STATE OF GOLF IN THE UK
Average number of Rounds Played per course in each month ~ 2011- 2015
Adults who have played on a full length golf course (9 or 18 hole) at least once in the last 12 months.

2015 PARTICIPATION: GB FULL LENGTH COURSE USERS

Two year rolling average

=6.0% 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.

- **2015** = 1,377,000 = 44% of full course users
- **2014** = 1,514,000 = 46% of full course users
- **2013** = 1,521,000 = 45% 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

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

We have gathered information on:

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

- Rounds Played
  - Between 20-22 clubs submitted data for the peak golfing season.
    - This is consistent with 2014
  - Data was submitted either online at www.nitbgolf.net or via an SMS INC spreadsheet emailed to courses.

- Visitor Interviews
  - 302 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

- The Economic Impact of golf tourism for Northern Ireland in 2015 remaining in Northern Ireland is:

  2015 = £32,100,000
  2014 = £33,200,000
  2013 = £27,000,000

- The number of golfing visitors to Northern Ireland is:

  2015 = 139,300
  2014 = 139,300
  2013 = 134,300
KEY FINDINGS

- The Economic Impact of golf tourism from **non-domestic golfers** for Northern Ireland in 2015 is:
  
  2015 = £24,700,000  
  2014 = £24,600,000  
  2013 = £22,400,000  

- The number of **non-domestic** golfing visitors to Northern Ireland is:
  
  2015 = 23,231  
  2014 = 22,293  
  2013 = 20,484
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.

- 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.

- 2014 may have been an anomaly but the number of Northern Irish golfers taking a domestic overnight break has fallen and the economic impact of this has had the biggest single influence for 2015.

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

- **Overnight Visitor Total Expenditure**
  - 2013: £22,400,000
  - 2014: £26,900,000
  - 2015: £25,600,000

- **Day Visitor Total Expenditure**
  - 2013: £4,600,000
  - 2014: £6,300,000
  - 2015: £6,500,000
TOTAL EXPENDITURE PER COUNTRY

OVERNIGHT VISITOR TOTAL EXPENDITURE
- N.I: £1,400,000
- R.O.I: £1,300,000
- UK: £2,800,000
- Europe: £2,900,000
- N. Am: £900,000
- R.O.W: £16,400,000

DAY VISITOR TOTAL EXPENDITURE
- N.I: £6,000,000
- R.O.I: £37,000
- UK: £900,000
- Europe: £400,000
- N. Am: £37,000
- R.O.W: £2,900,000

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## TOTAL EXPENDITURE 2015 – 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>1,386,000</td>
<td>5,100</td>
</tr>
<tr>
<td>ROI</td>
<td>1,279,000</td>
<td>2,600</td>
</tr>
<tr>
<td>Rest of UK</td>
<td>2,841,000</td>
<td>4,300</td>
</tr>
<tr>
<td>Europe</td>
<td>2,865,000</td>
<td>1,800</td>
</tr>
<tr>
<td>North America</td>
<td>16,352,000</td>
<td>8,400</td>
</tr>
<tr>
<td>Rest of World</td>
<td>892,000</td>
<td>270</td>
</tr>
</tbody>
</table>

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2015 PERIODIC ANALYSIS
On average 7,823 rounds of golf were played by visitors (including domestic visitors) at each participating venue throughout 2015.

August, as in 2014, was the month with the highest average number of rounds.
TOTAL REVENUE BY QUARTER – DAY VS OVERNIGHT

- 1st Quarter: £838,000 - Day: £814,000
- 2nd Quarter: £8,212,000 - Day: £2,276,000
- 3rd Quarter: £13,674,000 - Day: £2,552,000
- 4th Quarter: £2,865,000 - Day: £869,000
ORIGIN OF TOTAL ROUNDS PLAYED BY QUARTER

1st Quarter: 16,300
- N.I: 1,400
- R.O.I: 800
- UK: 200
- Europe: 700
- N. Am: 60
- R.O.W: 23

2nd Quarter: 45,200
- N.I: 4,400
- R.O.I: 4,700
- UK: 2,600
- Europe: 400
- N. Am: 13,000
- R.O.W: 60

3rd Quarter: 49,300
- N.I: 6,900
- R.O.I: 6,500
- UK: 4,000
- Europe: 900
- N. Am: 23,400
- R.O.W: 900

4th Quarter: 17,400
- N.I: 1,400
- R.O.I: 1,400
- UK: 700
- Europe: 4,800
- N. Am: 400
- R.O.W: 200

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ORIGIN OF TOTAL ROUNDS PLAYED BY QUARTER - EXCLUDING DOMESTIC

1st Quarter: R.O.I 1,400, UK 800, Europe 200, N. Am 700, R.O.W 60
2nd Quarter: R.O.I 4,400, UK 4,700, Europe 2,600, N. Am 400, R.O.W 13,000
3rd Quarter: R.O.I 6,900, UK 6,500, Europe 4,000, N. Am 900, R.O.W 23,400
4th Quarter: R.O.I 1,400, UK 1,400, Europe 700, N. Am 200, R.O.W 4,800
CONSUMER INTERVIEWS
VISITOR TYPE

