Golf tourism from Europe

The popularity of golf tourism is recovering after a few years of decline. The number of bookings has increased, as well as spending and the length of trips. Many European golf clubs are investing in junior programmes to attract younger people to the sport. Although golf tourists value personal contact with travel agents, they are increasingly booking their holidays online. Golf tourism is a particularly interesting market as golfers often travel in groups, with their partner or friends.

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1. Product description

Golf tourism refers to trips or holidays in which the main purpose is to play golf. Additionally, European travellers increasingly include golf as an important secondary holiday activity. Golf tourism is a niche market of sports tourism.

According to KPMG, most golf trips are four to seven days long. The proportion of bookings of longer trips started to increase in 2014. For 2016, the average trip length is also expected to increase slightly.

When choosing a golf holiday destination, important factors are:

- accessibility (for instance direct flights)
- package prices
- quality of the golf course
- facilities (at least 4 to 5 stars).

Safety

Political stability

Safety is important to European travellers, especially because some developing countries are politically unstable. Most commercial tour operators do not offer holidays to countries that their Ministry of Foreign Affairs has declared unsafe. This has led to a drop in tourism arrivals to such
countries as Mali, Egypt and Kenya. This is also true for golf destinations in developing countries. Recent developments in Turkey have led to a sharp decrease in holiday bookings, including golf holidays.

### Tips

- Keep (potential) customers updated on changes in the safety situation in your area, for example through your website and through your staff.
- Share safety experiences from customers on your website. Let them write about how safe they felt, because people value the experience of other travellers.
- If your region is ‘unsafe’, commercial tour operators will most probably not go there. In this case, focus on volunteer organisations and individual travellers. Check your country’s current safety status on the website of your target country’s Ministry of Foreign Affairs, like on these of [the Netherlands](#), [Sweden](#) and the [United Kingdom](#).
- Decreasing bookings as a result of political unrest in some countries, can offer opportunities for golf tourism providers in other destinations.

### Health and safety measures

Health and safety are important to European travellers. They often inquire about the safety of their destination. Especially safe driving can be a concern. They want to know about drivers and testing of equipment. Poor cleanliness of rooms and missing smoke detectors are an annoyance at the destination. This might result in bad reviews after their holiday.

### Tips

- Pay attention to health and safety measures. Make sure to:
  - regularly check vehicles and equipment
  - place smoke detectors and fire extinguishers
  - have a first aid kit available
  - invest in good drivers.

### Traveller profile

The average population of registered golfers in Europe consists of:

- 66% men
- 25% women
- 9% junior golfers (under 18 years).

However, there are great differences per country. For example, Germany has nearly twice as many adult female golfers as other European countries. Around 70% of the male golf tourists travel with their partner or spouse.

Golf travellers generally:

- have a higher socio-economic background
• belong to a high income group  
• find luxury important  
• are slightly conservative in nature  
• often travel with their partner and/or with groups of friends.

Based on age and golf level, there are four types of golf travellers:

**Beginners and higher handicap players**
These golf travellers are not very experienced golfers, but they are often very enthusiastic. They can be of all ages and either sex. They might not (yet) have a registered handicap.

**Tips**
- If your course allows players without a handicap certificate, clearly state this on your website.
- Make new golfers feel welcome, for instance by offering (beginner’s) lessons. Be clear about the rules and code of conduct for your golf course. Take a look at online resources about attracting and/or creating new golfers. For example the [Tips to Create New Golfers](#) from the National Golf Course Owners Association.

**Junior golfers**
Around 9% of the registered golfers in Europe are juniors. Junior golf travellers often travel with their parents or grandparents. They are an especially interesting market, as the junior golfers of today can become your loyal customers in the future.

The top 5 European markets in terms of total number of junior golfers in 2015 are:

1. Germany (45,398)  
2. Sweden (44,563)  
3. France (41,233)  
4. England (40,596)  
5. Spain (34,730).

**Tips**
- Accommodate for junior players. You can offer family clinics and packages or provide shortened courses. For more ideas, look at the tips for attracting families on the website of the [National Golf Course Owners Association](#).
- Develop a junior golf tour, such as South Africa’s [TGSE Junior Tour](#). This shows interested travellers that these courses are suitable for junior players.
- For more information on how to attract young golfers to the sport, see Syngenta’s [The Opportunity to Grow Golf: Youth Participation](#).

**Golf as a secondary tourism activity**
Many European golfers like to include golf in their holiday, alongside other activities. They often combine golf with other sports-related activities (sailing, swimming, cycling, walking), as well as with ones related to food and culture (dining, city excursions).
Tips
- Promote your products as an experience, rather than just playing golf.
- Tour operators should be flexible. Offer different types of activities, including golf, which customers can combine.

