REVIEW OF GOLF IN NORTHERN IRELAND IN 2013
Research Results Presentation, NITB Headquarters, February 11th 2014
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 tourism monitor has comprised of three main sources of measurement.

- Visitor Interviews
- Monitor of Rounds Played
- Benchmark Study
The Programme

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

- How have we achieved this?
  - Collecting Data from selected Participating Clubs (Benchmarking Study)
  - Gathering Rounds Played Information
  - Interviewing Golf Visitors.

- Benchmark Questionnaires
  - 32 of 32 Submitted
  - Questionnaires filled out in person with SMS INC representative Ken Revie
  - 29 of 32 clubs provided estimates for visitor rounds
The Programme

- Rounds Played
  - Between 13–17 clubs submitted data for the peak golfing season, with May to August attracting the greatest number of responses (17 clubs)
  - Data was submitted either online at www.nitbgolf.net or via an SMS INC spreadsheet emailed to courses.
The Programme

- Visitor Interviews
  - 482 visitor interviews conducted at clubs during the prime golfing season.
  - Interviewers asked visiting golfers questions on:
    - their golf visit
    - the length and type of break
    - their level of enjoyment of golf in Northern Ireland
The Programme

- Visitor Interviews
  - Key questions such as average length of stay and average expenditure were asked to:
    - golfers of all nationalities, both visitors enjoying a day trip as well as golfers on longer golf breaks.
    - This information has been key to estimating the economic impact of golf in Northern Ireland.
Key Findings
Key Findings

- The Economic Impact of golf tourism for Northern Ireland in 2013 remaining in Northern Ireland is: £27,000,000

- The number of golfing visitors to Northern Ireland is: 134,268
Key Findings

- The Economic Impact of golf tourism from non-domestic golfers for Northern Ireland in 2013 is: £22,400,000

- The number of non-domestic golfing visitors to Northern Ireland is: 20,484
Key Findings

- The American market is currently the cornerstone of the out of state golf tourism market to Northern Ireland.

- The feedback from American visitors is very positive and a high proportion want to return.

- The country's current golf visitors tend to be highly affluent, highly organised visitors for whom a trip to Northern Ireland represents a cherished trip that merits a heavy level of investment.
  - Potential room for expansion among more spontaneous “whim” visitors, particularly from mainland UK and the Republic of Ireland.
Volume and Value of Golf Tourism...

- Calculated using a long established model developed by SPORTS MARKETING SURVEYS INC.

- Information sources:
  - Rounds Played numbers – for origin of visitors & rounds played numbers on a monthly basis.
  - Consumer Interview Programme – for expenditure and length of stay by type of visitor on their overall golf break.
  - The Benchmarking Survey – for the proportion of rounds played accounted for by submitting clubs compared to clubs within the monitor who did not provide monthly data.

- Confidence level impacted upon by disappointing level of return from the clubs.
Breakdown of Overnight vs Day visitor revenue

- Overnight Visitor Total Expenditure: £22,409,199.00
- Day Visitor Total Expenditure: £4,597,115.18
Total expenditure per country

<table>
<thead>
<tr>
<th>Country</th>
<th>Overnight Visitor Total Expenditure</th>
<th>Day Visitor Total Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>N.I</td>
<td>£256,816</td>
<td>£236,317</td>
</tr>
<tr>
<td>R.O.</td>
<td>£972,051</td>
<td>£22,285</td>
</tr>
<tr>
<td>J.K</td>
<td>£2,321,572</td>
<td>£3,528,992</td>
</tr>
<tr>
<td>Europe</td>
<td>£3,528,992</td>
<td>£4,338,514</td>
</tr>
<tr>
<td>USA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>R.O.W</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Total Expenditure 2013 – 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>£256,816</td>
<td>1,445</td>
</tr>
<tr>
<td>ROI</td>
<td>£972,051</td>
<td>2,745</td>
</tr>
<tr>
<td>Rest of UK</td>
<td>£2,300,170</td>
<td>3,563</td>
</tr>
<tr>
<td>Europe</td>
<td>£2,321,572</td>
<td>1,262</td>
</tr>
<tr>
<td>USA</td>
<td>£13,029,598</td>
<td>7,071</td>
</tr>
<tr>
<td>Rest of World</td>
<td>£3,528,992</td>
<td>1,915</td>
</tr>
</tbody>
</table>
Quarterly Analysis
Total revenue by quarter – Day vs Overnight

1st Quarter: £1,085,761
2nd Quarter: £8,307,001
3rd Quarter: £1,578,328
4th Quarter: £1,438,109

Day: £716,877, £1,748,808, £1,581,741, £1,438,109
Overnight: £368,884, £6,598,193, £996,587, £150,000
On average 4,672 rounds of golf were played by visitors at each participating venue throughout 2013.

