

SPORTS MARKETING SURVEYS INC.

GOLF TOURISM IN NORTHERN IRELAND | 2018

Results Presentation – March 2019



tourism
northernireland



April 24, 2019

SPORTS MARKETING SURVEYS INC.

STATE OF GOLF IN THE UK

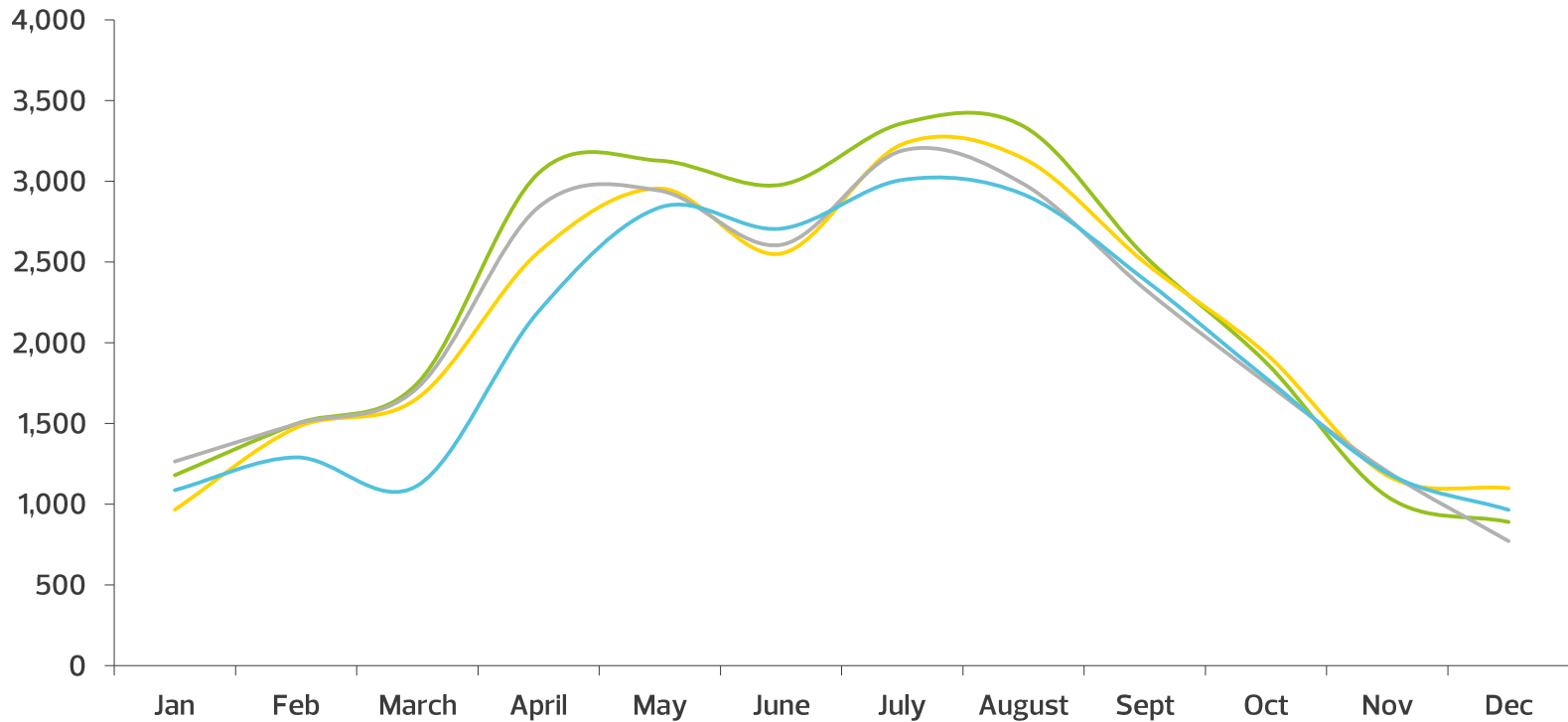


April 24, 2019

STATE OF GOLF IN THE UK

Average number of Rounds Played per course
in each month ~ 2014- 2018

— 2015 — 2016 — 2017 — 2018



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GOLF TOURISM MONITOR



April 24, 2019

OVERVIEW OF THE PROJECT



AIMS



THE PROGRAMME

- **Rounds Played**
 - 24 clubs submitted data for the peak golfing season.
 - This is more than in 2017
 - Data was submitted either online at www.nitbgolf.net or via an SMS INC. spreadsheet emailed to courses

- **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 2018 is:

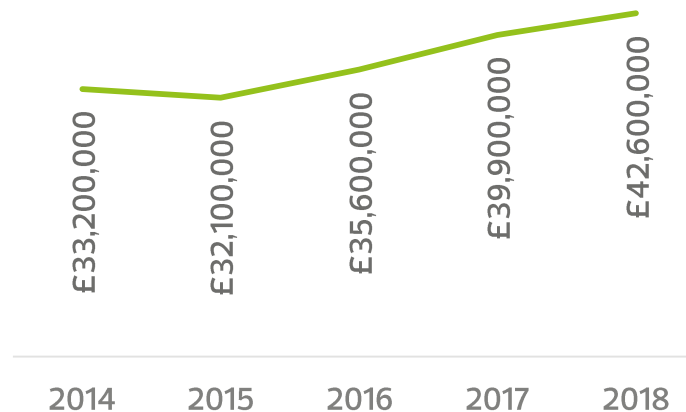
2018 = £42,600,000

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:

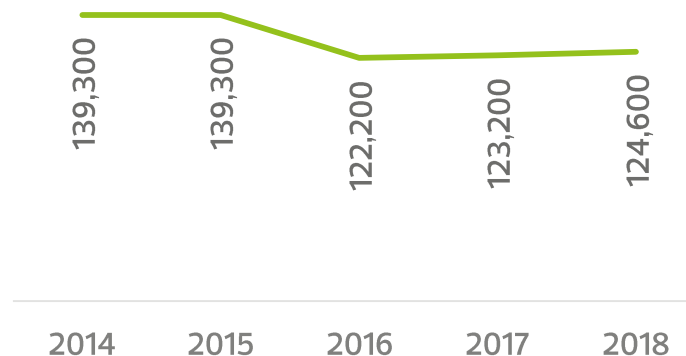
2018 = 124,600

2017 = 123,200

2016 = 122,200

2015 = 139,300

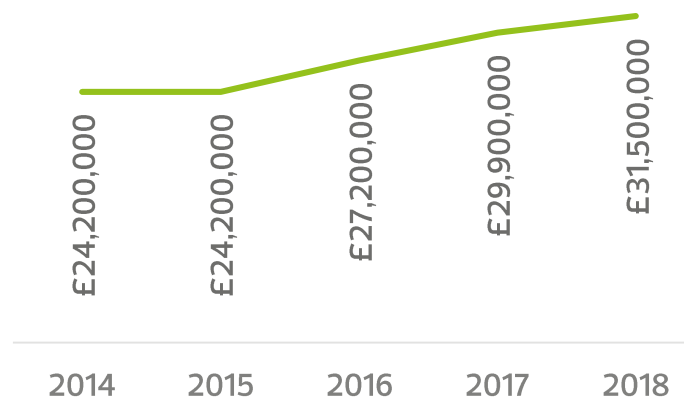
2014 = 139,300



KEY FINDINGS

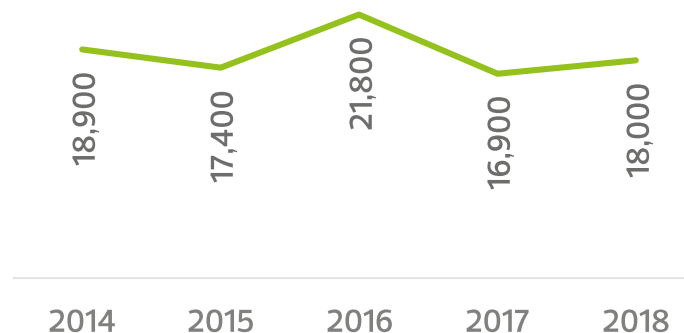
- The Economic Impact of golf tourism from **non-domestic overnight golfers** for Northern Ireland in 2018 is:

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:

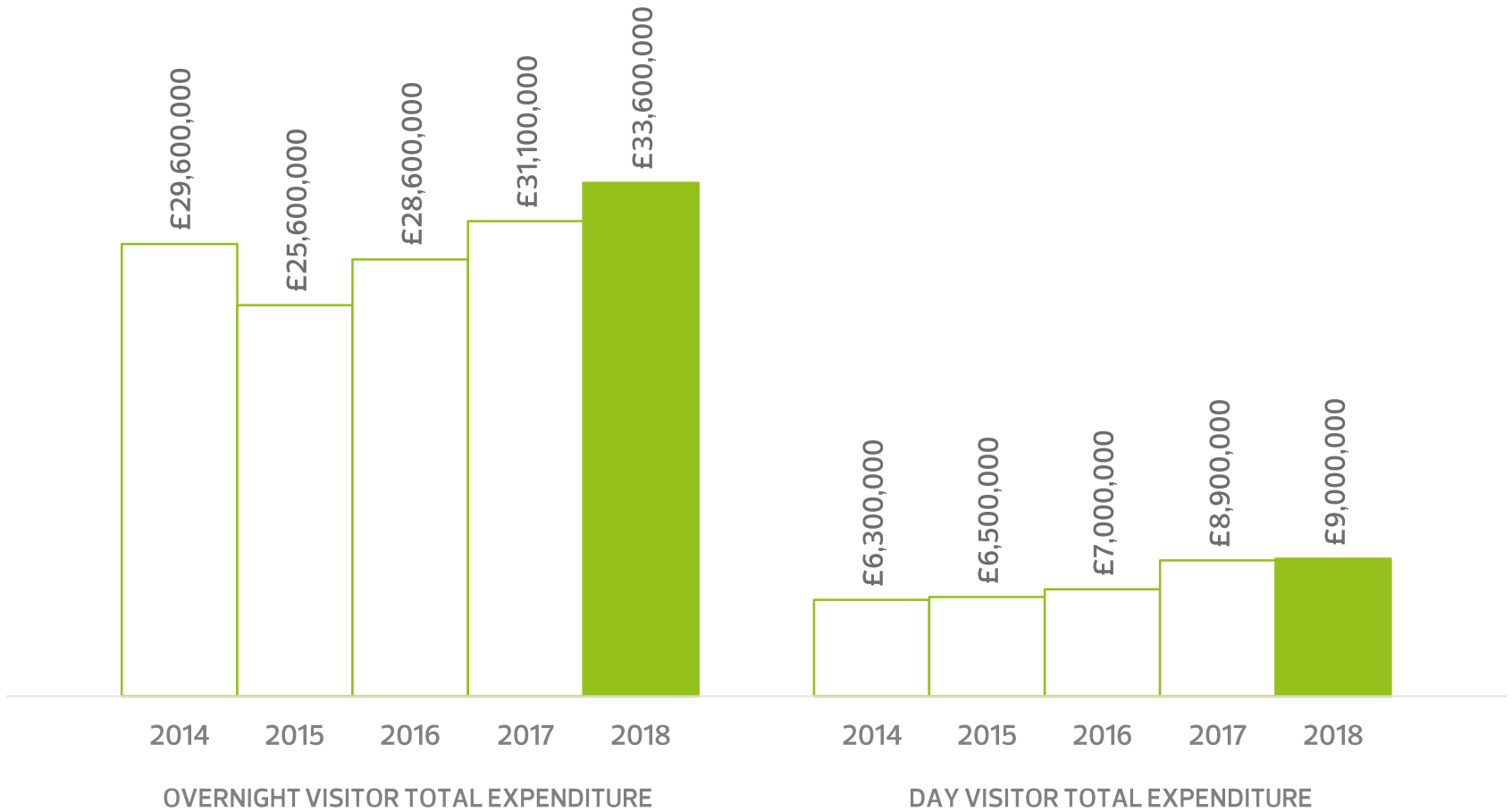
2018 = 18,000
 2017 = 16,900
 2016 = 21,800
 2015 = 17,400
 2014 = 18,900



