



GOLF TOURISM IN NORTHERN IRELAND 2024



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OBJECTIVES



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



THE PROGRAMME - 2024

■ Rounds Played

- Sporting Insights has been running the Golf Tourism monitor since 2013.
- 18 clubs in total submitted their rounds played data for the whole year.
- Data was submitted via a Sporting Insights spreadsheet emailed to courses.

■ Visitor Interviews

- 2024 saw a briefer questionnaire asked of golf visitors.
- 409 interviews were conducted among visitors at clubs during the prime golfing season.
- Interviewers asked visiting golfers questions about:
 - The type and length of break and their expenditure
 - The number of rounds/courses played during visit
 - Their level of enjoyment of golf in Northern Ireland

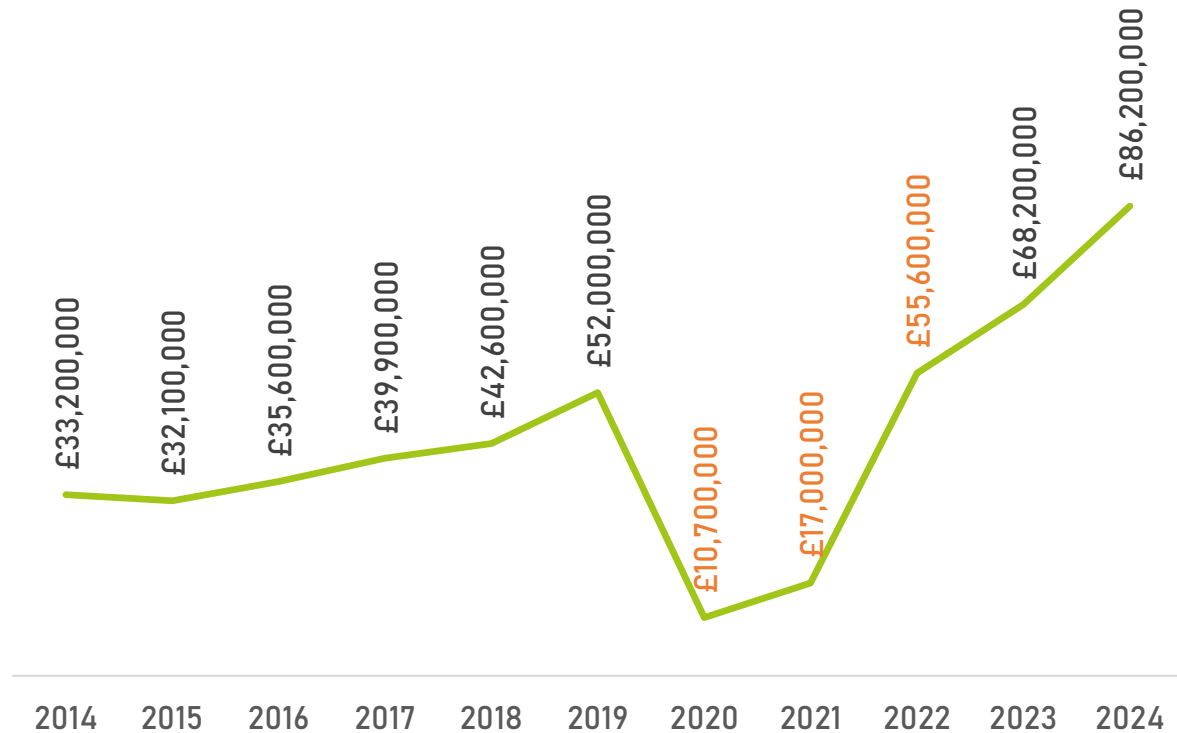
KEY FINDINGS



KEY FINDINGS | Overall impact

The Economic Impact of golf tourism for Northern Ireland in 2024 is:

- 2024 = £86,200,000
- 2023 = £68,200,000
- 2022 = £55,600,000
- 2021 = £17,000,000
- 2020 = £10,700,000
- 2019 = £52,000,000
- 2018 = £42,600,000
- 2017 = £39,900,000
- 2016 = £35,600,000
- 2015 = £32,100,000
- 2014 = £33,200,000



Orange figures are estimates based on partial research as a full monitor was not conducted for these years There was no formal research for visitors between 2020 and 2022

KEY FINDINGS | Non-domestic visitors

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

- 2024 = 29,400
- 2023 = 29,000
- 2022 = 26,500
- 2021 = 15,000
- 2020 = 10,000
- 2019 = 23,400
- 2018 = 18,000
- 2017 = 16,900
- 2016 = 21,800
- 2015 = 17,400
- 2014 = 18,900

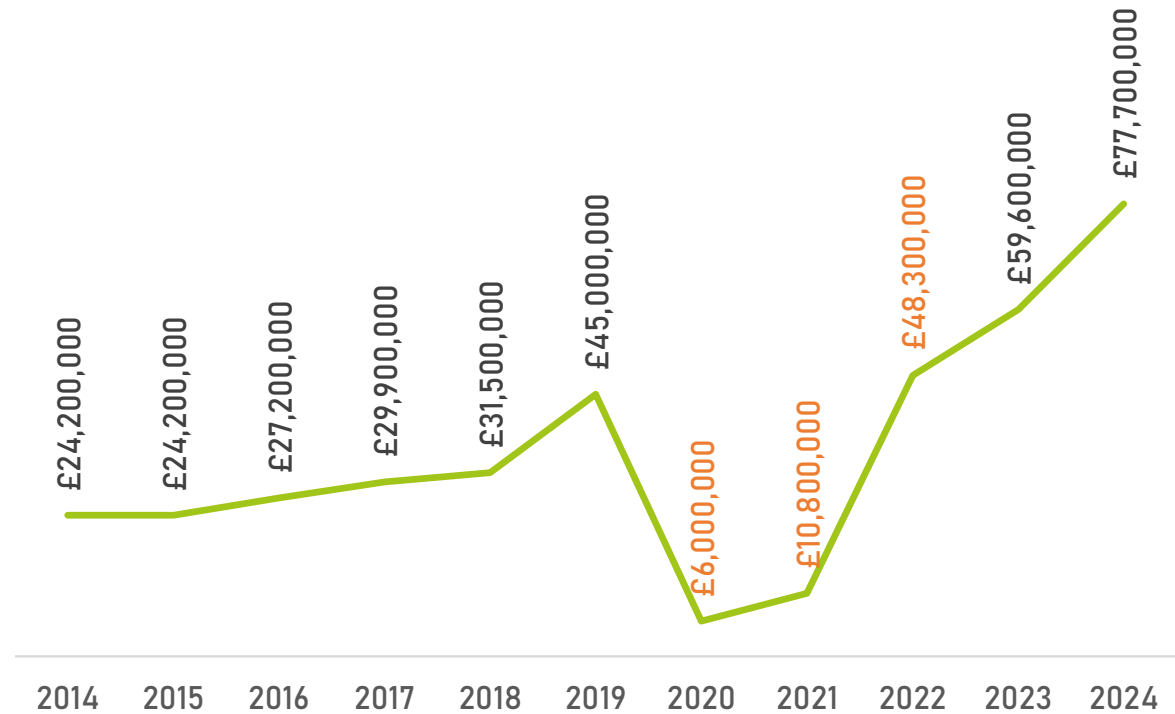


Orange figures are estimates based on partial research as a full monitor was not conducted for these years There was no formal research for visitors between 2020 and 2022

KEY FINDINGS | Non-domestic impact

Impact of golf tourism from **non-domestic overnight golfers** for Northern Ireland in 2024 is:

2024 = £77,700,000
 2023 = £59,600,000
 2022 = £48,300,000
 2021 = £10,800,000
 2020 = £6,000,000
 2019 = £45,000,000
 2018 = £31,500,000
 2017 = £29,900,000
 2016 = £27,200,000
 2015 = £24,200,000
 2014 = £24,200,000



Orange figures are estimates based on partial research as a full monitor was not conducted for these years
 There was no formal research for visitors between 2020 and 2022

