

# **Golf Tourism Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Service Type (Personal Tours, Professional Tours), By Application (Domestic, International), By End User (Male, Female), By Region, By Competition, 2019-2029F**

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## **Abstracts**

Global Golf Tourism Market was valued at USD 23.14 Billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 7.4% through 2029. Golf has experienced a surge in popularity across various levels, driving a notable expansion in the global market. Factors such as the proliferation of domestic and international tournaments, substantial investments in sporting infrastructure, and a rising number of professional and amateur players worldwide have fueled this growth. Governments and sports organizations are actively promoting golf, organizing tournaments, and investing heavily to attract players and boost local economies. An example of this is the Canadian Federal Government's pledge in August 2022 to invest USD 4.4 million in Golf Canada's CP Women's Open and RBC Canadian Open. This funding aims to encourage golf participation, stimulate economic benefits, and attract tourists to the region. However, the industry faced setbacks due to the pandemic, with a significant decline in golf tourism and international travel, resulting in substantial financial losses globally. Despite these challenges, the sector is poised for significant growth driven by increasing interest in outdoor sports events, government initiatives to promote sports tourism, and a rising number of young golf enthusiasts. This presents opportunities for tour operators to explore new markets. Moreover, government support for the industry, coupled with efforts to promote sports holiday destinations, is expected to further fuel expansion and contribute to economic growth. Given the widespread popularity and future growth potential of

golf, governments worldwide are keen to capitalize on the industry's opportunities and maximize its economic benefits.

## Key Market Drivers

### Growing Affluence of Individuals

The growing affluence of individuals globally stands out as a pivotal driver behind the burgeoning golf tourism market. Economic development in various regions has led to an expansion of the middle and upper classes, resulting in increased disposable income among consumers. As a consequence, a larger segment of the population now possesses the financial capacity to engage in recreational and leisure activities. Golf, once considered an exclusive sport for the elite, has become more accessible to a broader demographic, contributing to a rising interest in golf tourism. The ability of more individuals to afford golf-related expenses, including travel, accommodation, and green fees, has propelled the industry forward.

Moreover, the increasing affluence of individuals has shifted consumer preferences towards experiences over material possessions. Golf, as a leisure activity, aligns well with this trend, offering not just a game but an entire experience. The appeal of golf extends beyond the sport itself to the amenities and luxurious settings provided by golf resorts and destinations. This evolving consumer behavior, driven by economic prosperity, has significantly fueled the demand for golf tourism on a global scale.

### Rising Trend in Leisure Spending

A second major driver of the global golf tourism market is the rising trend in leisure spending. As individuals experience an improvement in their financial well-being, there has been a notable shift in how discretionary income is allocated. Modern consumers increasingly prioritize experiences that contribute to their overall well-being and create lasting memories. Golf tourism has positioned itself as an ideal choice within this evolving landscape of leisure spending.

Golf resorts and destinations have adapted to this trend by transforming the traditional golf experience into a comprehensive leisure package. Beyond offering world-class golf courses, these destinations now provide luxurious accommodations, fine dining options, and spa facilities, creating a holistic and immersive experience for travelers. The emphasis on providing a complete leisure package caters to the evolving preferences of consumers who seek more than just a game; they desire an

enriching and luxurious experience, making golf tourism a favored choice in the realm of leisure spending.

### Search for Unique and Memorable Experiences

The search for unique and memorable experiences has emerged as a significant driver in the global golf tourism market. In an era where individuals increasingly prioritize experiences over possessions, golf tourism has capitalized on the demand for distinctive and enriching activities. Golf resorts and destinations have evolved to offer a diverse range of courses, each with its own character, challenges, and scenic surroundings.

Golf enthusiasts are drawn to the opportunity to play on iconic courses or in picturesque settings, seeking novelty and excitement in their golfing experiences. The ability to explore different destinations with distinct golf courses adds a layer of diversity and adventure to the overall travel experience. This driver taps into the human desire for exploration and the creation of lasting memories, making golf tourism an attractive option for those seeking not just a game of golf, but a unique and memorable journey. The availability of golf packages that combine access to renowned courses with accommodation, dining, and other recreational activities further enhances the overall experience. Golf tourists are enticed by the prospect of not only honing their skills on well-known courses but also immersing themselves in the culture and beauty of the destination, thereby elevating the entire travel experience beyond the confines of the golf course.