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

- Day Visitor (coming from home) 34%
- On a short break/holiday where the main purpose is to play golf 34%
- On a short break/holiday where golf is part of the trip 32%
- Individual green fee 37%
- Guest of a member 18%
- Small Society (< 10 players) 18%
- Open Day 17%
- Medium Society (10-20 players) 8%
- Large Society (over 20 players) 1%

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INTERVIEWEE PROFILE - OUT OF STATE

North America 20%

Rep. of Ireland 43%

Rest of UK 26%

Rest of World 2%

Europe 9%
PLAYING GOLF IN NORTHERN IRELAND

Q – Have you played golf in Northern Ireland before?

- Yes within the last year:
  - ROI (129): 57%
  - Rest of UK (79): 7%
  - Europe (27): 22%
  - North America (58): 6%
  - Overall (301): 90%

- Yes within the last 5 years:
  - ROI (129): 30%
  - Rest of UK (79): 28%
  - Europe (27): 3%
  - North America (58): 4%
  - Overall (301): 66%

- Yes more than 5 years ago:
  - ROI (129): 19%
  - Rest of UK (79): 16%
  - Europe (27): 3%
  - North America (58): 4%
  - Overall (301): 28%

- Never:
  - ROI (129): 2%
  - Rest of UK (79): 3%
  - Europe (27): 14%
  - North America (58): 37%
  - Overall (301): 3%
WHY DID YOU CHOOSE NORTHERN IRELAND?

- Previous experience: 44%
- Good courses: 24%
- Good value: 25%
- Hospitality / people: 8%
- Word of Mouth / Recommendation: 21%
- Awareness of NI major champions: 4%
- Visit Family & friends: 29%
- Good facilities: 19%

- ROI: 31%
- Rest of UK: 43%
- Europe: 19%
- North America: 0%
- Overall: 24%

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TODAY’S GOLF - BOOKING

- Online tee booking website: 27% ROI, 27% Rest of UK, 33% Europe, 22% North America, Overall 27%
- Directly with golf course: 39% ROI, 22% Rest of UK, 24% Europe, 4% North America, Overall 7%
- Through a tour operator: 3% ROI, 18% Rest of UK, 48% Europe, 48% North America, Overall 21%
- Through a member: 13% ROI, 25% Rest of UK, 15% Europe, 14% North America, Overall 17%
- Just turned up: 11% ROI, 5% Rest of UK, 6% Europe, 0% North America, Overall 2%
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?

Courses Visited
Rounds Played

ROI: Courses Visited = 2.3, Rounds Played = 3.2
Rest of UK: Courses Visited = 2.8, Rounds Played = 3.0
Europe: Courses Visited = 3.1, Rounds Played = 4.2
North America: Courses Visited = 5.0, Rounds Played = 5.0
Please rate the following aspects of your course…

- Ease of booking: 87% Excellent, 11% Mean
- Customer service: 85% Excellent, 14% Mean
- Directions / signage to find the course: 81% Excellent, 18% Mean
- Quality of the pro shop: 80% Excellent, 19% Mean
- Overall course facilities: 79% Excellent, 20% Mean
Do you intend to return to the course (where you were interviewed) in the future?

- Yes on this visit: 19%
- Yes would hope to do so in the future: 55%
- Undecided - no plans as yet: 20%
- No: 6%

Base: 303
NORTHERN IRELAND VS. OTHER COUNTRIES: VALUE FOR MONEY

<table>
<thead>
<tr>
<th>Country</th>
<th>Wales (268)</th>
<th>ROI (292)</th>
<th>England (273)</th>
<th>Spain (276)</th>
<th>Scotland (271)</th>
<th>Portugal (279)</th>
<th>USA (274)</th>
</tr>
</thead>
<tbody>
<tr>
<td>NI is much better</td>
<td>51%</td>
<td>4.1%</td>
<td>28%</td>
<td>40%</td>
<td>30%</td>
<td>42%</td>
<td>38%</td>
</tr>
<tr>
<td>NI is a little better</td>
<td>38%</td>
<td>17%</td>
<td>24%</td>
<td>15%</td>
<td>21%</td>
<td>14%</td>
<td>10%</td>
</tr>
<tr>
<td>About the same</td>
<td>22%</td>
<td>16%</td>
<td>26%</td>
<td>21%</td>
<td>21%</td>
<td>19%</td>
<td>11%</td>
</tr>
<tr>
<td>NI is a little worse</td>
<td>14%</td>
<td>14%</td>
<td>21%</td>
<td>20%</td>
<td>35%</td>
<td>18%</td>
<td>34%</td>
</tr>
<tr>
<td>NI is much worse</td>
<td>12%</td>
<td>24%</td>
<td>21%</td>
<td>5%</td>
<td>6%</td>
<td>7%</td>
<td>3.4%</td>
</tr>
</tbody>
</table>