KEY FINDINGS | Economic Trends



Golf tourism soars, driven by overseas visitors and high-spenders

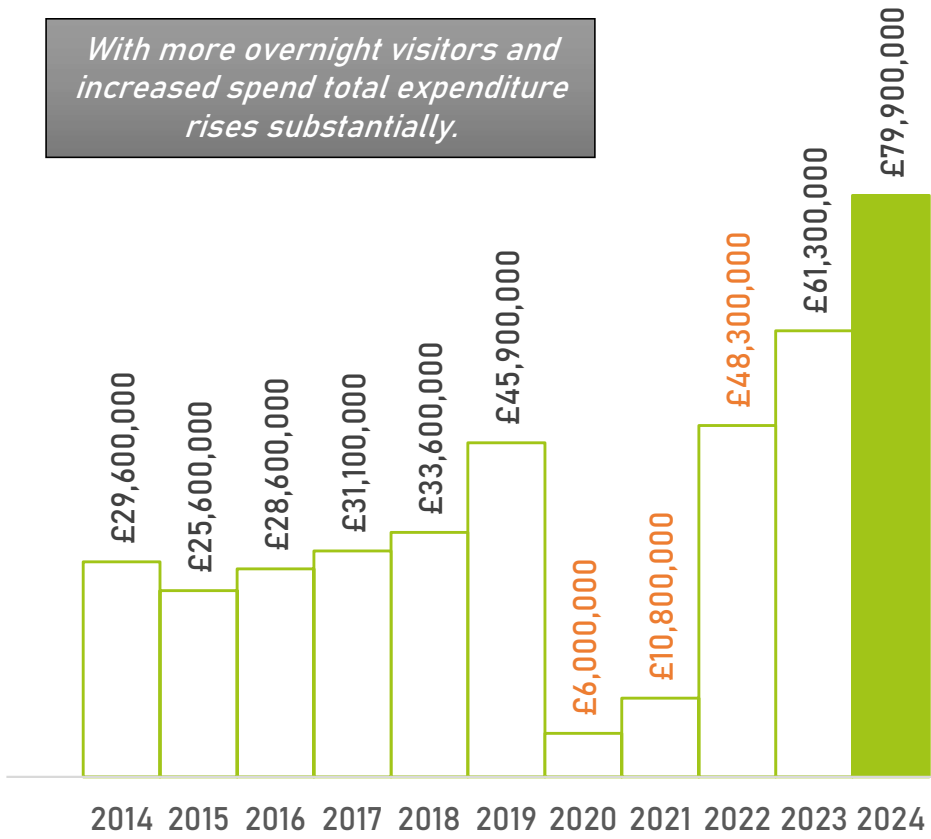
- As we saw in 2023, the combination of more overseas visitors and higher expenditure in 2024 has seen the economic impact of golf tourism to Northern Ireland continue to rise (+£18 million) with the figure now at £86.2 million (*Global inflation between 3% - 8% since 2021*).
- This increase in high spenders continues to be significant in driving the overall growth in economic impact; demonstrating the success of aiming to increase footfall from North American and ROW golfers.
- Overall visitor rounds played remain similar to the previous year, but tee times were taken by more North Americans in 2024. In addition, Europeans and ROW average spend and length of stay in 2024 rose compared to 2023.
- Overall, 2024 was a great year for golf tourism in Northern Ireland generated by more North American and international golfers, combined with a notable increase in luxury market spending and longer stays. The high appeal of The Open continues with an opportunity to build on its legacy in 2025 and in future years.

VOLUME AND VALUE OF GOLF TOURISM



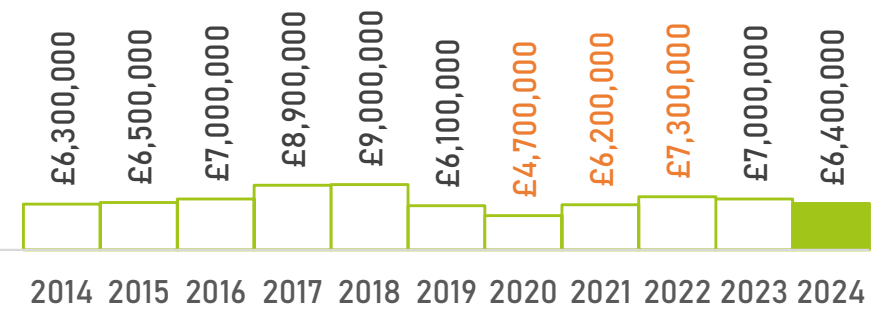
VOLUME AND VALUE | Overnight vs day visitor revenue

With more overnight visitors and increased spend total expenditure rises substantially.



OVERNIGHT VISITOR TOTAL EXPENDITURE

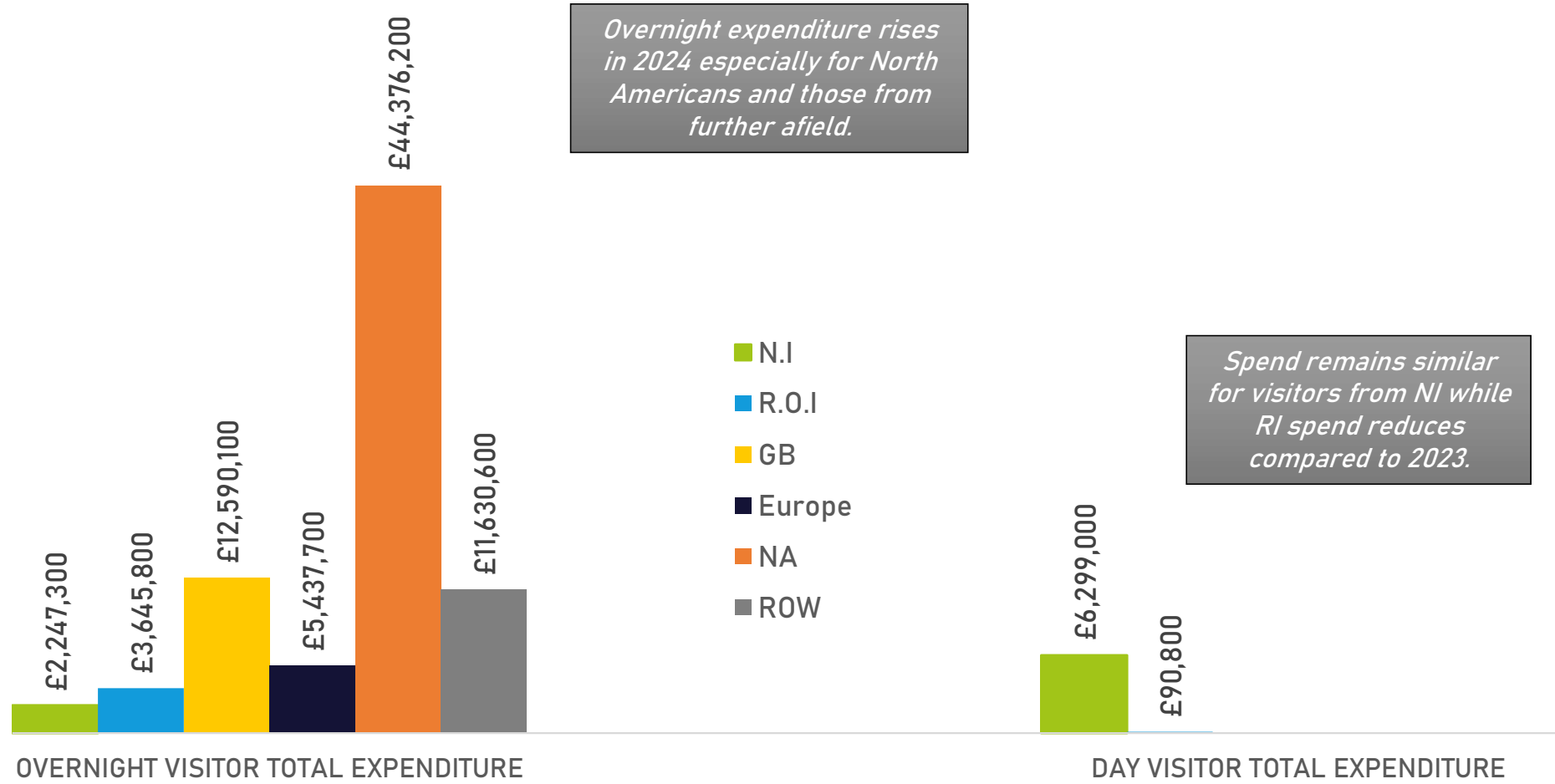
Less day visitors meant slightly lower expenditure in 2024.



