



# Research on demand and capacity for golf tourism

## Visit Wales



Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

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## Research on Demand and Capacity for Golf Tourism

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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# **1. Summary**

## **Golf clubs**

### **Tourism is a valued part of the business**

Visitors are a crucial source of revenue to golf clubs. As well as the green fee income, visitors tend to spend more than members on food & drink, and if the club has accommodation, the visitors may stay overnight. Visitor income allows for reinvestment in the club and helps to keep membership fees to a reasonable level.

That said, members provide clubs with seasonal continuity, especially through winter. Clubs are therefore conscious of balancing the needs of members with the needs of visitors.

### **Capacity for more visitors**

Most clubs are keen to attract more visitors because they recognise the importance of the revenue they generate. This even includes in the summer, helped by longer days and therefore more tee times.

Visitors are unlikely to be able to play on a Saturday, and some clubs also reserve some early mornings in the week for members. Otherwise, there are not many days and times which are reserved for members.

### **UK market dominates; season is April to October**

For most clubs, nearly all (typically over 95%) of their visitors come from the UK, primarily England. This is even true for some of the more prestigious clubs. The main season is April to October. Winter golf breaks are of little interest to either the clubs or the players.

### **Working with tour operators**

Tour operators are more likely to be used by larger groups and those travelling from further afield, especially from overseas. The closer and smaller the group, the more likely they are to book direct. Tour operators therefore play an important role for any club wishing to cast a wide net and attract large volumes of visitors.

### **Women and the AIG Open**

Women's golf is a growing market, with clubs seeing many couples visiting. Receiving female golfers is becoming more 'normal' and clubs believe they offer everything that female golfers need.

Some clubs are using the AIG Women's Open to promote women's golf. They see strong opportunities for legacy marketing at a Wales level, as golfers tend to remain interested in championship courses for quite a long time after the event.

## **Future plans and working with Visit Wales**

Clubs are generally very keen on growing their visitor levels. Some recognise the potential for increasing strong domestic volumes even further, whilst others are more excited about the prospect of attracting a relatively untapped overseas market.

Clubs see Visit Wales as an important partner, especially if any growth from overseas is to be achieved. Some feel that promotional investment died away after the 2010 Ryder Cup. Clubs tend to see each other as partners rather than competitors in terms of attracting visitors from outside Wales.

## **Tour operators**

### **Good demand from UK market, but not from overseas**

For UK-based operators, Wales sells reliably well. Its easy access from many parts of England is key to converting interest into bookings. Demand is from April to October and highest Friday to Sunday, but because it can be hard to play as a non-member on Saturdays, this spreads out bookings onto weekdays.

In the overseas market, Wales does not fare well against Scotland, Ireland and parts of England. Consumer awareness of Wales is low, whereas Scotland and Ireland are perceived to have a strong golf product with history, quality courses and luxury accommodation in the right places.

### **But Wales offers far better value than Scotland and Ireland**

Wales' current USP over Scotland and Ireland is that its value for money is far better. Scotland and Ireland have seen significant price hikes in green fees in recent years (post-Covid), leaving Wales now set apart in its value for money offering.

Further key strengths of Wales include the lack of inundation from visitors, and picturesque scenery and villages with friendly local people. This all gives those who do visit a relaxing and authentic 'local' experience.

## **Key barriers to Wales**

As well as limited consumer awareness, operators also lack awareness of Wales-based suppliers such as accommodation and transport providers, and how best to reach the destination from overseas.

Views on accommodation are mixed, with some seeing no issues, especially for the UK market, but capacity for larger groups and high end luxury for American visitors can both be issues. A further barrier to the American market is felt to be the limited number of high profile courses to fill longer trips.

## **Women and the AIG Open**

Women now make up a sizeable proportion of operators' business, especially for Scandinavian and German operators. They rarely come across barriers to playing golf such as lack of adequate changing facilities anymore, either in Wales or generally anywhere.

When marketing to women, non-golf elements of the package matter a lot. This includes the quality of the dining experience and possible add-ons such as a spa and afternoon tea.

Operators are positive about Wales hosting the Women's Open. Some however say Wales needs to attract the (men's) Open to break through as a major golf destination.

## **Future plans for Wales**

Operators are generally open to considering featuring Wales (more), but the initiative has to come from Visit Wales, especially if overseas business is to grow. Operators are content to just keep selling destinations that are currently in demand.

