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## Knowledge Exchange Seminar Series (KESS)

### ***Developing and harnessing golf tourism and film tourism as economic drivers***

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#### **Abstract**

This presentation explains that golf and film tourism are both highly lucrative and Northern Ireland must develop and plan for them in a more strategic manner. First it outlines findings from an extensive study (utilising surveys, interviews, and observation methods internationally and domestically) by Ulster Business School, which analysed and evaluated the Northern Ireland golf tourism product by focusing on perspectives of golf tourists and specialist golf tour operators with an integral economic impact assessment of the recent Irish Open 2012 at Royal Portrush. The presentation highlights how, if leveraged properly, this high-spend form of tourism can bring job creation, new business development, urban and coastal regeneration, improved quality of hotel/restaurant provision and improved image as a tourist destination. Thereafter the presentation focuses on film tourism, which can also bring enormous opportunities in terms of global destination image as well as economic impact and development. It highlights that there is an urgent need to capitalise on the tourism potential of on-going film productions in Northern Ireland, explaining strategic opportunities for destination development and enhancement based on global online research (netnography) undertaken with the fan-base of Game of Thrones, and further supplemented with analysis of key informant interviews with industry stakeholders which have recently begun Game of Thrones tours and activity based experiences. It concludes outlining new insights that could help to inform new strategic directions for developing Northern Ireland's tourism product in this area.

#### **Introduction**

Our tourism industry and potential in Northern Ireland is currently surging forward to great success. Indeed ever since 2012 we have expanded and diversified what we have on offer and showcased this to the world through many of the great events that we have hosted. Our tourism product here is excellent. In many respects it always has been. We have stunning beaches, dramatic coastlines, breathtaking scenery, iconic heritage sites, great hotels, restaurants and pubs and the list could go on. In the past it wasn't always easy to convince people of that, to get them to see past some of the negative publicity and pay Northern Ireland a visit. Times have changed. We can export that more effectively in the current climate. Tourism here has been gathering pace and if we get it right it can have an incredibly bright future.

In recent years, we've had new visitor attractions (such as Titanic and the visitor centre at the Giant's Causeway), we've hosted major scale events (such as the Giro d'Italia, the Irish Open Golf, the World Police and Fire Games etc) and we've had great sporting success (golf in particular, but also rugby, boxing, rowing, surfing etc). When we start adding all this together there's a definite and very positive image for Northern Ireland and a recipe for tourism success. Where do we go from here though? How do we follow that recipe and use the right mix of those recent successful ingredients to keep the

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momentum moving forward and achieve something truly special in terms of our tourism industry and what that can do for our economy?

Well, there are many factors at play but a key part of future success lies in harnessing and developing those forms of tourism that are highly lucrative (in terms of tourist spend), that have high visibility ie. are especially media friendly, therefore easy to market and promote with the right know-how and something that potential tourists are interested in and likely to respond to very strongly and that will add value to our traditional tourism product. On a global basis two such forms of tourism that many other countries have used to great success, are golf tourism and film tourism (Hudson & Hudson, 2010, Bolan et al. 2011). Northern Ireland couldn't be better placed to capitalise on exactly those two forms of tourism right now. Golf tourism and film tourism are both highly lucrative forms of tourism that we must develop and plan for in a more strategic way.

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). Northern Ireland is in a prime position to capture a larger slice of this lucrative market due to an excellent golf product in terms of courses and venues, the extremely high profile of the country's top golfers (boosted yet further by Rory McIlroy's recent wins at The Open and the US PGA) and an ever-increasing portfolio of events (particularly the return of the Open as early as 2019). Golf tourists typically spend 2-3 times as much as many other forms of tourist and can be more frequent travellers than many other forms of tourist (Gelan 2003, Harris & Lepp, 2011). Northern Ireland's media profile in relation to golf is huge right now and there is tremendous momentum (Bolan & Cotter, 2014).

Our creative industries (particularly film and television) are flourishing. Film tourism or screen tourism can also bring enormous opportunities in terms of global destination image as well as economic impact and development (£2.1 billion of visitor spend/year in the UK is already attributable to the influence of film, according to Oxford Economics, 2012). With hugely successful shows made right here such as Game of Thrones (currently shooting its 5<sup>th</sup> season in Northern Ireland) and major feature films like Universal's Dracula Untold (getting its cinematic release in October), there is an urgent need to capitalise on the tourism potential of these productions. They have already brought a strong economic impact from the film-making and production itself but they showcase Northern Ireland and its scenery to vast global audiences and so the tourism spin-off is arguably much greater still.

The Game of Thrones (GOT) fans are already coming to our shores and we've now seen the entrepreneurial spirit here seize that opportunity. Clearsky Adventures at Castle Ward (Winterfell in the show) with their GOT themed archery and other activities, McCombs Coach tours with their GOT location tour around the province are just two of the highly successful examples. We need more of that, all fitting within an overall film tourism strategy for Northern Ireland. Tourism Ireland launching their GOT marketing campaign back in March 2014 (with HBO endorsement) was an excellent start but it can't just be one-off campaigns and it can't only focus on Game of Thrones. A full film tourism strategy for the future is a must to achieve proper success in this arena in the way that VisitBritain have done for GB and that Tourism NZ have done for New Zealand. This form of tourism also allows Northern Ireland to create a new image, a new brand in a sense, if tapped into wisely.