August, no doubt helped by the success of the World Police and Fire Games in Belfast, was the best performing month.
Green Fee Rates

Source: Benchmark Survey
Only two clubs had increased green fee prices compared to 2012.

The average individual green fee was more than double the average member's guest fee.

N.B. average rates are club’s rate card green fees – price actually charged to golfers may have differed.
Consumer Interviews
The typical out of state visitor

- Takes a golf holiday once or twice a year
- Has never played in Northern Ireland before
- Visits Northern Ireland on a break where the main purpose is to play golf
- Plays either as an individual green fee payer or as a large society
- Books their round through a tour operator
The typical out of state visitor

- Travels in a party of 12.9 golfers
- Travels with 1.9 non golfers
- Visits only Northern Ireland
- Visits an average of 3.4 courses
- Plays an average of 3.8 rounds
The typical out of state visitor

- Was attracted to Northern Ireland by the good courses
- Moves between different accommodations
- Stays in a four star or better hotel
- Spends an average of £2,543 at an average of £385 per day
Visitor Type

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

- **Day Visitor**: 71.6%
- **On a short break/holiday where the main purpose is to play golf**: 18.2%
- **On a short break/holiday where golf is part of the trip**: 10.2%

Base: 176 – Out of state only

Individual green fee: 28%
Guest of a member: 19%
Large Society (over 20 players): 18%
Small Society (less than 10 players): 17%
Medium Society (10-20 players): 14%
Company/Corporate Day: 2%
Club Match: 2%

Base: 177 – Out of state only
Q – Do you know what influenced the decision to choose Northern Ireland?
Countries included in trip

Q – Are you visiting only courses in Northern Ireland on your golf break? (out of state visitors)

Out of state visitors only: (62)

Republic of Ireland: 92%
England: 15%
Scotland: 5%
Wales: 8%
Europe: 2%
Interviewee Profile – Out of State

USA/Canada – 54%
ROI – 23%
Rest of UK – 15%
Europe – 7%
### Consumer Interviews – Profile of Golf Visitors

<table>
<thead>
<tr>
<th>Demographics</th>
<th>2013</th>
<th>Northern Ireland</th>
<th>Republic of Ireland</th>
<th>Rest of UK</th>
<th>Europe</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sex:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>80.3%</td>
<td>75.2%</td>
<td>95.1%</td>
<td>96.4%</td>
<td>75%</td>
<td>85.4%</td>
</tr>
<tr>
<td>Female</td>
<td>19.7%</td>
<td>24.8%</td>
<td>4.9%</td>
<td>3.6%</td>
<td>25%</td>
<td>14.6%</td>
</tr>
<tr>
<td>Total %</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Age:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>&lt;18 years</td>
<td>5.7%</td>
<td>8.4%</td>
<td>2.4%</td>
<td>3.6%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-29</td>
<td>8.8%</td>
<td>9.7%</td>
<td>22%</td>
<td>14.3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>30-39</td>
<td>13.7%</td>
<td>16.4%</td>
<td>9.8%</td>
<td>14.3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>40-49</td>
<td>21.9%</td>
<td>18.1%</td>
<td>34.1%</td>
<td>-</td>
<td>8.3%</td>
<td>36.5%</td>
</tr>
<tr>
<td>50-59</td>
<td>20.4%</td>
<td>18.5%</td>
<td>17.1%</td>
<td>32.1%</td>
<td>58.3%</td>
<td>19.8%</td>
</tr>
<tr>
<td>60+</td>
<td>29.5%</td>
<td>28.9%</td>
<td>14.6%</td>
<td>35.7%</td>
<td>33.3%</td>
<td>35.4%</td>
</tr>
<tr>
<td>Total %</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Based on those interviewed – the typical visitor to Northern Ireland is an experienced male golfer with a mid range handicap.
- Visitors from further afield tend to be older and better golfers, with American visitors showing the best average handicap.
Visitors from the USA, who have made the largest financial commitment to reach Northern Ireland, stay the longest, with the average American visitor spending at least a week in the country.
Today’s Golf – Booking