Ideally, operators would like to be invited to golf trade shows and/or familiarisation trips in Wales so they can meet suppliers and become more knowledgeable about the destination. This would increase their confidence to sell it.

## **Consumers**

### **Very positive feedback on experiences of Wales from visitors**

Slightly over half (56%) of consumers have been on a golf break in Wales. Likelihood of visiting correlates strongly with proximity to Wales.

About a quarter (27%) of those who have taken a golf break in Wales describe the experience as 'much more enjoyable' than golf in other destinations, and a further 28% describe the experience as 'slightly more enjoyable'. Only a small minority (5%) describe golf in Wales as 'less enjoyable'.

Golfers visiting Wales are taken in by the stunning scenery, which comprises mountains and/or attractive coastlines. Further key perceived positives of Wales over other golf destinations include well maintained courses at very competitive rates, lack of crowds, easy access and lovely people.

### **Perception of poor or unreliable weather is the key negative**

Wales seems to suffer from a reputation of rainy weather among consumers in England. Unfortunately though, feedback on spoilt golf trips in Wales means that this barrier is not entirely a perception issue.

A further key barrier to golf in Wales is the lack of awareness among those who have not visited, meaning that interest is often lukewarm due to not knowing what to expect.

There are many golfers, both visitors and non-visitors to Wales, who perceive Wales' golf offering to be similar to that of other golf destinations in Britain.

### **Women**

There are numerous developments which would make golf breaks more appealing to women, the most commonly cited one being 'golf combined with spa breaks' (answered by 68% of women when prompted).

## 2. Background and method

### Why has this research been commissioned?

Visit Wales has identified special interest tourism products with potential for future growth. Golf is explicitly referenced in Visit Wales' strategy in this regard: [Welcome to Wales: priorities for the visitor economy 2020 to 2025](#). Golf fits with Wales' core offer, aligns with the brand vision (in particular, natural landscapes and activities) and enhances the wellbeing of Wales' resident communities.

Golf is also thought to offer good potential in the shoulder seasons, which would align well with Visit Wales' aims to grow tourism outside of the peak summer season.

In 2023, 32% (2.57m) of domestic trips to Wales involved outdoor leisure activities and/or sports. This included over 110,000 trips to play golf, with an average spend per trip of £332. In addition, there were nearly 100,000 day trips involving golf, with an average daily spend of £76, one of the highest levels of spend for outdoor leisure activities.

Royal Porthcawl hosted the AIG Women's Open from 31<sup>st</sup> July to 3<sup>rd</sup> August. This offered and continues to offer an opportunity to showcase Wales for golf tourism, particularly to the female audience.

Visit Wales commissioned Strategic Research and Insight (SRI), an independent Cardiff-based research agency, to undertake research with golf clubs in Wales, tour operators and consumers. The main objectives are to understand:

- Demand and capacity for golf tourism in Wales
- Strengths and weaknesses of the current golf tourism offer
- Barriers and opportunities to grow golf tourism

### How has the research been conducted?

Primary research has been conducted in three phases:

- Qualitative depth interviews with golf clubs in Wales
- Qualitative depth interviews with UK and overseas based tour operators
- Quantitative panel survey with golfers in Britain and Ireland

We discuss each phase in more detail below.

#### Qualitative interviews with golf clubs

Visit Wales identified key golf clubs to approach for a depth interview. These clubs are known to attract at least some degree of golf tourism.



Depth interviews are a form of qualitative research, which is fluid by nature and does not follow rigidly scripted questions like a questionnaire used in quantitative research. The purpose is to explore depth rather than breadth. Interviews can last around half an hour. SRI has conducted 16 depth interviews with golf clubs, spread across Wales.

Feedback from these key stakeholders is discussed by theme in section 3. Topic guides are available on request.

## **Qualitative interviews with tour operators**

Visit Wales provided a database of UK and overseas based golf tour operators. These operators vary in the extent to which they feature trips to Wales, ranging from extensively to not at all.

Although an operator's main market is usually the country they are based in, most operators sell trips to customers living in other countries too. The destinations they sell could be anywhere.

SRI has conducted 19 depth interviews with tour operators, spread as follows by country in which the operator is based:

- UK: 5
- USA: 5
- Scandinavia: 2
- Germany: 2
- Netherlands: 2
- Canada: 1
- France: 1
- Republic of Ireland: 1

Feedback from these key stakeholders is discussed by theme in section 4. Topic guides are available on request.