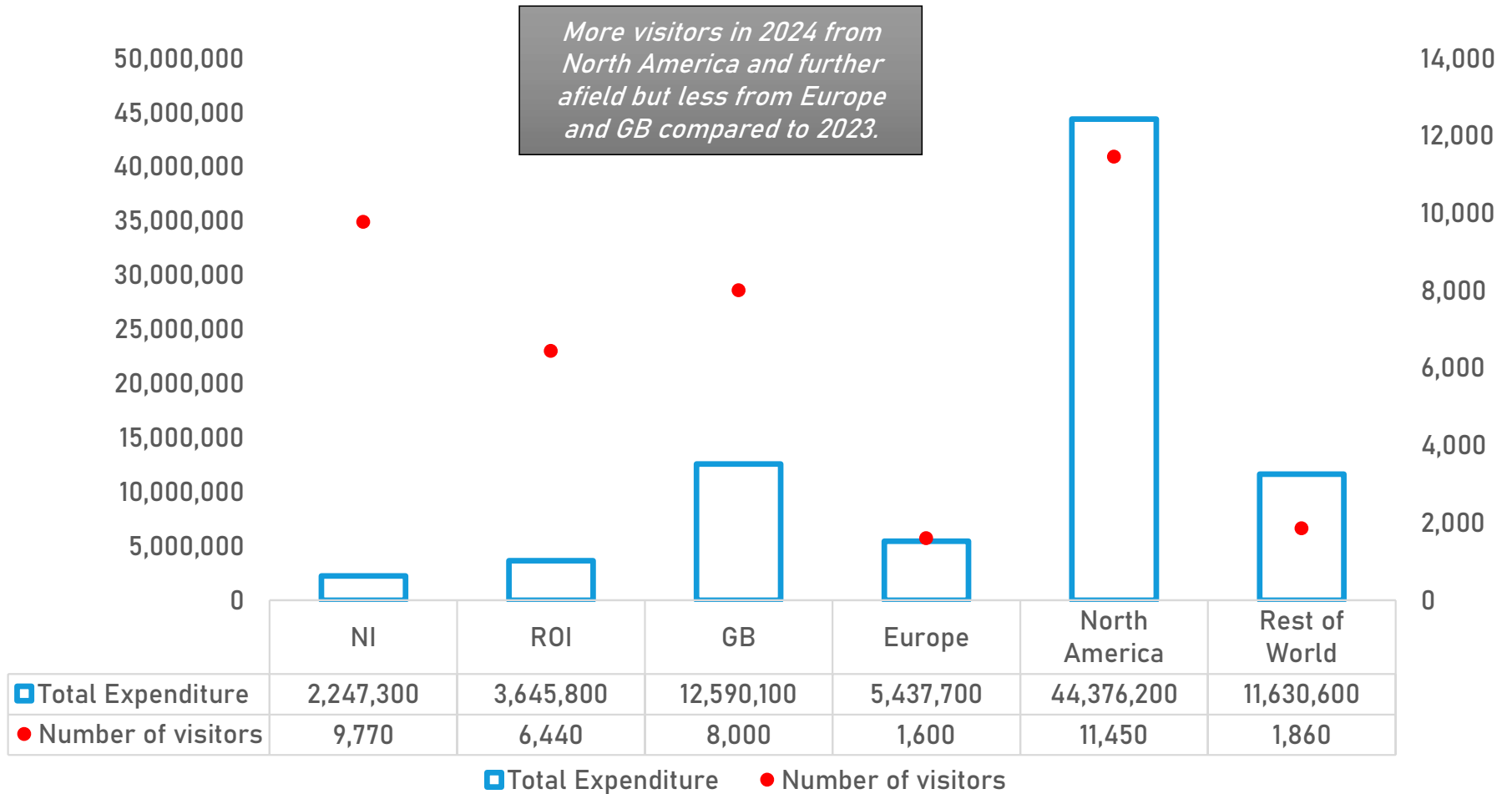
DAY VISITOR TOTAL EXPENDITURE

Orange figures are estimates based on partial research as a full monitor was not conducted for these years
There was no formal research for visitors between 2020 and 2022

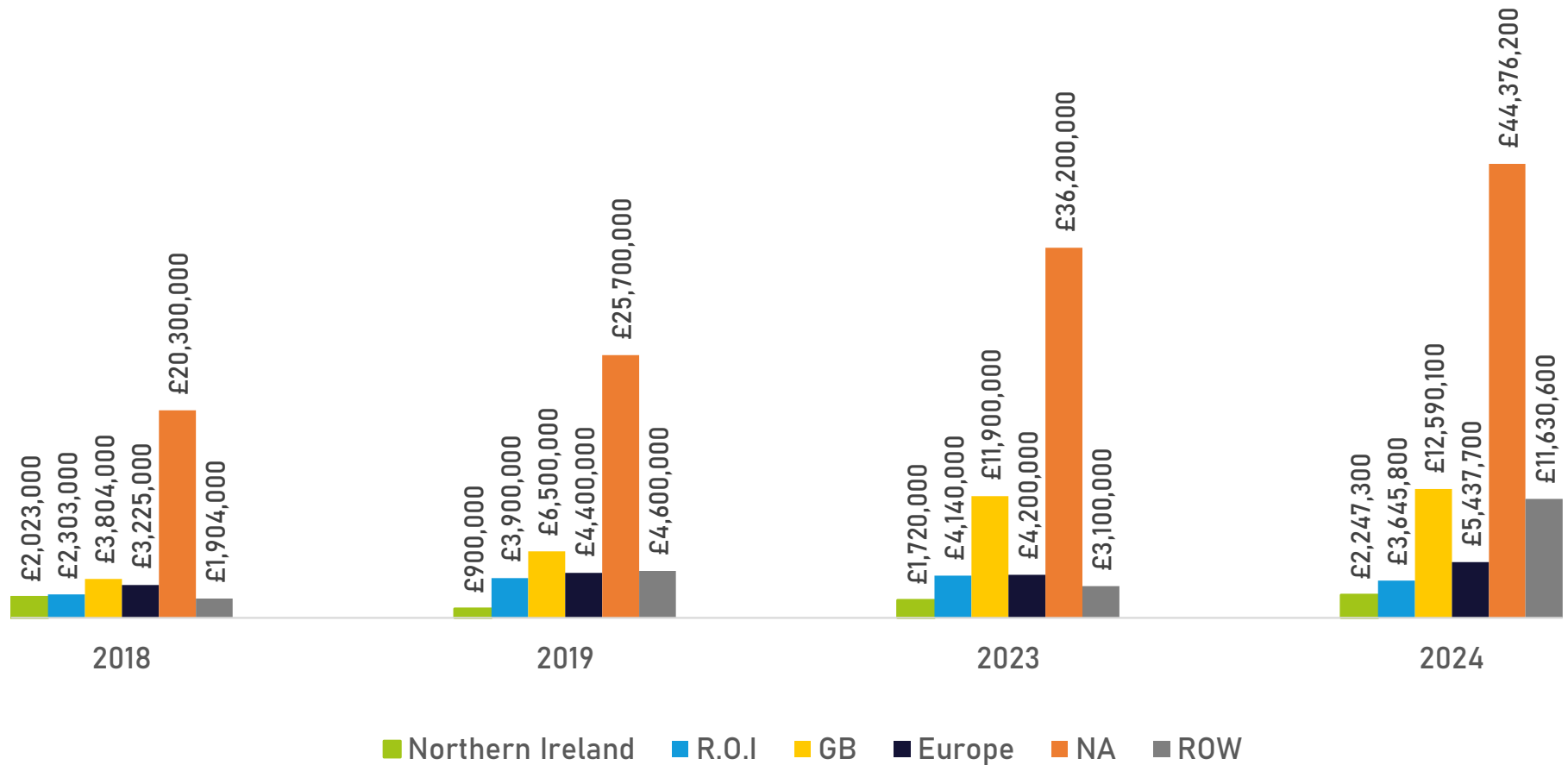
VOLUME AND VALUE | Expenditure by country