- Directly with golf course: 48% (NI 48%, ROI 48%, Rest of UK 48%, USA/Canada 48%)
- Through a member: 29% (NI 31%, ROI 29%, Rest of UK 29%, USA/Canada 29%)
- Through a tour operator: 46% (NI 46%, ROI 46%, Rest of UK 46%, USA/Canada 46%)
- Just turned up: 11% (NI 11%, ROI 11%, Rest of UK 11%, USA/Canada 11%)
- Online tee booking website: 3% (NI 3%, ROI 3%, Rest of UK 3%, USA/Canada 3%)
- Through accommodation operator: 4% (NI 4%, ROI 4%, Rest of UK 4%, USA/Canada 4%)

Total - Inc NI: 83%
Total - Out of State: 17%
Q – What type of accommodation are you staying in?

- **4* or more hotel**: 68%
- **3* hotel**: 7%
- **Bed & Breakfast**: 39%
- **House (rented)**: 3%
- **With friends**: 18%

**Total (163)**

**ROI (31)**

- **4* or more hotel**: 39%
- **3* hotel**: 7%
- **Bed & Breakfast**: 12%
- **House (rented)**: 2%
- **With friends**: 7%

**Rest of UK (26)**

- **4* or more hotel**: 42%
- **3* hotel**: 12%
- **Bed & Breakfast**: 19%
- **House (rented)**: 4%
- **With friends**: 8%

**USA/Canada (96)**

- **4* or more hotel**: 89%
- **3* hotel**: 4%
- **Bed & Breakfast**: 35%
- **House (rented)**: 8%
- **With friends**: 2%
Accommodation distance

- **On course**: 34.1%
- **Less than 10 minutes away**: 29.7%
- **10 to 30 minutes away**: 20.3%
- **More than 30 minutes away**: 15.9%

Base: 138 – (out of state only)

- Rest of UK (not NI/ROI) (20): 15.0%
- USA/Canada (92): 47.8%
Courses & Rounds in Northern Ireland – This Visit – 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?

<table>
<thead>
<tr>
<th>Region</th>
<th>Courses Visited</th>
<th>Rounds Played</th>
</tr>
</thead>
<tbody>
<tr>
<td>ROI (29)</td>
<td>2.1</td>
<td>2.6</td>
</tr>
<tr>
<td>Rest of UK (21)</td>
<td>2.4</td>
<td>2.7</td>
</tr>
<tr>
<td>USA/Canada (90)</td>
<td>4.1</td>
<td>4.4</td>
</tr>
<tr>
<td>Overall - out of state visitors</td>
<td>3.4</td>
<td>3.8</td>
</tr>
</tbody>
</table>

Base: out of state 149
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

- Spain (63) 38% 3.8
- England (80) 28% 3.7
- Portugal (43) 33% 3.6
- ROI (128) 9% 3.3
- Scotland (103) 8% 3.2
- USA (114) 10% 3.2
Please rate the following aspects of your course on a scale of 1–5 (1= Very Poor, 5 = Excellent):

- Customer Service: 4.8
- Ease of booking: 4.7
- Overall facilities: 4.6
- Pro Shop Quality: 4.5
- Directions/Signage: 4.5

- Very Poor: 18%
- Poor: 12%
- Average: 33%
- Good: 39%
- Excellent: 58%
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 (64) - 42% (4.0)
England (81) - 33% (3.6)
Wales (45) - 40% (3.5)
Republic of Ireland (131) - 73% (3.2)
USA (117) - 60% (3.2)
Scotland (106) - 66% (3.0)
Northern Ireland vs. Other Countries – Value for Money

Q – How would you rate value for money for golf 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

<table>
<thead>
<tr>
<th>Country</th>
<th>Rating 1 (%)</th>
<th>Rating 2 (%)</th>
<th>Rating 3 (%)</th>
<th>Rating 4 (%)</th>
<th>Rating 5 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ROI</td>
<td>27%</td>
<td>32%</td>
<td>21%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>England</td>
<td>18%</td>
<td>10%</td>
<td>41%</td>
<td>32%</td>
<td>3%</td>
</tr>
<tr>
<td>Spain</td>
<td>21%</td>
<td>11%</td>
<td>41%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Portugal</td>
<td>17%</td>
<td>15%</td>
<td>41%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Scotland</td>
<td>12%</td>
<td>15%</td>
<td>56%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>USA</td>
<td>7%</td>
<td>25%</td>
<td>60%</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>
A Northern Ireland Major?

How interested would you be in coming to NI to watch a major championship golf event?

