Golf Tourism Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Specialty, Niche & Experience Tourism (Hospitality & Tourism)
> **Source:** https://www.mordorintelligence.com/industry-reports/global-golf-tourism-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 17.97 billion
Projected Forecast (2031)	USD 17.97 billion
Growth Rate (CAGR)	8.74 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Golf Tourism industry](images/chart_2.png)

![Golf Tourism Market Summary](images/chart_3.png)

![Golf Tourism Market : Market Share by Product Type](images/chart_4.png)

![Golf Tourism Market : Market Share by Booking Channel](images/chart_5.png)

![Golf Tourism Market  CAGR (%), Growth Rate by Region](images/chart_6.png)

![Global Golf Tourism Market Concentration](images/chart_7.png)

![Icon](images/chart_8.png)

![footer background image](images/chart_10.png)

![Mordor Intelligence on Facebook](images/chart_12.svg)

![Mordor Intelligence on Pinterest](images/chart_14.svg)

![Mordor Intelligence on Instagram](images/chart_15.svg)

![ESOMAR](images/chart_17.png)

![GPTW](images/chart_19.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2022 - 2031 |
Market Size (2026) | USD 17.97 Billion |
Market Size (2031) | USD 27.32 Billion |
Growth Rate (2026 - 2031) | 8.74 % |
Fastest Growing Market | Asia-Pacific |
Largest Market | North America |
Market Concentration | Low |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Golf Tourism Market Analysis by Mordor IntelligenceThe Golf Tourism Market size is projected to expand from USD 17.36 billion in 2025 and USD 17.97 billion in 2026 to USD 27.32 billion by 2031, registering a CAGR of 8.74% between 2026 to 2031.

The golf tourism market is expanding because high-spending leisure travelers now expect golf trips to include wellness, culture, and family-oriented resort experiences rather than only course access. The demand base is also widening, as the R&A reported that more than 100 million adults and juniors played golf across R&A-affiliated markets in 2024, with participation continuing to rise in 2025[1]RANDA.ORG https://www.randa.org/en/articles/over-100-million-golfers-in-randa-markets-as-global-participation-continues-to-grow. North America remained the largest regional revenue base in 2025, while Asia-Pacific is set to post the fastest expansion through 2031 as newer destinations convert broader leisure infrastructure into golf-led travel programs. The market also remains open to specialist operators because no single company controls a meaningful global position, although trade networks such as IAGTO continue to strengthen distribution efficiency and forward bookings across destinations. At the same time, water use and course sustainability are moving closer to the center of destination selection, especially after the USGA committed USD 30 million over 15 years to help courses reduce water use by 45%[2]USGA.ORG https://www.usga.org/content/usga/home-page/articles/2024/09/every-drop-counts.html..

Key Report Takeaways* By tourism type, leisure golf tourism held 64.4% of the global golf tourism market share in 2025, while tournament golf tourism is forecast to grow at a 9.6% CAGR through 2031.
* By tourist type, domestic travelers accounted for 58.0% of the global golf tourism market share in 2025, while international travelers are projected to expand at an 8.9% CAGR through 2031.
* By service type, professional tours represented 54.9% of the global golf tourism market share in 2025, while personal tours are expected to grow at a 9.6% CAGR through 2031.
* By booking channel, direct bookings captured 41.8% of the global golf tourism market share in 2025 and are also the fastest-growing channel, with a projected 9.2% CAGR through 2031.
* By destination type, resort-based Golf held 52.3% of the global golf tourism market share in 2025, while international golf circuits are forecast to grow at a 10.1% CAGR through 2031.
* By geography, North America held 39.9% of the global golf tourism market share in 2025, while Asia-Pacific is projected to expand at a 9.4% CAGR through 2031.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Golf Tourism Market*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Rising Spend on Premium Experiential Leisure Travel	+2.0%	Global, with concentrated uplift in North America, Europe, and the Middle East	Medium term (2-4 years)
Expansion of Golf Resorts and Tournament-Led Destination Infrastructure	+1.6%	Middle East, Asia-Pacific, and North Africa	Long term (≥ 4 years)
Digital Booking Adoption and Mobile Trip Discovery	+0.9%	Global, strongest in North America, the UK, South Korea, and Australia	Short term (≤ 2 years)
Rising Amateur Golf Participation and Leisure-Sport Crossover	+1.3%	Asia-Pacific core, with spillover to South and Southeast Asia	Medium term (2-4 years)
Shift Toward Golf-Plus Itineraries in Emerging Value Destinations	+0.7%	Asia-Pacific, the Middle East and Africa, and South America	Medium term (2-4 years