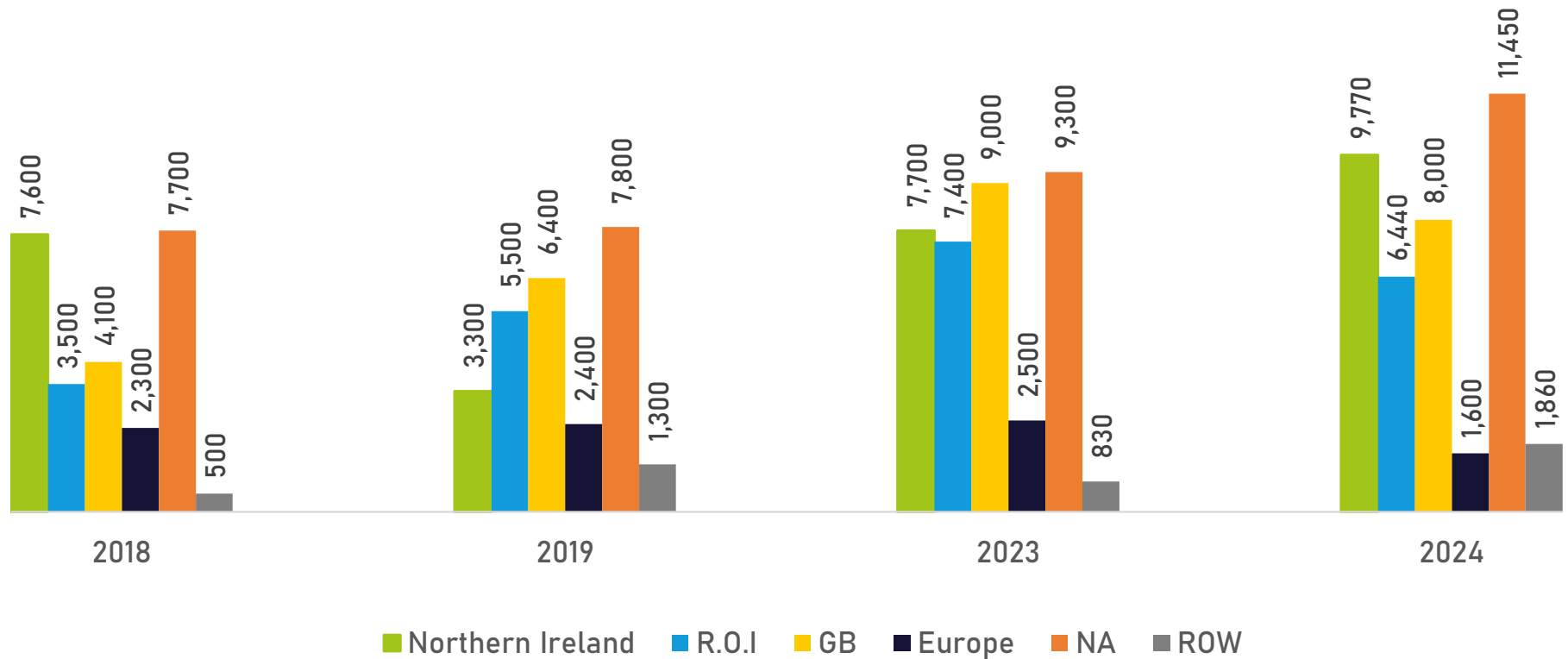
VOLUME AND VALUE | Expenditure & footfall overnights