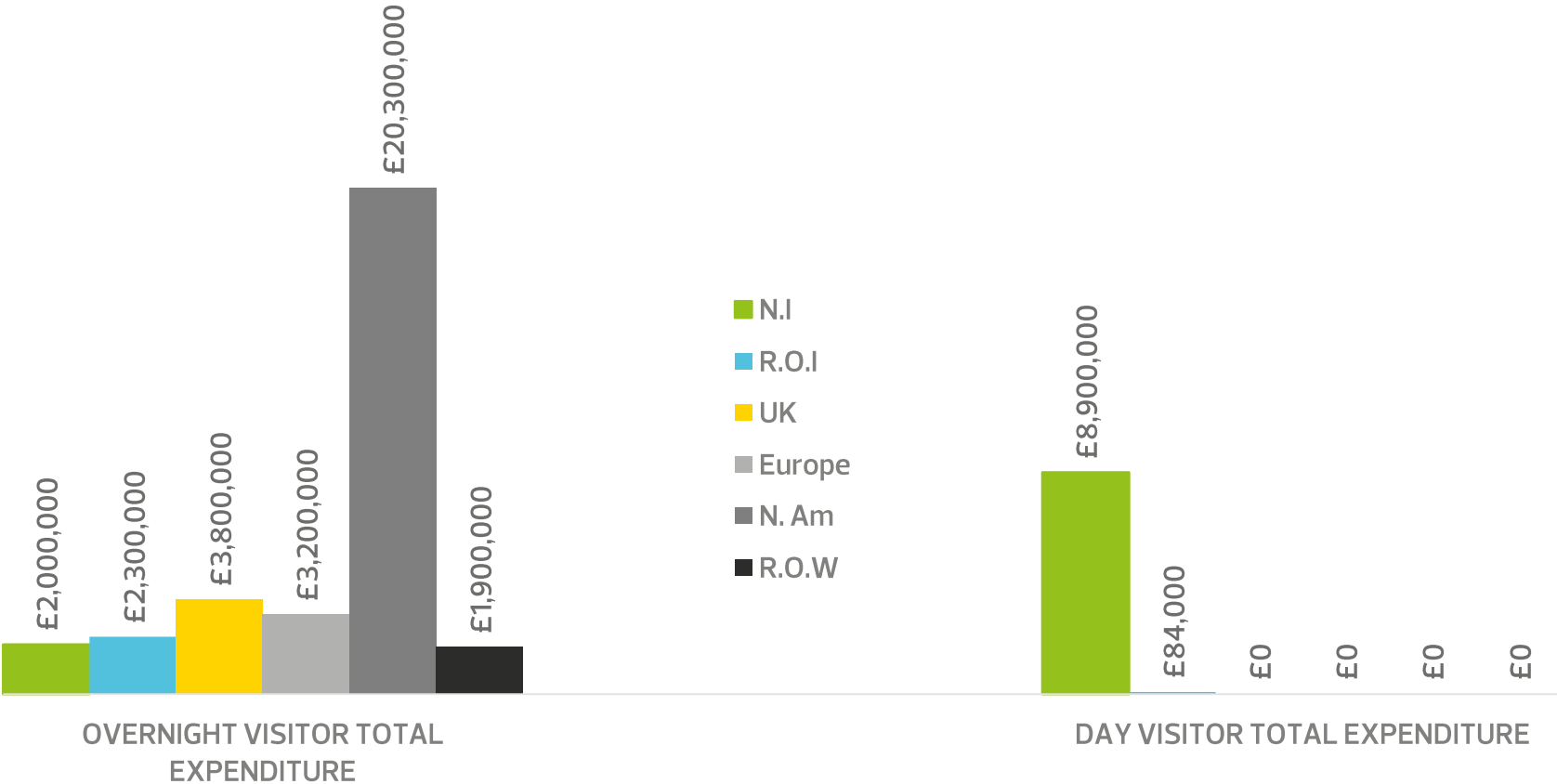
VOLUME AND VALUE OF GOLF TOURISM



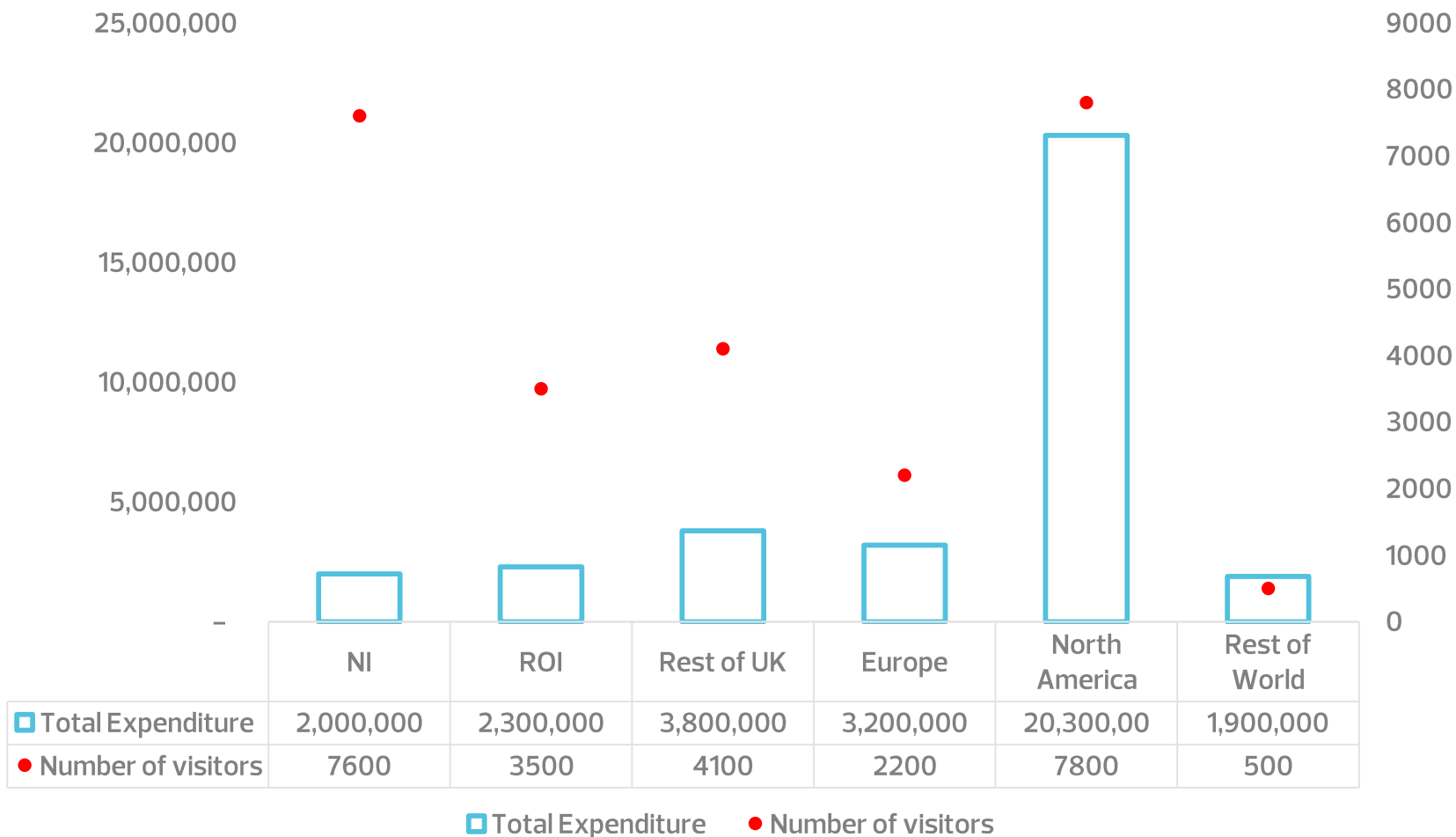
OVERNIGHT VS DAY VISITOR REVENUE



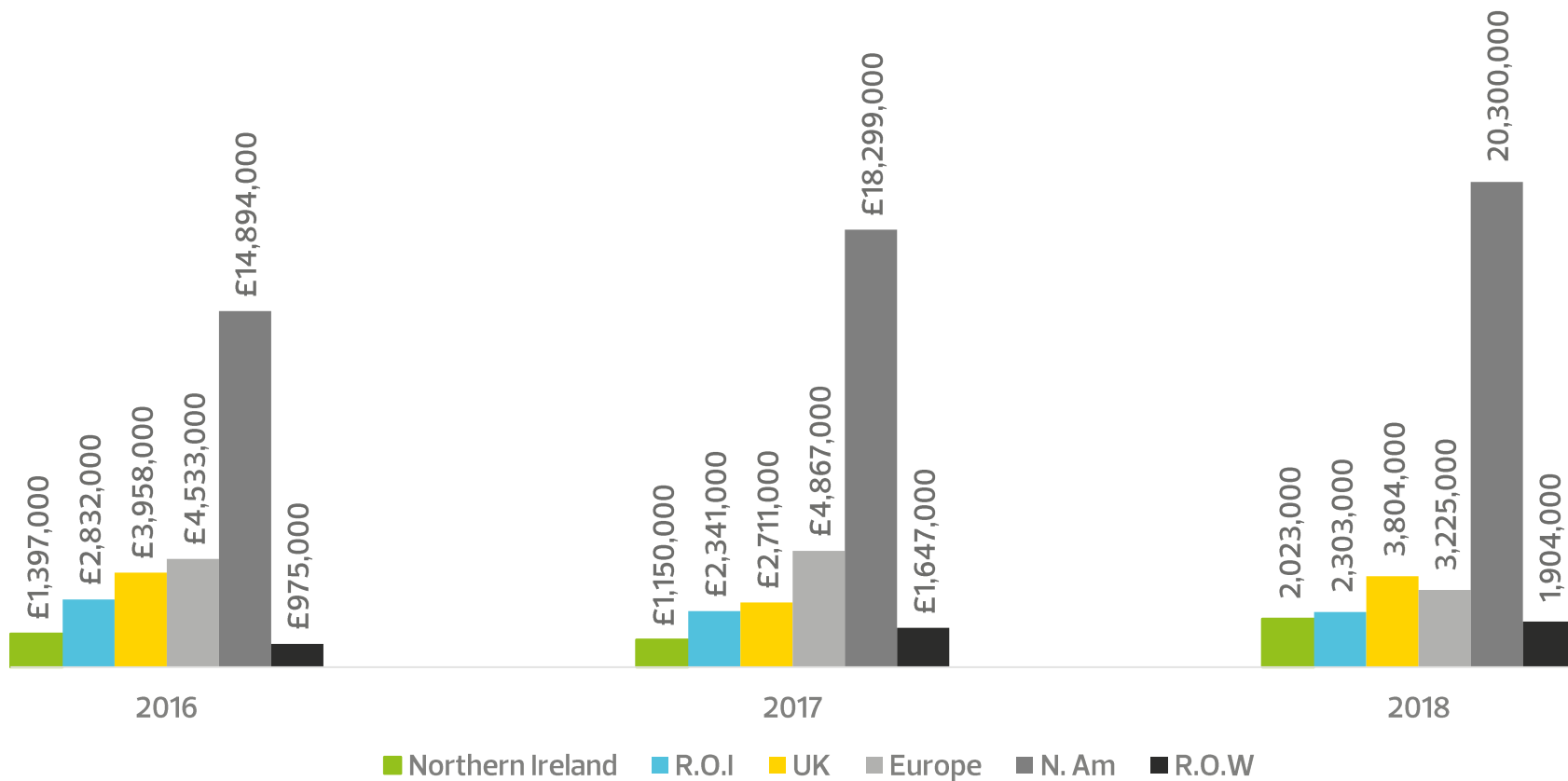
EXPENDITURE BY COUNTRY



