

GOLF

Definition

Golf tourism is the term used to describe trips undertaken by persons for which the main purpose is to play golf. Golf may also be pursued as a secondary activity (for example, someone on a beach holiday playing a round during their vacation). This type of activity is more difficult to measure, and whilst it can be important for the golf courses themselves it has little significance for tour operators.



Estimate of Global Market Size

The global golf tourism market is worth over \$17 billion, according to the International Association of Golfing Tour Operators (IAGTO).

56 million people play golf worldwide: 26.7 million in the United States, 5 million in Canada, 5.5 million in continental Europe, 14 million in Japan, and 3.8 million in the United Kingdom. Of this 56 million, between 5% and 10% travel overseas each year for the main purpose being to play golf – therefore making the international size of the golf tourism market between 2.8 million and 5.6 million.

The leading market in terms of golf as a sport is the United States - it is thought to contribute over \$60 billion to the economy. Europe (aside from the UK) is not a mature golf market; it is still mainly pursued by the elite few (worth \$20 billion). The UK, Japan, and Australia all have mature golfing markets.

Potential for Growth

The mature golfing markets of North America, UK, Japan and Australia have seen stagnation in the number of dedicated golfers in recent years. It appears that membership has reached saturation level; a major contributor to this seems to be the amount of time the sport consumes (average round of golf is around 4 hours). There is a growing trend whereby people would rather participate in activities that take a shorter amount of time.

In these markets, the main potential for growth lies with the aging population, which is growing in size in most developed countries. These consumers are becoming increasingly active and as they are likely to be either “empty nesters” (parents whose children have left home) or retired, they tend to have more time than their younger counterparts.

The rapidly growing golf markets in Asia, the Middle East and Mexico will contribute to the growth of the golf sector worldwide. However, it is not expected that these countries/regions will contribute to the growth of golf tourism in the short term, as there will be a delay between actively taking the sport up and travelling to participate

in the playing of it. However, in the long term (in 5-10 years) growth will be notable.

In continental Europe the participation rates in golf are low but are increasing steadily (French participation rates are increasing between 5-8% per year). This is the market that demonstrates the most growth potential in terms of golfing holidays. The proliferation of the low-cost airline sector in Europe has had a significant impact on the growth of golfing holidays in Europe, in particular from the UK, but increasingly from other countries too.

Brief Profile of Consumers

Consumers are predominantly male, with the majority being middle aged (40-55) or retired (55+). Professional and managerial groups dominate the sector. Golf tourists are likely to be members of golf clubs at home.

- United States: Golf participants are generally affluent, they have a higher than average annual income with two-thirds of American golfers earning over \$50,000. 65% of golfers are over 40 years of age and 80% are male.
- United Kingdom: Golfers are predominantly (78%) male. 62% are aged between 35-60 and 42% are from the AB socio-economic grouping.
- Canada: Predominantly male with an average age of 48 years. The Canadian consumer tends to combine golfing with business trips. They are likely to be well educated with a graduate or undergraduate degree. The Greater Toronto Area is the key generating area.
- France: 65% are male, although 70% of golfing tourists will travel with their partner or spouse.

Main Source Markets:

The main source markets for golf tourism are:

- United States
- United Kingdom
- Japan
- Canada
- Australia

Emerging Markets

- Taiwan
- Malaysia
- China
- Thailand

Main Competing Destinations

The United States, United Kingdom / Ireland, Japan, Australia, and Scandinavia are established destinations.

Thailand, Malaysia, Singapore, and Taiwan are all relatively new, growing destinations.

Emerging golf destinations are Korea and China that will, albeit from small numbers, exhibit significant growth over the next five years:

- Korea: currently has 200 golf courses; this is expected to double to 400 by 2016.
- China: currently has a growth rate of 40% per annum in terms of golfing facilities. At present there are 311 golf courses and this is expected to double over the next 10 years.

Key Tour Operators

Golf Holidays

United States

<http://www.golfholidays-online.com>

16885 West Bernardo Drive, Suite 350, San Diego, CA 92127

Tel: 888 465 3499, 858 451 8190

Golfbreaks.com

United Kingdom

<http://www.golfbreaks.com>

2 Windsor Dials, Arthur Road, Windsor, SL4 1RS

Tel: (+44) 800 279 7988

4Golf.com

<http://www.4golf.com>

75 King Street, South Shields, Tyne & Wear, NE33 1DP

Tel: (+44) 191 497 4516

The INTA Group consists of 4golf.com and a number of subsidiary companies including Bill Goff Holidays, Teetimesanywhere.com, Longshot Golf and Jack High Holidays. This group is the UK's largest golf travel specialist, with over 25 years travel experience.

Direct Golf Holidays

Spain

<http://www.directgolfholidays.com>

Avenida de Mijas 2, Edificio J Serrano Portal 1 3-C, Mijas Costa 29649 Malaga.

Tel: (+34) 656 561 530

Email: info@directgolfholidays.com

Key Points for Marketing and Distribution

There are a plethora of golf magazines that serve the sector, including:

Travel Golf.com

<http://www.travelgolf.com>

Travel and Leisure Golf
<http://www.travelandleisure.com/tlgolf>

Golf Today
<http://www.golftoday.co.uk>

Broadsheet newspapers, in particular the New York Times (in the US) and Times and Daily Telegraph (in the UK) are alternative options for marketing and distribution. These tend to be read by professionals in the AB socio-economic group.

United States: USA Today - travel section
<http://www.usatoday.com/travel>

United States: New York Times - travel section
<http://travel.nytimes.com>

United Kingdom: The Times - travel section
http://travel.timesonline.co.uk/to/life_and_style/travel

United Kingdom: Telegraph - travel section
<http://www.telegraph.co.uk/travel>

Germany: Faz Frankfurter Allgemeine Zeitung
<http://www.faz.net>

Direct promotions targeted at golf clubs and their members can also be effective.

Social Networks

The Golf Space
<http://www.thegolfspace.com>

19thHole.com – Social network for golfers
<http://www.19thhole.com>

IGolf.to – Socail networking portal to meet other golfers.
<http://www.igolf.to>

Trade Fairs

National Golf Expo
United States
February
<http://www.paragonexpo.com/213.html>

The Vancouver Golf & Travel Show
Canada
February
<http://www.vancouvergolfsow.com>

Additional Information

General Information

PGA of America

<http://www.pga.com>

International Association of Golf Tour Operators

<http://www.iagto.com>

Organisations/Institutions in the Caribbean

Caribbean Golf Association (CGA)

<http://cgagolfnet.com>

Further regional sub-organisations also exist, such as the TTGA (Trinidad and Tobago Golf Association)

<http://www.trinidadandtobagogolfassociation.com>