TOTAL EXPENDITURE | Overnight visitors



VOLUME AND VALUE | Total overnight visitors



CONSUMER FEEDBACK



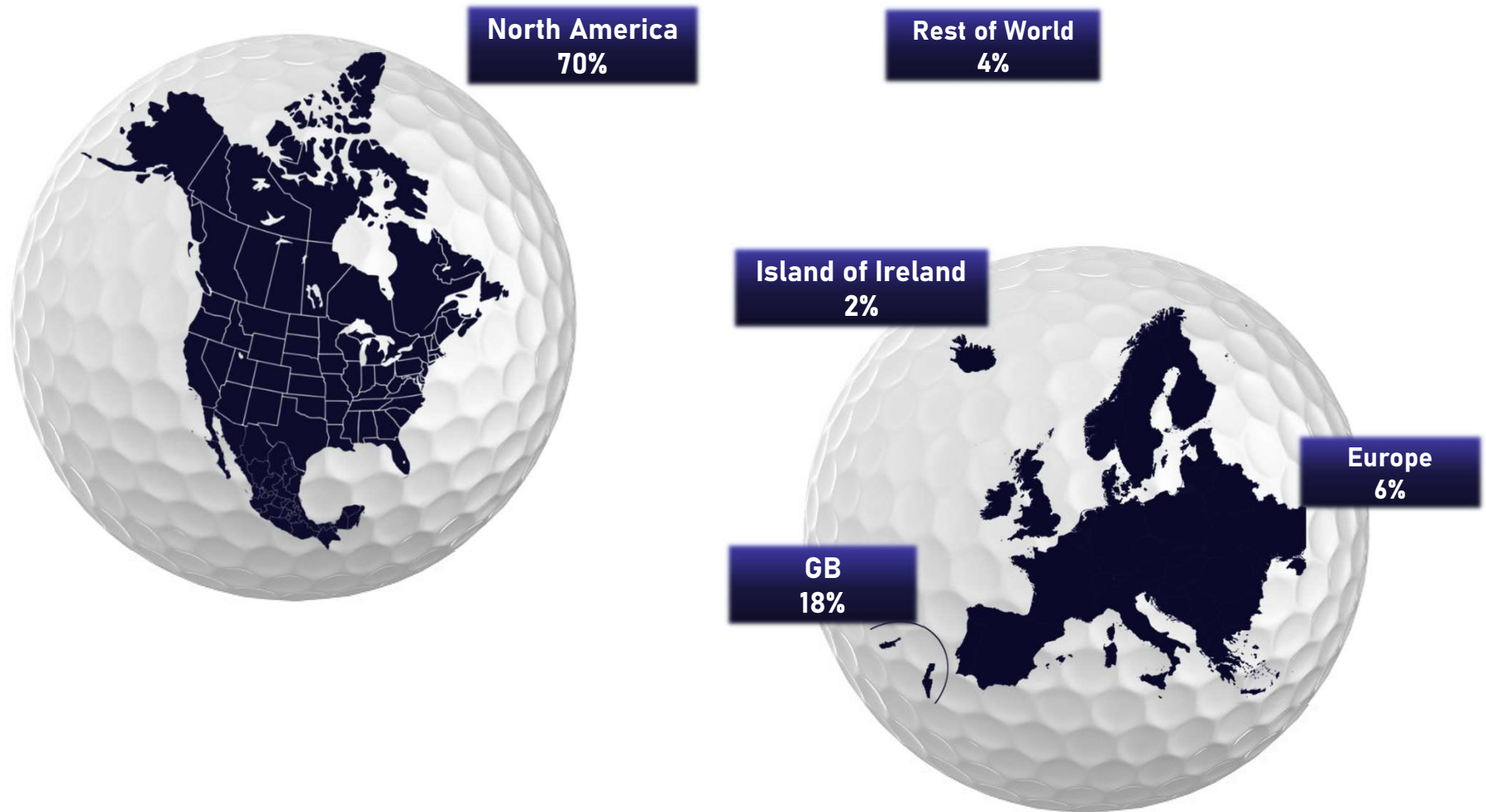
CONSUMER TRENDS AND KEY TAKE OUTS



North American golfers flock to Northern Ireland in 2024

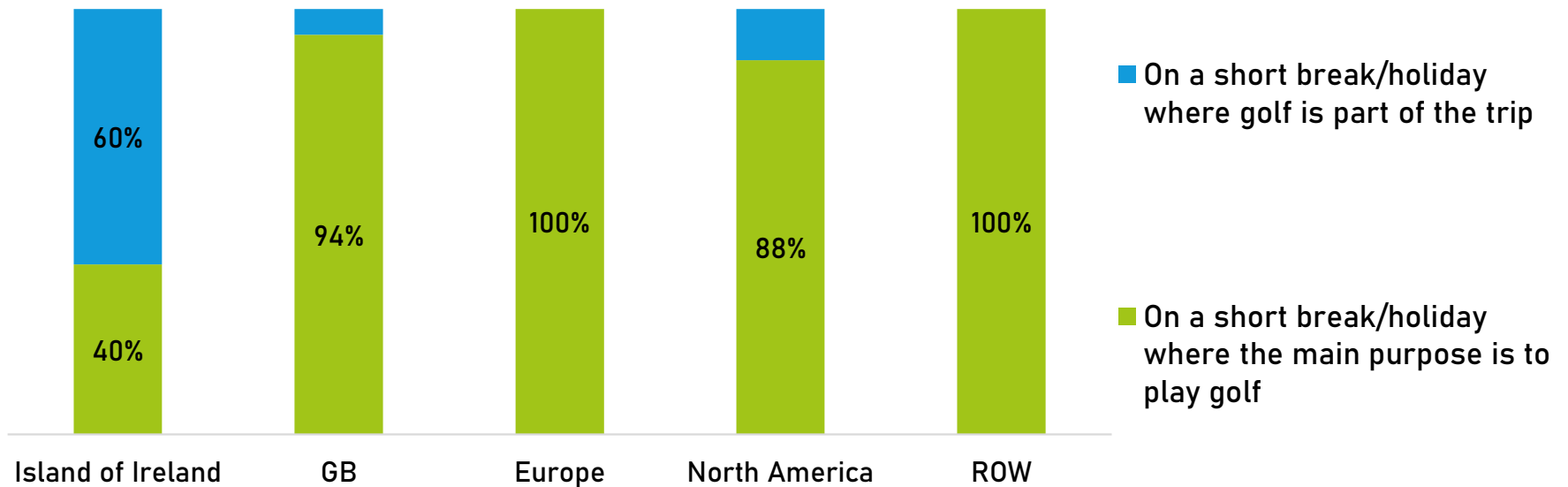
- More than two thirds (70%) of visitors we spoke to came from North America, and around one in five (18%) from GB. For the vast majority, the main purpose of the trip was golf in 2024. Just a few were playing golf as just part of a trip, and these were mainly from North America. On average golfers spent around 9 days on their visit to Northern Ireland.
- Golfers tended to play 5 rounds on different courses during their visit to Northern Ireland and 2 rounds on courses elsewhere. Those from further afield like Australia also played 9 rounds on courses outside of Northern Ireland. Total spend generally rose among golfers, while North American spend remained high.
- The vast majority of golfers rated their experience in Northern Ireland as excellent, and compared to other golfing destinations it is seen as slightly better value for money in 2024 compared to the previous year. As with value, Northern Ireland is also seen as better for enjoyment in 2024 compared to 2023.

CONSUMER FEEDBACK | Where do you live ...



CONSUMER FEEDBACK | Type of break

Q: Which of the following best describes you?

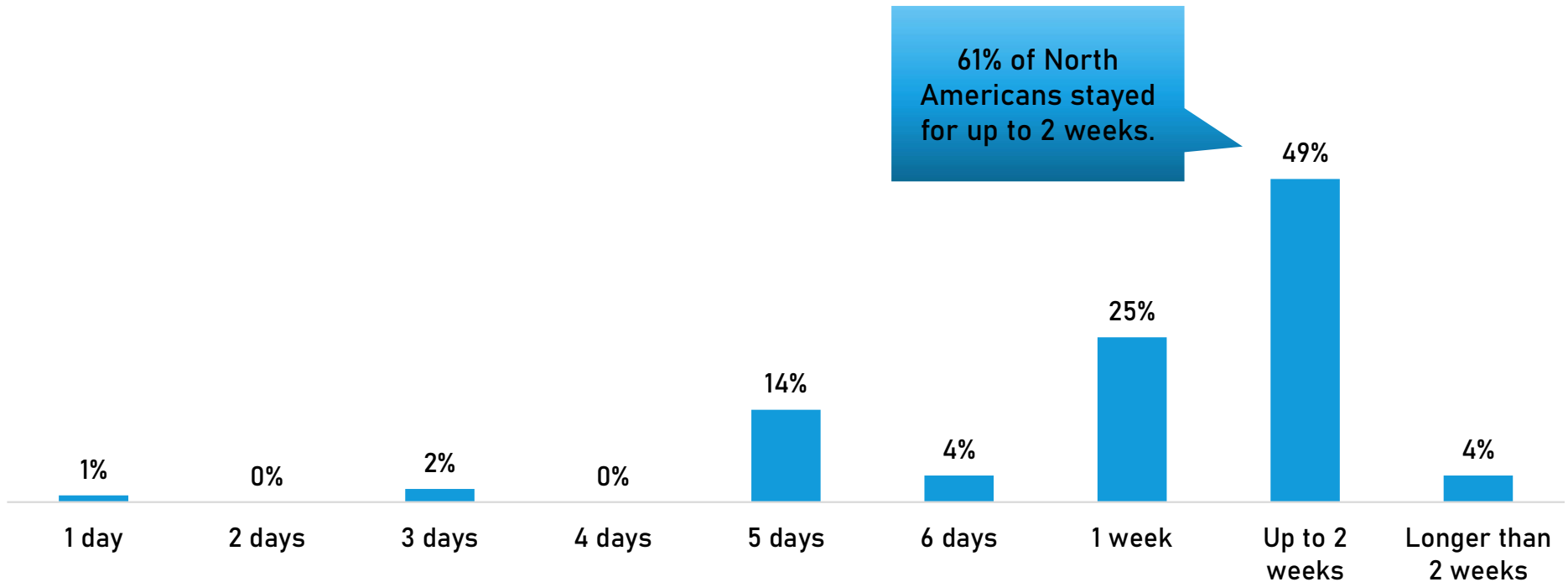


The majority were on a short break or holiday where the main purpose is to play golf, only a few came where golf was just part of the trip.

Base: Overall, 409

CONSUMER FEEDBACK | Break length

Q: How long is this golf break?



The average stay for visitors was around 9 days, nearly two thirds of those visiting from North America spent up to 2 weeks.

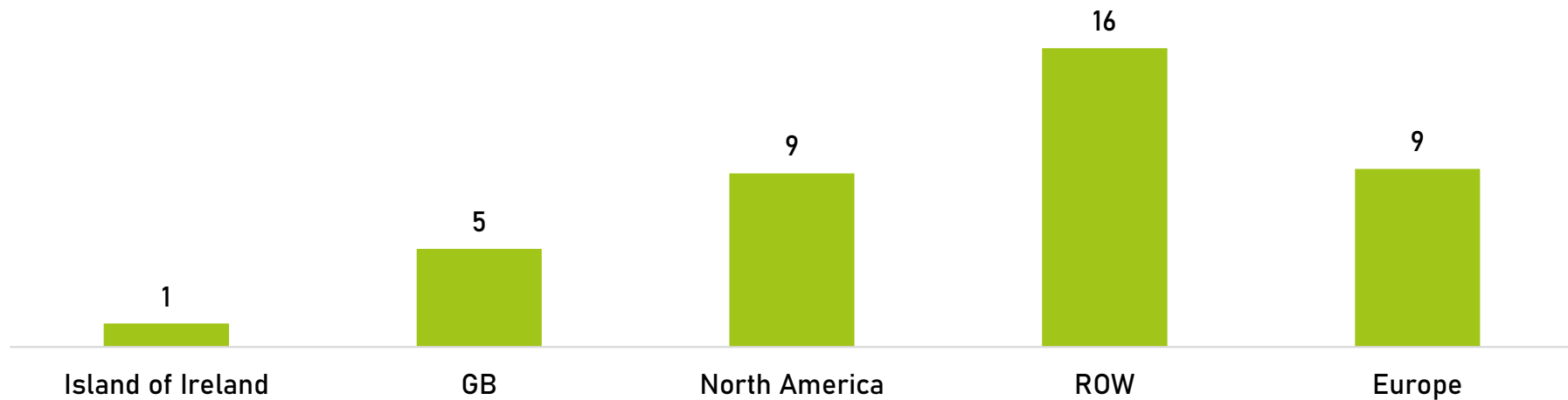
Base: Overall, 409

CONSUMER FEEDBACK | Break length

Q: How long is this golf break?