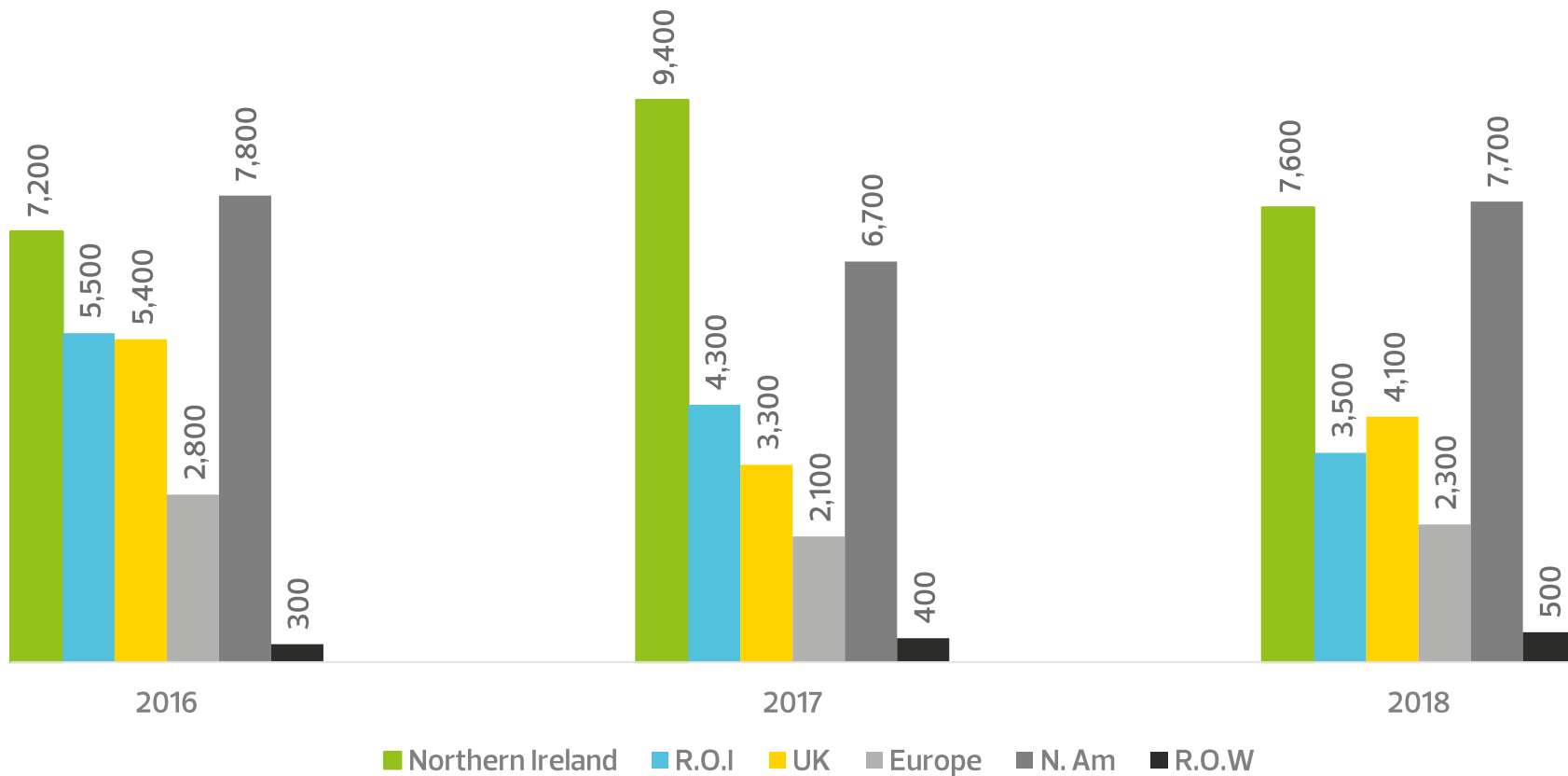
TOTAL EXPENDITURE



TOTAL EXPENDITURE – OVERNIGHT VISITORS



TOTAL VISITORS – OVERNIGHT VISITORS



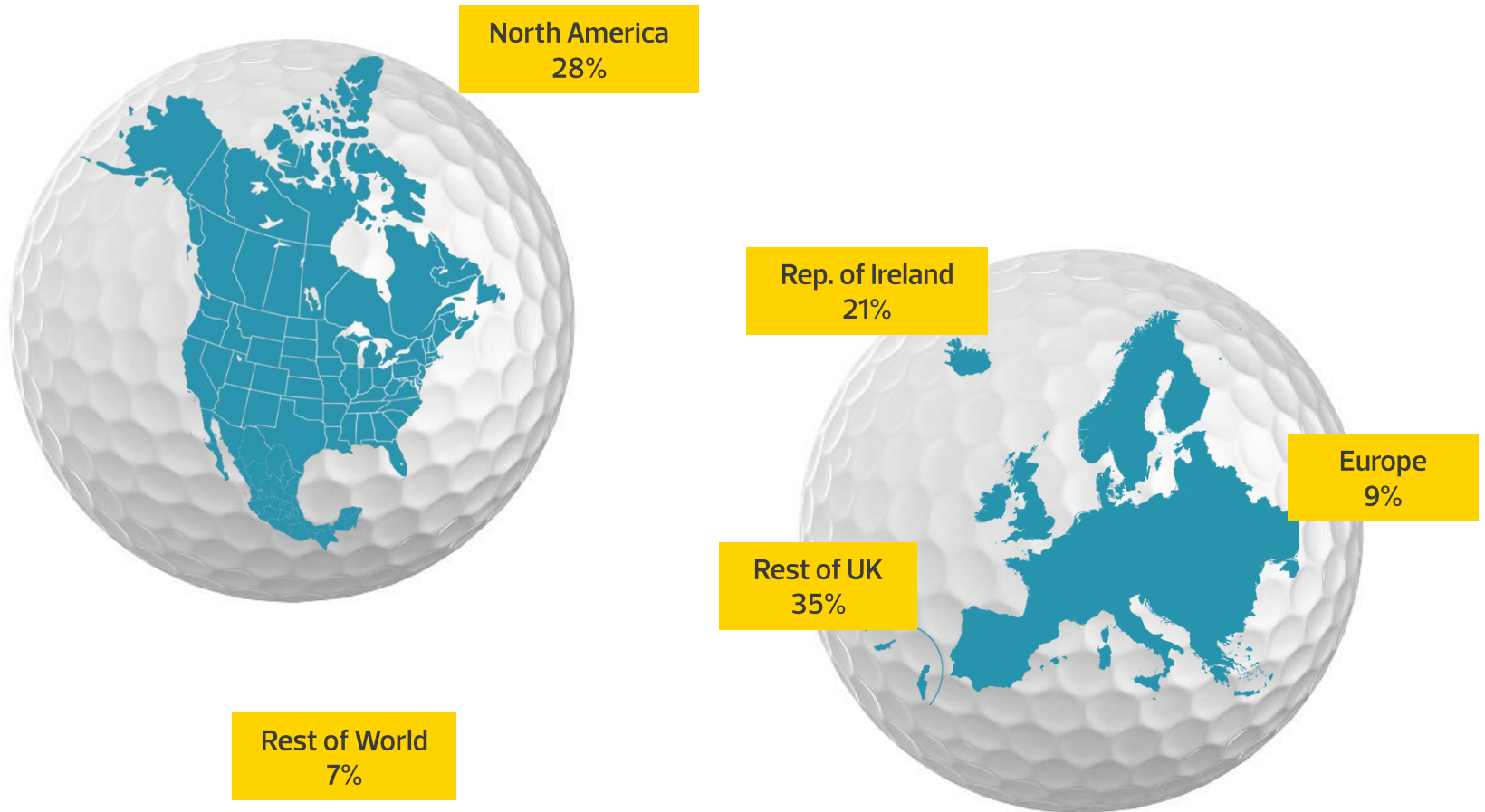
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CONSUMER FEEDBACK