### Corporate and Group Outings

Corporate and group outings represent another significant driver for the global golf tourism market. Recognizing the value of golf as a networking and team-building activity, many businesses opt for golf-centric destinations for corporate events and retreats. Golf resorts cater to this demand by offering specialized packages that include meeting facilities, golf tournaments, and various recreational activities.

The combination of business and leisure has become increasingly popular, as corporations view golf destinations not only as a place for professional engagements but also as a unique venue for team-building exercises. The serene and scenic environments of golf resorts provide an ideal setting for fostering camaraderie and building relationships among employees or business partners.

This driver not only contributes to the overall growth of golf tourism but also diversifies the consumer base. While individual travelers may seek golf destinations for personal leisure, corporate and group outings bring a different dimension to the market. The inclusion of business-related activities positions golf tourism as a versatile and attractive option for a wide range of consumers, further solidifying its status as a thriving industry.

## Key Market Challenges

### Economic Uncertainty

One of the primary challenges faced by the golf tourism market is the impact of economic uncertainty on consumer spending. Economic downturns or recessions can lead to reduced disposable income, causing individuals to cut back on leisure activities, including golf tourism. The high costs associated with golf trips, including travel, accommodation, and green fees, make the market particularly susceptible to economic fluctuations. As a result, the industry must adapt to economic uncertainties and find ways to appeal to a diverse range of consumers across different income brackets.

### Seasonal Nature of Golf Tourism

Golf tourism is inherently seasonal, with many destinations experiencing peak and off-peak seasons based on weather conditions. This seasonality poses a challenge for businesses operating in the industry, as they must contend with fluctuations in demand and revenue throughout the year. Destinations that rely heavily on a specific time of the year for golf tourism may struggle to maintain consistent profitability during off-peak periods. To overcome this challenge, diversification of offerings, such as hosting events, conferences, or other activities during the offseason, becomes crucial for sustaining business operations.

### Environmental Concerns

The environmental impact of golf courses and the travel associated with golf tourism is a growing concern. Golf courses require significant amounts of water and maintenance chemicals, leading to environmental degradation and concerns about sustainability. Additionally, the carbon footprint associated with air travel to golf destinations contributes to climate change concerns. The industry needs to address these environmental challenges by adopting sustainable practices, promoting eco-friendly golf

course management, and exploring ways to reduce the overall carbon footprint of golf tourism.

### Competition from Non-Golf Destinations

The global tourism landscape is highly competitive, with travelers having a plethora of options beyond golf-centric destinations. Traditional golf tourism markets face increasing competition from non-golf destinations that offer diverse attractions and experiences. To remain competitive, golf tourism destinations must enhance their overall tourism infrastructure, including entertainment, cultural offerings, and recreational activities. Marketing strategies should emphasize the destination's appeal beyond golf to attract a broader range of tourists.

### Changing Demographics and Preferences

Demographic shifts and evolving consumer preferences pose a challenge for the golf tourism market. Younger generations may have different interests and priorities, and the industry needs to adapt its offerings to cater to a changing demographic landscape. This includes incorporating technology, creating more social and inclusive golf experiences, and reevaluating traditional golfing norms. Failure to address these changing preferences may result in a declining interest in golf tourism among newer generations.

### Infrastructure and Accessibility

The success of golf tourism is closely linked to the accessibility and quality of destination infrastructure. Some destinations may face challenges in developing and maintaining world-class golf courses, accommodation facilities, and transportation networks. Insufficient infrastructure can deter potential visitors, limiting the growth of golf tourism in certain regions. Investment in infrastructure development and improvements in accessibility are essential to unlock the full potential of golf tourism in emerging markets.

### Key Market Trends

#### Rise of Experiential Travel

In recent years, there has been a notable shift in consumer preferences towards experiential travel. Golf tourism is no exception, as travelers seek more than just a

round of golf. They are increasingly looking for immersive experiences that go beyond the course, including cultural excursions, culinary adventures, and interactions with local communities. Golf destinations are responding by diversifying their offerings to provide a well-rounded experience, creating a blend of golf and local cultural attractions to cater to the evolving preferences of modern travelers.

### Technology Integration

Technology is playing a pivotal role in enhancing the overall golf tourism experience. From online booking platforms to mobile apps providing real-time course information and interactive maps, technology is making it easier for golf enthusiasts to plan and enjoy their trips. Virtual reality (VR) and augmented reality (AR) are also being leveraged to offer virtual golf course tours, allowing prospective visitors to explore courses before making travel decisions. This tech integration enhances convenience, accessibility, and engagement, contributing to an enriched golf tourism experience.