Chart shows average length in days

North Americans spent an extra day compared to 2023, ROW +2 days and Europeans +3 days



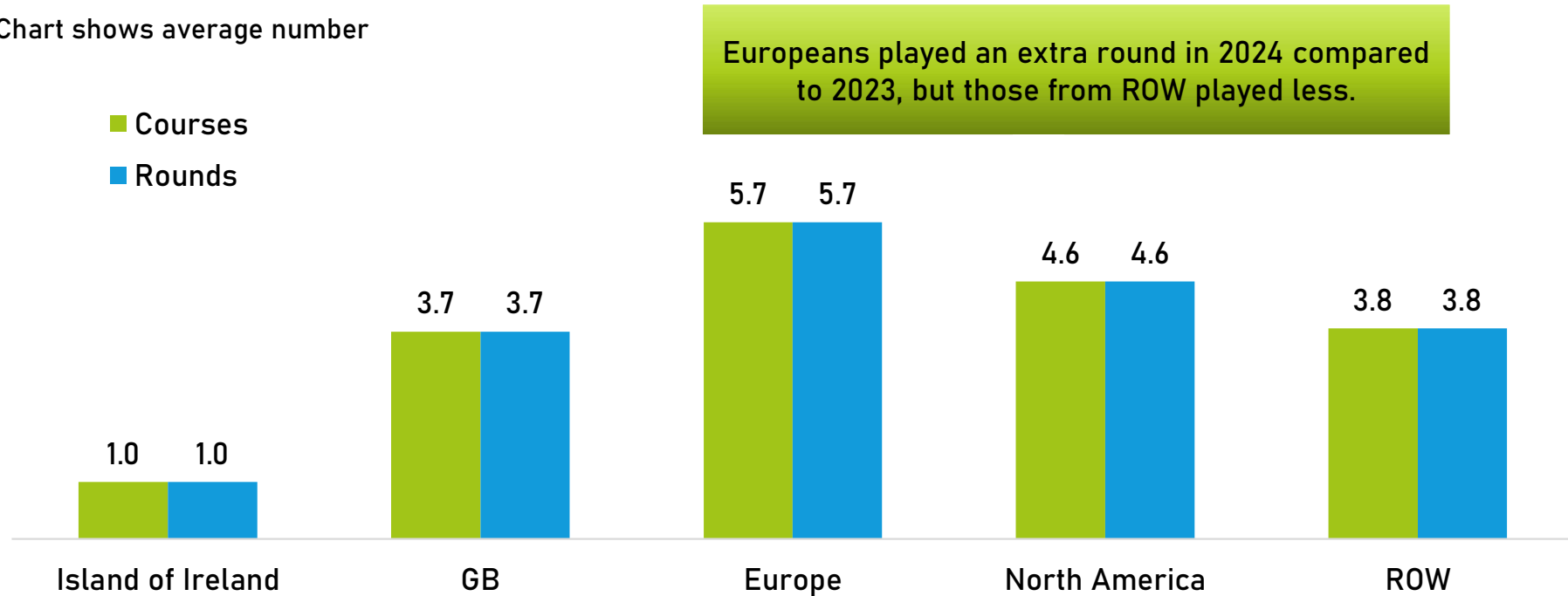
North Americans and Europeans spent on average around 9 days on their golf break, while visitors from further afield spent 16 days.

Base: Overall, 400

CONSUMER FEEDBACK | Rounds & Courses Played NI

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

Chart shows average number



Europeans played an extra round in 2024 compared to 2023, but those from ROW played less.

Visitors from Europe played on average a round at between 5 and 6 courses during their visit, while those from further afield played less in Northern Ireland.

Base: Overall, 409

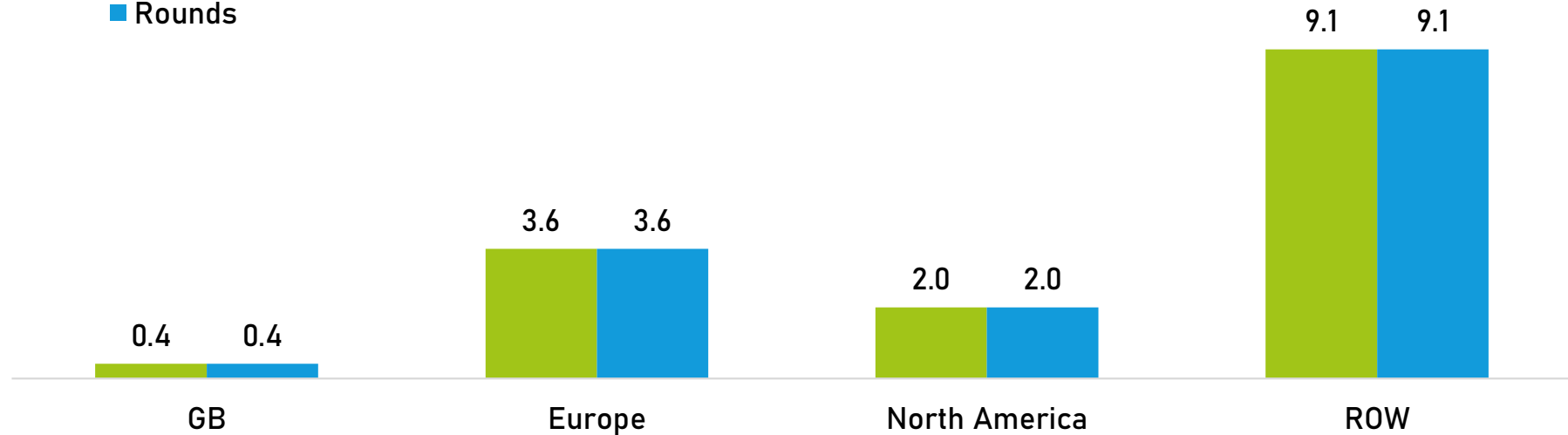
CONSUMER FEEDBACK | Rounds & Courses Played Elsewhere

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

Chart shows average number

- Courses
- Rounds

Those from ROW played more rounds outside of NI in 2024 compared to 2023, while North Americans played less.



Visitors travelling from further afield played a round at on average 9 different courses outside of Northern Ireland.

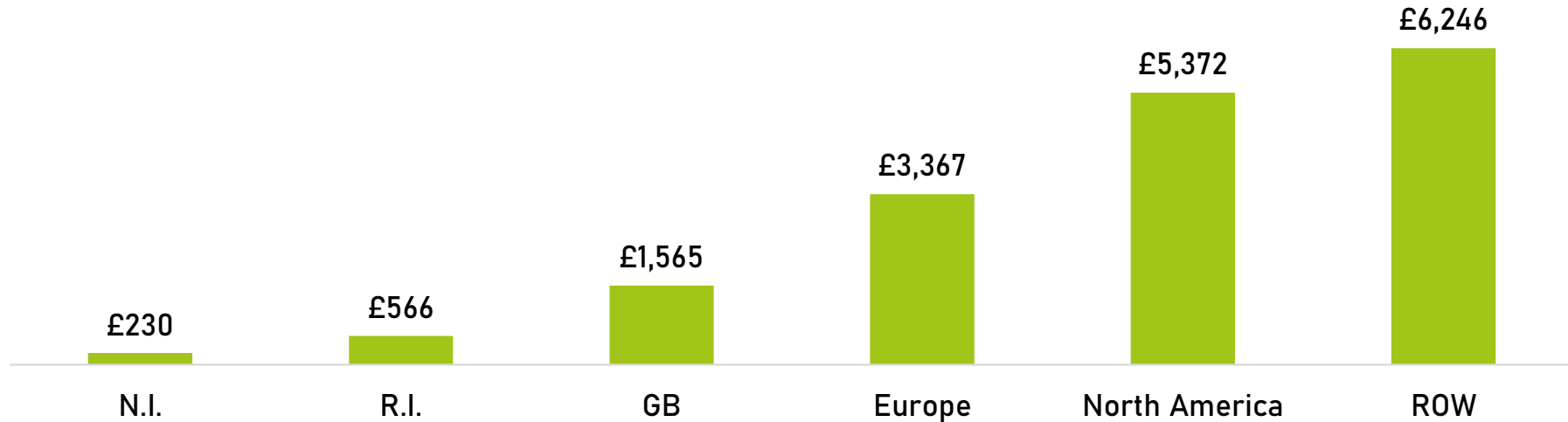
Base: Overall, 406

CONSUMER FEEDBACK | Cost of trip (overnighters)

Q: Please share the cost of your trip to Northern Ireland

Chart shows average total cost in GBP

Average spend in Europe and the rest of the world has risen substantially since 2023.