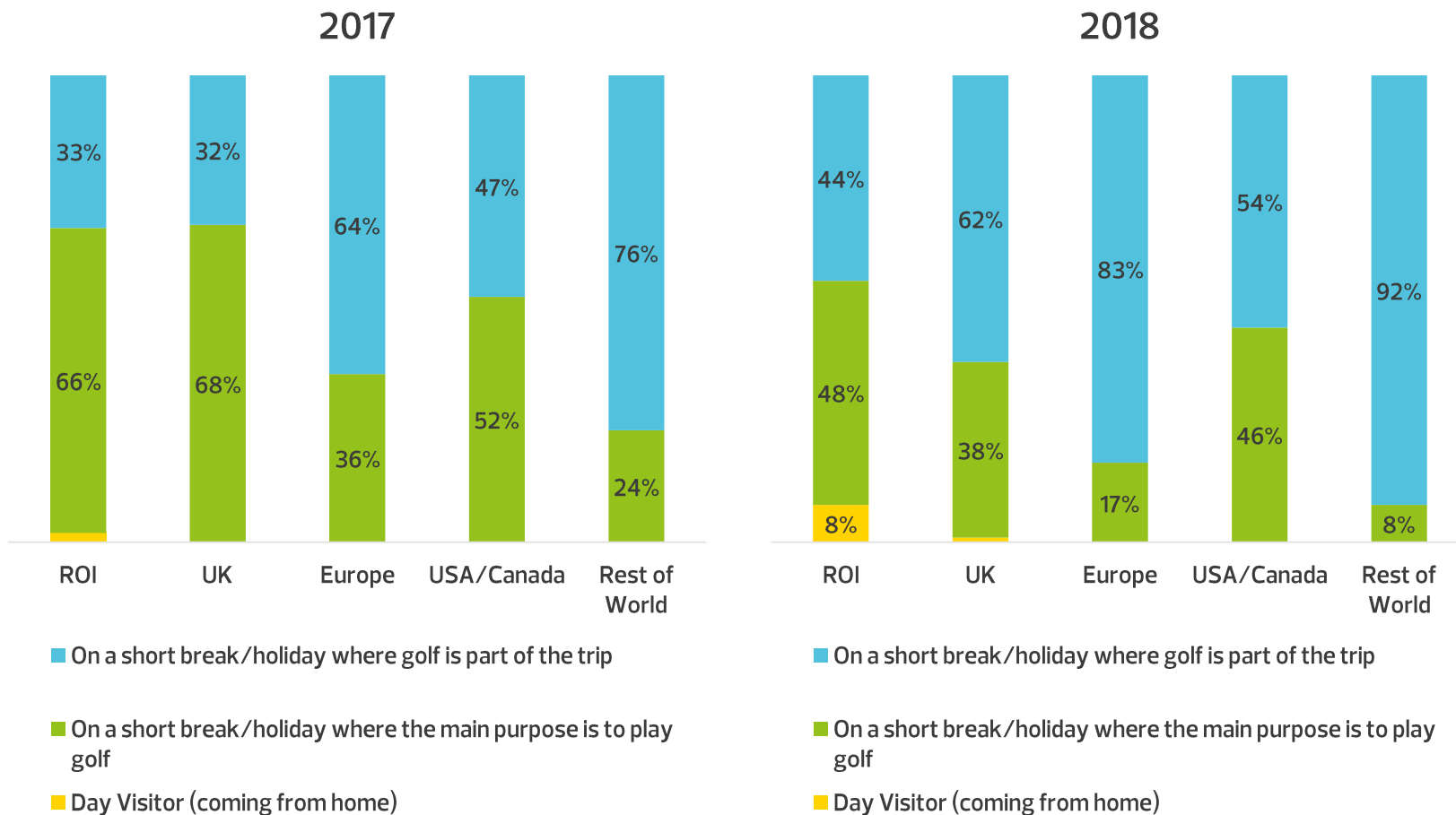
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CONSUMER FEEDBACK | Interviewee Profile



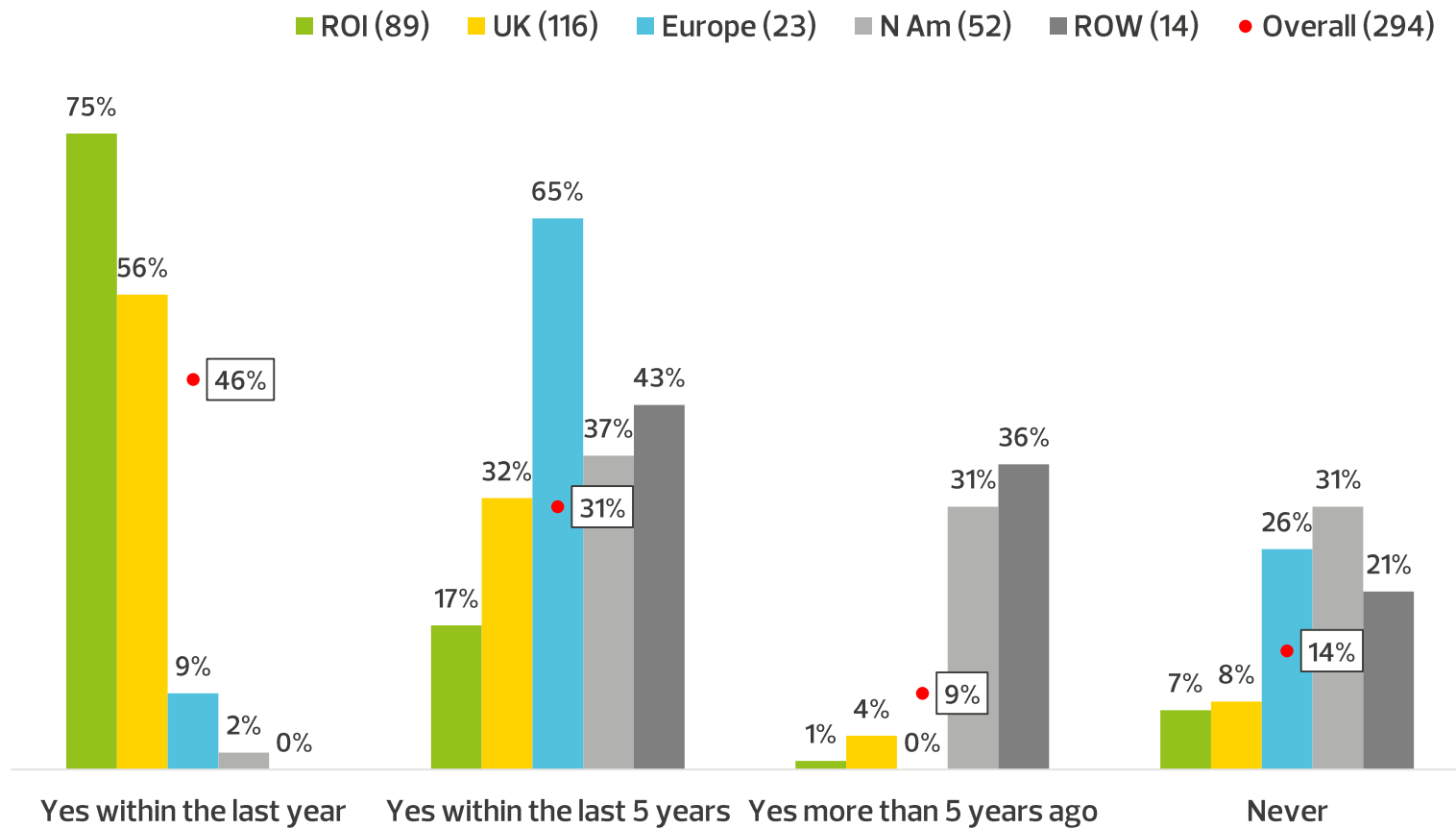
CONSUMER FEEDBACK | Feedback Type

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



CONSUMER FEEDBACK | Playing in NI

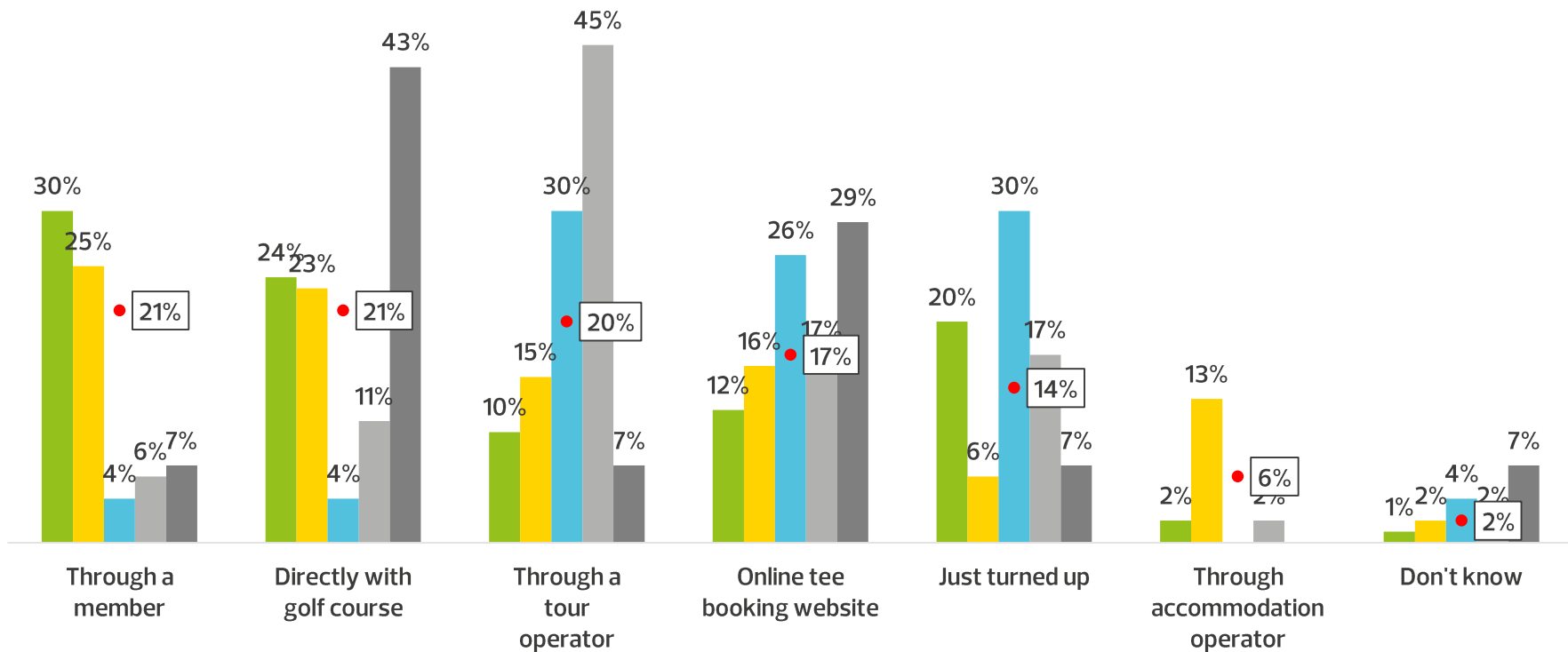
Q: Have you played golf in NI before?