### Emergence of Golf Cruises

Golf cruises have gained popularity as a unique way for golf enthusiasts to combine their love for the sport with a cruise vacation. These specialized cruises offer onboard golf simulators, professional instruction, and exclusive access to some of the world's most renowned golf courses at various ports of call. Golf cruises cater to a growing segment of travelers seeking a seamless blend of luxury cruising and golfing, providing a unique and convenient way to experience multiple courses in different destinations without the hassle of changing accommodations.

### Sustainable Golf Tourism

Sustainability has become a key focus in the travel industry, and golf tourism is no exception. Environmental concerns associated with

high golf course maintenance and travel are prompting destinations to adopt more eco-friendly practices. This includes implementing sustainable course management, water conservation initiatives, and promoting responsible tourism. Golf resorts and courses that demonstrate a commitment to environmental stewardship are increasingly appealing to environmentally conscious travelers, contributing to a positive image and long-term sustainability of golf tourism.

### Growth of Golf Events and Tournaments

The hosting of major golf events and tournaments has a significant impact on golf tourism. Destinations that host prestigious tournaments attract a global audience and experience a surge in golf tourism as enthusiasts flock to witness the events and play on the same courses. The association with high-profile tournaments enhances the visibility and reputation of golf destinations, creating a positive economic impact. As a result, more destinations are investing in golf facilities and infrastructure to position themselves as hosts for prominent golf events.

### Focus on Wellness and Health Tourism

Wellness tourism is a rapidly growing segment, and golf tourism is tapping into this trend by positioning itself as a wellness-oriented activity. Golf is recognized for its physical and mental health benefits, and destinations are promoting golf tourism as a holistic wellness experience. Resorts and courses are incorporating wellness amenities such as spa facilities, fitness centers, and healthy dining options, attracting travelers seeking a well-rounded and health-conscious vacation.

### Segmental Insights

#### Application Insights

In 2023, the domestic application segment retained the largest share of total revenue, maintaining its dominance, and is expected to continue leading in the upcoming years. Concerns regarding the pandemic have led businesses to prioritize domestic travel in their marketing strategies and target market approaches. Government development programs and substantial investments in sports infrastructure, including playing fields, stadiums, sports clubs, and access to sporting goods for golfers, have significantly contributed to the growth of this segment. Over the projected period, the international segment is forecasted to experience the fastest Compound Annual Growth Rate (CAGR). Increasing government initiatives and the growing number of golfers traveling to other countries are fostering the popularity of golf as a sport in developing nations, driving market expansion. Several nations are promoting international tours to attract new golfers. For instance, the World Junior Golfing Championship, initiated in June 2022 by the DP World Tour and The British Junior Golf Tour (BJGT), aims to encourage young golfers by providing them with the opportunity to participate in a top-tier international tournament.

### Regional Insights

In 2023, North America dominated the market due to the increasing presence of professional golf tours and tournaments, coupled with a growing number of domestic and international golfers frequenting U.S. golf courses. The International Association of Golf Tour Operators (IAGTO) has highlighted the substantial growth potential of the U.S. market, projecting it to become an appealing destination for global golf enthusiasts. In response, U.S. sports authorities and associations are launching significant initiatives, viewing sports, particularly golf, as a vital avenue to revitalize the country's tourism sector. These efforts are poised to further bolster the regional market in the years ahead.

### Key Market Players

Golfasian Co., Ltd.

Premier Golf Tours Pty. Limited

The Haversham & Baker Company

Perry Travel Inc (DBA PerryGolf)

Carr Golf & Corporate Travel Limited

Palatinate Group Limited

SGH Golf Inc.

Golfbreaks Ltd.

Golf Tours International Ltd

Scottish Golf Holidays Inc.

### Report Scope:

In this report, the Global Golf Tourism Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:



Golf Tourism Market, By Service Type:

Personal Tours

Professional Tours

Golf Tourism Market, By Application:

Domestic

International

Golf Tourism Market, By End User:

Male

Female

Golf Tourism Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Golf Tourism Market.

### Available Customizations:

Golf Tourism market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

#### Company Information

Detailed analysis and profiling of additional market players (up to five).

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- 14.1.10. Scottish Golf Holidays Inc.
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  - 14.1.10.6. Key Management Personnel

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- 15.1. Key Focus Areas
- 15.2. Target By Service Type
- 15.3. Target By End User

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