Overall (179) 62% Very interested 4.2
ROI (42) 57% Very interested 4.4
Rest of UK (28) 64% Very interested 4.3
USA/Canada (96) 55% Very interested 4.1

Not at all interested 6% 10% 14% 7%
Not really interested 5% 10% 7% 9%
Neither interested nor disinterested 5% 10% 14% 7%
Fairly interested 4.2 4.4 4.3 4.1
Very interested 56% 57% 64% 55%

Mean 4.2 4.4 4.3 4.1
UK Golf Tourism Research
Domestic Holidays in last three years

Q: Have you taken a golfing holiday inside your main country of residence during the last 3 years?

More than 70% of British and Northern Irish golfers have taken a domestic golf break in the last three years.
Q: Which of the following best describes the type of accommodation you stayed in on your most recent golfing holiday in your main country of residence?
Q: Which country did you take your most recent golfing holiday outside your main country of residence?

Overall, the top locations were Spain, Portugal and France, ahead of Scotland, Turkey and the USA.
Discussion...
Moving Forward 2014
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.
  - Hugely helpful, therefore, if together we can encourage a better response rate in 2014.

- 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
Helping to Make the Research More Robust

– Despite an increase in the number of clubs using the online reporting option, there are still several who ignore its benefits and ease.

– The more clubs who input data online the more beneficial the system will prove for the clubs, with a greater sample for clubs to compare their own performance with others using the online reporting system.

– Data entry needs to become a habit, with courses setting a monthly reminder, perhaps to input the previous month's data at the end of the following month.
Maintaining the success of 2013 in 2014

- In 2013, tourism to Northern Ireland benefited from:
  - Derry~Londonderry being the UK city of culture for 2013.
  - The success of the World Police And Fire Games in Belfast in August, which appears to have impacted positively on the number of visitors to golf clubs in the region.

- Additionally:
  - The 2012 Irish Open at Portrush was the first to take place in Northern Ireland in almost 60 years.
    - This was a great success, uniting three Northern Irish Major champions, and is highly likely to have exerted an impact on bookings to the country.
  - Rory McIlroy's success at the tail end of 2012, and his signing of a lucrative deal with Nike would have further pushed Northern Ireland into the American consciousness in the 6–12 months before the 2013 golf season.
However,

- Even without these things, there is a huge opportunity for the NITB to attract people to play golf in Northern Ireland. Secure in the knowledge that:
  - many of those who come to Northern Ireland for golf are affluent and looking for a high level experience
  - the experience is hugely enjoyed by the great majority
  - with many planning to return
Have you ever visited a Northern Ireland stand at a golf exhibition/show?

- Yes: 1%
- No: 86%
- Don’t know: 14%

Base: 179 – (out of state only)

Have you heard of the Northern Ireland ‘Time to Play’ campaign?

- Yes: 10%
- No: 90%
- Don’t know: 0%

Base: 175 – (out of state only)
2014 Recommendations

- It is vital that communication and relationships are maintained with participating Monitor golf clubs.

- The Rounds Played Monitor is the key to keeping clubs engaged and to monitoring the footfall of visitors to Northern Ireland month by month.
  - The online performance monitoring system can provide key information for clubs, but only if there is a commitment from all clubs to provide regular information via this system.
  - Greater familiarity with this system will only improve the accuracy of future returns and therefore results.

- Benchmarking information is important for key aspects such as Green Fee rates.

- More detailed consumer questions surrounding the breakdown of spending would help to pinpoint exactly how much of this money is entering Northern Ireland as opposed to paying foreign companies for tour packages, flights, etc.
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 RESEARCH EXECUTIVE
ed.willis@sportsmarketingsurveysinc.com
Using SPORTS MARKETING SURVEYS INC. Data

GUIDELINES

- We are pleased for our clients to use this data in their advertising, press releases, catalogues and newsletters. The use of our information in your marketing efforts is a legitimate and valuable application. However, there are guidelines under which data may be released outside your organisation.

- Any publication of confidential information outside of your organisation without the prior consent of SPORTS MARKETING SURVEYS INC. is expressly forbidden. You should send us a copy of any literature that references our data before it is published. We will generally agree to such publication, but ask you to adhere to the following guidelines:
  - The information should be a clear, fair and accurate representation of what our research indicates
  - The time period and measure should be clearly indicated
  - SPORTS MARKETING SURVEYS INC. should be credited as the source of the information.

- If you have any questions regarding these guidelines, or the appropriate uses of our data, please feel free to call.