CONSUMER FEEDBACK | Booking today's round

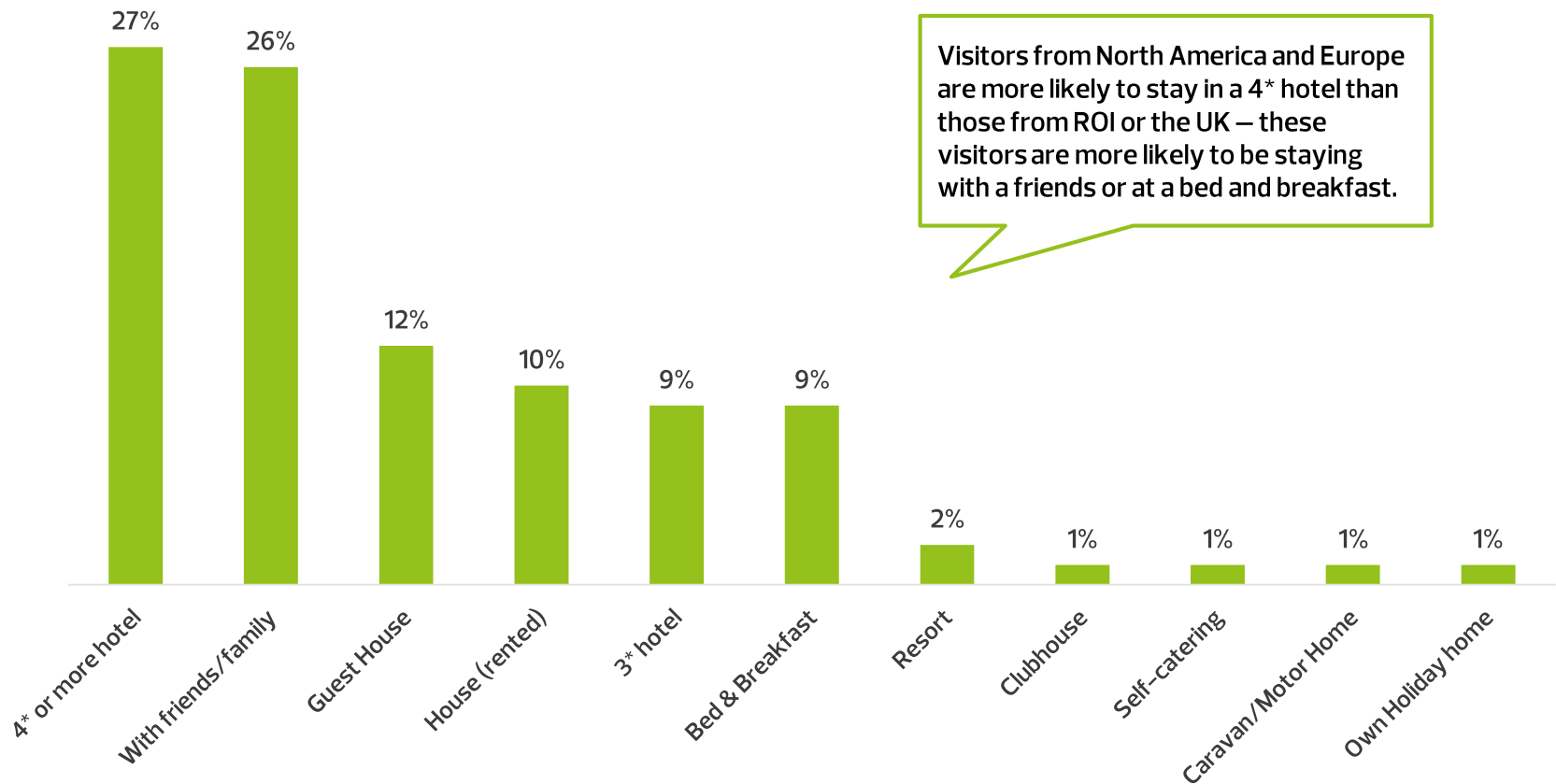
Q: Do you know how your booking was made?

■ ROI (89)
 ■ UK (116)
 ■ Europe (23)
 ■ N Am (53)
 ■ ROW (14)
 ● Overall (295)



CONSUMER FEEDBACK | Accommodation

Q: What type of accommodation are you staying in?



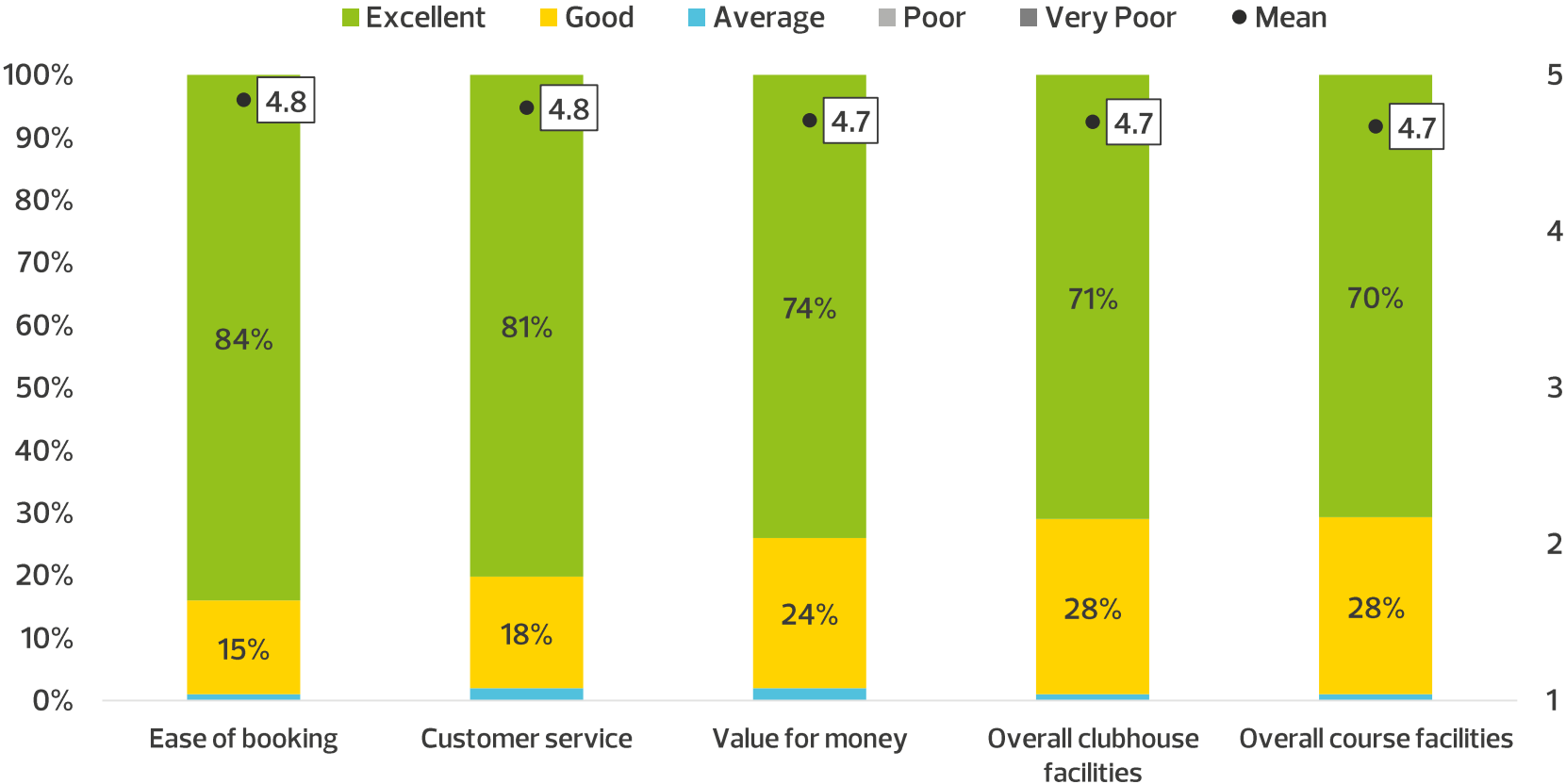
CONSUMER FEEDBACK | Rounds & Courses Played

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



CONSUMER FEEDBACK | Course Ratings

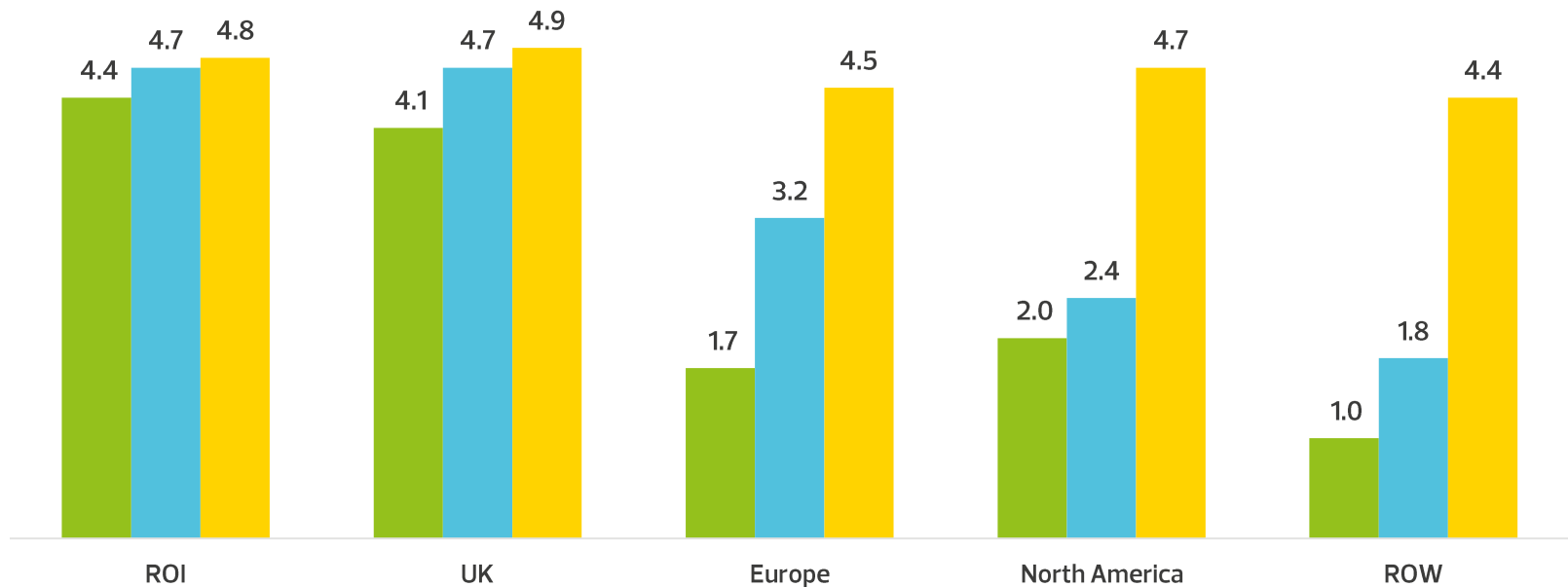
Q: Regarding this course, how would you rate the following 5 areas?



