Developing and harnessing golf tourism and film tourism as economic drivers

Dr Peter Bolan, Dr Karise Hutchinson
Mr Matthew Kearney

Ulster University Business School
Overview

Golf tourism and film tourism are both highly lucrative and emerging forms of tourism.

Northern Ireland must prioritise and plan strategically to maximise the forms of tourism that are most lucrative and have the greatest momentum and potential at the present time.

These forms of tourism have not been developed and exploited to anywhere near their full potential.

Knowledge Exchange Seminar Series (KESS)
Maximising the economic potential of golf tourism in Northern Ireland
Global Economic Potential

Golf tourism has been valued at some ‘US$20 billion with over 50 million golf tourists travelling the world to play on some of the estimated 32,000 courses’ (Hudson & Hudson, 2010, 3).
Global Potential

Golf is primarily played on 2 distinctly different types of courses: Parkland and Links.

The majority of the world’s 32,000 courses are parkland courses.

According to Peper and Campbell (2010) there are only 246 true links courses in the world (less than 1% of all courses in existence).
Northern Ireland Potential

Golf tourists (especially North Americans) predominantly prefer to play links courses.

Ireland as a whole has 58 links courses 24% of Global total

Northern Ireland has 14 of these 58 links courses 6% of Global total
### Characteristics - Choosing a Golf Destination

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Golfers %</th>
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</thead>
<tbody>
<tr>
<td>Weather/Climate</td>
<td>76</td>
</tr>
<tr>
<td>Price</td>
<td>72</td>
</tr>
<tr>
<td>Location</td>
<td>60</td>
</tr>
<tr>
<td>Resort/Hotel Reputation</td>
<td>49</td>
</tr>
<tr>
<td>Quality of courses</td>
<td>46</td>
</tr>
<tr>
<td>Other area attractions</td>
<td>42</td>
</tr>
<tr>
<td>No. of courses in area</td>
<td>33</td>
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<tr>
<td>Shopping in area</td>
<td>28</td>
</tr>
<tr>
<td>Spa facilities</td>
<td>14</td>
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<tr>
<td>Proximity to airports</td>
<td>10</td>
</tr>
<tr>
<td>Gastronomy</td>
<td>8</td>
</tr>
<tr>
<td>Nightlife/Entertainment</td>
<td>7</td>
</tr>
</tbody>
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Source: adapted from Hudson & Hudson, 2010
Research Methodology

Golf tour operator generated business to our links golf courses to determine economic value.

Questionnaire research conducted with golf tour operators (76 operators across 19 countries)

Questionnaire research conducted with all of our links courses (14 in all)
Interviews with Golf club Secretary Managers and club professionals (6 in total)
Research Methodology

Golf event economic impact study - Irish Open 2012 at Royal Portrush.

Observational research during the tournament, content analysis of social media during the event, and

Questionnaire research conducted with 30 retail-focused SME’s from the north coast region.
Key Findings

Total NI Revenue from Links Golf Tourists is just under £9million (£8,993,171)

5% of NI Golf Clubs produce 64.23% of that revenue

75.48% are golfing ‘purists’, 16.13% are ‘golf and activity seekers’ and 8.39% are ‘corporate clients’

Average group size is 7.16 people spending 7.25 trip nights and play 6 courses in that period
Key Findings

80.91% go for 4 and 5 star accommodation

67.82% are from the US, 19.09% Canadian, 6.95% European, Middle East/Asia/Australasia 6.14%

Busiest month of the year is September (over a quarter of all arrivals), followed by May
Key Findings – Irish Open 2012

Immediate economic impact wasn’t capitalised on – particularly for retail

A huge slice of potential earnings were lost by traders

Why? What were the issues?
Key Findings

Opening hours – total fiasco
Lack of business know-how – not understanding the market
Not fully embracing the event

Visitors not being allowed off course once they had entered
Park and ride scheme taking people away straight after play was over
Summary

Golf tourists coming here are high-spend tourists

Links golf appears to be under valued in terms of its economic contribution

There is an over reliance on the North American market

Air access routes is a highly significant factor in future growth potential
Summary

Capacity issues in September, need to spread the business much more across the year

Lack of a purpose-built golf resort – the loss of the Bushmills Dunes project is extremely detrimental

To maximise event success – we need to learn from mistakes made at the 2012 Irish Open
Film Tourism Potential in Northern Ireland
Economic impact of film in the UK

UK film contributes over £4.6 billion to UK GDP and supports over 117,000 jobs (up from 100,000 in 2009).

Films depicting the UK are responsible for generating around a 10\textsuperscript{th} of overseas tourism revenues, estimating that around £2.1 billion of visitor spend a year is attributable to UK film.

(Oxford Economics, 2012)
NI Focus on FilmTourism
DRACULA
UNTOLD
OCTOBER
Economic impact of film in NI

NI has benefitted from direct production spending of £121 million between 2009 and 2014.

However, the potential tourism impact is much greater and yet has received very little serious attention (with some Game of Thrones initiatives being the one exception).
Research Methodology

Netnography with the Game of Thrones fan-base on a global basis.

Interviews with HBO, Tourism Ireland and various stakeholders involved in Game of Thrones based activities and experiences (including Clearsky Adventures at Castle Ward & McCombs Coach Tours).
Key Findings

The ‘Game of Thrones tourist’ is passionate and demanding in what they seek in terms of tourism experience.

They are escapists searching for an immersive experience that captures some authenticity of ‘Westeros’, its characters and storylines, as well as the scenery, sets, costumes and even food.

They want a themed activity-based experience and are willing to pay for it.
Key Findings

The awareness level that Northern Ireland is the main location is growing amongst the fan base.

Elements of a creative entrepreneurial spirit to cater to these ‘film tourists’ is also growing, but too slowly to leverage maximum potential.

Despite the HBO endorsed NI marketing campaign by Tourism Ireland, promotional efforts overall have been lacking.
Conclusion and Recommendations

A coherent and focused film tourism strategy for NI is urgently required. Opportunities to capitalise on the tourism potential of film and television success here are being missed (reactive rather than proactive).

Likewise, a focused strategy is required urgently for golf tourism in Northern Ireland which must address the key findings outlined from the research here.
Thank you

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Knowledge Exchange Seminar Series (KESS)

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