNTRIES – VALUE FOR MONEY

1 - Northern Ireland is much worse
2 - Northern Ireland is a little worse
3 - About the same
4 - Northern Ireland is a little better
5 - Northern Ireland is much better

ROI (133) 27% 3.7
England (84) 18% 3.6
Spain (66) 21% 3.6
Portugal (46) 17% 3.5
Scotland (100) 12% 3.3
USA (117) 7% 3.0

ROI (133) 24% 2.0
England (84) 32% 2.7
Spain (66) 27% 2.7
Portugal (46) 17% 3.5
Scotland (100) 17% 3.5
USA (117) 8% 3.0

ROI (133) 45% 3.0
England (84) 41% 3.0
Spain (66) 41% 3.0
Portugal (46) 41% 3.0
Scotland (100) 56% 3.0
USA (117) 25% 3.0

ROI (133) 10% 1.0
England (84) 11% 1.0
Spain (66) 15% 1.0
Portugal (46) 15% 1.0
Scotland (100) 15% 1.0
USA (117) 25% 1.0
Northern Ireland vs. Other Countries – Overall Enjoyment

Q – How would you rate overall enjoyment of your break in Northern Ireland compared with the following countries?

1 - Northern Ireland is much worse
2 - Northern Ireland is a little worse
3 - About the same
4 - Northern Ireland is a little better
5 - Northern Ireland is much better
Do you intend to visit any tourist attractions whilst in Northern Ireland?

- Yes: 59.6%
- No: 29.7%
- Don't know: 10.6%
Are you aware that the Irish Open is to be held at Royal County Down in 2015?

- Yes: 83.9%
- No: 16.1%

How likely do you think it is that you will attend the Irish Open at Royal County Down next year?

- Very unlikely: 0%
- Unlikely: 10%
- Neither: 20%
- Likely: 30%
- Very likely: 40%

- Very unlikely: 16.2%
- Unlikely: 19.1%
- Neither: 11.0%
- Likely: 35.6%
THE TYPICAL OUT OF STATE VISITOR

- Takes between one and three golf holidays a year.
- Books through a tour operator.
- 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.
- Travelled in a group of more than 10 golfers.
- Intends to visit only Northern Ireland.
- The average out of state, overnight visitor spent £1,971 on their golf break, an average of £308 per day.
EUROPEAN GOLF TOURISM
GLOBALLY – 62.9M golfers

EUROPEAN golfers – 7.9M golfers
(13% of global)

FRANCE, GERMANY, SCANDINAVIA & GB&I – 6.3M golfers
(79% of European golfers)
“GOLF TOURISTS” - NON-DOMESTIC HOLIDAYS

Q: Have you taken a golf holiday outside your national country in the last 12 months.

**GB&I**
- Yes: 37.9%
- No: 62.1%

**Sweden**
- Yes: 82.5%
- No: 17.5%

**France**
- Yes: 33.2%
- No: 66.8%

**Germany**
- Yes: 10.5%
- No: 89.5%
GOLF TOURISTS – NON DOMESTIC DESTINATIONS

GB&l  Sweden  France  Germany

Spain  35.6%  30.3%  22.5%  41.8%
Portugal  4.4%  6.4%  2.7%  10.5%
Turkey  12.3%  6.5%  4.4%  12.7%
USA  7.6%  4.4%  5.3%  7.1%
Morocco  1.4%  16%  2.3%  17.7%
Ireland / Eire  2.9%  2.7%  3.8%  11.5%
Austria  0.2%  0.8%  0.2%  1.6%
Italy  5.9%  3.3%  4.4%  17.6%
Scotland  0.0%  0.9%  4.4%  7.6%
England  0.0%  0.9%  6.1%  12.3%
Other  16.9%  3.9%  5.7%  35.5%
### ‘GOLF TOURIST’ - RESEARCHING HOLIDAYS