CONSUMER FEEDBACK | Returning to NI

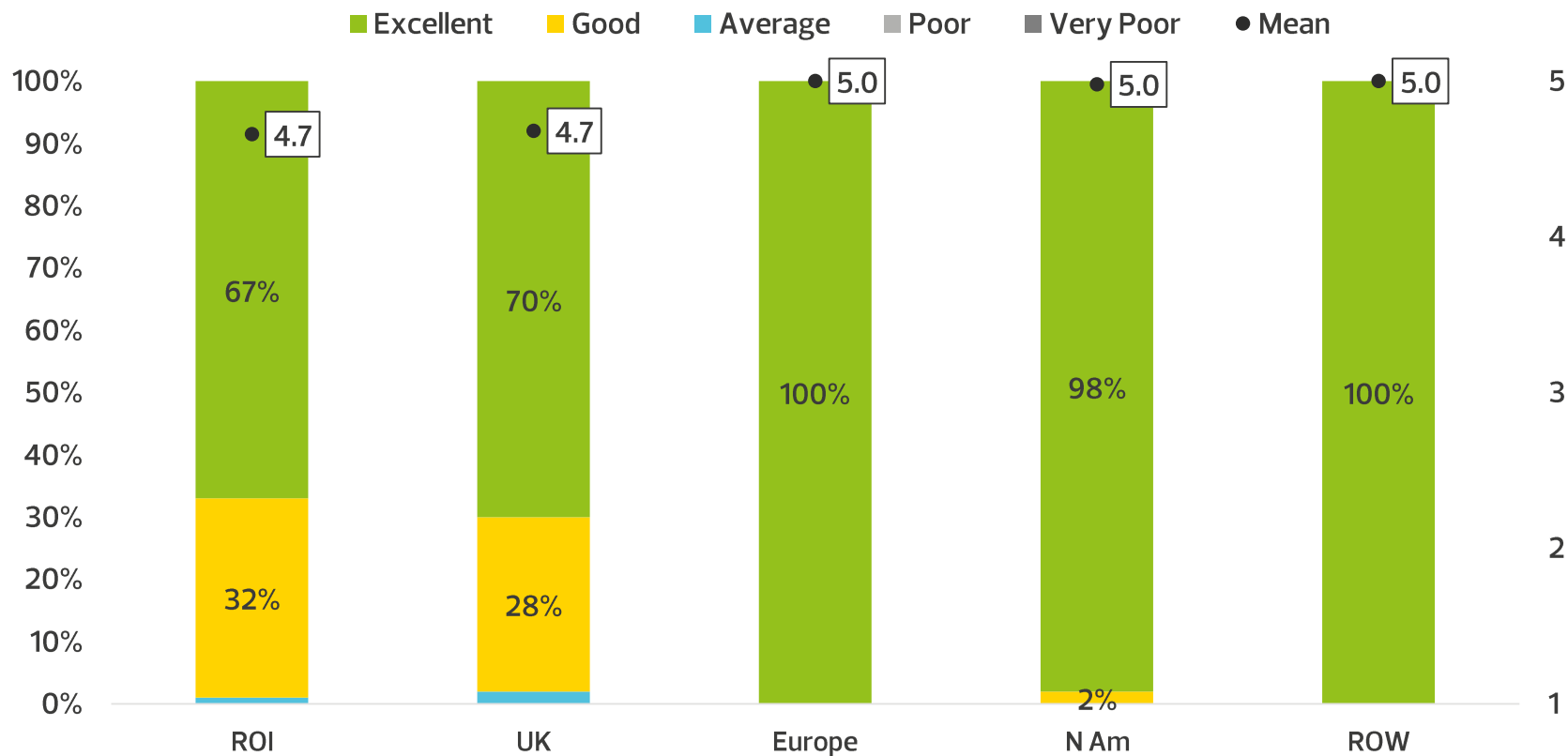
Q: On a scale of 1-5, how likely is it that you will return to NI for golf?

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



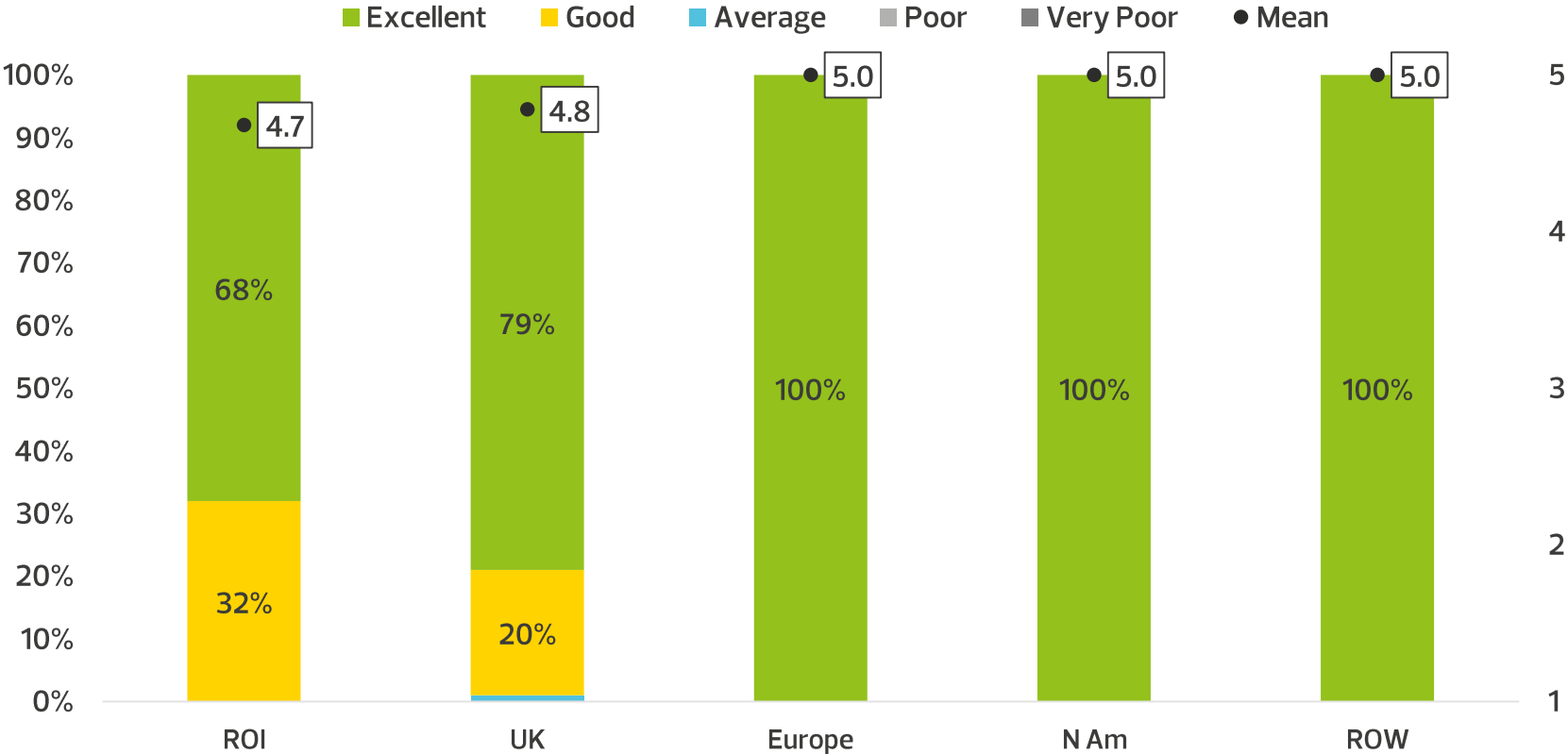
CONSUMER FEEDBACK | Rating the golf

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



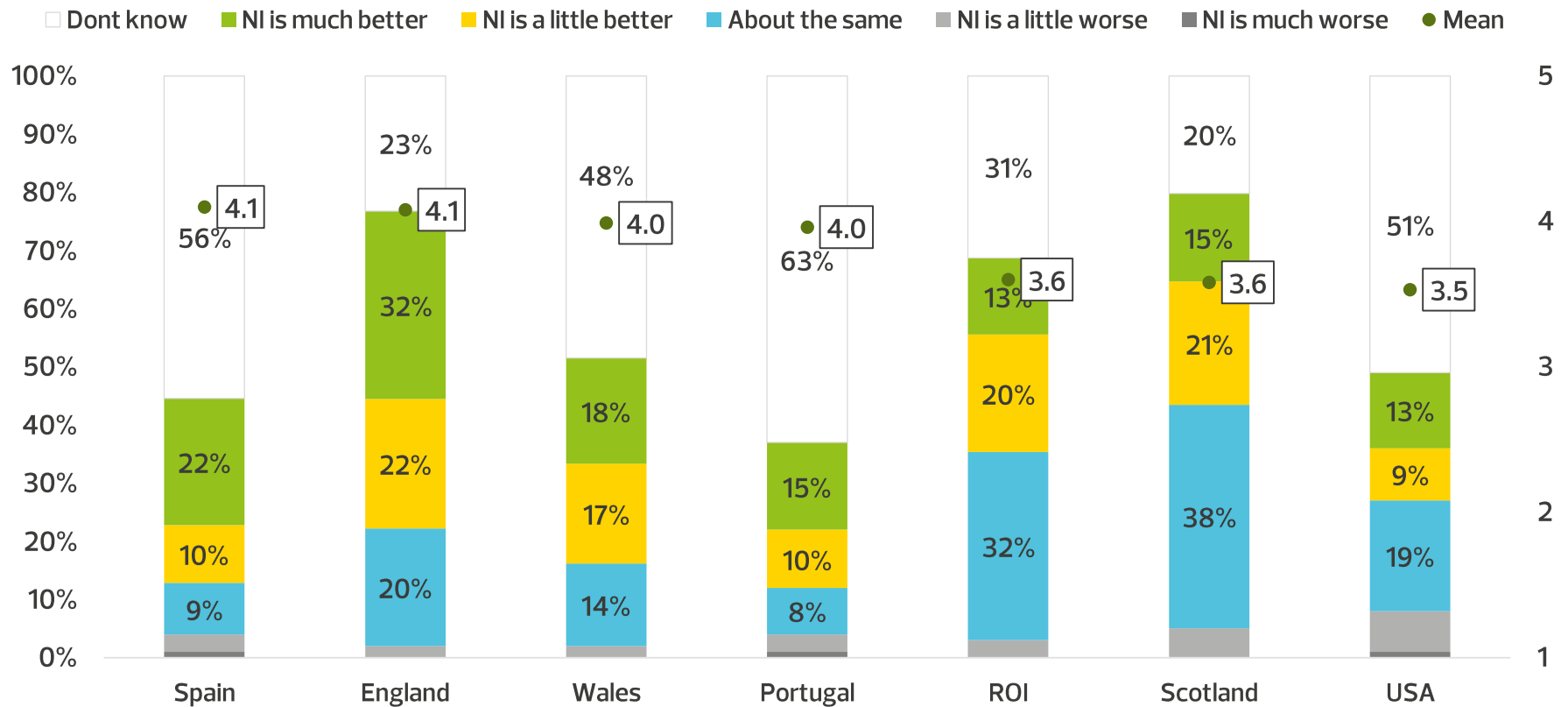
CONSUMER FEEDBACK | Rating the golf break overall