Senior golf players
Some 56% of European golf players are over 50. According to VISION 2020, this percentage may rise to 66% by 2020. They are often financially affluent and have a desire to travel. This makes senior golf players an important and promising market to focus on. They highly value good service, comfort and good quality food.

Tips
- Make your course friendly to the senior golfer. There are special products for senior golfers to help them play actively on golf courses.
- Accommodation providers should focus on comfort, providing for instance:
  - storage for medication
  - sufficient medical support if needed
  - comfortable beds
  - luggage service.
- See our study about senior travel from Europe for tips on how to target senior travellers.

2. Which European markets offer opportunities for golf tourism?
Golf tourism recovering after period of decline
In 2015 there were approximately 4.1 million registered golfers in Europe. This number has been decreasing slightly for the past three years, due to the economic crisis. However after a similar decrease in golf tourism, this market showed signs of recovery in 2015. For 2016, KPMG expects a growth of 1.6%.

Main European source markets for golf tourism
The United Kingdom has the most registered golfers in Europe. They are also the most frequent golf travellers. Other European countries with many golfers keen to travel abroad for golf are Scandinavia (mainly Swedes and Danes) and Germany. The largest growth markets for golf tourism are the Netherlands (+8%), Slovakia (+4%), and Latvia (+4%), according to KPMG.

Golf players are often registered with a national golf association in their home countries. They need this registration for access to golf courses and for their handicap registration.

**Tip**
- Consider targeting golfers through golf associations or golf clubs in their home countries, such as golf federations or clubs in the United Kingdom, Germany, Sweden, France, the Netherlands and Spain.

**Popular golf tourism destinations**
Developing countries that are popular golf tourism destinations include:

- Morocco
- South Africa
- Thailand
- Vietnam.

Main golf tourism destinations also include the United Arab Emirates and United States of America, as well as European countries like:

- Bulgaria
- Portugal
- Spain
• the United Kingdom (especially Scotland).

Tips
• In your marketing, emphasise those golf elements that travellers cannot find in competing countries.
• To find out how many golf courses your country has, see the website of the World Golf Foundation. There you can select your country and compare it to other countries.

For more information, see our study about European demand for tourism in developing countries.

3. What trends offer opportunities on the European market for golf tourism?

Faster-paced golf
A traditional round of golf can take several hours, but for some that is too long. This has resulted in a growing demand for faster-paced golf with a maximum of nine holes. For example, France is developing shorter courses and in the United Kingdom the ‘Golf Express’ campaign encourages quick rounds of golf. As this fast-paced golf takes two hours at most, it is ideal for people with busy schedules, or for travellers with golf as a secondary activity. This makes it a strong trend for the coming years.

Tip
• Developing shorter courses for faster-paced golf. If you offer faster-paced golf, make sure you promote this option in your marketing message.

Social experiences
Many European golf travellers are looking for social activities during their holiday. They like to network and meet new people on the course and later in the clubhouse or resort. This also benefits golf providers, as these personal relationships create loyalty. Golf travellers also use golf holidays to spend quality time with friends and family that travel with them. As socialising is an important element in playing golf, this trend is here to stay.

Tips
• Offer group lessons as well as individual lessons. Clinics encourage social connections and a sense of belonging to the sport
• In the past, main methods for attracting golfers were the promotion of golf facilities and simplification of registration practices. Today, you can focus more on building and retaining lasting connections between people and the sport. This connection can stimulate repeat business as well.
• For more tips on improving your product in the area of social experiences, take a look at the VISION 2020 project. In 2014, the European Golf Course Owners Association (EGCOA) developed this project to better understand social trends in European golf. They developed
four key words to promote golf tourism.
- Flexibility
- Fun
- Friendship
- Family

Increasing use of online research
European golf travellers increasingly research and plan their trip online. They increasingly book directly with hotels that have their own golf course or can arrange tee times. To gather information and share experiences they use:

- peer review sites, like TripAdvisor and Holidays Uncovered
- travel forums, like Golf Breaks, or The Sand Trap
- social media, like Instagram, Facebook, Flickr, Twitter and YouTube
- online travel agents (OTAs), like Expedia, Priceline or Booking.com.

You have to show European golf travellers the experience you can offer them. Visual media like photos and videos are useful tools for this. Sharing pictures of golf courses and their surroundings on social media is popular. Online research is a trend that has increased exponentially over the past five years. Although growth has peaked, the use of internet to research tourism will continue to increase. It is predicted to remain the most important research channel for years to come.

Tips
- Maintain a strong internet presence and online marketing strategy, including social media. Photos and videos let travellers explore your destination from home. They can bring your story to life.
- Use current customers as ambassadors for your company and area. Encourage them to share their experiences, photos and videos on social media. They can also write blogs and reviews.

For more information, see our study about European tourism market trends.

4. With which requirements should your golf travel product comply to be allowed on the European market?

For general tourism requirements, see With which requirements should my services comply to attract European tourists?