## **Quantitative phase**

Following the qualitative phases, SRI conducted an online panel survey with 525 golfers in Britain and Ireland. The sample was sourced through the panel provider, Cint. Quantitative research measures breadth using a large sample size and serves a different purpose from qualitative research, which explores feedback in greater depth.

To qualify for the survey, respondents have to:

- Have been on a golf break in the past two years
- Consider Wales for a golf break

The sample frame of online panellists invited to the survey was nationally representative of the British and Irish populations by age, gender and region, but the qualified sample was

allowed to fall out naturally in order to reflect the profile of consumers who take golf breaks and would consider doing so in Wales. The final qualified sample of 525 is shown below:

**Table 1: quantitative research sample by region, age and gender**

Region	Sample size	Age group	Sample size	Gender	Sample size
England	418	Under 35	116	Male	392
Scotland	47	35 to 44	79	Female	133
Ireland	41	45 to 54	113		
Wales	19	55 to 64	109		
		Over 65	108		

The market for golf breaks to Wales is dominated by golfers in England. There is a good spread of ages, and female golfers make up 25% of the market.

The quantitative findings are discussed in section 5. The questionnaire is available upon request.

### **3. Golf clubs**

This section is based on 16 qualitative interviews with golf clubs known by Visit Wales to attract at least some degree of golf tourism.

#### **How important is golf tourism to the clubs?**

##### **Valued part of the business**

Nearly all of the clubs value and appreciate the custom they receive from visitors. Whilst rounds played by members typically outnumber rounds played by visitors over the course of a full year, the visitors are a crucial source of revenue. As well as the green fee income, visitors tend to spend more than members on food & drink, and if the club has accommodation, the visitors may stay overnight. Visitor income allows for reinvestment in the club and helps to keep membership fees to a reasonable level.

“A visitor is paying a green fee, for a buggy, a bedroom, a dinner, lots of beers behind the bar, whereas a member spends nowhere near that”

“The membership fees do not cover our costs, so we use visitors to drive up the income. For this reason, golf tourism is very important to us. It allows us to reinvest in the club and keep subscriptions down for members. The reinvestment benefits members as well.”

Depending on the location, a golf club may be an important source of tourism in the shoulder season for other local businesses.

“In the summer, visitors are coming to our town anyway to go to the beach but in those in-between times [shoulder seasons], businesses in the village really notice it if the golf course isn’t doing well.”

##### **But members’ needs cannot be neglected**

Whilst visitors are valued, the clubs cannot rely on their income all year round. Members are therefore very important because they provide clubs with seasonal continuity, especially through the winter months. Clubs are therefore conscious of balancing the needs of members with the needs of visitors. Most clubs feel they manage to do this well, but it isn’t always easy.

“As a private members club, our priority is to ensure that there are no issues for members accessing the golf course”

“It’s the job of the club to educate members that we have to provide an equally good experience for the visitors. It’s important for visitors to feel welcome. The reason members are sitting in a lovely laid out clubhouse is because of the money coming in from visitors.”

## **What capacity do the clubs have for visitors?**

### **Open to receiving more visitors**

Most clubs are keen to attract more visitors because they recognise the importance of the revenue they generate. This even includes in the summer, helped by longer days and therefore more tee times.

If a club has a strong membership base then it has less capacity for visitors in the winter because the days are short and therefore there are fewer tee times. However, they do not expect visitors to come during the winter anyway.

“There’s not much capacity in winter months due to lack of daylight and we have to keep some of that for members. But we could easily accommodate more visitors in the summer.”

Clubs which rely more on income from visitors than members are more likely to feel the drop in business during the winter when the visitors stop coming.

### **Most and least likely times when visitors can play**

Visitors are unlikely to be able to play on a Saturday, and some clubs also reserve some mornings, especially early mornings, for members. Otherwise, there are not many days and times which are reserved for members. This is because clubs value the income that visitors bring. Some clubs are particularly keen to attract more visitors on weekdays.

“Wednesday and Saturday mornings are reserved for members. Weekends are much busier, but there are very few weekdays when we don’t have capacity for visitors, even in peak summer.”

Some other clubs include Sundays as a day they are trying to fill with visitors, alongside some specific weekdays.

“We’ve identified two key days when member usage is low: Thursdays and Sundays. Those are the days we’re trying to encourage visitors into the club.”

The likelihood of visitors finding a tee time on a day they want to play can depend on how flexible they are. For example, does a group want adjacent tee times?



