

Golf Tourism - Ireland - January 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“With golf club memberships in decline and participation in golf low across Ireland – particularly in RoI – the sport will have to do more to adapt to lifestyles of modern consumers and offer less expensive and time-consuming ways to participate in the game.”
– David Falls, Research Analyst

This report looks at the following areas:

- What is the state of play for golf in Ireland?
- What image do Irish consumers hold of golf?
- What can be done to help attract non-golfing consumers to the game?
- How popular are golfing holidays with Irish consumers?
- What impact could the hosting of high-profile golfing events have on golf tourism?

Golf has assumed greater prominence with regard to tourism over recent years, and while it is a relatively niche segment, is it one of high potential value growth, with spending by golf tourists higher than average tourist expenditure.

Ireland has a strong golfing reputation amongst Irish consumers who participate in the sport; however, such consumers would be more likely to take an overnight trip to spectate at a high-profile golf tournament than to take a holiday just to play golf. Overall, however, data collected for this report indicates that the majority of Irish consumers do not play golf, citing expense and time as key barriers to play. In order to attract more consumers to the game and benefit domestic golf tourism, the sport will have to respond to the pressures faced by modern consumers.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Golf Tourism - Ireland - January 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Introduction

Key themes in the report
 Definition
 Data sources
 Abbreviations

Executive Summary

The market
 Market factors
 Declining golf club memberships
 Less than half of Irish consumer watch golf
 Ireland's portfolio of courses and events helps to position it as key golf destination
 Golf tourism in RoI benefiting from lower costs
 Innovations
 The consumer
 RoI consumers not engaged with golf
 Figure 1: How often consumers play golf, NI and RoI, October 2014
 Fun is the main reason for play, while expense the key barrier
 Figure 2: Reasons why consumers have played golf, NI and RoI, October 2014
 Figure 3: Main reasons why consumers do not play golf, NI and RoI, October 2014
 Irish golfing consumers feel that Ireland has a good reputation for golf
 Figure 4: Agreement with statements regarding golf tourism, NI and RoI, October 2014
 What we think

Issues and Insights

What is the state of play for golf in Ireland?
 The facts
 The implications
 What image do Irish consumers hold of golf?
 The facts
 The implications
 What can be done to help attract non-golfing consumers to the game?
 The facts
 The implications
 How popular are golfing holidays with Irish consumers?
 The facts
 The implications
 What impact could the hosting of high-profile golfing events have on golf tourism?
 The facts

**BUY THIS
 REPORT NOW**

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
 EMAIL: reports@mintel.com

Golf Tourism - Ireland - January 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The implications

Trend Application

FSTR HYPR

Patriot Games

The Nouveau Poor

Market Overview

Key points

Club membership continues to decline

Figure 5: Golf club membership in Ireland, 2004-14

Finances, time pressures and patterns of play likely driving decline

Figure 6: Average cost of household and utility bills and groceries, RoI, December 2013-November 2014

Figure 7: Average number of actual weekly hours of work in main job, full and part-time employees, UK (including NI) and RoI, 2009-13

Decline sharpest amongst juniors

Figure 8: Golf club membership in Ireland amongst men, women and juniors, 2004-14

Irish consumers more likely to watch golf live on TV than at an event

Figure 9: Methods of watching golf over the last 12 months, NI and RoI, November 2013

Irish women and younger consumers in RoI less likely to watch golf at all

Figure 10: Consumers who do not watch golf, by gender and age, NI and RoI, November 2013

Ireland's golf product

Figure 11: Distribution of golf courses and links courses between NI and RoI

Ireland's portfolio of golf events

Figure 12: Notable golf events hosted/to be hosted in Ireland, 2006-19

Developing and marketing Ireland's golf product

Weakening euro a challenge to NI tourism

Figure 13: Value of euro to Pound Sterling, 2005-15

Tourism in RoI enjoying lower tax rates

Market Size

Key points

RoI attracts more non-domestic golfing visitors

Figure 14: Non-domestic golf visitors, NI and RoI, 2010-13

Non-domestic golfing tourists more lucrative

Figure 15: Expenditure by non-domestic golf visitors, NI and RoI, 2010-13

NI reliant on RoI and UK golfers; Britain the key source market for RoI

Figure 16: Country of origin of non-domestic golf visitors to NI, 2013

Figure 17: Country of origin of non-domestic golf visitors to RoI, 2012 and 2013

RoI to benefit from improved air links to core golf source markets

Figure 18: Total number of golfers in core golf markets as identified by Fáilte Ireland, 2014