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NORTHERN IRELAND VS. OTHER COUNTRIES: OVERALL ENJOYMENT

- Wales (264): 51% Don't know, 32% NI is much better, 16% NI is a little better, 14% About the same, 15% NI is a little worse, 7% NI is much worse.
- ROI (288): 4.1% Don't know, 3.9% NI is much better, 3.6% NI is a little better, 3.1% About the same, 3.0% NI is a little worse, 3.0% NI is much worse.
- England (267): 4.0% Don't know, 3.9% NI is much better, 3.7% NI is a little better, 3.3% About the same, 3.2% NI is a little worse, 3.2% NI is much worse.
- Spain (271): 39% Don't know, 38% NI is much better, 36% NI is a little better, 34% About the same, 32% NI is a little worse, 32% NI is much worse.
- Scotland (265): 29% Don't know, 28% NI is much better, 27% NI is a little better, 25% About the same, 24% NI is a little worse, 24% NI is much worse.
- Portugal (270): 43% Don't know, 42% NI is much better, 40% NI is a little better, 38% About the same, 36% NI is a little worse, 36% NI is much worse.
- USA (268): 37% Don't know, 36% NI is much better, 35% NI is a little better, 33% About the same, 32% NI is a little worse, 32% NI is much worse.
ACCOMMODATION

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

Overall
- 4* or more hotel: 35%
- With friends/family: 21%
- Bed & Breakfast: 14%
- Guest House: 17%

ROI
- 4* or more hotel: 30%
- With friends/family: 24%
- Bed & Breakfast: 14%
- Guest House: 14%

Rest of UK
- 4* or more hotel: 31%
- With friends/family: 21%
- Bed & Breakfast: 16%
- Guest House: 16%

Europe
- 4* or more hotel: 48%
- With friends/family: 15%
- Bed & Breakfast: 19%
- Guest House: 7%

North America
- 4* or more hotel: 56%
- With friends/family: 11%
- Bed & Breakfast: 11%
- Guest House: 14%
Do you intend to visit any tourist attractions whilst in Northern Ireland?

Overall
- Yes: 59%
- No: 32%
- Don't know: 9%

By Region
- ROI: 13% Yes, 74% No, 13% Don't know
- Rest of UK: 27% Yes, 52% No, 21% Don't know
- Europe: 91% Yes, 9% Don't know
- North America: 96% Yes, 4% Don't know
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?

<table>
<thead>
<tr>
<th>Region</th>
<th>Price</th>
<th>Courses included</th>
<th>A mix of course types (e.g. Links/parkland)</th>
<th>Food/drink included</th>
<th>Quality of accommodation</th>
<th>Only links courses included</th>
<th>Inclusion of non-golf activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>ROI</td>
<td>86%</td>
<td>68%</td>
<td>22%</td>
<td>7%</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Rest of UK</td>
<td>58%</td>
<td>15%</td>
<td>27%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Europe</td>
<td>26%</td>
<td>22%</td>
<td>52%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>North America</td>
<td>34%</td>
<td>42%</td>
<td>24%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
PROFESSIONAL GOLF EVENTS

Are you aware of another Professional Tour event taking place in August at Galgorm Castle Golf Club? (ROI Only)

- Yes: 69%
- No: 28%
- Don't know: 3%

Would you consider staying in Northern Ireland for 1 night or more during this event? (ROI Only)

- Yes: 41%
- No: 58%
- Don't know: 1%
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 4 courses on their trip, and play 5 rounds.
- The average out of state, overnight visitor spent £1,746 on their golf break, an average of £267 per day.
DISCUSSION...
MOVING FORWARD 2016
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
  – Many clubs prefer to submit data at the end of the year
MAINTAINING THE SUCCESS OF 2015

- In 2015, tourism to Northern Ireland continued to benefit from:
  
  - The continued success and coverage of Northern Irish Golfers. Despite losing his spot as World Number 1, another fantastic year for Rory McIlroy kept Northern Irish golf firmly in the media as has the build up to the 2016 Ryder Cup with Darren Clarke as Team Europe’s Captain.
    - Awareness of NI major champions was the second most important reason for choosing Northern Ireland for a holiday according to visitors from North America and third most important for visitors from Europe.
  
  - The success and coverage of The Irish Open at Royal County Down will have put Northern Ireland firmly in the minds of golfers far and wide, the opportunity is to continue Northern Ireland’s association with the event and persuade visitors to the 2016 Open to travel north to play golf before and after.
MAINTAINING THE SUCCESS OF 2015
CONTACT DETAILS

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