

SPORTS MARKETING SURVEYS INC.

GOLF TOURISM IN NORTHERN IRELAND | 2019

FINAL REPORT

April 2020



tourism
northernireland



April 20, 2020

PROJECT OVERVIEW & METHODOLOGY



OBJECTIVES



AIMS



THE PROGRAMME – 2019

- **Rounds Played**
 - 28 clubs submitted data for the whole year.
 - This is the highest number of clubs to submit data since the Monitor began.
 - Data was submitted either online at www.nitbgolf.net, via an SMS INC. spreadsheet emailed to courses, or by submitting raw data from their till system directly to SMS INC.

- **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 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.

KEY FINDINGS



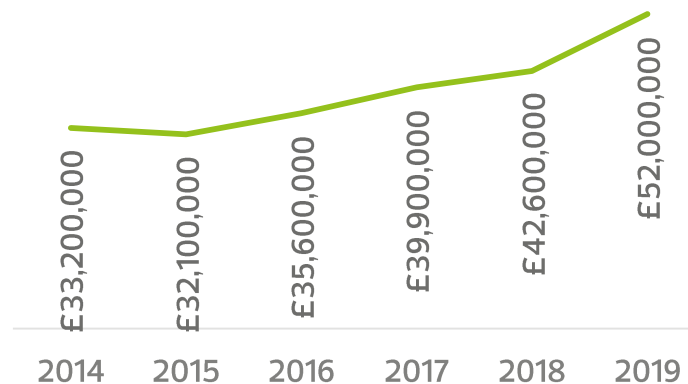
tourism
northernireland



KEY FINDINGS

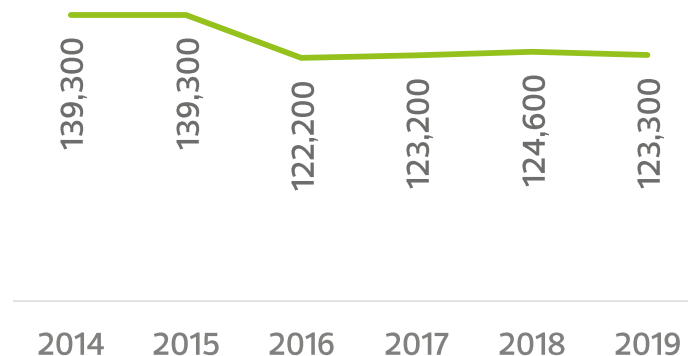
- The Economic Impact of golf tourism for Northern Ireland in 2019 is:

2019 = £52,000,000
 2018 = £42,600,000
 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:

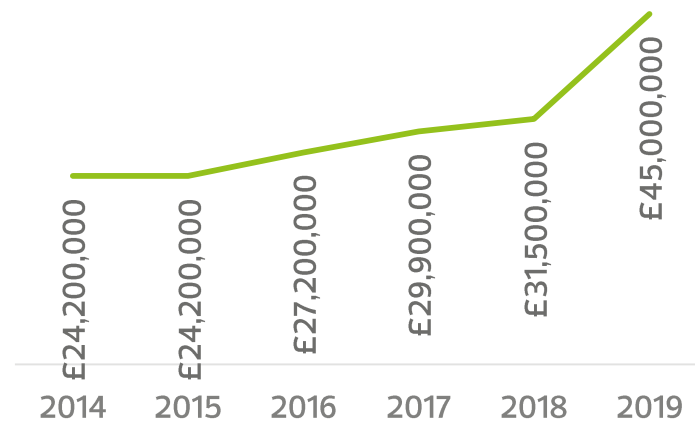
2019 = 123,300
 2018 = 124,600
 2017 = 123,200
 2016 = 122,200
 2015 = 139,300
 2014 = 139,300



KEY FINDINGS

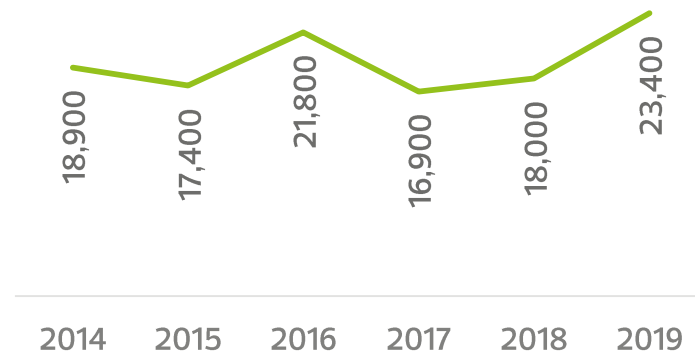
- The Economic Impact of golf tourism from **non-domestic overnight golfers** for Northern Ireland in 2019 is:

2019 = £45,000,000
 2018 = £31,500,000
 2017 = £29,900,000
 2016 = £27,200,000
 2015 = £24,200,000
 2014 = £24,200,000



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

2019 = 23,400
 2018 = 18,000
 2017 = 16,900
 2016 = 21,800
 2015 = 17,400
 2014 = 18,900



2019 TRENDS AND KEY TAKE OUTS

- The number of visitors and rounds played was very similar between 2019 and 2018 but a much higher percentage of these were overseas visitors in 2019.
- The average number of rounds played per person has declined marginally in 2019 although the average length of stay has remained consistent.
 - With an increase in the percentage of golfers stating that they visited a tourist attraction e.g. the Titanic experience or Giants Causeway, or did non-golf activities, this highlights the overall appeal of Northern Ireland as a tourism destination. Visiting Game of Thrones locations was also a very popular additional tourist attraction.
- The combination of an increase in overseas visitors and higher expenditure on overall breaks has seen the economic impact of golf tourism to Northern Ireland increase significantly compared to 2018 (+£9.5 million) with the figure now at £52 million.

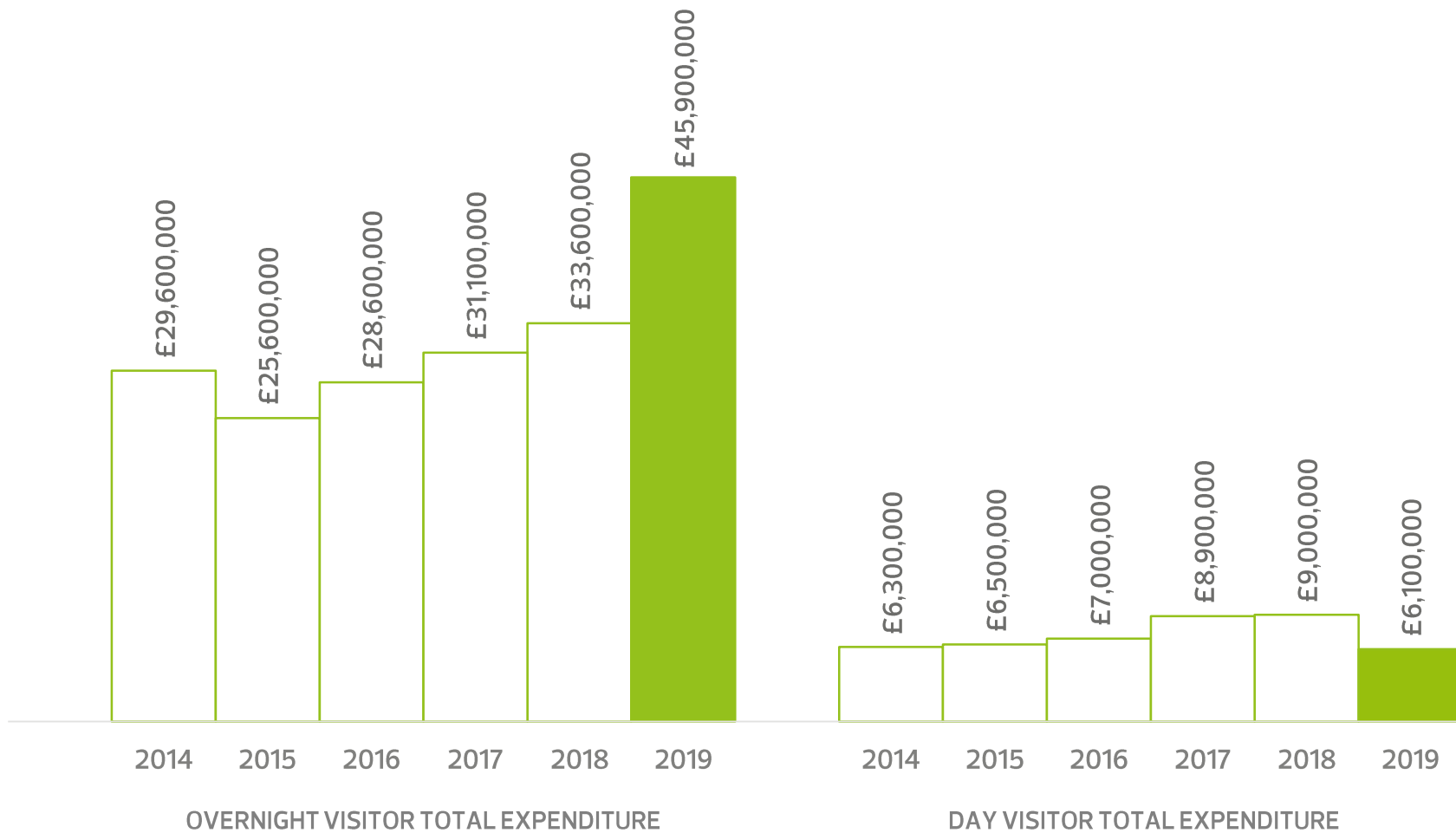
SPORTS MARKETING SURVEYS INC.