Strengths and Weaknesses

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Golf Tourism - Ireland - January 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Strengths

Weaknesses

Companies and Innovations

Key points

Innovations

Golf courses interested in super-sized holes

'Golf Bicycles' lead to a quicker round of golf

Crowdsourcing local knowledge helps golfers improve their game

Company profiles

Tourism authorities

Fáilte Ireland

Northern Ireland Tourist Board (Tourism Northern Ireland)

Tourism Ireland

Golf authorities

Confederation of Golf in Ireland

Golfing Union of Ireland

PGA (Irish Region)

Golf tour operators and associations

Ireland Golf Tour Operator Association

Irish Tourism Group

Irish Golf Tours

JD Golf Tours

Links Golf Ireland

SWING (South West Ireland Golf Ltd)

TheGolfPA.com

Golf resorts

Adare Manor

Carton House

Castlemartyr Resort

Druids Glen Resort

K Club

Lough Erne Golf & Hotel Resort

Roe Park

Trump International Golf Links & Hotel, Ireland

The Consumer – How Engaged are Irish Consumers with Golf?

Key points

NI consumers more likely to be engaged with golf

Figure 19: How often consumers play golf, NI and RoI, October 2014

Positive signs for the future of golf in NI, with 16-24-year-olds playing frequently

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Golf Tourism - Ireland - January 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 20: Consumers who play golf once a month or more, by work status, NI, October 2014

Poor outlook for attracting new players to the sport

Figure 21: Agreement with the statement 'I have never played golf and am not interested in playing in the future', by gender and social class, NI and RoI, October 2014

High level of churn amongst the over-45s

Figure 22: Agreement with the statement 'I have played golf in the past – but not in the last year', by gender and age, NI and RoI, October 2014

Overnight golf trips more likely amongst NI consumers

Figure 23: If consumers have taken an overnight trip to play golf in Ireland or abroad in the last 12 months, NI and RoI, October 2014

The Consumer – Drivers and Barriers to Playing Golf

Key points

Fun is the main reason Irish consumers play golf

Figure 24: Reasons why consumers have played golf, NI and RoI, October 2014

Expense the key barrier to play

Figure 25: Main reasons why consumers do not play golf, NI and RoI, October 2014

Figure 26: Agreement with the statement 'It is too expensive' as a reason for not playing golf, by social status, RoI, October 2014

Family and work constraints key barriers to play

Figure 27: Agreement with the statement 'I don't have the time' as a reason for not playing golf, by age of children in household, RoI, October 2014

A third of RoI men don't play due to concern they would not be good

Figure 28: Agreement with the statement 'I am not very good/ don't think I would be good at playing golf' as a reason for not playing golf, by gender and age, RoI, October 2014

The Consumer – Attitudes towards Golf Tourism

Key points

RoI golfers more likely to think Ireland has a good reputation for golf

Figure 29: Consumer attitudes towards golf tourism, NI and RoI, October 2014

Self-employed and retired consumers in NI are more likely find a holiday to just play golf appealing

Figure 30: Agreement with the statement 'Taking a holiday just to play golf appeals to me', by work status, NI, October 2014

Almost half of NI golfing consumers are more interested in taking a golf holiday abroad

Figure 31: Agreement with the statement 'I would be more interested in taking a golf holiday abroad than in Ireland (eg Scotland)', by gender, NI, October 2014

Over half of golfing consumers would take an overnight trip to spectate at a high-profile event

Figure 32: Agreement with the statement 'I would be willing to take an overnight trip to spectate at a high-profile golf tournament/ competition', by work status, NI, October 2014

Over half of golfing consumers would like to visit golf resorts/ destinations featured in televised tournaments

Figure 33: Consumers who agreed with the statement 'Seeing golf resorts/destinations in Ireland featured on televised golf tournaments makes me want to visit them', by gender, NI, October 2014

Appendix

NI Toluna tables

Figure 34: How often consumers play golf, by demographics, NI, October 2014

Figure 35: How often consumers play golf, by demographics, NI, October 2014 (continued)