## Research – Golf Tourism

Research examined the previously unexplored field of golf tour operator activity on Northern Ireland's links golf courses, to determine its economic value. Detailed questionnaires provided comprehensive economic data and further evidence from operators and golf courses support these. Questionnaire research was conducted with golf tour operators (76 operators across 19 countries). Questionnaire research was also conducted with all of Northern Ireland's links courses (14 in all). This was followed by in-depth interviews with Golf club Secretary Managers and club professionals (6 in total). A golf event economic impact study was also carried out around the Irish Open 2012 at Royal Portrush (a significant milestone in golf terms for Northern Ireland). Observational research was conducted during the tournament, content analysis of social media during the event and a survey conducted post-event 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

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- 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
- 80.91% of these golf tourists 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

With regard to the Irish Open 2012 (in Portrush) despite some hugely significant positives, there were a number of negatives that need to be seriously addressed:

- Immediate economic impact wasn't capitalised on, particularly for retail
- A huge slice of potential earnings were lost by traders
- Opening hours were a huge issue. Too many businesses were closed when there was increased footfall during the evening (when play had ended for the day)
- There was a distinct lack of business know-how – not understanding the market
- Not enough local businesses embraced the event
- Visitors not being allowed off course once they had entered did create issues
- Park and ride scheme taking people away straight after play was over was also seen to be negative for local businesses

Overall, these findings quantify, for the first time, the significant revenues that Northern Ireland's links courses generate annually from international visitors and dispel all previous estimates of golf generated revenue estimates for Northern Ireland as overly conservative. Golf tour operators play a noteworthy role in delivering high spending golfers to Northern Ireland, particularly North Americans, on whom there is an apparent over-reliance. In relation to the recent Irish Open 2012, whilst there were great positives (record spectator numbers, record global viewing figures in television etc) there were very clear mistakes made which resulted in substantial revenue spend being lost by businesses within the region. This needs to be addressed for the forthcoming Irish Opens at Royal County Down (2015) and Lough Erne Resort (2017) but even more so for the return of The Open in 2019 where it would be a travesty if such potential was lost on a tournament of that scale and significance.

In addition, other factors which require serious and urgent attention if golf tourism is to be properly developed include air access routes. At the moment these do not connect well to even the most substantial source of golf tourists (ie. North America) never mind world regions of future potential such as elsewhere in Europe and particularly Asia. The lack of a purpose-built golf resort is also a factor that needs to be addressed. The now potential loss of the Bushmills Dunes project on the north coast is extremely detrimental to future development of golf tourism overall in Northern Ireland. This should not have been delayed and allowed to falter. The resort would have been a catalyst for golf tourism growth in a huge way. It would have given Northern Ireland 6 links courses all within a 25 mile stretch of coastline (from Castlerock at one end to Ballycastle at the other). That is a phenomenal USP that nowhere else in the world can offer in golfing terms. For this to be allowed not to happen shows the world that we are not that serious after all about developing as a tourist destination.

Having said this, if these aspects are fully addressed and leveraged properly, this high-spend form of tourism can bring job creation, new business development, urban and coastal regeneration, improved quality of hotel/restaurant provision and improved image as a tourist destination. However, we need to seize that huge potential and maximise it fully. It's there for the taking, but we have to get it right.

## Research – Film Tourism

Research focused on Game of Thrones in particular and from a methodological perspective employed the use of netnography with the Game of Thrones fan-base on a global basis. This was further supplemented with in-depth

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interviews conducted 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 awareness level that Northern Ireland is the main location is growing amongst the fan base.
- 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.
- Elements of a creative entrepreneurial spirit to cater to these 'film tourists' is growing, but too slowly to leverage maximum potential (all too reactive rather than proactive).
- Despite the HBO endorsed NI marketing campaign by Tourism Ireland, promotional efforts overall have been lacking with regard to this form of tourism.

Overall, these findings portray enormous potential for Northern Ireland in relation to film tourism and Game of Thrones in particular. Awareness has been growing that Northern Ireland is the main filming location featured in the show (something of an issue previously where the fan-base was not aware of the Northern Ireland connection). The Game of Thrones tourist is passionate in their interest of the locations and their desire to travel to them. They are demanding however and expect an authentic quality experience related to the show that has influenced them. As such, we cannot have these film tourists come to Northern Ireland and merely look at scenery. As spectacular and dramatic as much of our scenery is, these tourists want something more tangible. We have pockets of good practice addressing this already in relation to Clearsky Adventures and McCombs coach tours but we need much more of this coming through from the private sector and much more strategic direction and evidence of creative and proactive thought coming through from our tourism bodies who thankfully are at least at the table on film tourism now, but have arrived at the table somewhat late.

## Conclusion

There is huge momentum for Northern Ireland with both golf and film tourism at this moment in time. However, this has to be leveraged properly for our tourism industry and our overall economy to benefit. Research into these areas in a Northern Ireland context is very much in its infancy. We need effective and detailed strategies developed and put in place to grow these lucrative forms of tourism further. Not just maximise current momentum but actually nurture and develop something truly significant that can be carried forward and continue to grow in a sustainable way. Then we really will have added value to our already excellent tourism product and helped create a real growth industry here for the future.

Our work presented here provides evidence of the potential value of both golf and film tourism as drivers to the economy. Moving forward, both are core to the place identity of Northern Ireland and if effectively developed at strategy level which is then delivered upon at local and regional level these forms of tourism will sit as key economic drivers alongside financial services and other key business focused industries and sectors. There are a number of recommendations and suggestions for future research and consultancy relating to these aspects which can be explained and discussed further during the question/discussion period following this presentation.

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