VOLUME AND VALUE OF GOLF TOURISM

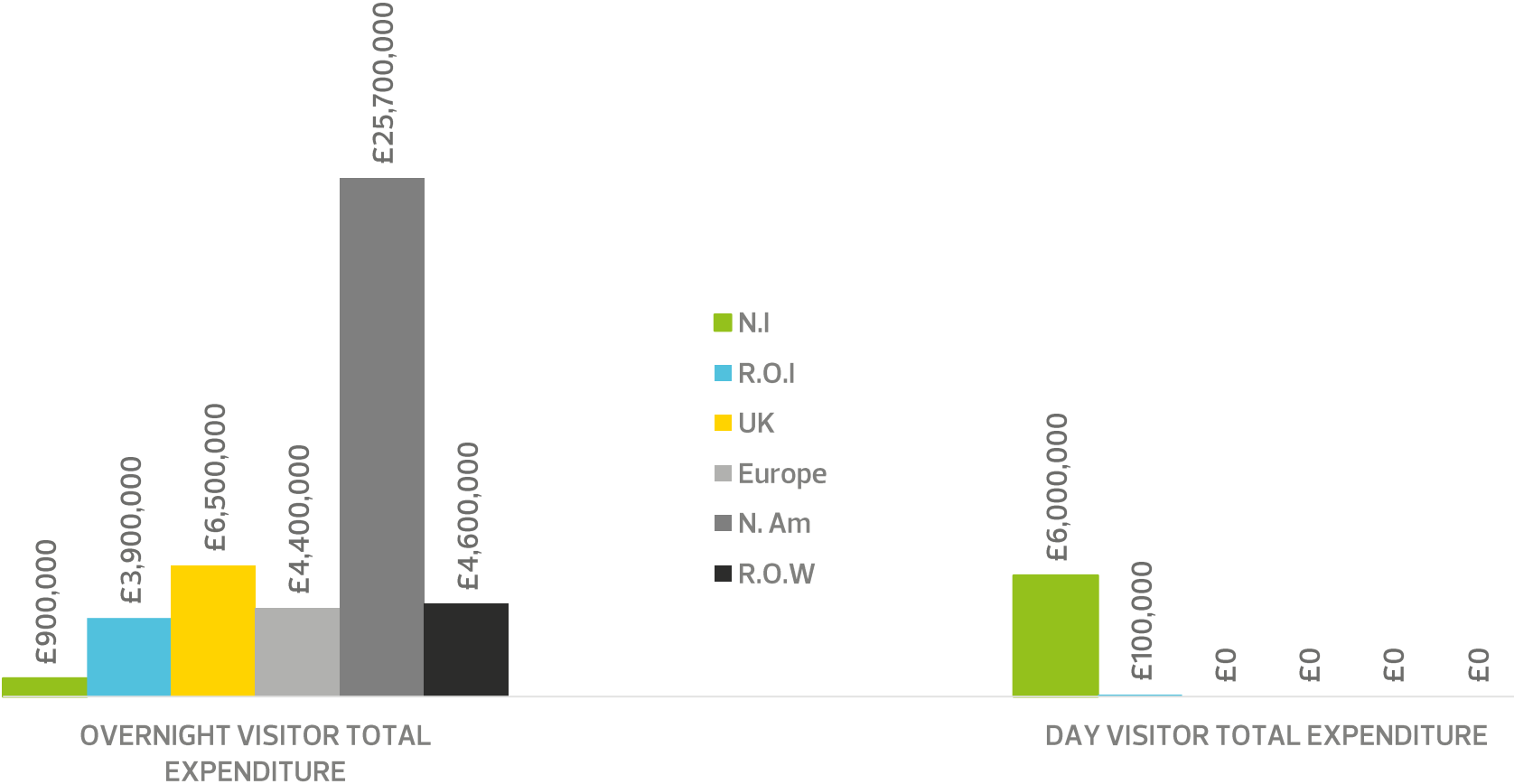


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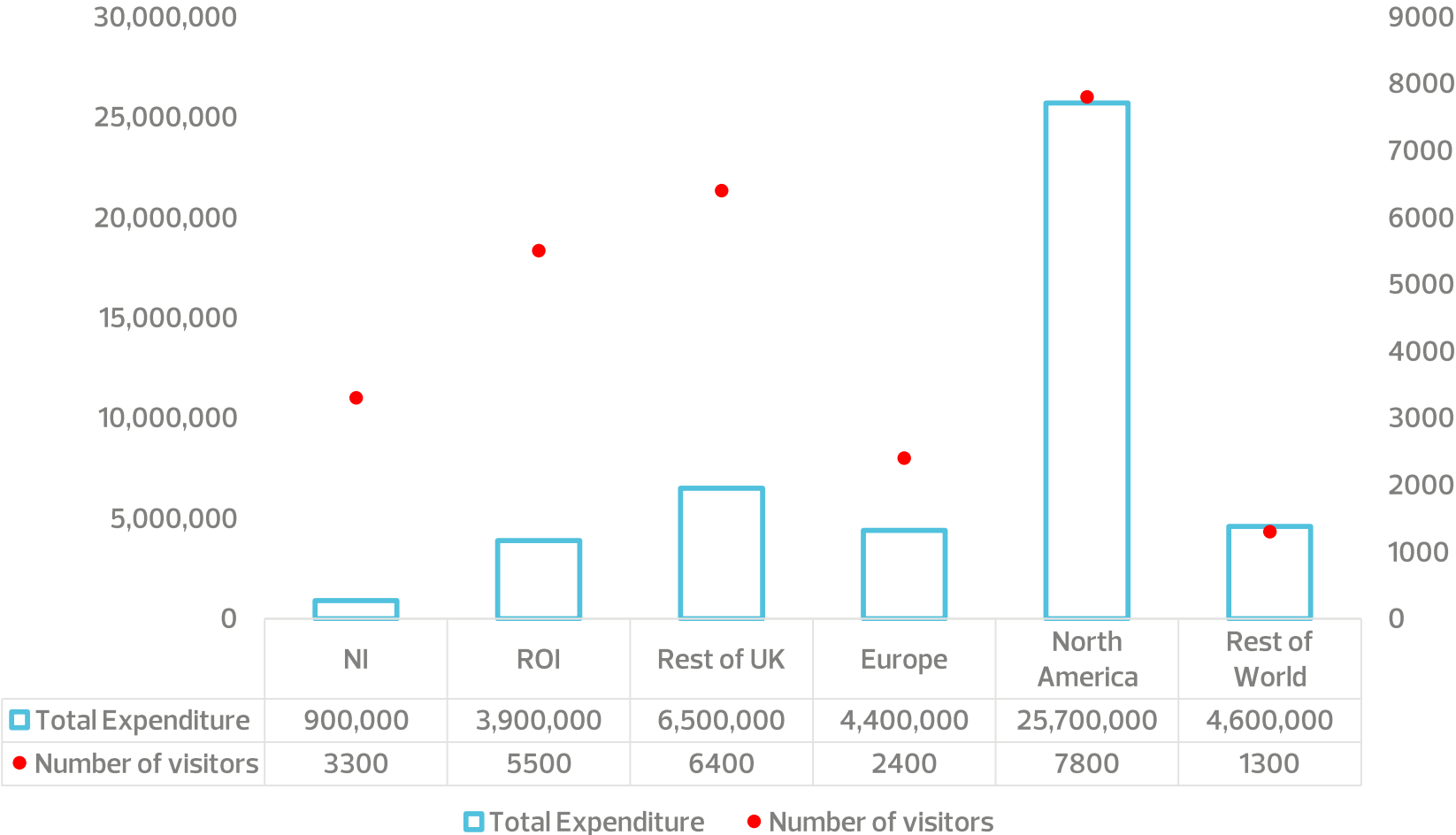
OVERNIGHT VS DAY VISITOR REVENUE



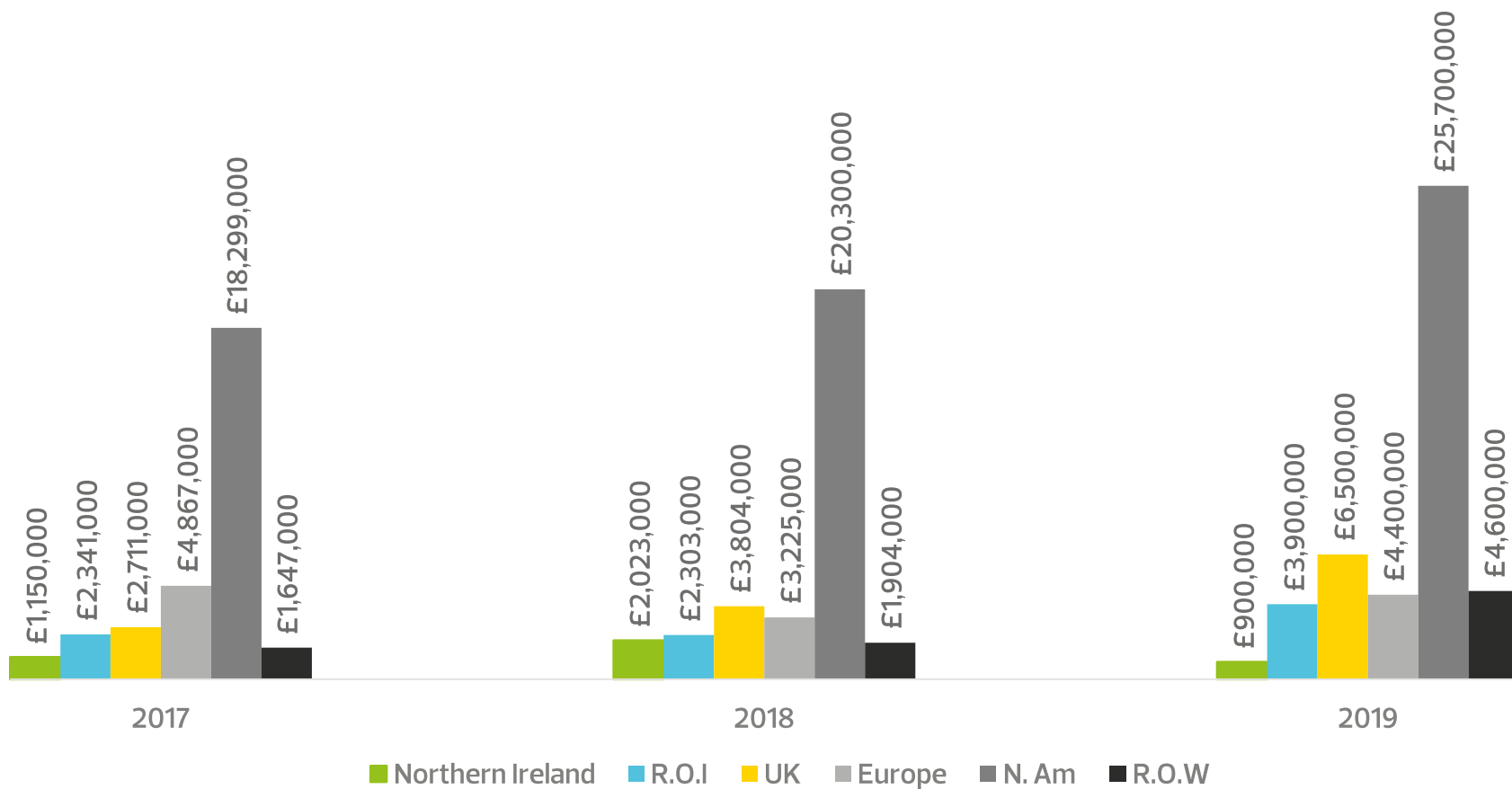
EXPENDITURE BY COUNTRY



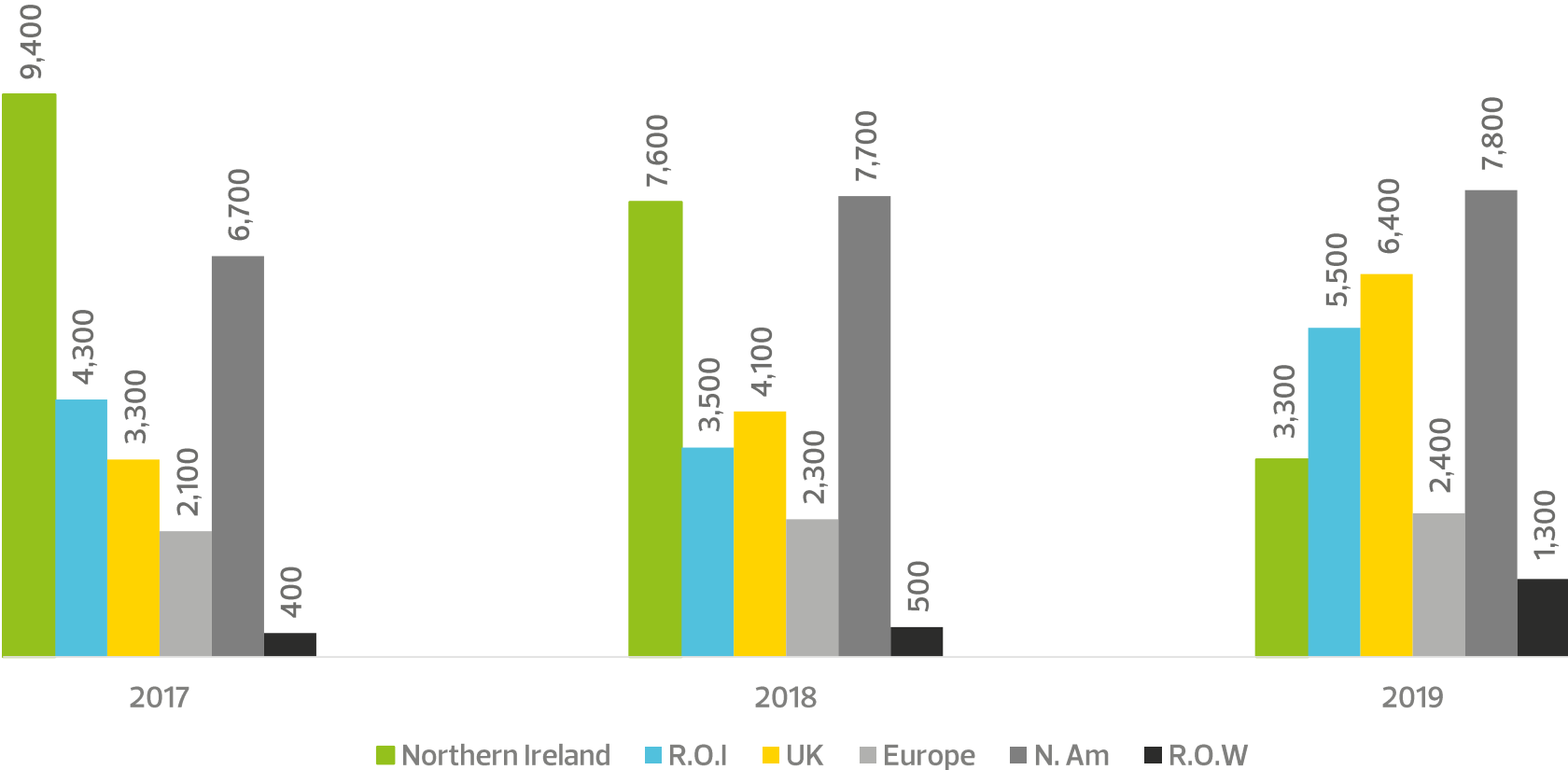
EXPENDITURE & FOOTFALL – OVERNIGHT VISITORS



TOTAL EXPENDITURE – OVERNIGHT VISITORS



TOTAL VISITORS – OVERNIGHT VISITORS



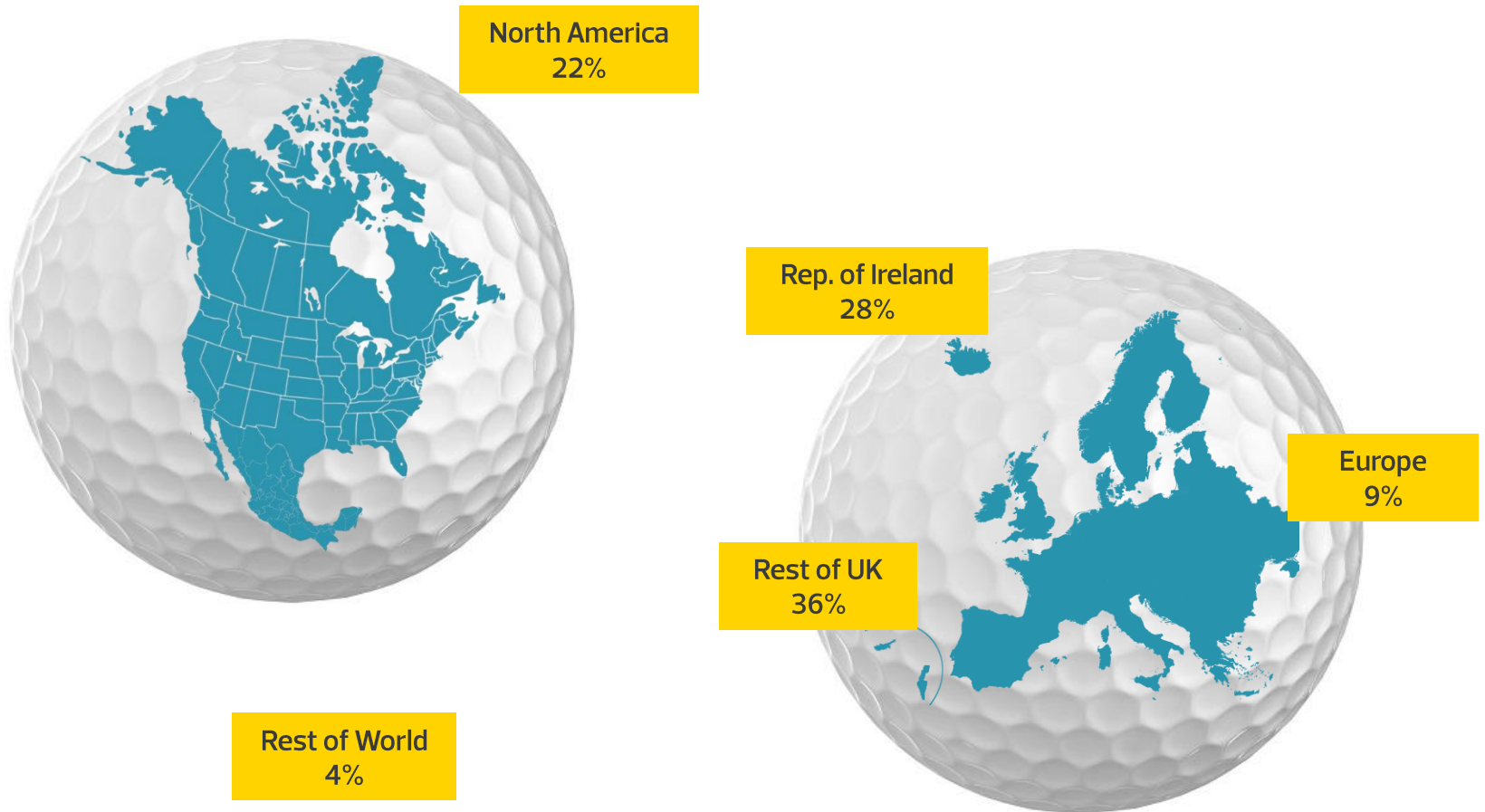
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CONSUMER FEEDBACK