Royal St David's, Harlech

## **Where do the golf visitors come from?**

### **Dominated by UK market**

For most clubs, nearly all (typically over 95%) of their visitors come from the UK, primarily England. This is even true for some of the more prestigious clubs. The M4 corridor is a strong market for South Wales clubs, and North West England is important for North Wales clubs. The West Midlands is important for both North and South Wales.

“Over 98% of our visitors come from Britain. 1% come from Europe [outside Britain] and then less than 1% from rest of the world.”

“Overseas markets make up less than 1% of our visitors”

Some clubs view their main competition for the UK market as overseas destinations more so than other UK clubs. There are different views about the current strength of overseas competition. Some say it is strong, offering good value for money and a better chance of good weather. Others feel that the post-Covid boom in demand to travel overseas has now levelled off.

“2025 was our most successful year to date. The Covid boom of people wanting to get away to Spain and Portugal has died down. It's more value for your buck to stay in the UK.”

### **Overseas golfers are likely to be European**

If any visitors come from overseas, they are likely to be European. Few Americans are found playing on golf courses in Wales, except at Royal Porthcawl. This is in spite of the publicity which Wales received from hosting the Ryder Cup in 2010 at the Celtic Manor.

“95%+ is UK domestic. We used to get overseas visitors in the build up to the Ryder Cup but that dropped off.”

## **When do the golf visitors come to Wales?**

### **April to October**

The season for golf tourism to Wales is April to October. Winter weather can be unpleasant, and courses can occasionally be unplayable. Whilst golfers can dress for wet weather, it's not the golf break experience they are looking for. Golfers wanting to go on a trip outside of this season may look to warmer destinations rather than the UK.

“Players want to enjoy eating and drinking outside the clubhouse or halfway house. Playing in your waterproofs in poor visibility just tinges that experience.”

### **Most clubs don't want to target visitors for the winter anyway**

As well as the fact that winter days are shorter and so capacity is limited, trying to attract visitors during the winter would be difficult anyway, and the course may not look its best. Clubs are therefore content with the visitor season remaining as it is, from April to October.

“People know that we're not Portugal. Wales does have rain.”

“Between October and March we don't promote the course to visitors due to poor weather during this period and the high level of last minute cancellations. Instead, we focus our attention on the members.”

## **What is the role of tour operators?**

### **Bookings through tour operators**

Tour operators are more likely to be used by larger groups and those travelling from further afield, especially from overseas. The closer and smaller the group, the more likely they are to book direct. Tour operators therefore play an important role for any club wishing to cast a wide net and attract large volumes of visitors.

“If they are booking as a larger group and going on a tour, they would tend to book through an operator. If they're coming for two days and an overnight stay, they'd arrange it directly with us.”

“The majority of European bookings come through tour operators”

“Tour operators help get us the bigger groups of 8 – 12 people, or sometimes up to 24”

The current balance between tour operator and direct bookings varies by club, but broadly speaking it's about 50/50 overall.

“For us, it’s about 50/50 between direct to the club and third party”

## **Experiences of working with tour operators**

The key advantages of working with tour operators are the larger groups attracted and the further reach, especially overseas. Working relationships between tour operators and the clubs are generally good, with both sides having a reasonable understanding of each other’s needs.

“I’ve worked with Countrywide Golf Holidays, Wales Golf Holidays and Welsh Golf Breaks for years and have built good relationships with them”

Some clubs say that their view of tour operators varies, with some they trust and like to work with and some they don’t. They pick the ones they want to work with.

“Some are better than others. We stopped working with one, who tended to cater for stag weekends. We didn’t want big rowdy groups and had to keep chasing payments. It became more hassle than it was worth.”

On the downside, some tour operators (especially large ones) won’t pay the club upfront, and in some cases clubs have to chase overdue invoices. The rates are also lower as tour operators expect discounts when booking for larger groups.

“Normally we expect the money from the tour operator up front a month before, but with the two big players you have to invoice them and then you have to chase for payment”

Working with tour operators is therefore a volume vs margin & cashflow consideration. Clubs generally feel that a fairly balanced mix between tour operator and direct bookings is important.



Celtic Manor, Newport

## **How does it work with accommodation?**

### **Most clubs don't see accommodation as a major issue**

Most clubs collaborate with local accommodation suppliers by signposting guests or agreeing on deals. Accommodation can be many different types, and as nearly all visitors are from the UK and are therefore familiar with what to expect, current provision is felt to be adequate.

