

#### Knowledge Exchange Seminar Series (KESS)

...is a forum that encourages debate on a wide range of research findings, with the overall aim of promoting evidence-based policy and law-making within Northern Ireland



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.





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).





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#### **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.



Northern Ireland has 14 of these 58 links courses 6% of Global total

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





#### **Characteristics - Choosing a Golf Destination**

Characteristic	Golfers %
Weather/Climate	76
Price	72
Location	60
Resort/Hotel Reputation	49
Quality of courses	46
Other area attractions	42
No. of courses in area	33
Shopping in area	28
Spa facilities	14
Proximity to airports	10
Gastronomy	8
Nightlife/Entertainment	7













#### 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 retailfocused 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

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# 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

#### WINTER IS COMING. BOOK NOW

Jump into Northern Ireland, GAME OF HRONES TERRITORY

# 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<sup>th</sup> of overseas tourism revenues, estimating that around £2.1 billion of visitor spend a year is attributable to UK film.

(Oxford Economics, 2012)













# GAME of HRONES





















# **Economic impact of film in NI**

NI has benefitted from direct production spending of £121million 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).

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## **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.







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#### Thank you

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