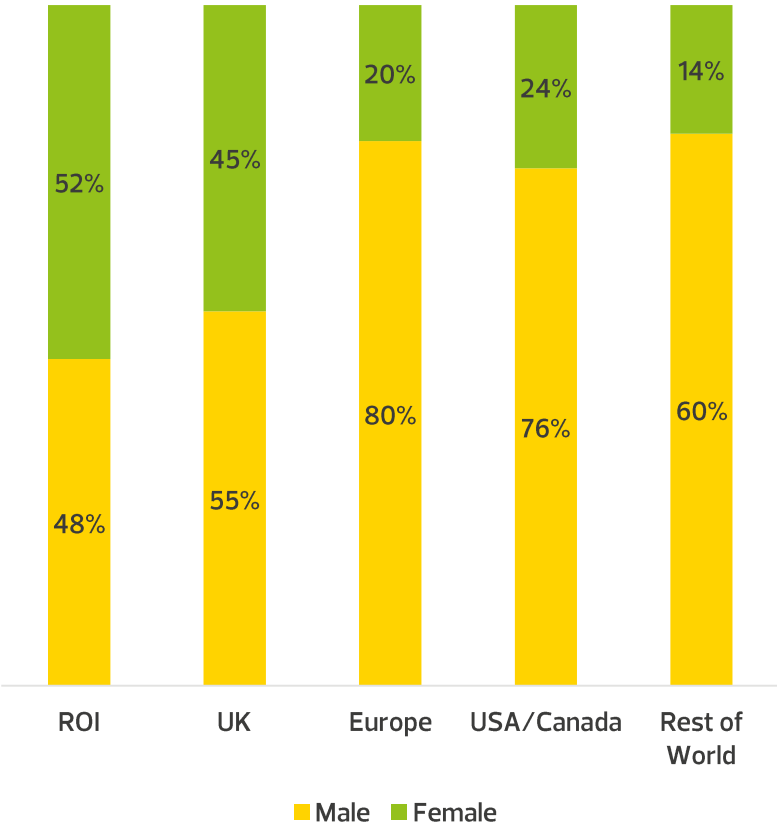
April 20, 2020

CONSUMER FEEDBACK | Interviewee Profile

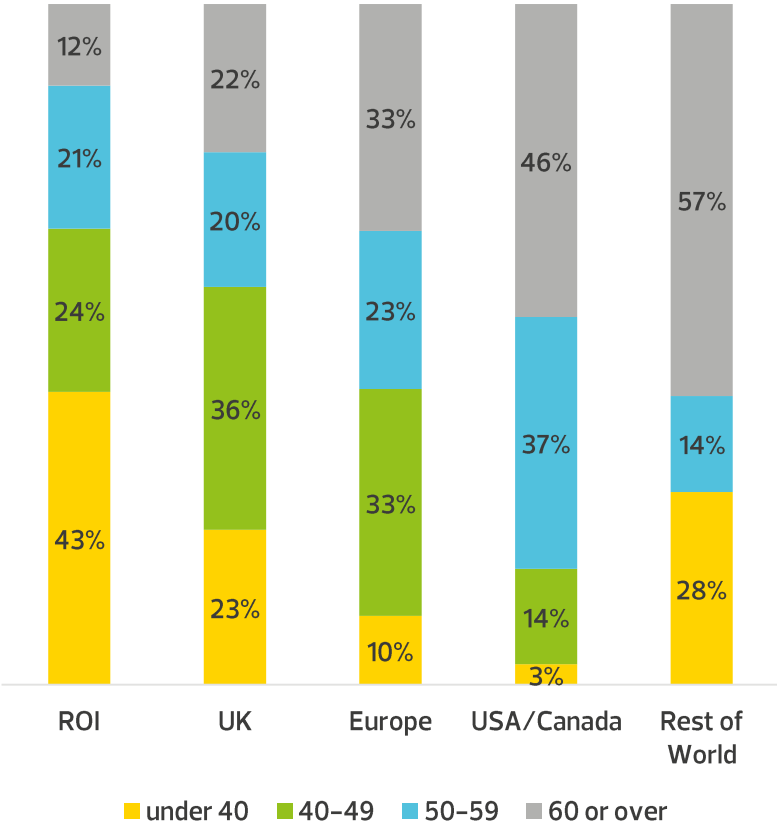


CONSUMER FEEDBACK | Feedback Type

Gender

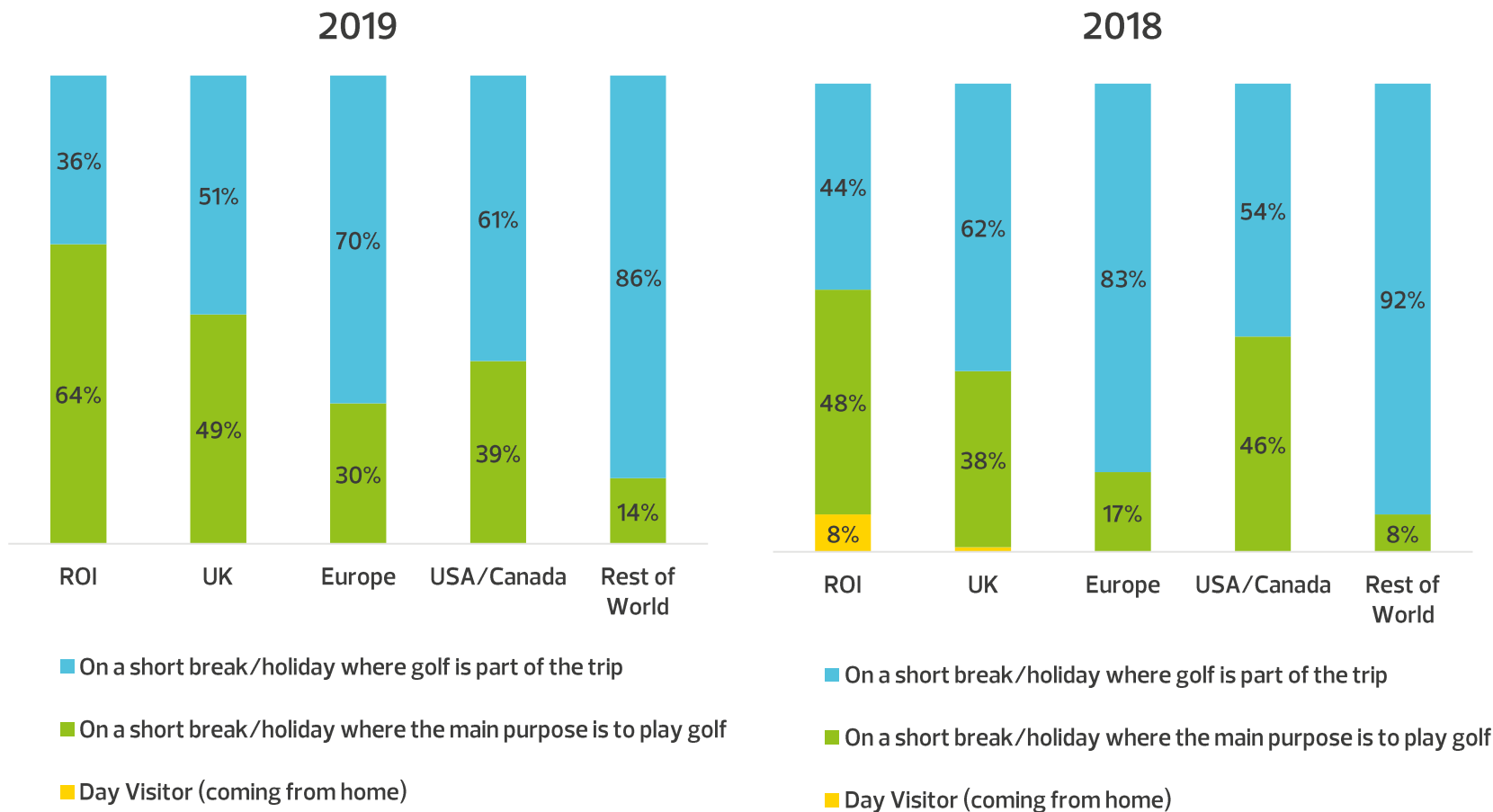


Age



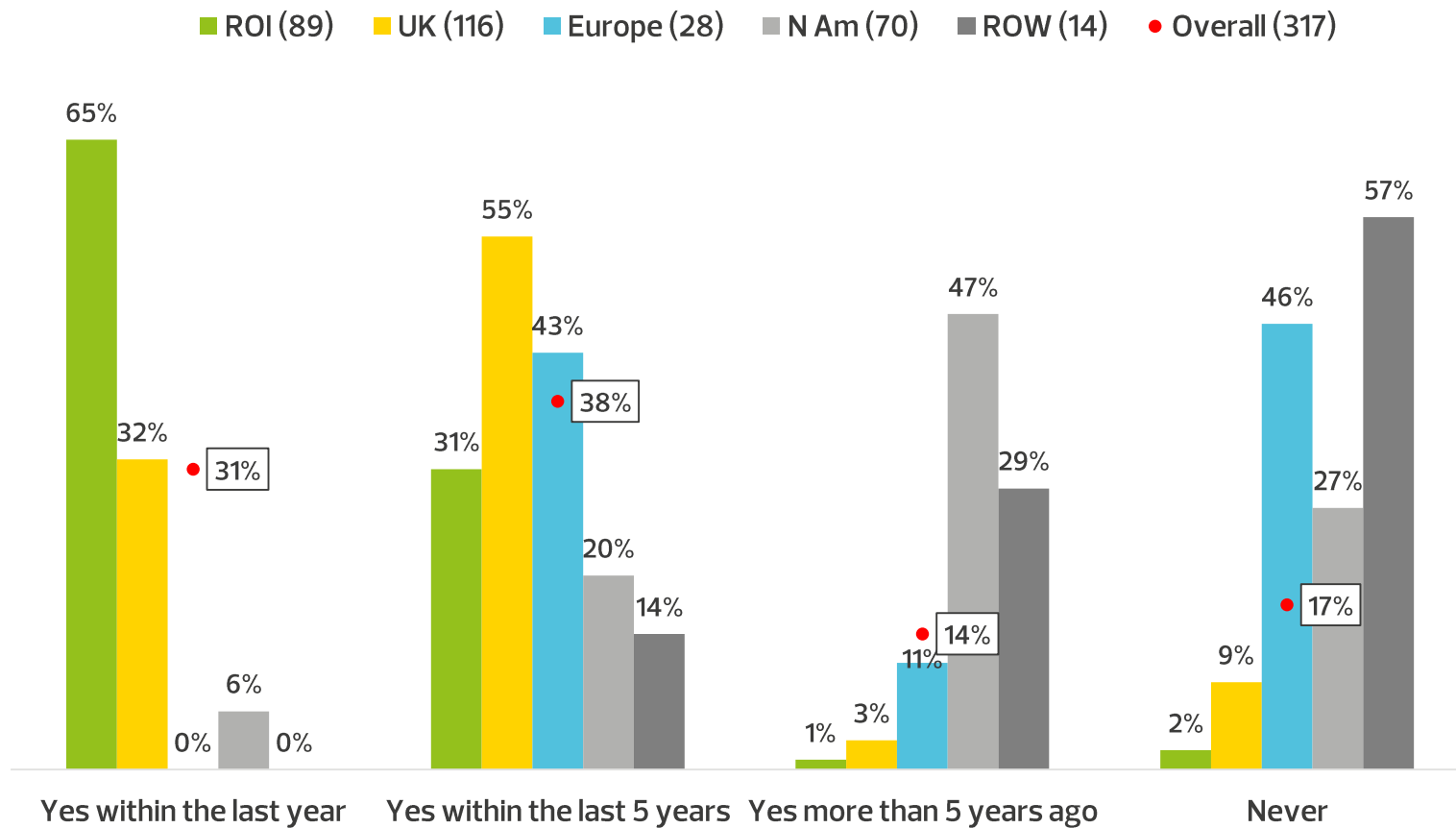
CONSUMER FEEDBACK | Feedback Type

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



CONSUMER FEEDBACK | Playing in NI

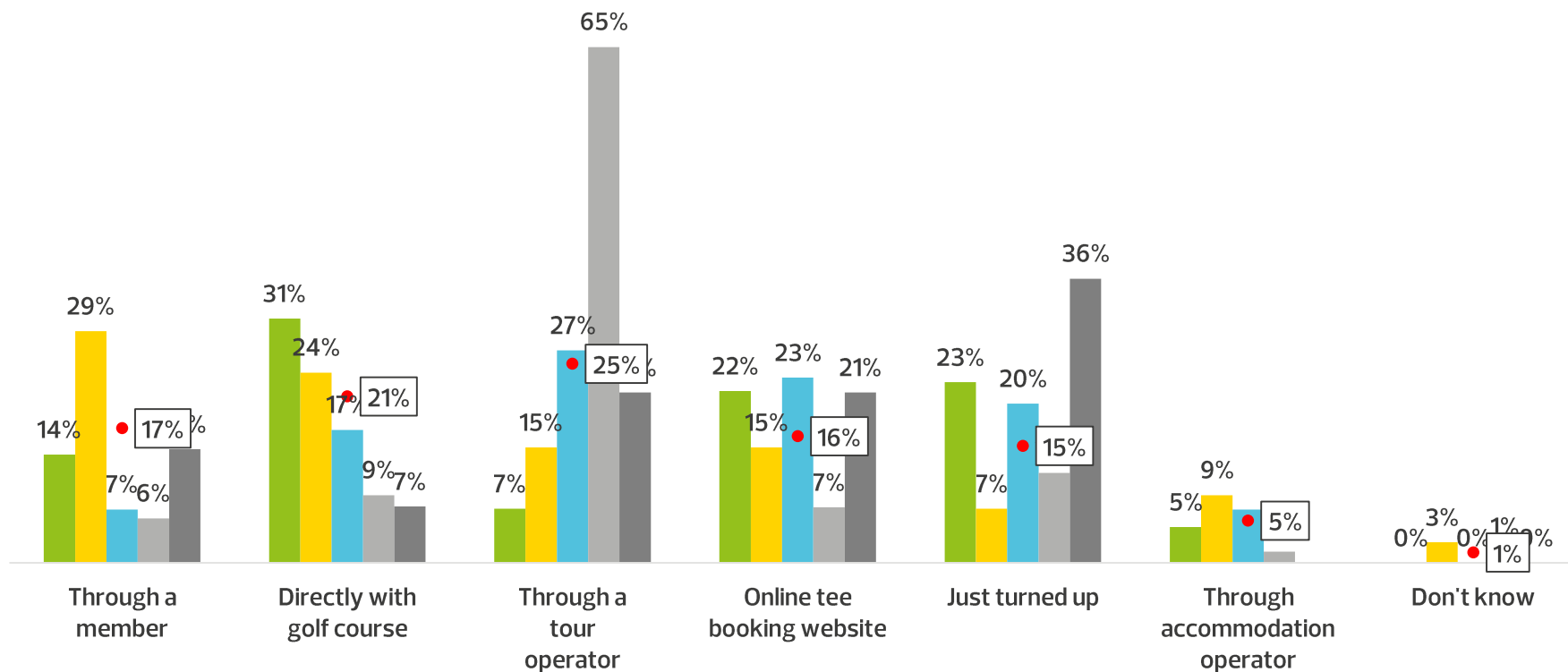
Q: Have you played golf in NI before?