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



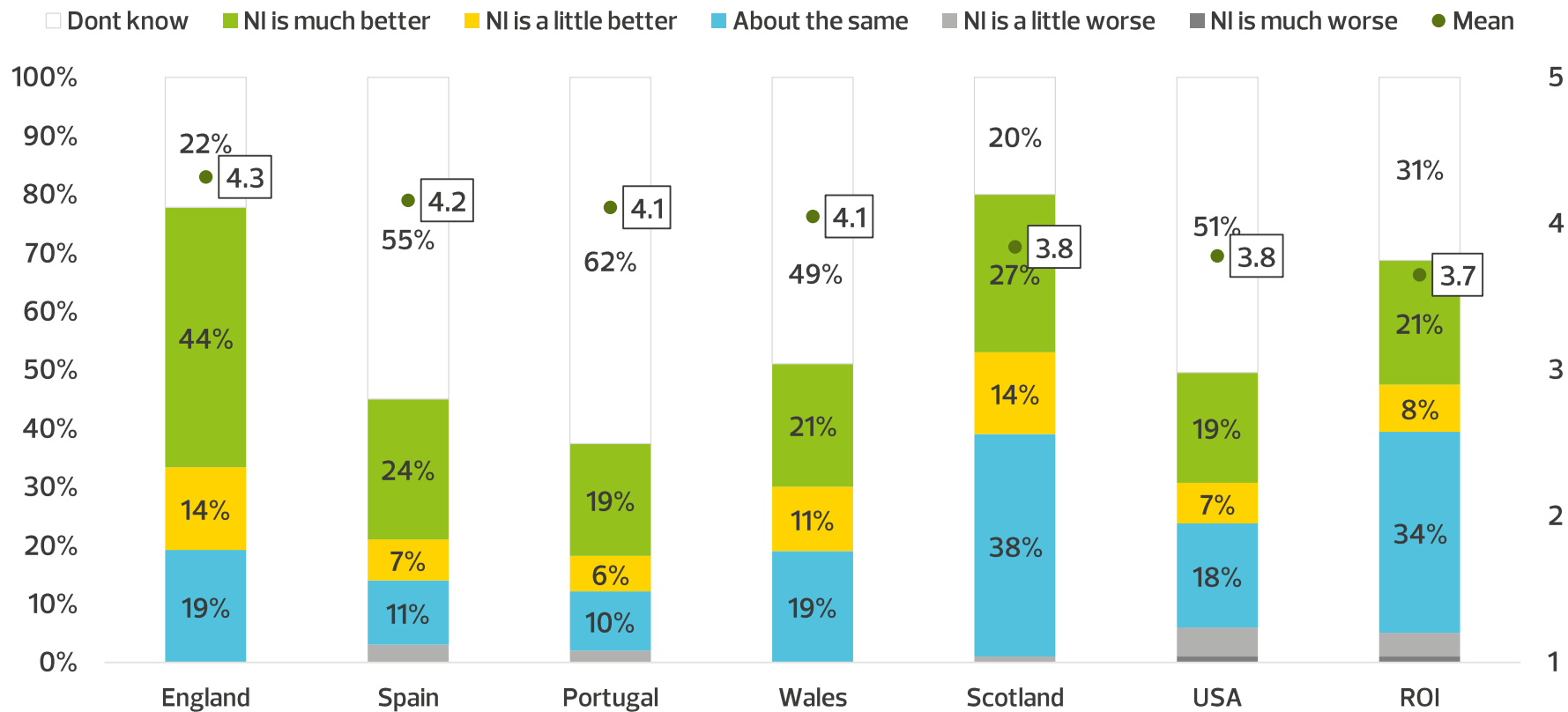
CONSUMER FEEDBACK | NI – Value for money