"We rarely hear of people having issues finding somewhere to stay. We have a large number of accommodation providers in the area, be that holiday lets or hotels."

### **Some clubs collaborate with each other on accommodation**

There are some golf 'resorts' in Wales, i.e. they have a substantial number of bedrooms onsite, as well as facilities for a leisure break. In some cases they collaborate with clubs in the region that are not resorts, with golfers staying overnight in the resort but playing the courses at other clubs too. Resorts and non-resorts tend to view each other as partners rather than competitors because the offering is different.

"We're in talks with a nearby resort about them making some of their rooms available for golfers playing with us. Collaboration is important."

### **Any issues may be with large groups and Americans**

Capacity issues may apply to large groups of golfers in areas away from the major cities and the resorts.

Americans only make up a very small proportion of current business in Wales, but if they were targeted more, the lack of high end luxury accommodation in Wales could be a barrier.

"The American market is looking for 6 star accommodation"

## **What are the opportunities for women's golf?**

### **Becoming more 'normalised'**

Women's golf is a growing market, with clubs seeing many couples visiting. Receiving female golfers is becoming more 'normal' and clubs feel they offer everything that female golfers need to play this sport which used to exclude them. Women now have better quality changing facilities than used to be the case, and some pro shops now have more items for women such as clothing and women's clubs, which are shorter and lighter. The lack of on-course toilets also used to be an issue at many clubs, but this is being recognised and addressed.



“Scandinavian female players tend to come over as a couple. That market brings more female golfers than any other.”

## **Balance between providing for women and not making an ‘issue’**

Whilst clubs are keen to provide for female golfers, there is a balance between tailoring provision for them and avoiding being patronising. For example, some courses have tee positions for men and different tee positions for women, which make the hole a bit shorter. Some clubs recognise however that female golfers may not wish to be treated differently.

“We no longer have gender-specific tees. We’ve also had our first ever female captain [rather than separate captains for men and women].”

## **Some women can be put off by harder courses**

Golf courses vary in their level of difficulty. Some of the less experienced female golfers can feel put off playing difficult courses.

“Our course has a reputation for being quite hard, which appears to be a deterrent for female players”

## **AIG Women’s Open**

The AIG Women’s Open was held at Royal Porthcawl from 30<sup>th</sup> July to 3<sup>rd</sup> August. Some clubs have used or are using the tournament to promote women’s golf. They see strong opportunities for legacy marketing at a Wales level, as golfers tend to remain interested in championship courses for quite a long time after the event.

“It’s great for Wales to have this major profile event. The knock-on is that people will want to play golf in Wales. It backs up Wales knows what it’s doing with golf, rather than Wales not being seen as a golfing destination.”

Some clubs also see an opportunity to invite overseas tour operators over on familiarisation trips.

“There’s a huge opportunity for Visit Wales to capitalise on the Women’s Open and to invite overseas tour operators on fam trips”

One club feels a bit disappointed with the lack of support from the R&A (governing body) and feels they could have been included more in the plans to promote golf and hospitality in the area.

“We weren’t allowed to use the R&A logo. There’s an R&A event down the road, come and visit us, but we’re not allowed to. They could have advertised the area a lot more within golf. The clubs around Porthcawl should be capitalising on the amount of visitors who will be coming in.”

## **What are the clubs' future plans?**

### **Strong interest in growing visitors**

Clubs are generally very keen on growing their visitor levels. This is because visitors are a high-spending revenue stream.

“The growth is coming from the visitors. We’ve grown our visitor revenue by 65% in the last five years. We’ve done that through marketing and by improving our infrastructure and the quality of our course.”

“We’re currently heavily geared towards the members ... so we’re trying to drive visitors up”

The UK market, mostly England, makes up nearly all of the golf visitors currently coming to Wales. Clubs recognise the importance of this market and are keen to at least maintain current UK visitor levels, or even increase them.

“We have tried to target Yorkshire, London, Devon and Cornwall, with reasonable success. Visitors from London find it easy due good transport links along the M4 and also getting rid of the toll on the bridge into Wales.”

However, some clubs see the overseas market as the significant opportunity for growth because it currently represents such a small share of their visitors. There is a sense of excitement about the volumes that the relatively untapped overseas market could bring.

“We see the growth coming from overseas, especially the USA and Scandinavia. They’re looking to enjoy coming to Wales. They’ve done, Scotland, they’ve done Ireland, they’ve done England. Those destinations are all very busy and expensive. They’re looking for something new, and Wales intrigues them.”