CONSUMER FEEDBACK | Booking today's round

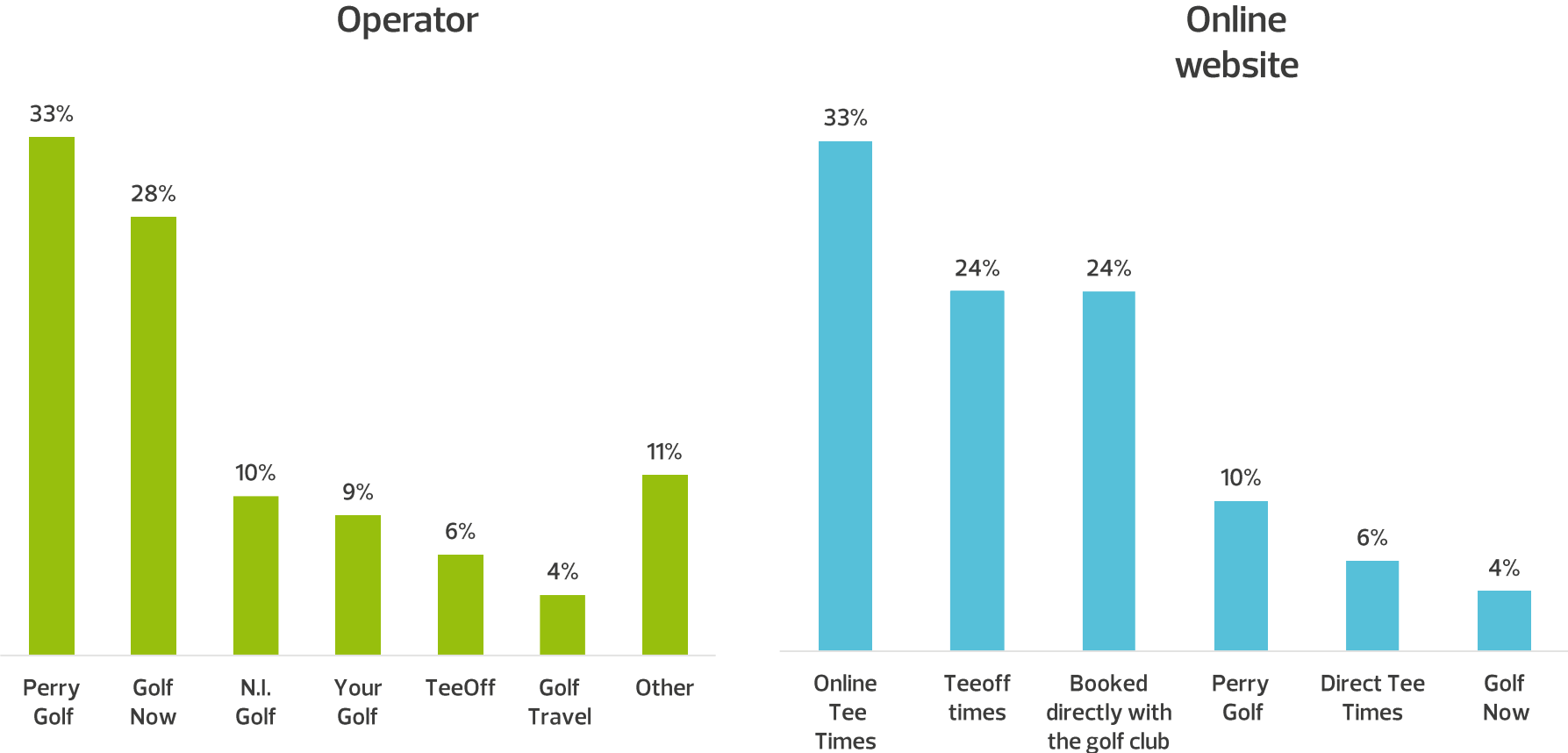
Q: Do you know how your booking was made?

■ ROI (88)
 ■ UK (117)
 ■ Europe (30)
 ■ N Am (71)
 ■ ROW (14)
 ● Overall (320)



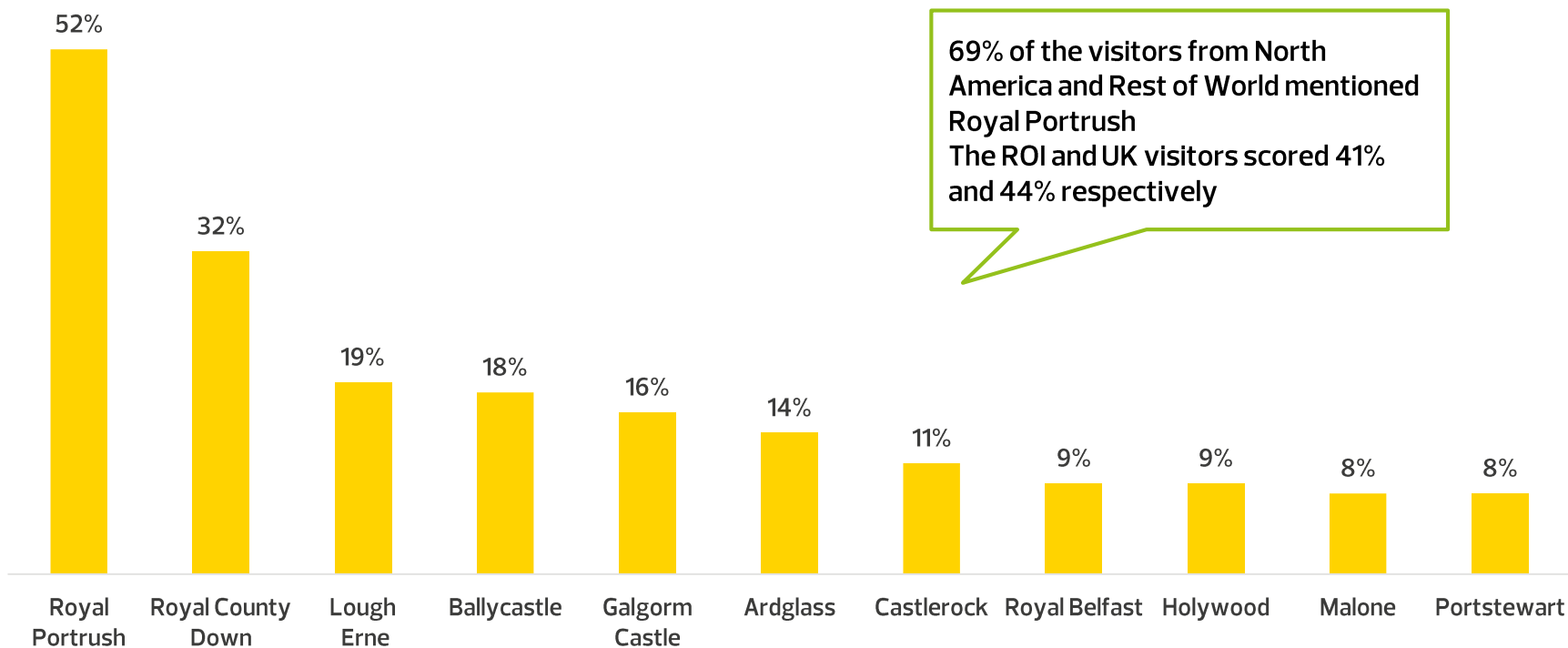
CONSUMER FEEDBACK | Booking today's round

Q: Which tour operator or online website did you use?



CONSUMER FEEDBACK | Playing in NI

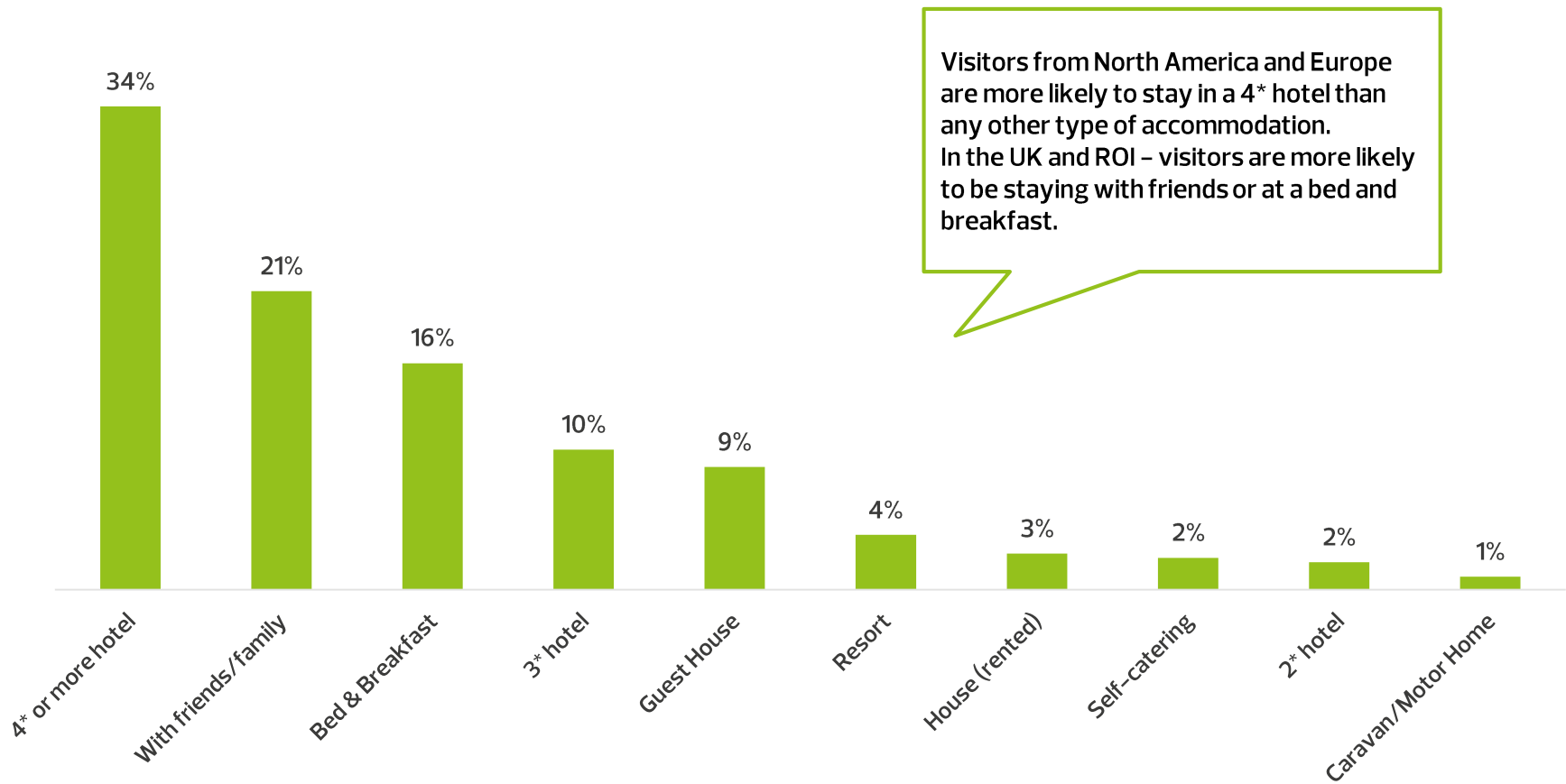
Q: What other courses in NI have you played or are you intending to play?



69% of the visitors from North America and Rest of World mentioned Royal Portrush
The ROI and UK visitors scored 41% and 44% respectively

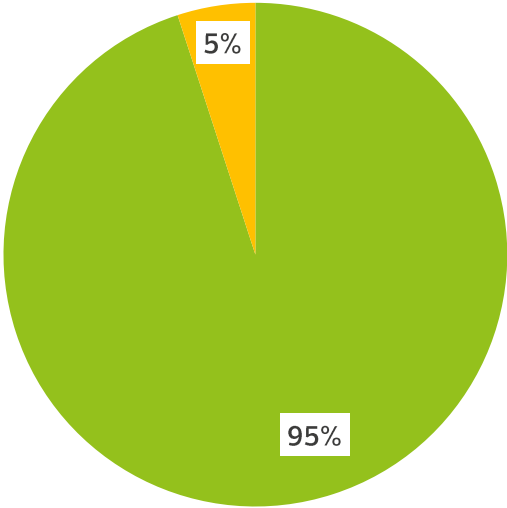
CONSUMER FEEDBACK | Accommodation

Q: What type of accommodation are you staying in?