<table>
<thead>
<tr>
<th>Source</th>
<th>GB&amp;I</th>
<th>Sweden</th>
<th>France</th>
<th>Germany</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friends’ recommendation</td>
<td>3.1</td>
<td>3.0</td>
<td>2.9</td>
<td>3.0</td>
</tr>
<tr>
<td>Golf magazines</td>
<td>2.4</td>
<td>2.8</td>
<td>2.3</td>
<td>2.6</td>
</tr>
<tr>
<td>Specialist golf tour operators</td>
<td>2.8</td>
<td>2.1</td>
<td>2.3</td>
<td>2.7</td>
</tr>
<tr>
<td>Golf pro’s recommendation</td>
<td>2.3</td>
<td>2.1</td>
<td>2.3</td>
<td>2.2</td>
</tr>
<tr>
<td>Online tour operators</td>
<td>2.3</td>
<td>1.8</td>
<td>2.0</td>
<td>2.5</td>
</tr>
<tr>
<td>High-street tour operators</td>
<td>1.6</td>
<td>2.6</td>
<td>1.8</td>
<td>1.9</td>
</tr>
<tr>
<td>Online blogs/reviews/golf networks</td>
<td>2.0</td>
<td>1.7</td>
<td>2.0</td>
<td>2.0</td>
</tr>
<tr>
<td>Social media</td>
<td>1.5</td>
<td>1.7</td>
<td>1.4</td>
<td>1.6</td>
</tr>
<tr>
<td>Reviews/adverts on TV</td>
<td>1.8</td>
<td>1.5</td>
<td>1.2</td>
<td>1.6</td>
</tr>
<tr>
<td>Outdoor advertising</td>
<td>1.5</td>
<td>1.2</td>
<td>1.7</td>
<td>1.5</td>
</tr>
</tbody>
</table>

Extent used sources for researching golf holidays. Rating of 1 to 4 – “Not at all” to “A great extent”
TRAVEL GROUP

GB&I and Swedish golfers travel in the largest groups.

French golfers are considerably more likely to travel with “non-golfers”.

Having “non golf options” is the 4th most important factor for a French golfer.

90% of French golfers and 86% of German golfers did at least one “non-golf” activity during their last break.
DISCUSSION...
MOVING FORWARD 2015
HELPING TO MAKE THE RESEARCH MORE ROBUST

- The greater the response rate from the clubs, the greater the confidence we can have in the data.
  - Improving response is cause for optimism in future years
  - However, clubs could still do more to submit regular data rather than yearly figures when chased at the end of the year.

- To complete a monthly data-entry would take less than 5 minutes.
  - Requires the clubs to be disciplined in recording data.
  - Requires casual visitor green fees and country of origin to be recorded by staff in Pro shops for back entry into BRS.
  - Requires managers to make clear to Professionals the importance of asking for country of origin data from visitors to the Pro shop
MAINTAINING THE SUCCESS OF 2014

- In 2014, tourism to Northern Ireland benefited from:
  - The continued success of Northern Irish Golfers. Rory McIlroy’s glorious summer, which saw him win back to back majors at the Open and PGA Championships no doubt provided Northern Ireland with the kind of lustre and desirability that no amount of marketing can replicate.
    - Awareness of NI major champions was the third most important reason for choosing Northern Ireland for a holiday according to visitors from North America.
  - More than half of visitors described themselves as likely or very likely to attend the Irish Open at Royal County Down in 2015.
  - As in the United Kingdom, where rounds played were up compared to 2013, good weather is likely to have played a key role in encouraging greater domestic golf tourism.
MAINTAINING THE SUCCESS OF 2014

- There remains much scope for the further expansion of golf tourism within Northern Ireland:
  - More golfers than in 2013 are visiting Northern Ireland exclusively and further continuation of this trend can only yield further benefits for the country.
  - Rory McIlroy remains the undisputed world #1 and the greatest draw in golf.
  - The Northern Ireland Open, European Challenge Tour event at Galgorm Castle has been granted a prime date for 2015 that does not clash with a regular European Tour event. Free entry continues to generate record crowds.
  - Northern Ireland continues to impress its visitors, with more than three quarters expressing an intention to return in the future.
CONTACT DETAILS

UK CONTACT DETAILS

The Courtyard, Wisley,
Surrey GU23 6QL, UK
info@sportsmarketingsurveysinc.com
Tel: + 44 (0) 1932 345 539

RICHARD PAYNE – SENIOR MANAGER, SPORTS ACCOUNTS
richard.payne@sportsmarketingsurveysinc.com

MICHAEL STONE – HEAD OF RESEARCH
michael.stone@sportsmarketingsurveysinc.com

EDWARD WILLIS – SPORTS ACCOUNT EXECUTIVE
ed.willis@sportsmarketingsurveysinc.com