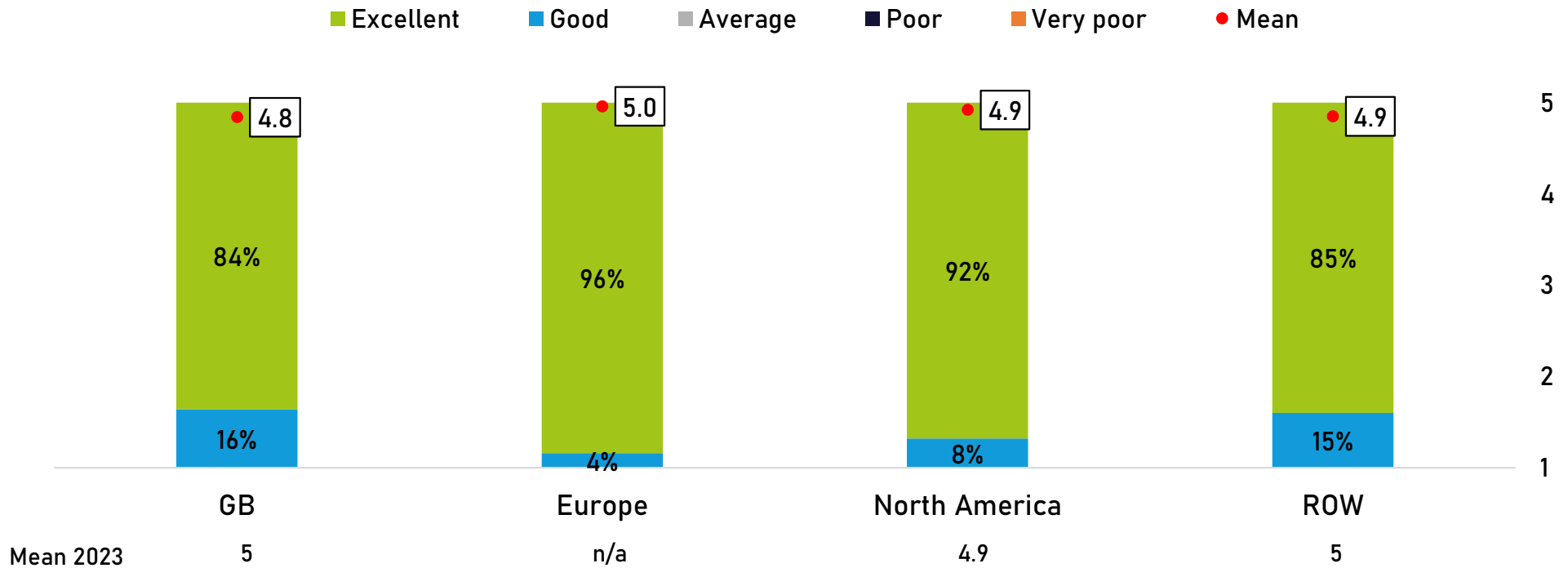


Golf trip spend has risen overall compared to, 2023 especially among visitors from Europe and further afield.

Base: Overall, 397

CONSUMER FEEDBACK | Golf experience

Q: How would you rate your golf experience overall in Northern Ireland?



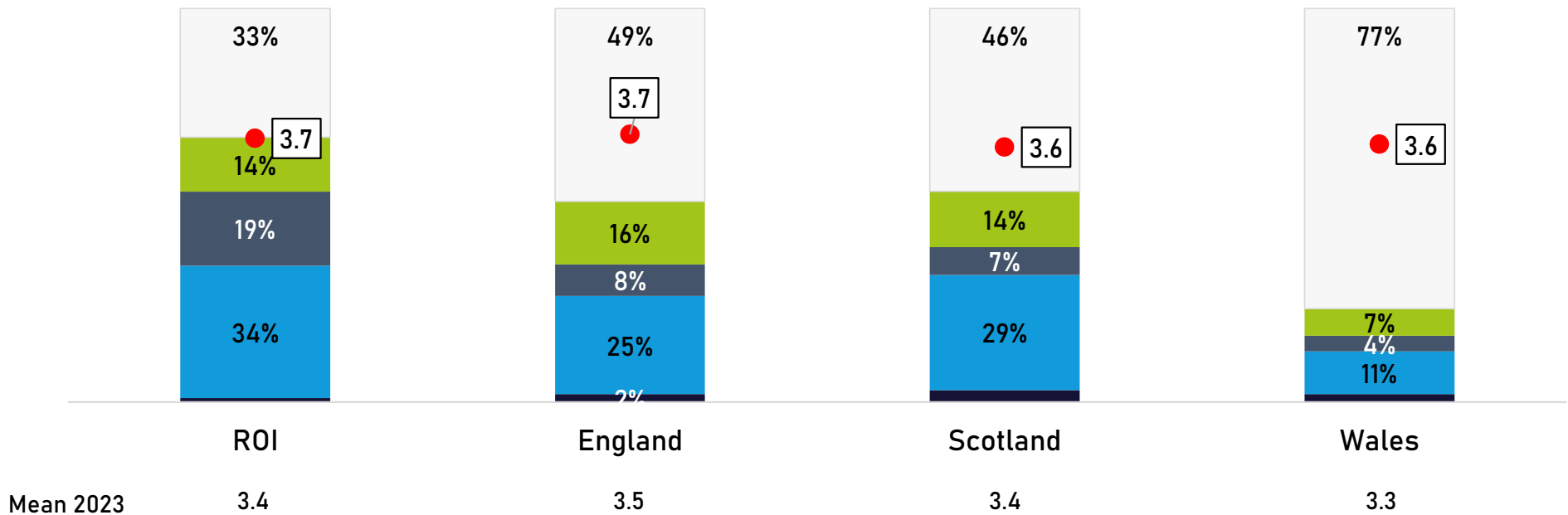
The majority rated their golf experience overall in Northern Ireland as excellent, especially those from Europe.

Base: Overall, 397

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



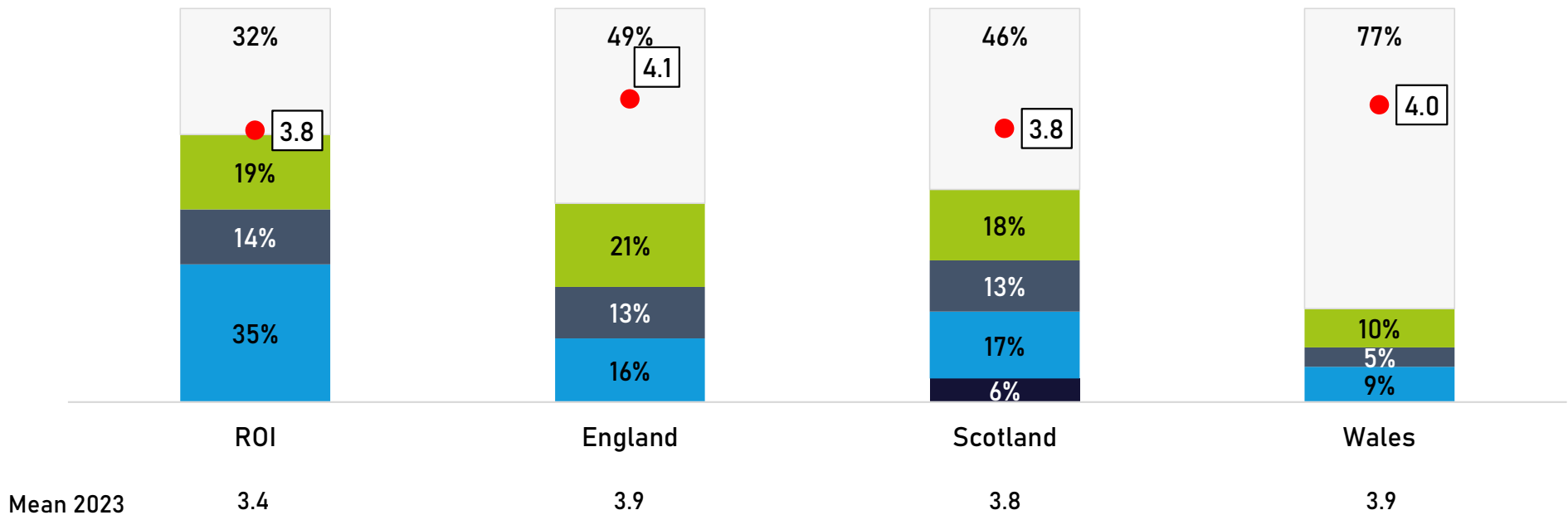
Views on NI value for money compared to other countries rises across the board in 2024 compared to the previous year.