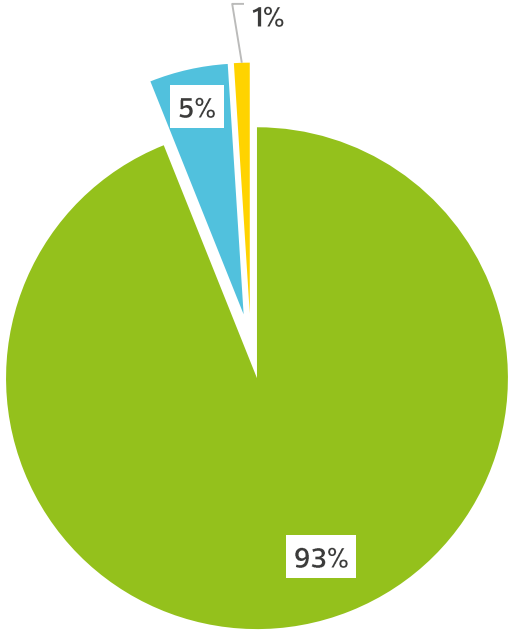


CONSUMER FEEDBACK | Accommodation

Q: Were you happy with the accommodation and the distance travelled to the course?



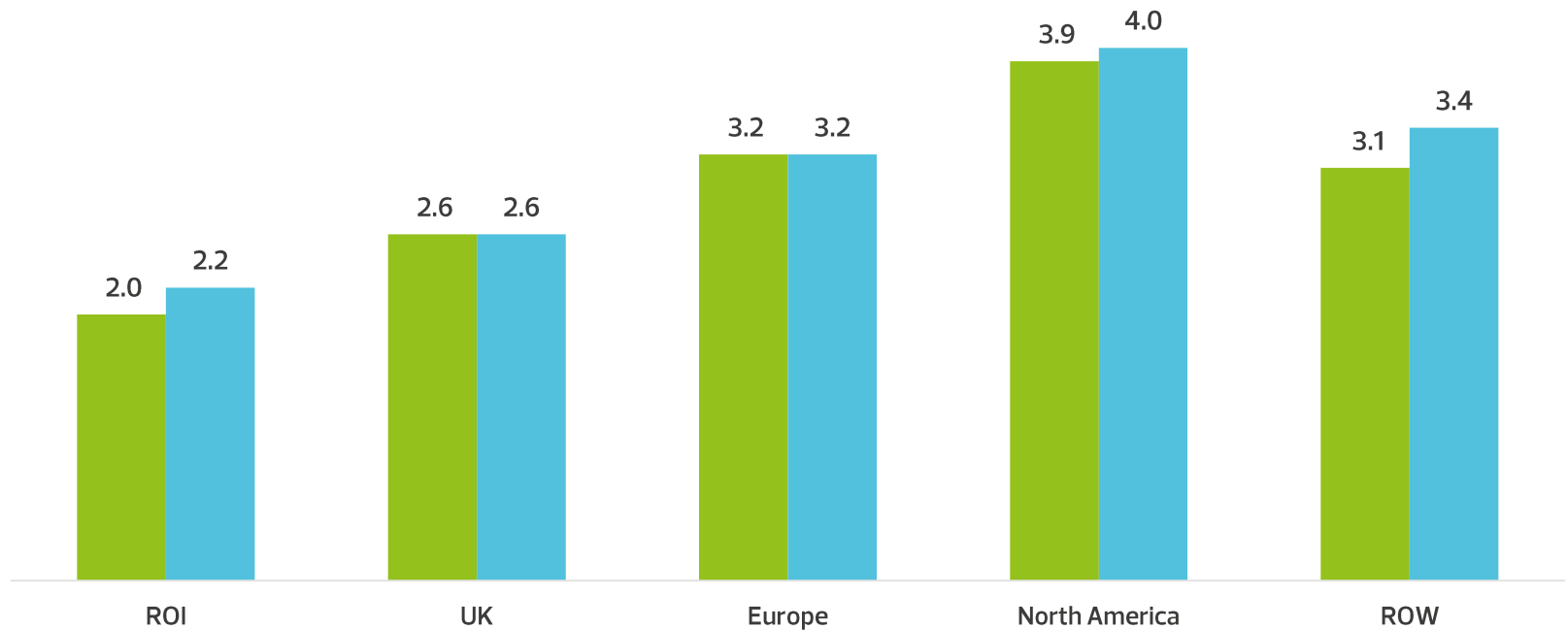
- Yes
- No - like option to stay in higher grade place



- Happy with distance travelled
- Preferred shorter distances to course
- Happy to travel further

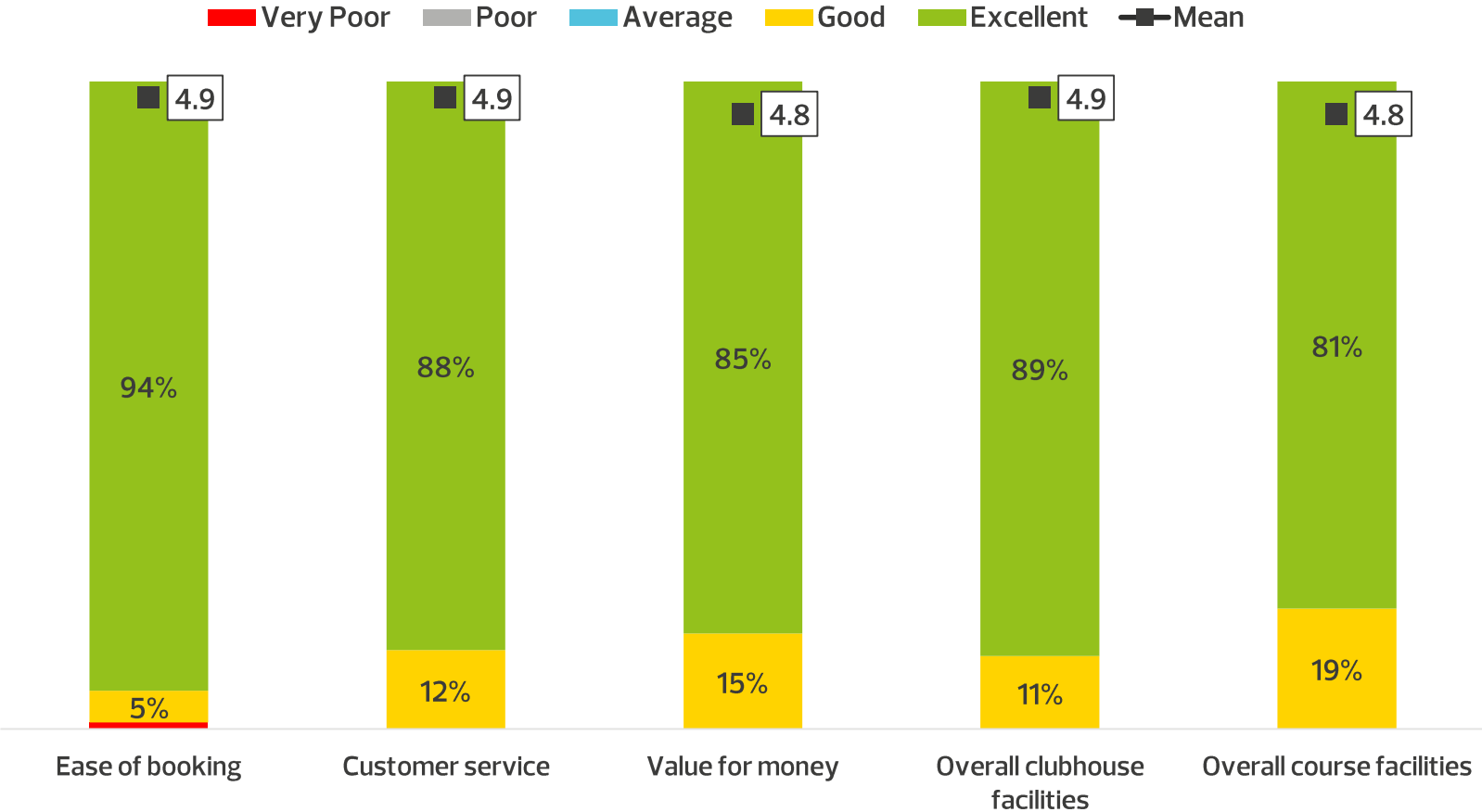
CONSUMER FEEDBACK | Rounds & Courses Played

Q: How many **courses** / **rounds** are you expecting to **visit** / **play** in NI on your current golf break?
Chart shows average number



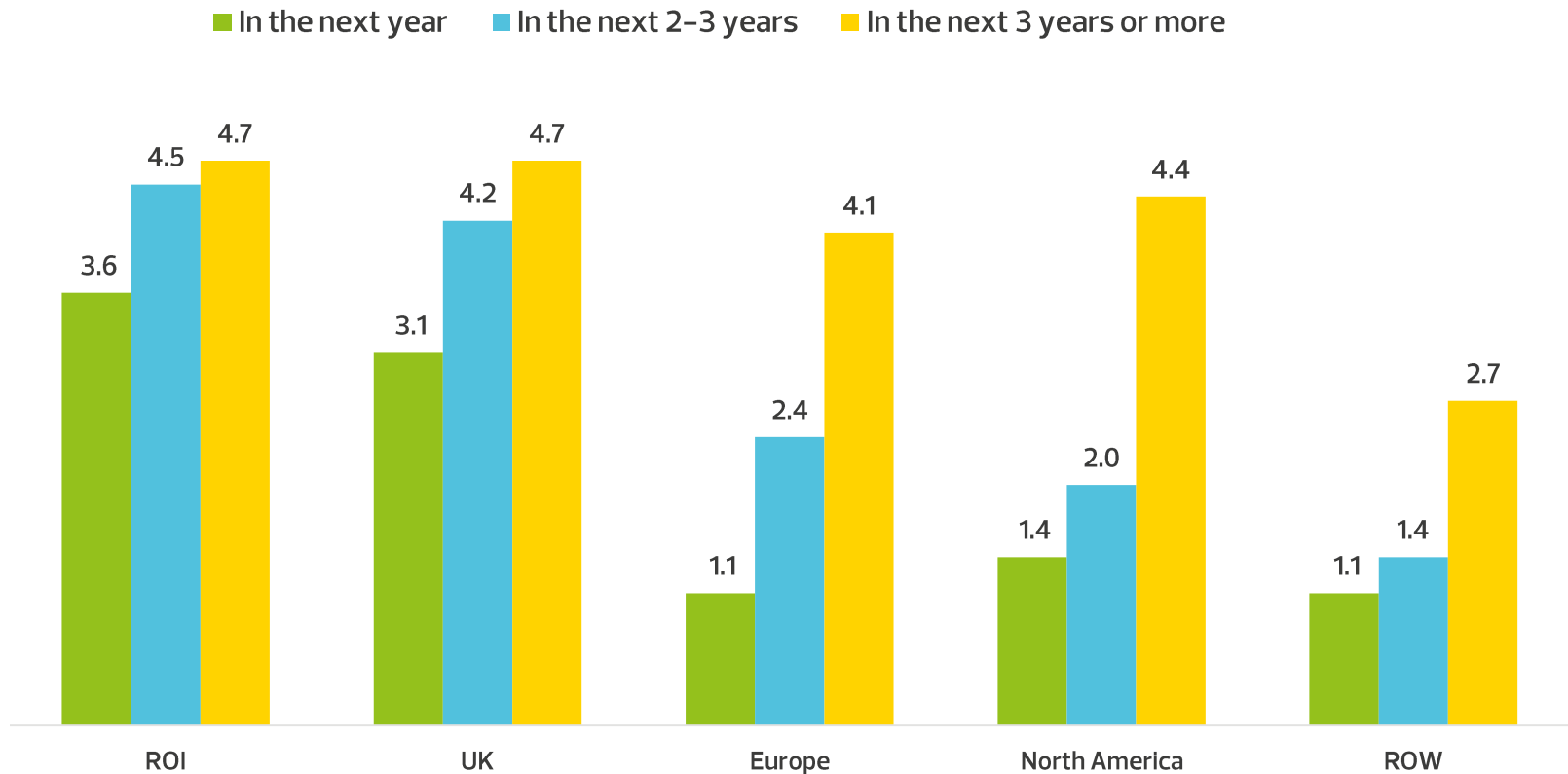
CONSUMER FEEDBACK | Course Ratings

Q: Regarding this course, how would you rate the following 5 areas?



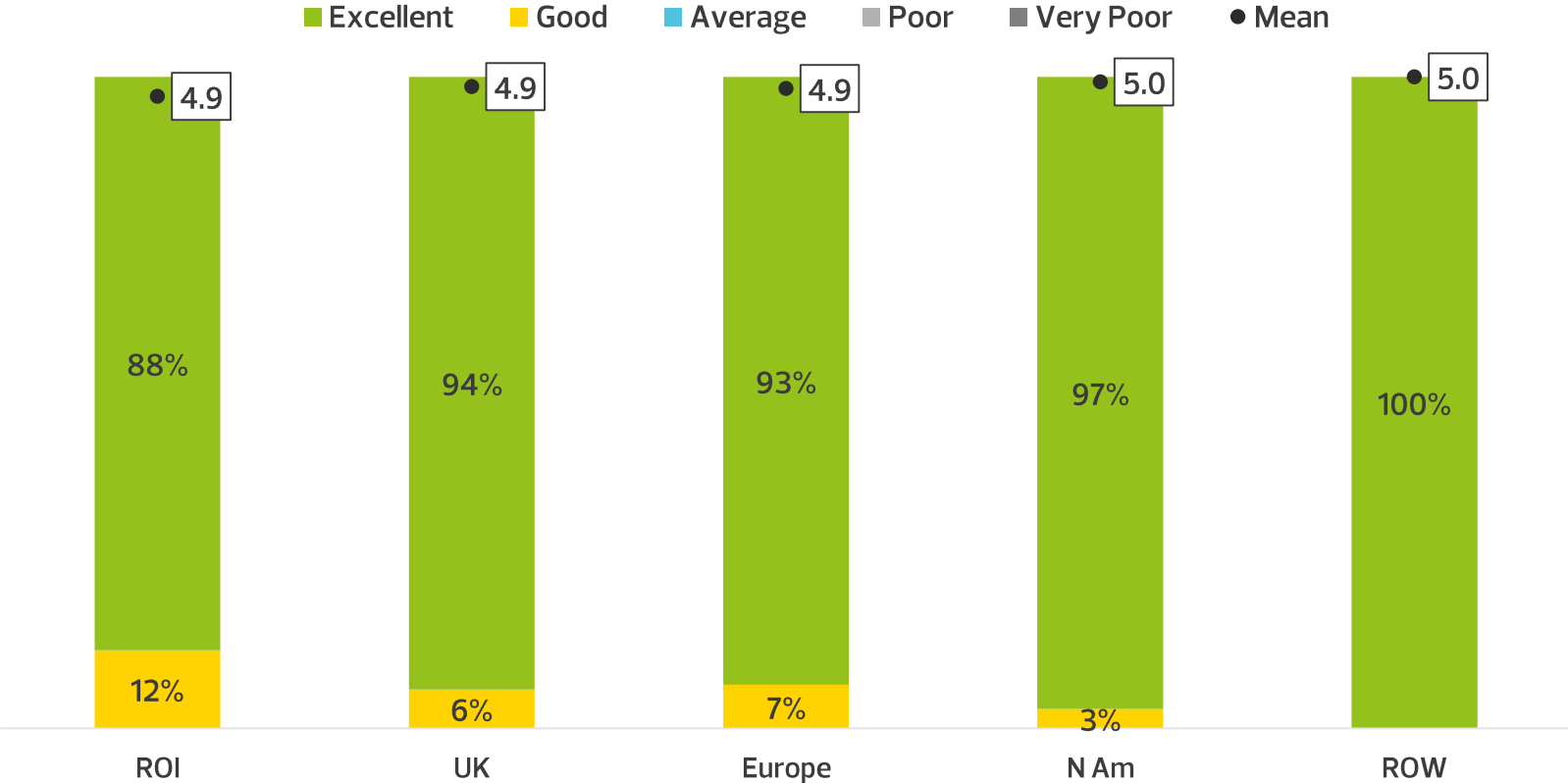
CONSUMER FEEDBACK | Returning to NI

Q: On a scale of 1-5, how likely is it that you will return to NI for golf?
Chart shows average score (1-5)