A few clubs are reaching saturation point in terms of capacity as they are conscious of keeping their members happy, but nevertheless, they still do what they can to fit visitors in because they value the revenue.

“We’re eeking towards that level of being able to balance healthy visitor levels and keeping the members happy”

### **Do clubs want to work with Visit Wales?**

Clubs see Visit Wales as an important partner, especially if any growth from overseas is to be achieved. Whilst a few clubs have active marketing activities in other countries with some degree of success, most feel that they are unlikely to get very far without Visit Wales. Some have tried on their own and failed.

“We used to go to IGTM but the return was negligible. We would meet a lot of agents who promise the world and say, ‘we’re fed up with going to Ireland and Scotland; we want to go to Wales.’ We would spend time putting packages together for them, but is that what the user really wants? Most

Americans still want to play Gleneagles and Trump Turnberry and are not willing to consider secondary options. They want to play the iconic courses.”

Visit Wales / Welsh Government invested strongly in promoting golf up to and including 2010, when the Celtic Manor hosted the Ryder Cup, but since then, clubs feel that the promotional investment has died away. They are keen to see this return, as Wales does not have the international presence in golf that Scotland and Ireland have. Changing this requires long term commitment.

“Wales hasn’t had a presence in international golf shows for some years. They stopped promoting golf strongly after the Ryder Cup, whereas Scotland and Ireland have a consistent presence in the market.”

There are also calls for Visit Wales to work with clubs on producing videos showcasing the courses.

Some operators feel that Visit Wales should be able to make a strong case for investing in golf tourism due to the high visitor spend.

“If you go on Visit Wales’ website, it’s all about walking, cycling and the fresh air; windsurfing ... I think golfers spend more money than any other type of activity visitor”

## **Collaboration in targeting overseas**

Golf clubs tend to see each other as partners rather than competitors when it comes to marketing the product further afield. The exception is if golf resorts have a similar offering to each other within the same region. Visitors, especially those from overseas, want to play a number of courses, not just one, so the clubs recognise they need to work with each other to attract those trips.

“There’s a good opportunity for local clubs to work together to bring people into Wales ... we try to offer competitive pricing, and it’s not to undercut other clubs. We try to work together to have a similar rate.”

Some see a role for Visit Wales in bringing clubs together in a particular region and marketing a ‘golf trail’ to visitors. This would go hand in hand with promoting the steeped history of golf in Wales, the stunning views and the excellent value for money.

“I’d love to see a golf trail developed in Wales. It’s about heritage, and people respect that.”

“When I talk to visitors from England, they don’t realise the value that you get here. They’re happily paying £200 – £300 a round. Our fees are still under £100.”

## **Some clubs are building accommodation**

Due to enquiries and potential demand, some clubs are currently investing in their own dormy accommodation onsite.

“The demand for accommodation is so high and so our next capital expenditure project is to build dormy accommodation”

“We are in the planning process for self-catered lodges and 20 twin rooms. We’re desperate to get the planning approved. It’s a £5m investment.”

## **Further investments in products, services and marketing**

As well as accommodation, some clubs are investing in improving their core golf product or the accompanying services. There are also new ideas for promotion.

“We’ve set ourselves up to host overseas golfers better, for example by putting caddies in place, providing towels and putting rangers in place. Overseas golfers tend to be quite demanding.”

“We have started work on a driving range and a chipping area. We have made significant investment into the greens machinery and training. We have an ongoing 5 year plan with an agronomist. We have also worked with a course architect to work on the aesthetics. We are talking about trying to create events alongside other clubs to make our area a golf destination.”

## **Attracting the men’s Open**

Some say that Wales really needs to attract the (men’s) Open if the country is to see a step change in awareness internationally.

“Bringing an Open Championship to Wales would be huge. We’ve seen the impact reports about what it’s done to [courses in] Scotland and Ireland in terms of golf tourism.”

Some point to Royal Porthcawl as having the best chance in Wales of being selected to host the Open. One club however feels that this is unlikely due to lack of infrastructure at the club or a suitable place to erect grandstand seating.



Pennard Golf Course, Swansea

# **What are the barriers to growth?**

## **Question marks over product suitability for American golfers**

Whilst the thought of attracting more overseas golfers excites many clubs, some question whether Wales has the right product to attract the Americans. They tend to be attracted to Scotland because of it being the 'home of golf', and Ireland because of ancestry. They take long stays of at least a week and so seek a number of top quality courses. Some Welsh clubs say that whilst Wales has a few such courses, there aren't enough for a full tour.