For golf tourism specifically, there is an interesting sustainable niche market.

Sustainable golf tourism
According to Between-us, 95% of golfers want greater sustainability in golf venues and 52% would pay for it. Although European tour operators usually do not require sustainability labels, they also prefer partners with sustainable certification. The International Association of Golf Tour Operators (IAGTO) and The Golf Environment (GEO) support and promote sustainability in golf tourism.
around the world. Since 2014, the annual IAGTO Awards have Sustainability as an important category.

The main sustainability certification programmes for golf are:

- Audubon Cooperative Sanctuary Program for Golf
- GEO Certified.

Tips

- GEO has information and advice on getting started on becoming a sustainable golf business.
- The Sustainable Golf Project lets you do a free online quickscan and benchmark test of your company’s sustainability. They can also inspire you with their best practices.
- Consider applying for sustainability certification. This will increase your credibility and strengthen your image, and give you a competitive advantage.
- If you are certified, make sure that the logo is visible on your website. Also make sure that your company is visible on the certification body’s website.
- For more information on sustainability in tourism, see our study about European tour operators and their need for sustainable suppliers in developing countries.

For more information, see our study about European tourism buyer requirements.

5. What competition will I be facing on the European market?

Emerging golf destinations grow fast

According to IAGTO the following golf tourism destinations are the most established:

- United States
- United Kingdom and Ireland
- Japan
- Australia
- Scandinavia.

Relatively new and growing golf tourism destinations include:

- Thailand
- Malaysia
- Singapore
- Taiwan.

Emerging golf destinations are the following:

- Korea: The country had approximately 200 golf courses in 2011. This is expected to double to 400 in 2016.
- China: The number of golf courses increased from 200 in 2004 to 600 in 2015. However, the Chinese government has currently banned the development of new golf courses.

Tip

- Learn about the golf tourism sector of competing destinations. Use this as inspiration to improve your product and marketing. Study the golf tourism associations in Malaysia or South Africa, for instance.
6. Which channels can you use to put golf tourism products on the European market?

For an overview of the trade structure for tourism, see our study about competition on the European tourism market.

In 2014, 46% of golf tourism bookings were made by phone, 32% via the internet and 22% in person. This shows that golfers still find it important to seek personal contact with agents. The main trend was the emergence of improved online booking systems and various smartphone and tablet applications. These booking channels are expected to gain importance in the coming years.

Selecting smaller specialised tour operators

European tour operators specialised in golf tourism or your destination offer the best opportunities. You can identify them via trade associations, events and databases.

Examples include the following.

- International Association of Golf Tour Operators (IAGTO) – global trade organisation for the golf tourism industry
- IGTM – International Golf Travel Market, held annually in November at different locations.
- ILTM – International Luxury Travel Market, held multiple times per year in different countries around the world.
- ITB – annual tourism trade event, March, Berlin.
- Luxury Travel Fair – trade fair dedicated to luxury travel, November in London.
- Top Resa – annual tourism trade event, September, Paris.
- VISION 2020 events – The people behind the VISION 2020 project also selected some interesting events for the golf industry.
- World Travel Market – annual tourism trade event, November, London.

Generating direct sales

European golf travellers increasingly book their holidays directly with service providers at the destination. To increase your chances of direct sales, you can promote your product on (golf) tourism websites and portals.

Such websites and portals include:

- 1golf.eu
- Golf
- GOLFBBOO
- GolfersGlobe.

7. What are the end-market prices for golf tourism products?

Travellers have many destinations and types of holiday to choose from. This makes tourism a relatively price sensitive and competitive industry. Three factors influence the price of a long haul trip.

1. The exchange rate between the currencies of the country of origin and the destination country.
2. The costs of transport to and from the destination country.
3. The price of goods and services the traveller consumes in the destination country.

European tour operators are not open about the purchasing prices of their tourism products.
According to industry experts, their margins range between 10–25%. Prices of holiday packages vary widely as they depend on many factors, such as:

- availability
- destination
- modes of transport
- period of travel
- number of travellers
- length of stay
- type of accommodation
- included activities (particularly tee times and green fees).

**Tips**

- Check which countries have cheap (direct) flights to your destination, for instance at [Skyscanner](https://www.skyscanner.com). This will give you a competitive advantage in those countries.

- You can compare prices for golf travel products via portals like [GOLFBOO](https://www.golfboocoupons.com). Including green fees and good tee times can give you a competitive advantage.

- Tourism Boost has some useful [online tools for pricing tours and accommodation](https://www.tourismboost.com/). These help to determine the break-even point and ideal retail price of your tourism product.

For more information on how to reach potential tourist from Europe, see our study about [European tourism market channels and segments](https://www.tourismboost.com/). Please review our [market information disclaimer](https://www.tourismboost.com/disclaimer).