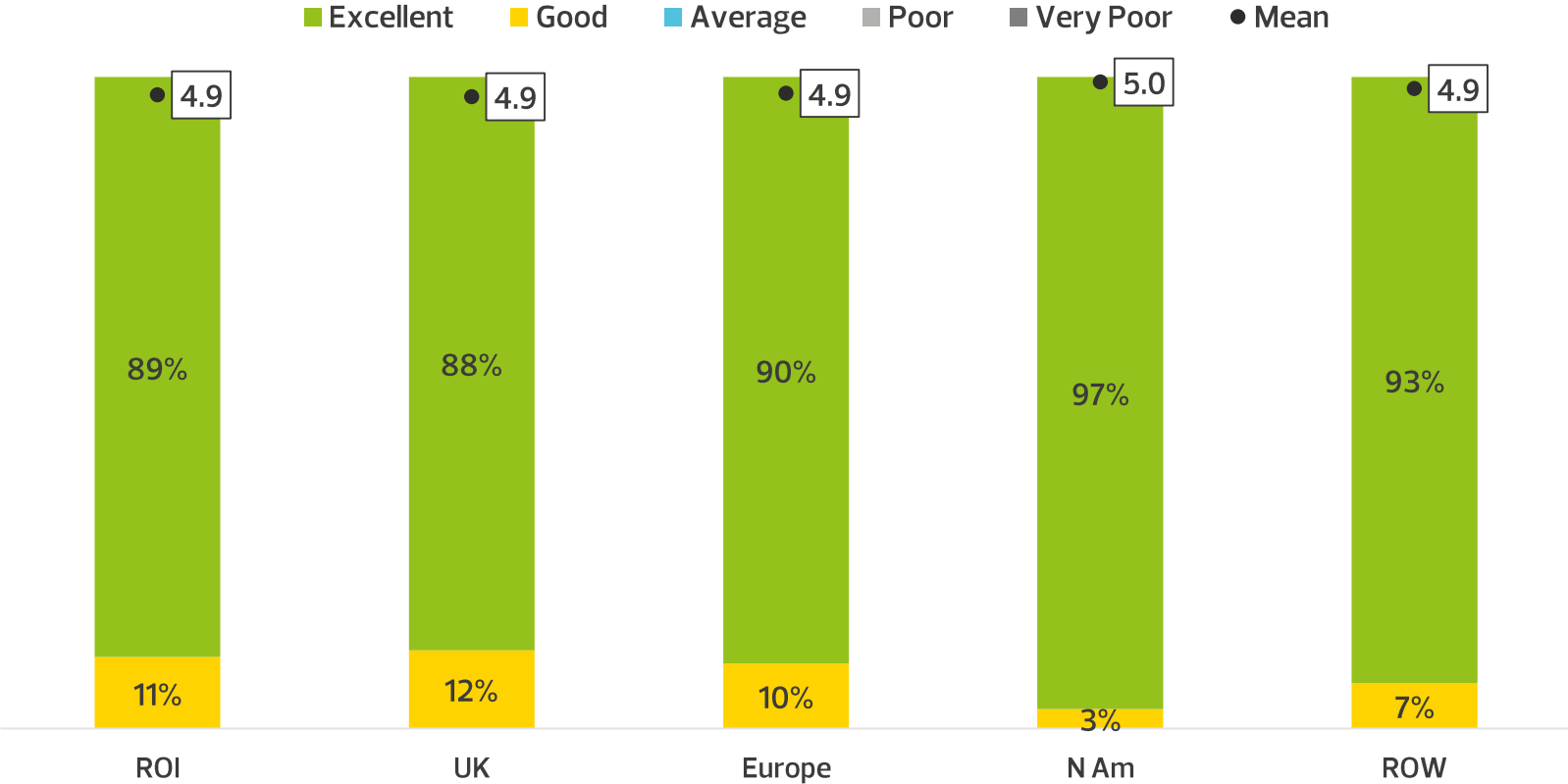
CONSUMER FEEDBACK | Rating the golf

Q: How would you rate your golf experience in NI?



CONSUMER FEEDBACK | Rating the golf break overall

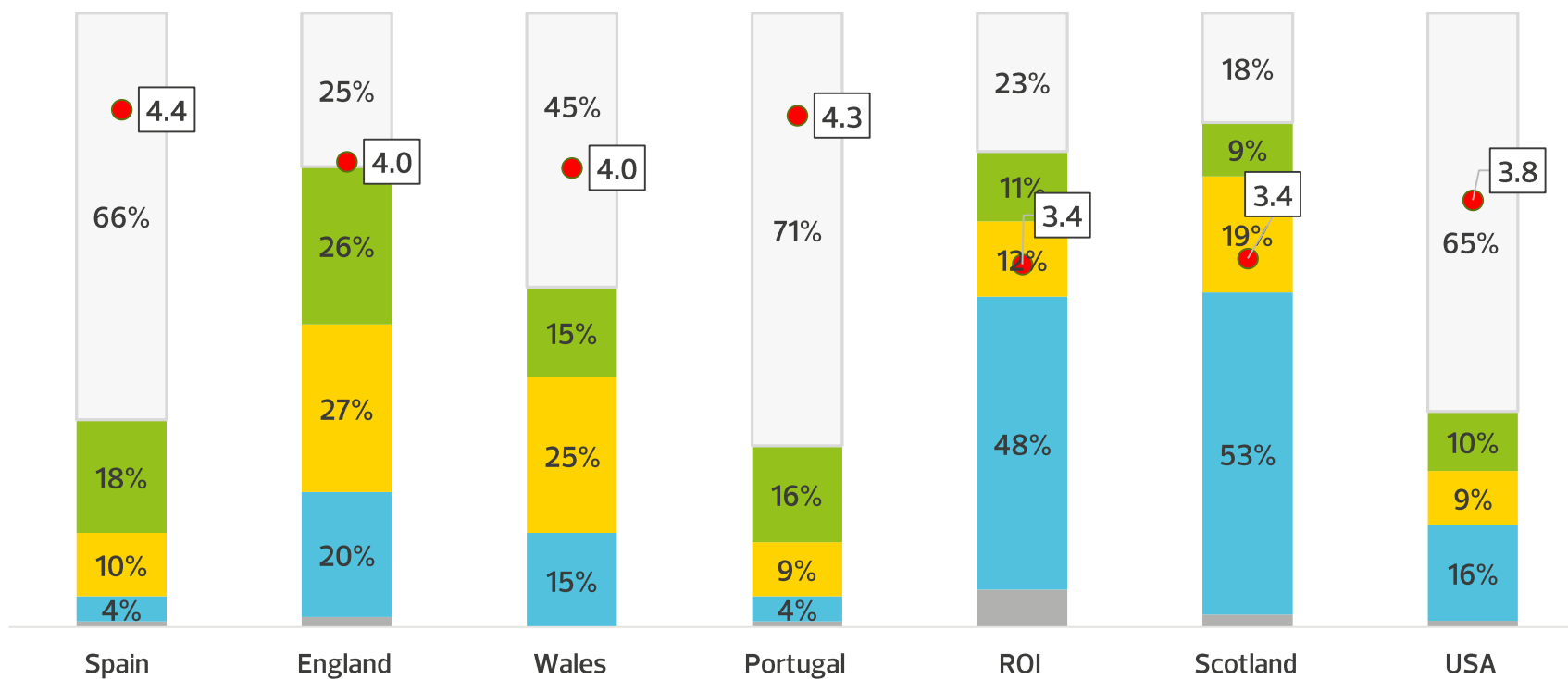
Q: How would you rate golf break in NI overall?



CONSUMER FEEDBACK | NI – Value for money

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

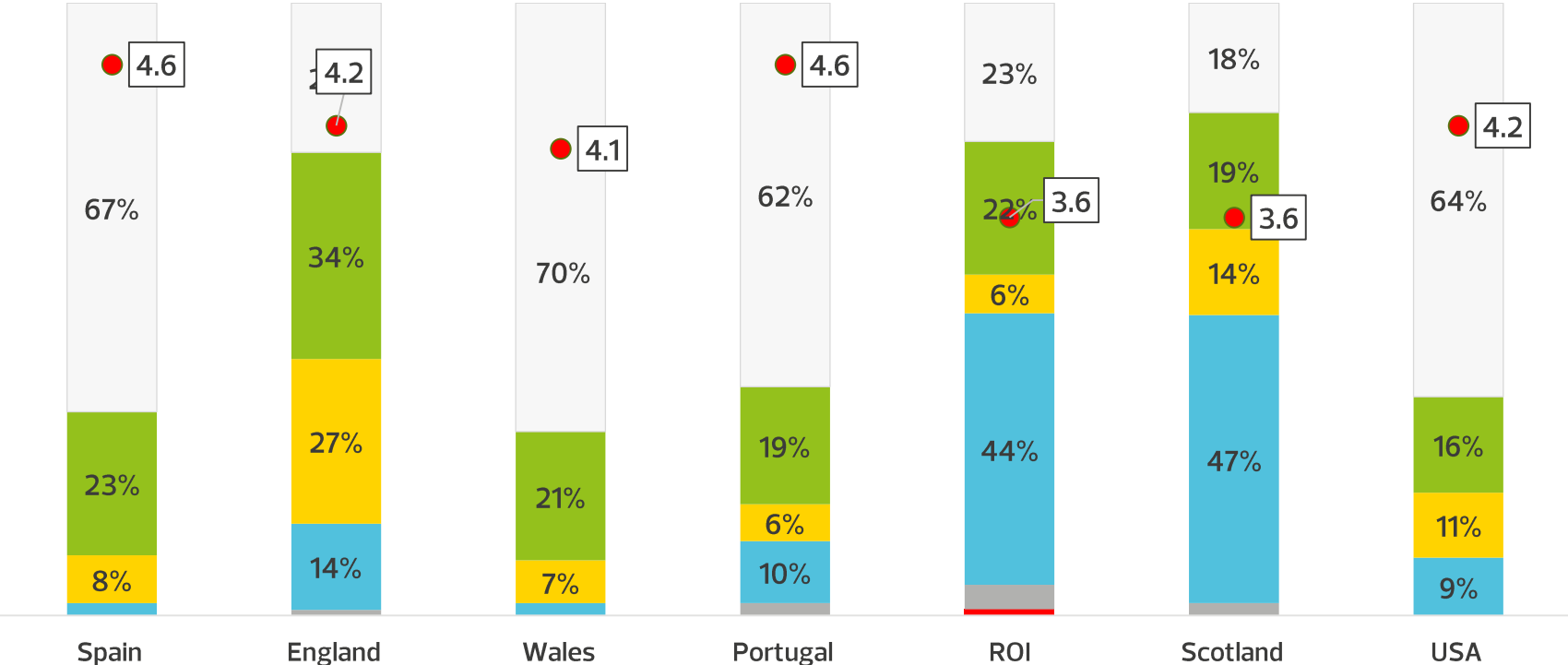
■ Dont know
 ■ NI is much better
 ■ NI is a little better
 ■ About the same
 ■ NI is a little worse
 ■ NI is much worse
 ● Mean