Base: 409

CONSUMER FEEDBACK | NI - Enjoyment

Q: How would you rate the overall enjoyment of a golf break in Northern Ireland 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

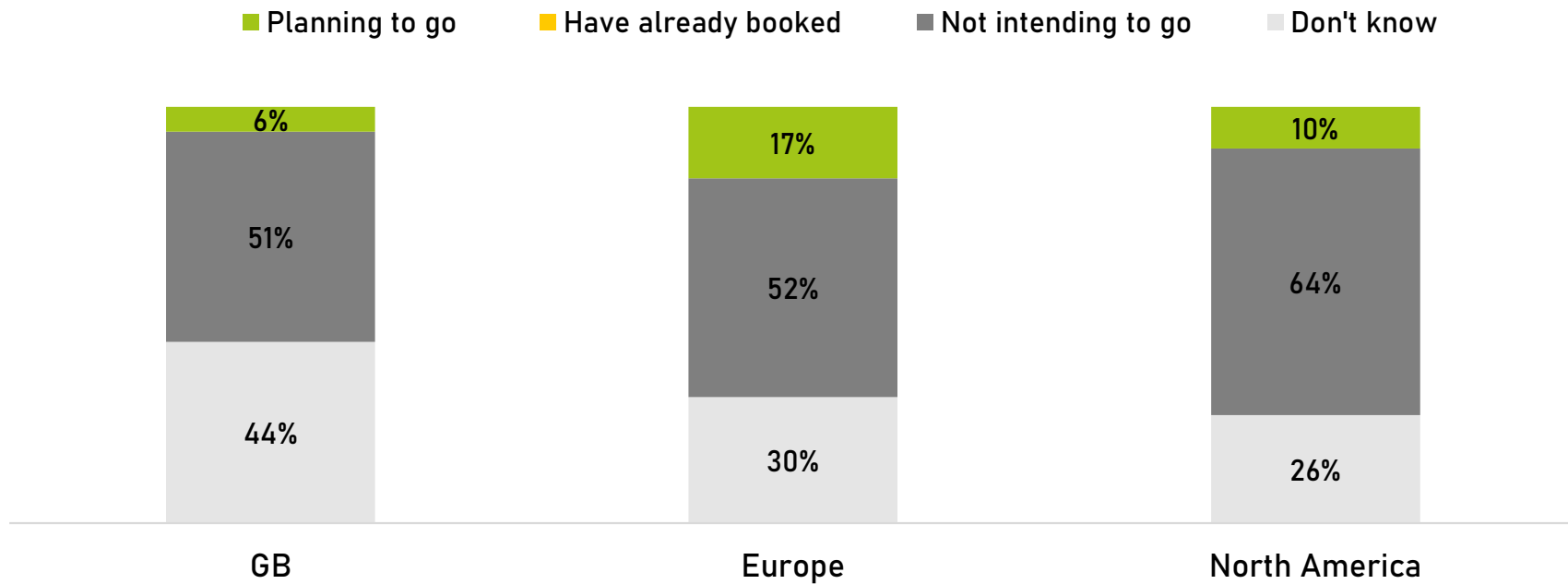


In 2024 enjoyment rises in comparison to other countries in 2024, and remains the same when compared to Scotland as it was in 2023.

Base: 409

CONSUMER FEEDBACK | Open at Portrush in 2025

Q: Are you intending to visit the Open at Portrush in 2025?



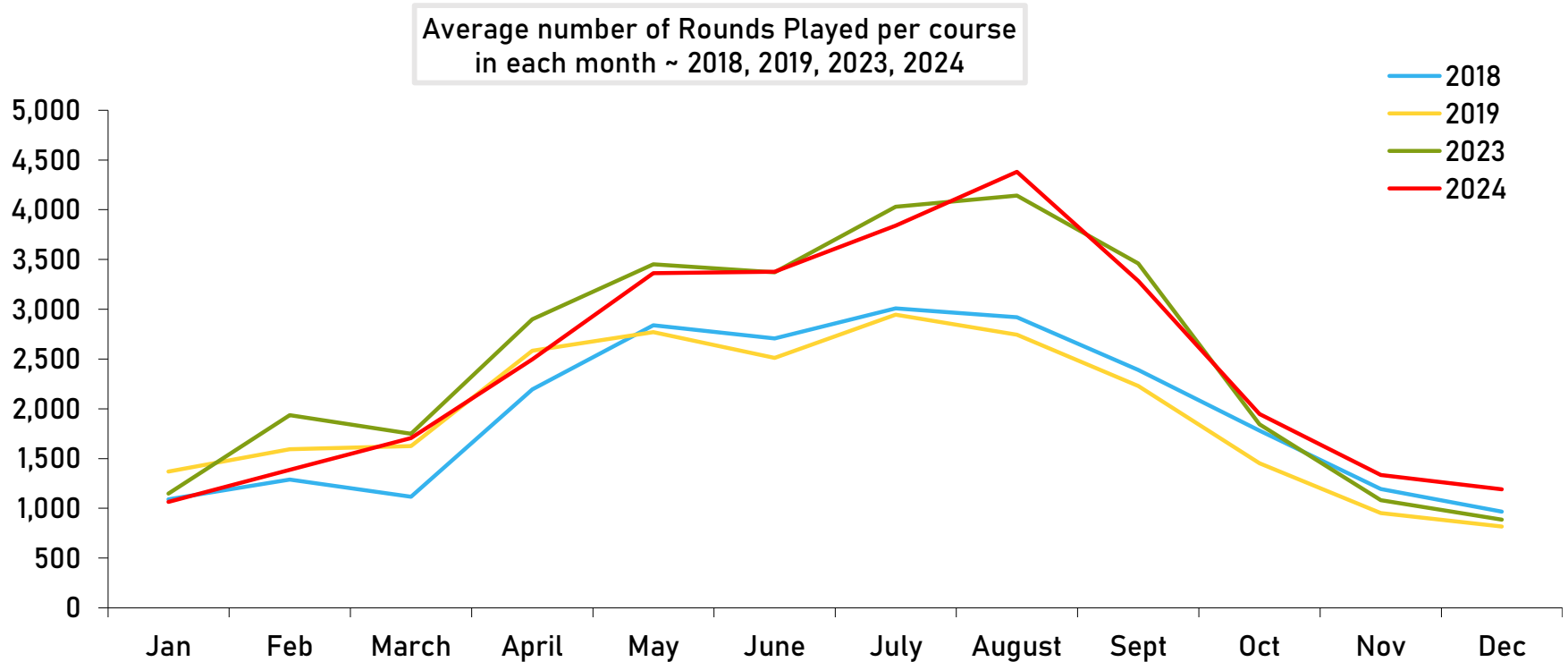
Visitors from Europe are most likely to be planning to go to The Open at Portrush in 2025, with around one in five (17%) saying they are doing so.

Base: 386

APPENDIX - STATE OF GOLF IN GB



STATE OF GOLF IN GREAT BRITAIN



After slower start to 2024 compared to 2023, August reached the highest level of rounds played in that month since 2005; with a continued strong end to the year.

CONTACT DETAILS





32 Frederick Sanger Road
Surrey Research Park, Guildford, GU2 7YD
www.sportinginsights.com
+44 (0)1932 345539

JOHN BUSHELL | JOINT MANAGING DIRECTOR

john.bushell@sportinginsights.com

RICHARD PAYNE | JOINT MANAGING DIRECTOR

richard.payne@sportinginsights.com

DAVID LLOYD | RESEARCH & INSIGHTS MANAGER

david.lloyd@sportinginsights.com

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