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



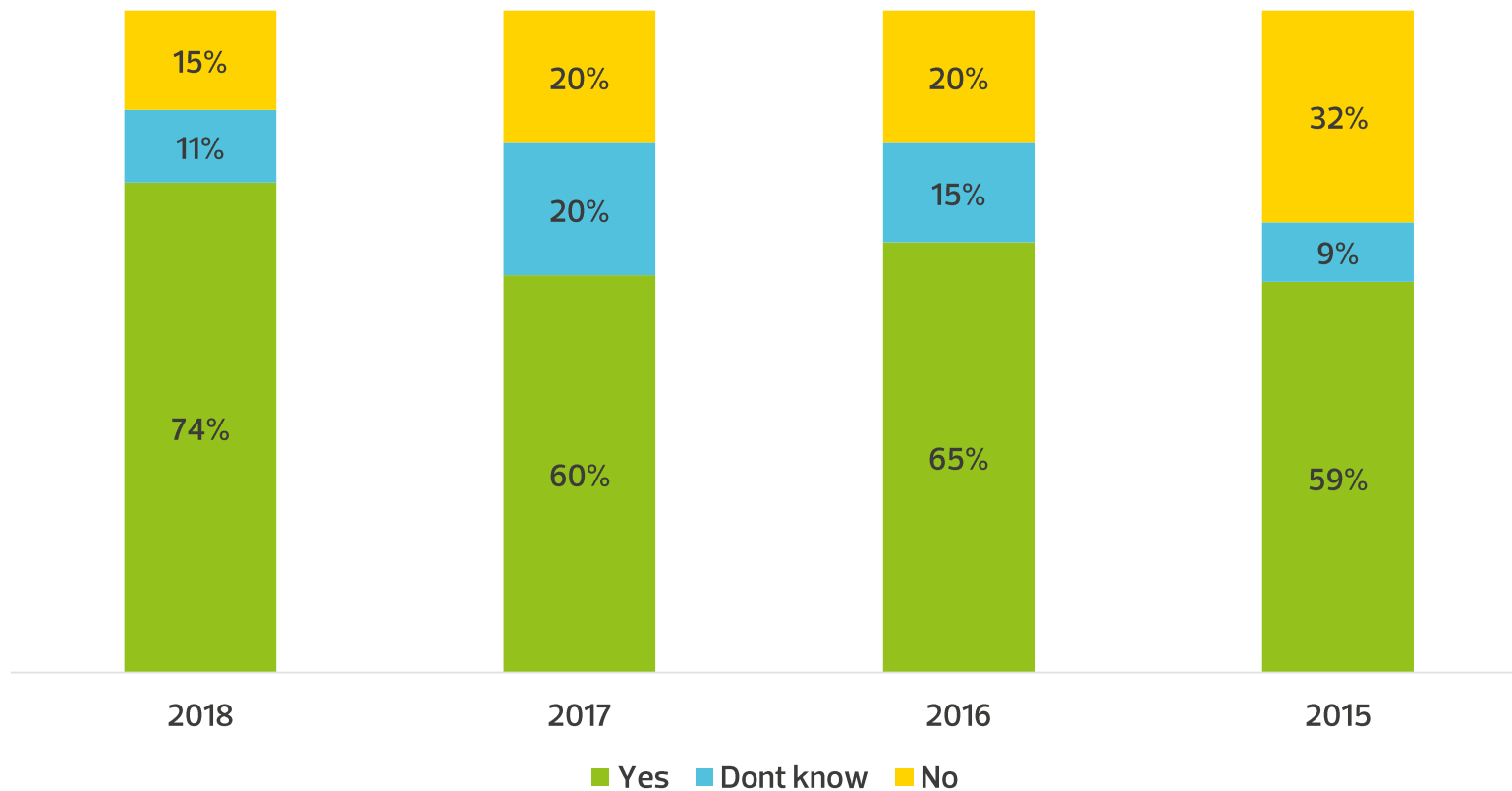
CONSUMER FEEDBACK | NI – Enjoyment

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



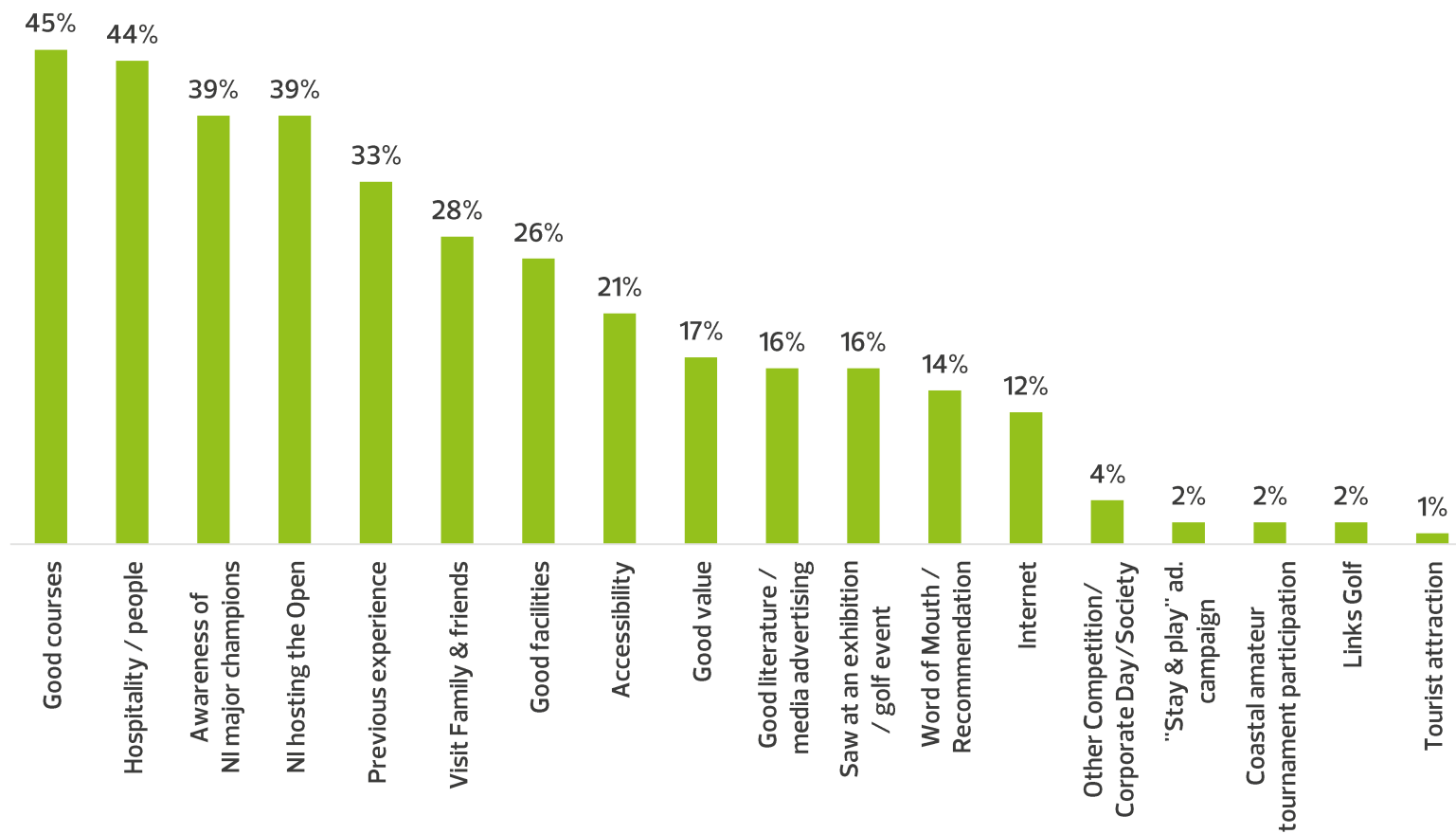
CONSUMER FEEDBACK | Tourist Attractions

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



CONSUMER FEEDBACK | Choosing NI

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



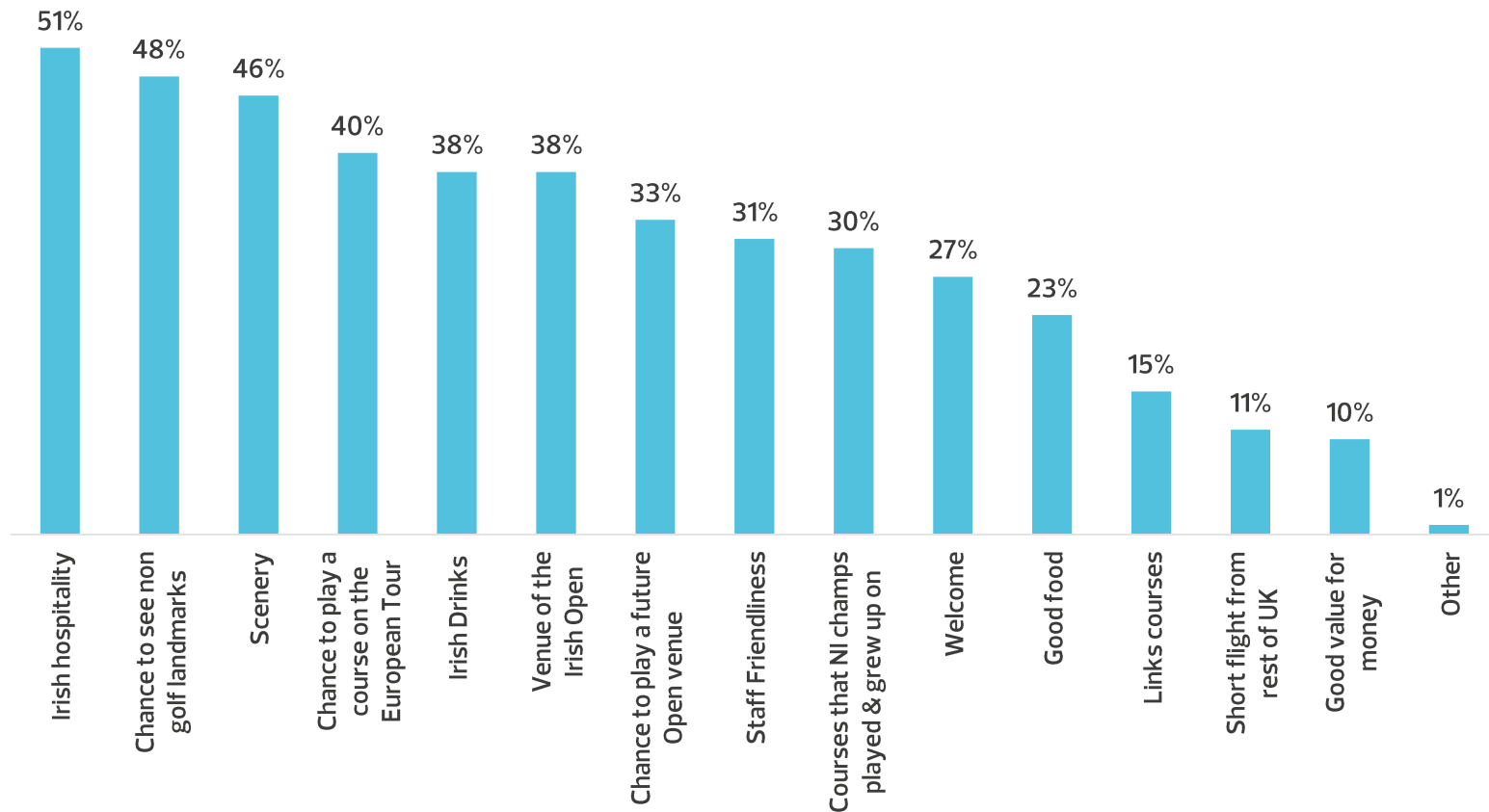
CONSUMER FEEDBACK | Choosing NI

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

	ROI	UK	Europe	N Am	ROW
Good courses	38%	49%	26%	57%	50%
Hospitality / people	23%	43%	52%	66%	86%
Awareness of NI major champions	38%	32%	61%	40%	64%
NI hosting the Open	30%	35%	78%	42%	64%
Previous experience	35%	37%	22%	34%	7%
Visit Family & friends	36%	29%	17%	13%	43%
Good facilities	26%	28%	30%	25%	14%
Accessibility	27%	20%	17%	19%	7%
Good value	23%	20%	9%	9%	-
Good literature / media advertising	8%	11%	26%	38%	7%

CONSUMER FEEDBACK | Trip highlight

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



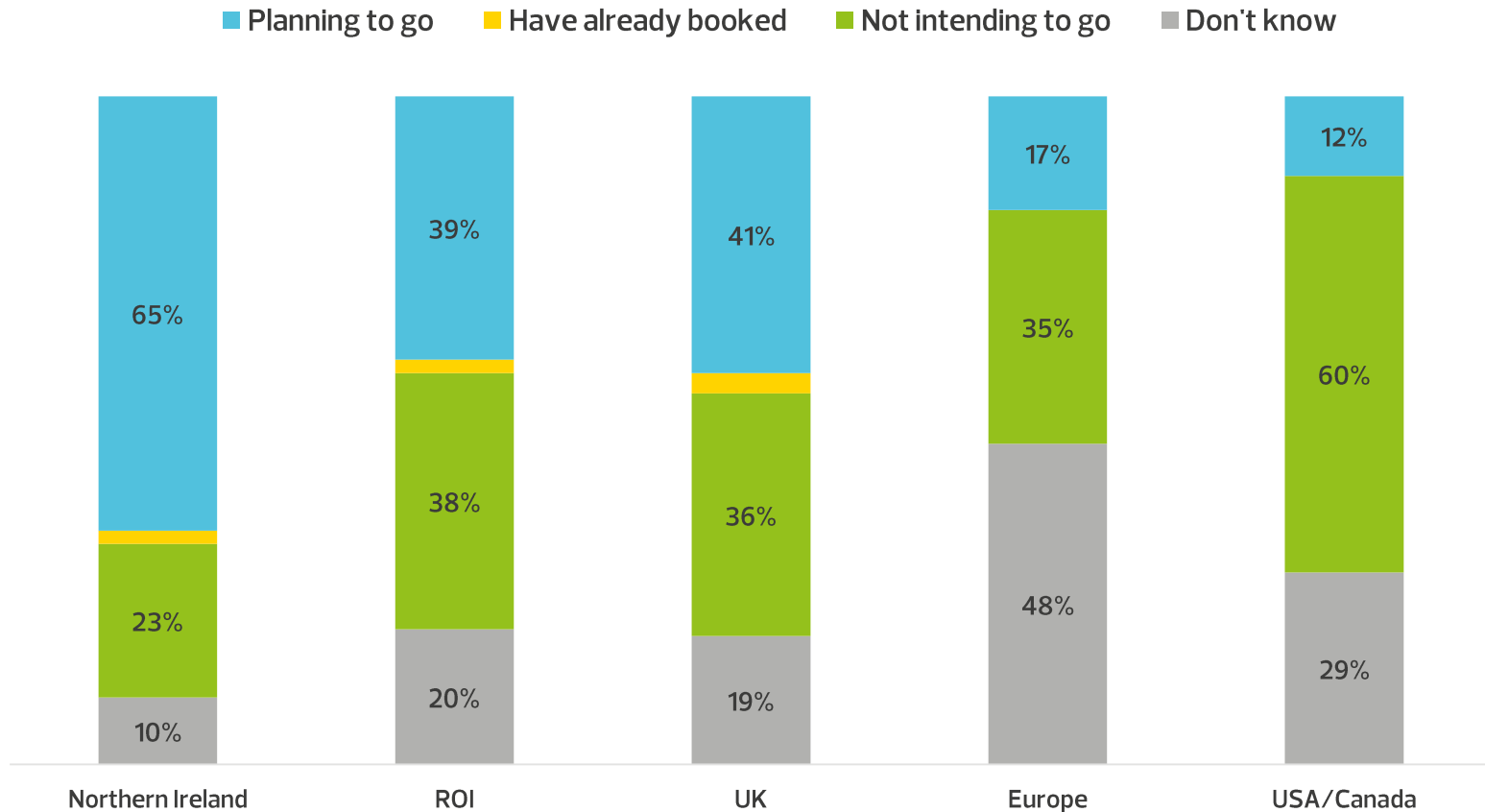
CONSUMER FEEDBACK | Choosing NI

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

	ROI	UK	Europe	N Am	ROW
Irish hospitality	13%	65%	87%	64%	64%
Chance to see non golf landmarks	36%	41%	78%	64%	71%
Scenery	31%	42%	70%	60%	79%
Chance to play a course on the European Tour	35%	34%	74%	45%	50%
Irish Drinks (e.g. Bushmills/Guinness)	12%	39%	78%	53%	64%
Venue of the Irish Open	31%	33%	70%	42%	57%
Chance to play a future Open venue	27%	25%	83%	34%	57%
Staff Friendliness	46%	27%	17%	23%	21%
Courses that NI champs played & grew up on	25%	23%	57%	34%	57%
Welcome	25%	28%	30%	26%	29%

CONSUMER FEEDBACK | The Open 2019

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



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 £2,481 on their golf break.

CONTACT DETAILS



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INVESTIGATION

INSIGHT

ACTION

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