CONSUMER FEEDBACK | NI – Enjoyment

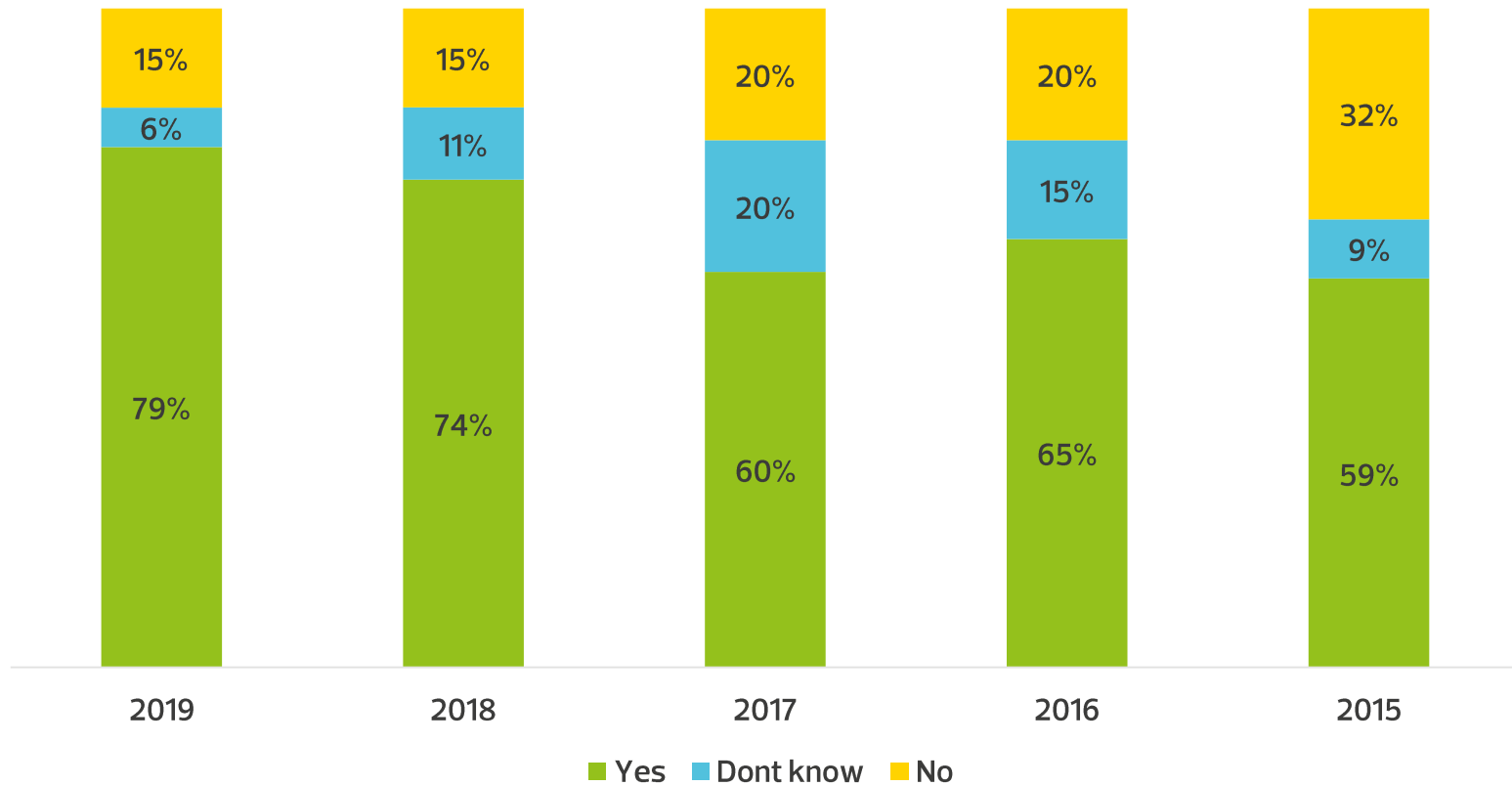
Q: How would you rate golf break in NI overall?

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



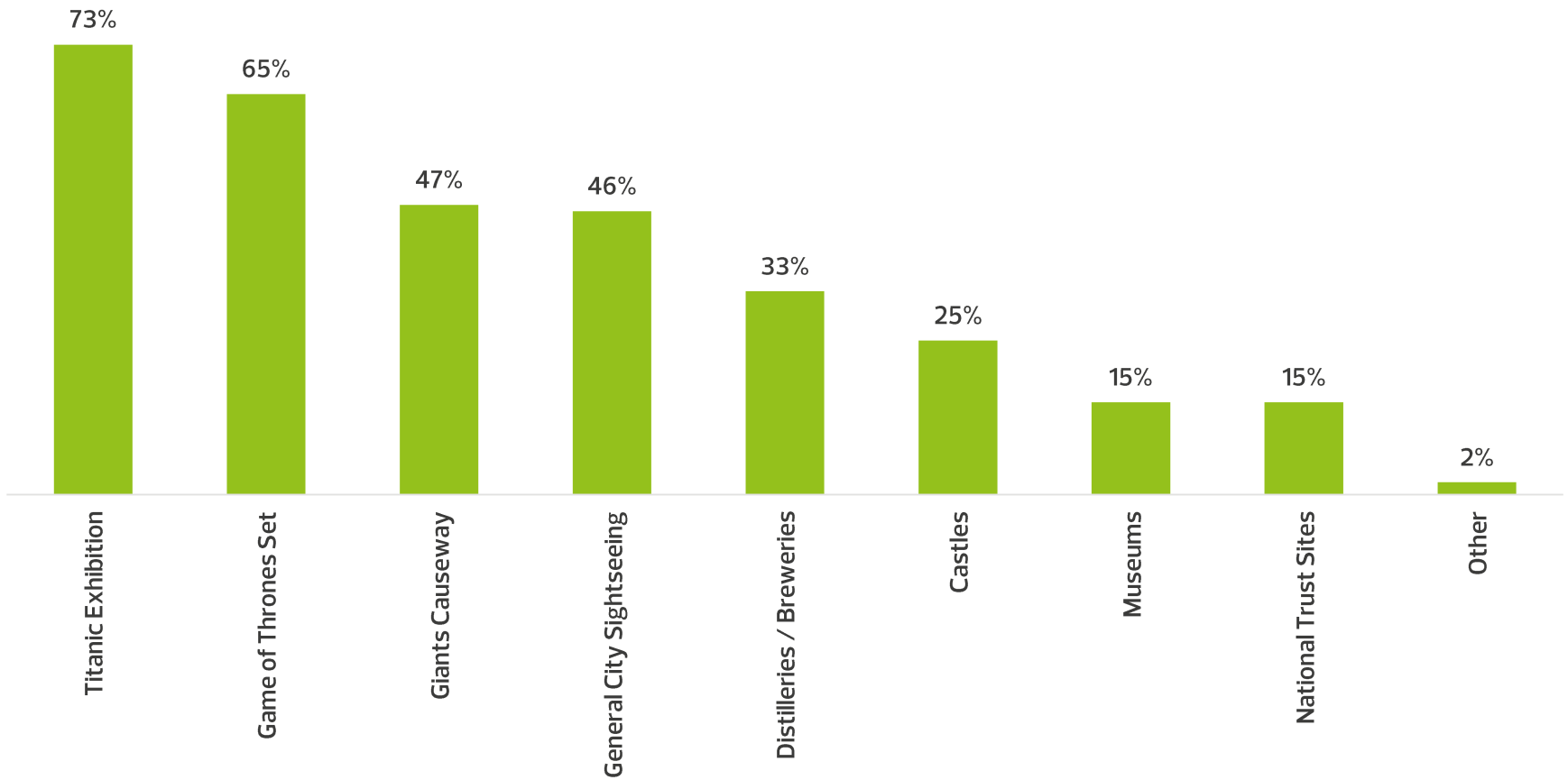
CONSUMER FEEDBACK | Tourist Attractions

Q: Do you intend on visiting any tourist attractions whilst in NI?



CONSUMER FEEDBACK | Tourist attractions

Q: Which tourist attraction/non golf activity have you seen/done on your current golf trip?



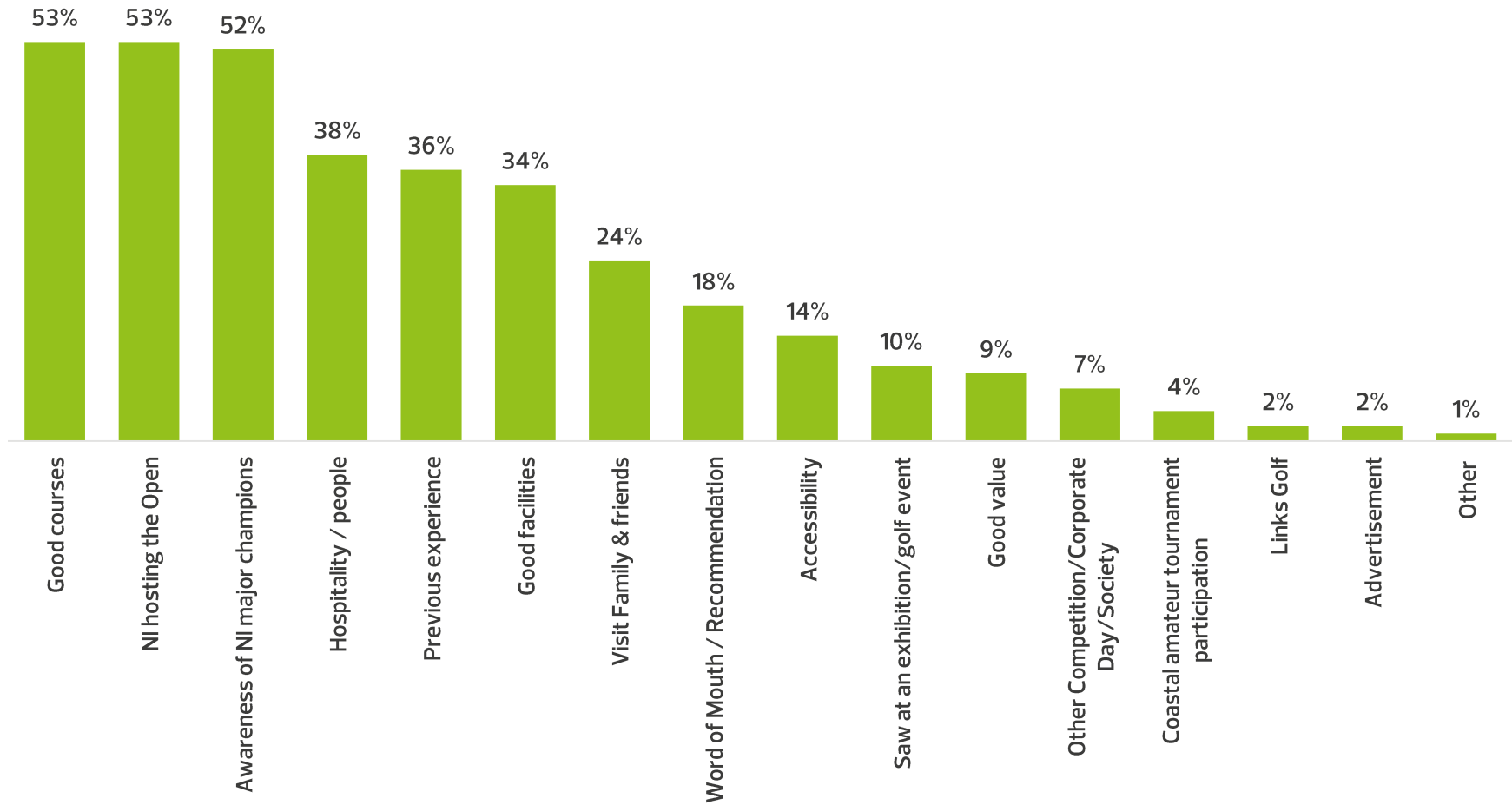
CONSUMER FEEDBACK | Tourist attractions

Q: Which tourist attraction/non golf activity have you seen/done on your current golf trip?

	UK	Europe	N Am	ROW*
Titanic exhibition	61%	80%	87%	100%
Game of Thrones set	51%	87%	70%	100%
Giants causeway	29%	43%	89%	79%
General city sightseeing	40%	40%	56%	79%
Distilleries/Breweries	25%	37%	54%	50%
Castles	12%	27%	46%	71%
Museums	10%	13%	27%	50%
National Trust sites	8%	10%	27%	57%
Other	4%	-	1%	-

CONSUMER FEEDBACK | Choosing NI

Q: Do you know what influenced you / the organiser to choose NI?



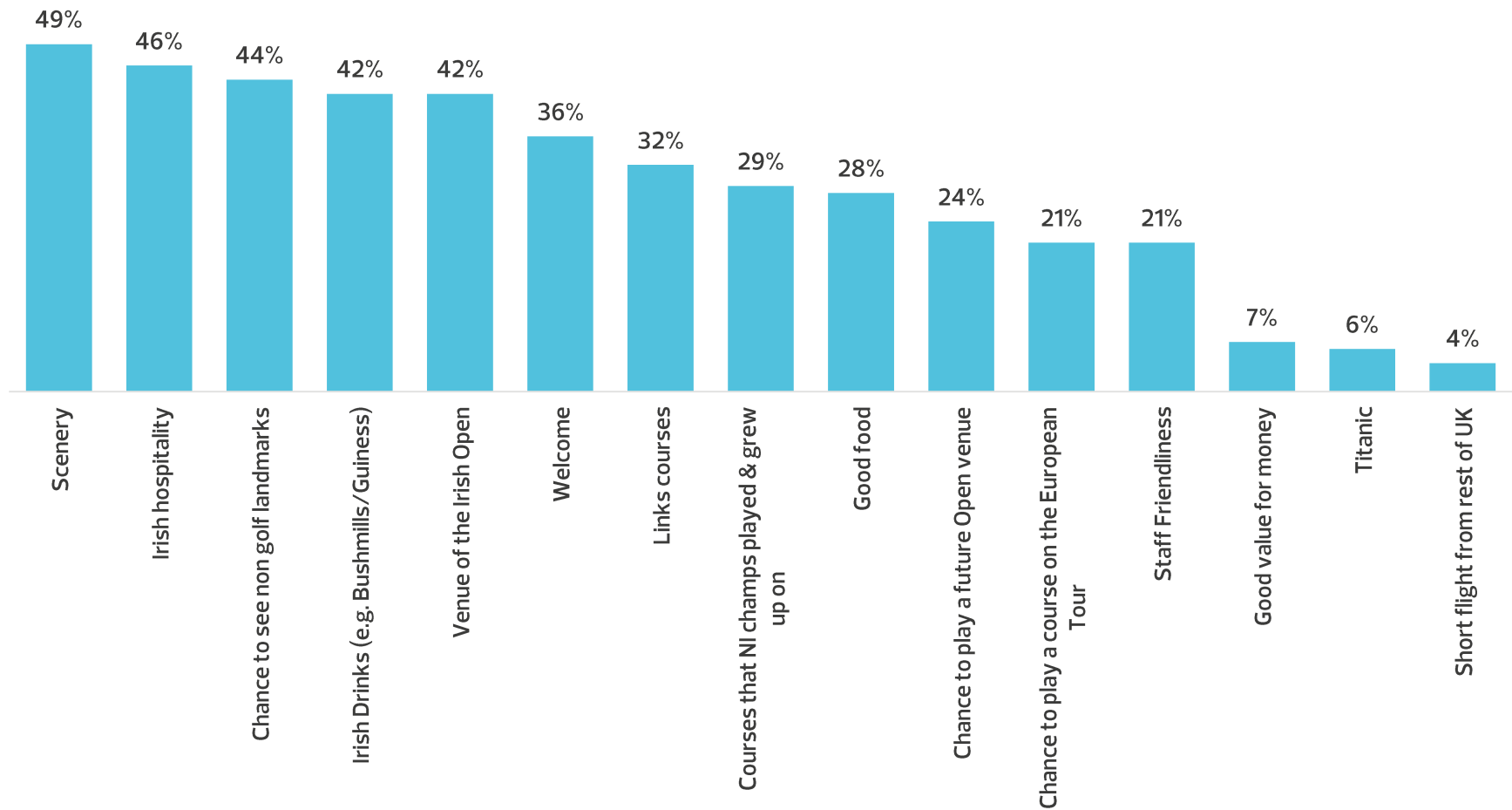
CONSUMER FEEDBACK | Choosing NI

Q: Do you know what influenced you / the organiser to choose NI?