) |
IAGTO-Led Trade Pipeline Accelerating Forward Bookings | +0.4% | Global, with early gains in Europe, the Middle East and Africa, and North America | Short term (≤ 2 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The golf tourism market remains highly fragmented, with the top player holding 3.2% of global share and the top five operators together accounting for 8.7%. This leaves most of the volume in the hands of regional specialists that compete through local access, destination expertise, and repeat relationships rather than on scale alone. In that setting, brands with a narrow regional focus can still build durable positions if they control trusted supplier networks and reliable itinerary execution. The golf tourism market, therefore, favors depth in selected destinations more than broad global coverage without strong local service. That structure also means competitive advantage often comes from product quality and course access rather than from price alone.

Several strategic moves show how companies are trying to strengthen their role in the golf tourism market without relying only on volume expansion. The PGA of America's partnership with Premier Golf in January 2025 strengthened Premier Golf's referral pathway into North America. It tied packaged travel more closely to a trusted industry institution. Red Sea Global's launch of Shura Links added a flagship asset that supports both destination branding and future resort-led package demand in the golf tourism market. LIV Golf's continued expansion across host markets also serves as a competitive supply catalyst, as event-led exposure helps destinations and travel sellers build packaged demand around a global schedule. These moves do not remove fragmentation, but they do raise the importance of brand partnerships, owned assets, and event-linked distribution.

Specialist networks still matter because the golf tourism market depends on coordination across operators, resorts, courses, and destination suppliers. IAGTO remains central to that structure, with 802 specialist tour operators in 66 countries and a role in more than 90% of golf vacation packages sold worldwide. Company disclosures also show that specialist reputation continues to matter, as Golfasian said it has served more than 192,000 golfers over 25 years in Asia. As a result, the golf tourism market is likely to remain open and fragmented even as stronger branded networks gradually improve their position.

Golf Tourism Industry Leaders* Golfbreaks

* PerryGolf

* Premier Golf

* Golfasian

* Carr Golf

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

Global Golf Tourism Market Report ScopeBy Tourism TypeLeisure Golf Tourism |
Business Golf Tourism |
Tournament Golf Tourism |

Segmentation Accordion Item

By GeographyNorth America | United States |
 | Canada |
 | Mexico |
South America | Brazil |
 | Peru |
 | Chile |
 | Argentina |
 | Rest of South America |
Europe | United Kingdom |
 | Germany |
 | France |
 | Spain |
 | Italy |
 | BENELUX |
 | NORDICS |
 | Rest of Europe |
 | |
APAC | Asia | India |
	China
	Japan
	South Korea
	South East Asia
	Rest of Asia
Oceania	Australia
	Rest of Oceania
Middle East and Africa	Middle East	United Arab Emirates
	Saudi Arabia
	Rest of Middle East
Africa	South Africa
	Nigeria
	Rest of Africa

Frequently Asked Questions

What is the size of the golf tourism market in 2026?

The golf tourism market is valued at USD 18.0 billion in 2026 and is forecast to reach USD 27.3 billion by 2031, with an 8.7% CAGR.

Which region leads golf travel demand?

North America led in 2025 with a 39.9% revenue share, supported by deep course infrastructure and strong domestic and outbound travel demand.

Which region is growing the fastest for golf-related travel?

Asia-Pacific is the fastest-growing region with a projected 9.4% CAGR through 2031, supported by expanding leisure infrastructure and strong inbound momentum.

What is the largest travel format in this sector?

Leisure Golf Tourism is the largest tourism type, accounting for 64.4% of revenue in 2025, as repeat recreational travelers still drive most package demand.

Why are resort-based trips still dominant?

Resort-based Golf accounted for 52.3% of revenue in 2025, as golfers continue to prefer integrated stay-and-play packages that combine accommodation, dining, an d wellness.

What is the biggest long-term challenge for golf destinations?

Environmental scrutiny is one of the biggest long-term constraints, especially around water use, land use, and compliance in arid regions.