Figure 36: If consumers have taken an overnight trip to play golf in Ireland or abroad in the last 12 months, by demographics, NI, October 2014

Figure 37: The main reasons why consumers play golf, by demographics, NI, October 2014

Figure 38: The main reasons why consumers play golf, by demographics, NI, October 2014 (continued)

Figure 39: The main reasons why consumers play golf, by demographics, NI, October 2014 (continued)

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Golf Tourism - Ireland - January 2015

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 40: The main reasons why consumers do not play golf, by demographics, NI, October 2014

Figure 41: The main reasons why consumers do not play golf, by demographics, NI, October 2014 (continued)

Figure 42: The main reasons why consumers do not play golf, by demographics, NI, October 2014 (continued)

Figure 43: Agreement with the statement 'Ireland has a good reputation for golf', by demographics, NI, October 2014

Figure 44: Agreement with the statement 'I would be willing to take an overnight trip to spectate at a high-profile golf tournament/competition', by demographics, NI, October 2014

Figure 45: Agreement with the statement 'All the attention on Irish golfers in the last 12 months has made me more interested in the game', by demographics, NI, October 2014

Figure 46: Agreement with the statement 'A golf holiday is not suitable as a family holiday', by demographics, NI, October 2014

Figure 47: Agreement with the statement 'Taking a holiday just to play golf appeals to me', by demographics, NI, October 2014

Figure 48: Agreement with the statement 'I would never travel to a destination just to play golf', by demographics, NI, October 2014

Figure 49: Agreement with the statement 'A golfing holiday would be more expensive than a normal holiday', by demographics, NI, October 2014

Figure 50: Agreement with the statement 'Deal-of-the-day websites (eg Groupon) are good for arranging golf trips', by demographics, NI, October 2014

Figure 51: Agreement with the statement 'Seeing golf resorts/destinations in Ireland featured on televised golf tournaments makes me want to visit them', by demographics, NI, October 2014

Figure 52: Agreement with the statement 'I would be more interested in taking a golf holiday abroad than in Ireland (eg Scotland)', by demographics, NI, October 2014

RoI Toluna tables

Figure 53: How often consumers play golf, by demographics, RoI, October 2014

Figure 54: How often consumers play golf, by demographics, RoI, October 2014 (continued)

Figure 55: If consumers have taken an overnight trip to play golf in Ireland or abroad in the last 12 months, by demographics, RoI, October 2014

Figure 56: The main reasons why consumers play golf, by demographics, RoI, October 2014

Figure 57: The main reasons why consumers play golf, by demographics, RoI, October 2014 (continued)

Figure 58: The main reasons why consumers play golf, by demographics, RoI, October 2014 (continued)

Figure 59: The main reasons why consumers do not play golf, by demographics, RoI, October 2014

Figure 60: The main reasons why consumers do not play golf, by demographics, RoI, October 2014 (continued)

Figure 61: The main reasons why consumers do not play golf, by demographics, RoI, October 2014 (continued)

Figure 62: Agreement with the statement 'Ireland has a good reputation for golf', by demographics, RoI, October 2014

Figure 63: Agreement with the statement 'I would be willing to take an overnight trip to spectate at a high-profile golf tournament/competition', by demographics, RoI, October 2014

Figure 64: Agreement with the statement 'All the attention on Irish golfers in the last 12 months has made me more interested in the game', by demographics, RoI, October 2014

Figure 65: Agreement with the statement 'A golf holiday is not suitable as a family holiday', by demographics, RoI, October 2014

Figure 66: Agreement with the statement 'Taking a holiday just to play golf appeals to me', by demographics, RoI, October 2014

Figure 67: Agreement with the statement 'I would never travel to a destination just to play golf', by demographics, RoI, October 2014

Figure 68: Agreement with the statement 'A golfing holiday would be more expensive than a normal holiday', by demographics, RoI, October 2014

Figure 69: Agreement with the statement 'Deal-of-the-day websites (eg Groupon) are good for arranging golf trips', by demographics, RoI, October 2014

Figure 70: Agreement with the statement 'Seeing golf resorts/destinations in Ireland featured on televised golf tournaments makes me want to visit them', by demographics, RoI, October 2014

Figure 71: Agreement with the statement 'I would be more interested in taking a golf holiday abroad than in Ireland (eg Scotland)', by demographics, RoI, October 2014

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com