	ROI	UK	Europe	N Am	ROW*
Good courses	41%	60%	37%	68%	29%
NI hosting the Open	43%	44%	73%	73%	43%
Awareness of NI major champions	30%	46%	67%	82%	57%
Hospitality / people	18%	35%	58%	59%	50%
Previous experience	47%	42%	13%	27%	21%
Good facilities	32%	37%	43%	34%	14%
Visit Family & friends	30%	29%	10%	8%	64%
Word of Mouth / Recommendation	6%	18%	30%	27%	21%
Accessibility	11%	13%	10%	20%	14%
Saw at an exhibition/golf event	5%	7%	10%	20%	14%
Good value	8%	8%	10%	7%	21%

CONSUMER FEEDBACK | Trip highlight

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



CONSUMER FEEDBACK | Areas of improvement

Q: Can you suggest any areas of improvement for the overall golf experience in NI?

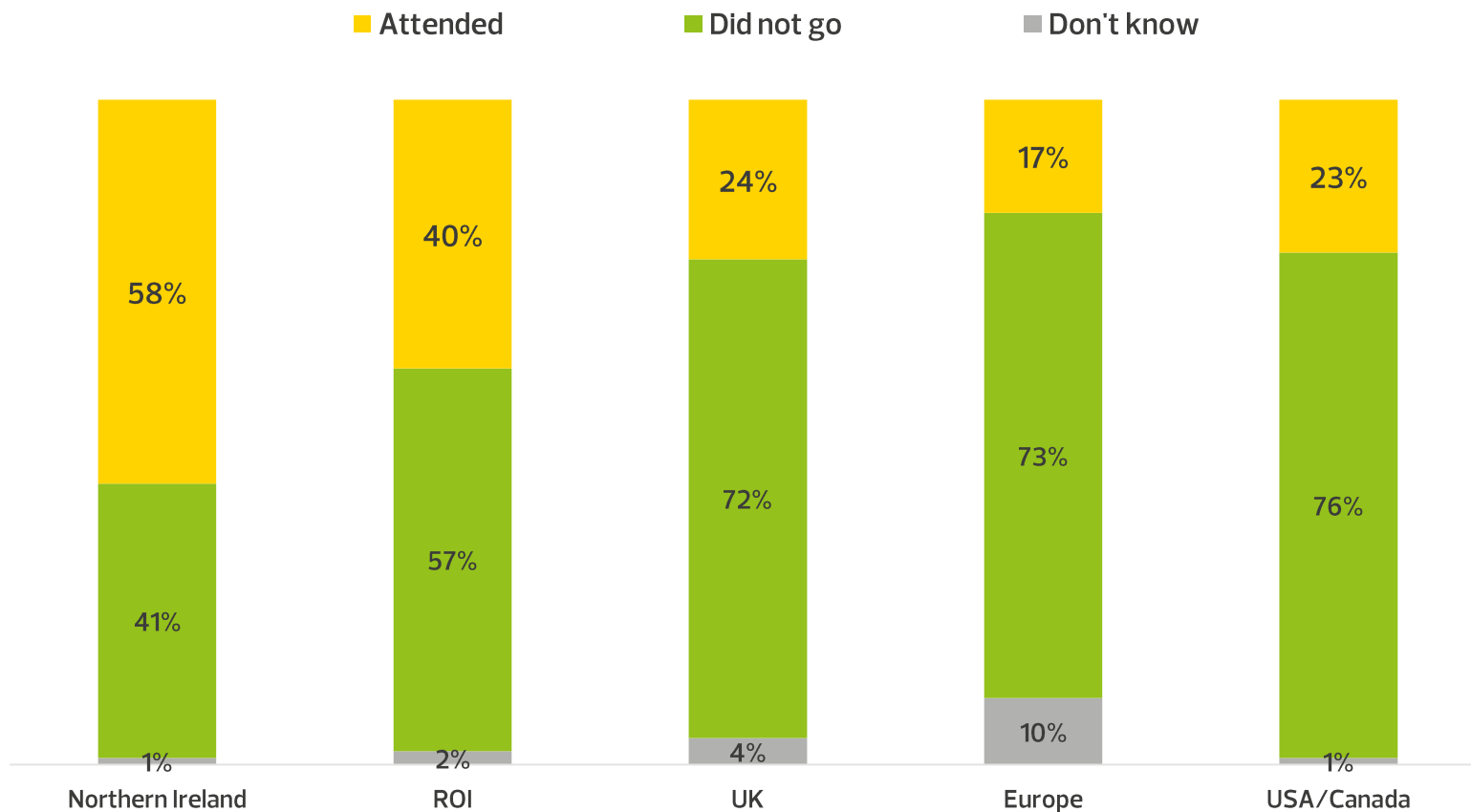
NONE



Only 3 negative comments: More local accommodation to the courses
 If not with a member it's pricey
 Better package deals with hotels for smaller courses

CONSUMER FEEDBACK | The Open 2019

Q: Are you planning /did you attend The Open at Royal Portrush 2019?



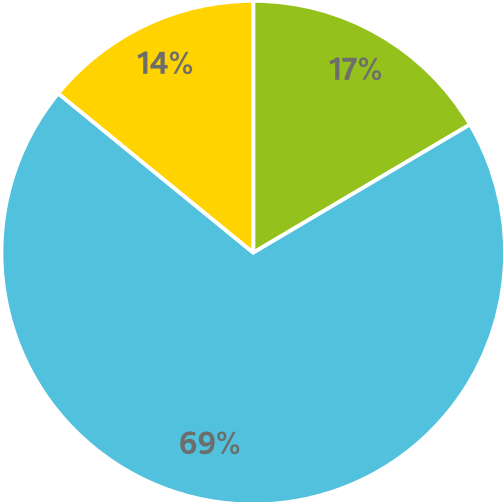
CONSUMER FEEDBACK | The Open 2019

Q: Which day/s did you attend the Open

	ROI	UK	Europe	N Am	ROW
Monday (5)	40%	40%	20%	-	-
Tuesday (12)	33%	33%	8%	17%	8%
Wednesday (17)	35%	29%	6%	24%	6%
Thursday (17)	35%	35%	6%	18%	6%
Friday (22)	41%	32%	14%	9%	5%
Saturday (35)	46%	37%	3%	11%	3%
Sunday (43)	33%	33%	5%	26%	5%
Average length of visit (Days)	1.9	2.1	2.5	2.0	3.5

CONSUMER FEEDBACK | The Open

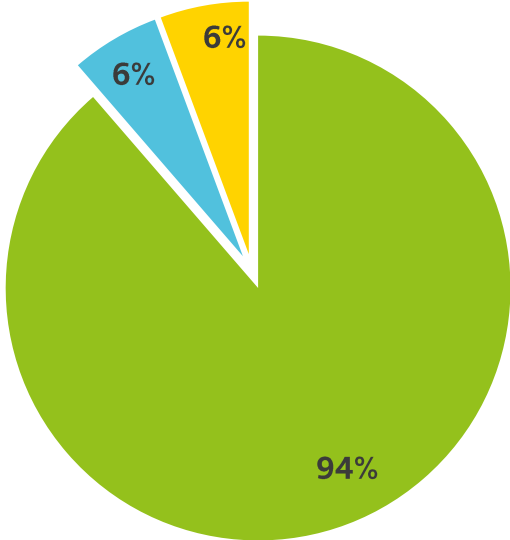
Q:Will you be playing golf on your visit?



■ Yes ■ No ■ Don't know

Base:85

Q:Which course(s) will you be playing ?

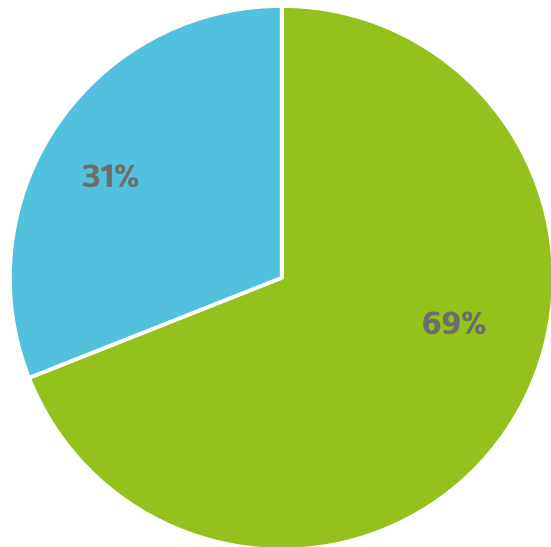


■ Royal Portrush ■ Royal County Down ■ Don't know

Base:17

CONSUMER FEEDBACK | The NI Open

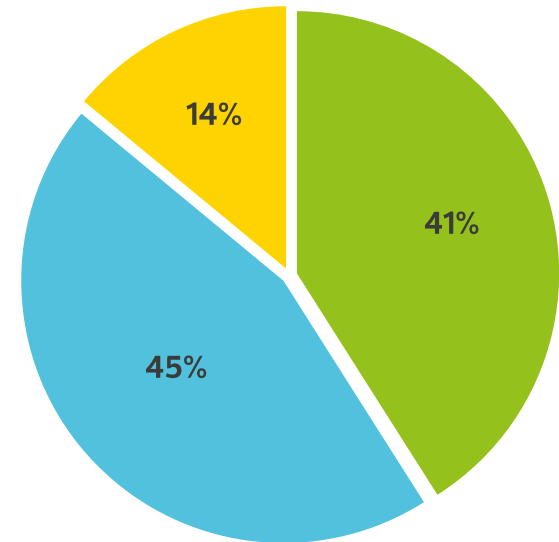
Q: Did you know that the NI Open is for Men & Ladies?



■ Yes ■ No

Base: 318

Q: Are you aware of the NI "Stay & play" campaign?



■ Yes ■ No ■ Don't know

Base:319

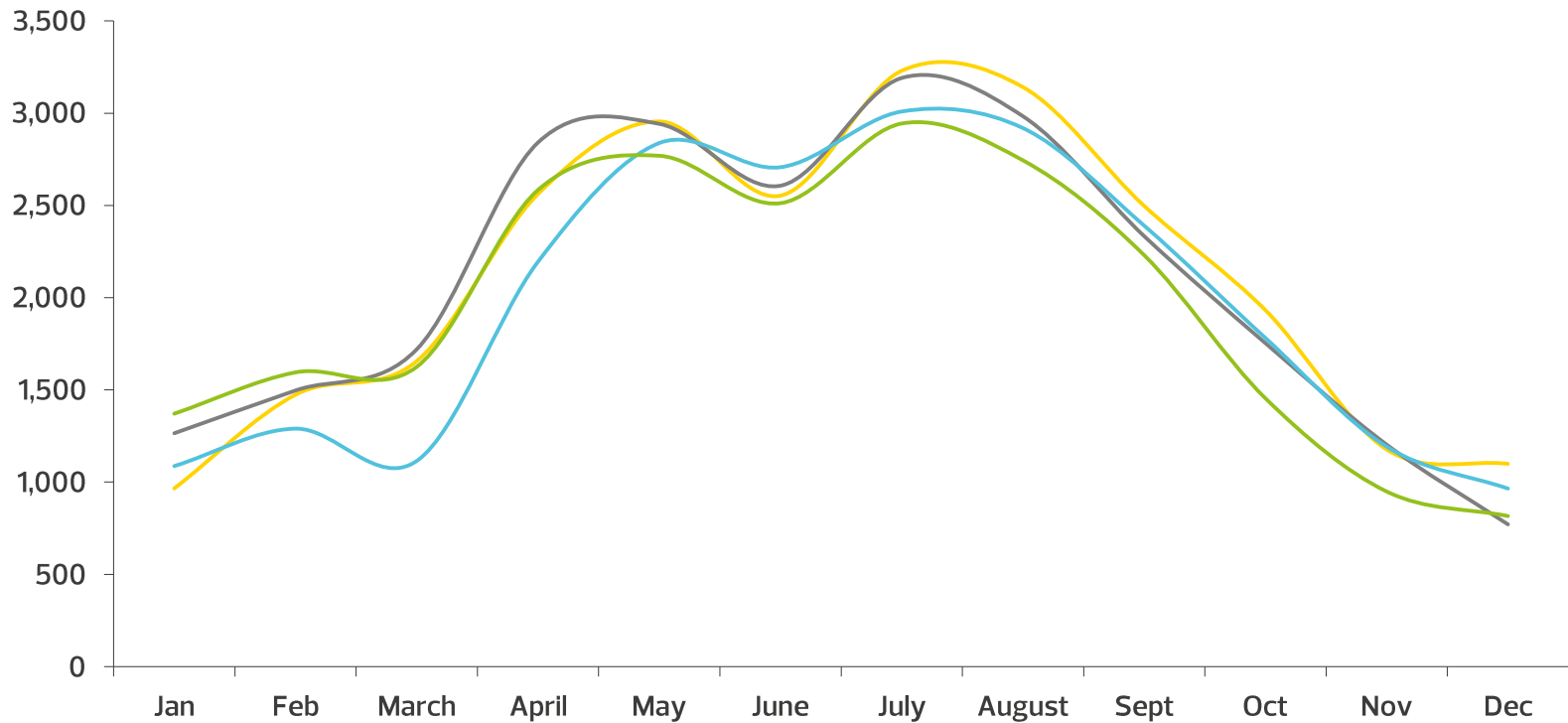
APPENDIX – STATE OF GOLF IN THE UK



STATE OF GOLF IN THE UK

Average number of Rounds Played per course
in each month ~ 2016- 2019

— 2016 — 2017 — 2018 — 2019



CONTACT DETAILS



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INVESTIGATION

INSIGHT

ACTION

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