"We've got some fantastic courses in Wales but we need to invest to bring more courses up to the standard of the top courses in Scotland and Ireland. The risk is that the gap between Ireland & Scotland and Wales opens up because they're reinvesting so heavily in their facilities."

"We have some great courses in Wales but are there enough of them to entice American golfers to Wales for a holiday?"

Clubs feel that Wales offers excellent value for money compared to Scotland and Ireland. However, they also say that American golfers are much less price-sensitive than Europeans. In some ways, Americans might actually rather pay a high price because they perceive they are getting top quality. There are doubts over whether Wales has sufficient top end quality accommodation.

"Americans won't look at a course that charges less than £100. They think it can't be good."

"We're opening up high end luxury accommodation and are planning to target the high spending American market. For the price of a green fee alone at Royal County Down, they can stay in a castle in Wales and play at Porthcawl."

## **Perceived flights access to Wales**

Some clubs say that they face a challenge sometimes in convincing overseas tour operators that flight access to Wales is not as difficult as they perceive. Direct international flights to Cardiff Airport are limited and so Visit Wales Travel Trade Team invests much time in informing operators that they can easily access Wales through Bristol, Birmingham and Manchester airports (as well as still promoting Cardiff Airport). Once operators have made the trip to Wales via a nearby English airport, they realise the journey is relatively simple, but it can be a challenge getting them to that point.

"Tour operators can't seem to get their head round that they land in Manchester but come to Wales. It's only when they actually do the journey themselves that they get it. They then go back and put a trip together, but it can take two years to get to that stage."

## 4. Tour operators

This section is based on 19 qualitative interviews with UK and overseas based tour operators. Although an operator's main market is usually the country they are based in, most operators sell trips to customers living in other countries too. The destinations they sell could be anywhere.

### What are the main characteristics of the geographical markets?

#### UK

UK golfers primarily book their domestic trips to take place between April and October. The January to March period is a key booking window. Trips can also be booked last minute if the weather forecast is good. In this case, the groups are likely to be smaller, comprising maybe two to six people. The opportunity to attract some last minute bookings when the weather is good sets the domestic apart from overseas because access to the golf destination is much quicker and easier.

As well as competing against each other, UK golf clubs and other suppliers interested in the domestic market are also competing against overseas destinations, especially Ireland, mainland Spain, Spanish islands, Portugal and France. If the UK experiences a summer of poor weather then this makes it harder for the UK to compete against overseas travel. UK-based operators, especially larger ones, send customers overseas as well as within the UK.

Female golfers make up a notable proportion of the domestic market. One large operator estimates 30% of UK customers are women and another large operator estimates 20%.

UK golfers taking domestic trips tend to be fairly easily satisfied with accommodation. Many are content to stay in mid range or budget accommodation as the focus of the trip is the golf experience.

One of the challenges facing UK-based operators selling domestic trips is that their customers could easily book their rounds and accommodation directly if they want to, leaving a very limited role for an operator.

“A lot of the time it's someone within a club who will organise it with their mates. How do you get them to come to us and buy a package when they have already sorted the accommodation and booked golf times?”

UK operator

#### Europe

European golfers tend to have a slightly narrower season for booking trips to the UK, more like May to September than April to October. Typical trip lengths are 7 nights with 5 rounds of golf, or 5 nights with 4 rounds. There are also some trips of 2 to 3 nights.

“We make no attempts to sell past September”

French operator

UK golf clubs and other suppliers interested in the European market are competing against other European destinations, especially warm sunny places such as Spain and Portugal. Some north European golfers are only interested in climates different to their own, which rules out the UK.

“The UK hardly features at all as our customers want sunnier climates”

German operator

The Scandinavian market has a strong female presence, with some operators saying that women make up nearly 50% of their customers. Compared to most other markets, Scandinavia is further along the journey towards equal presence of female and male golfers.

Scandinavians also appreciate good value for money. This means that they are more likely to seek mid range and budget accommodation than some nationalities, and they are more easily persuaded to visit good value destinations instead of pricey ones.

Golf is not a big sport in Germany, but many of those who do play will travel for it. The standard of play among German golfers is quite poor compared to the UK, which means that they seek aesthetically pleasing courses rather than challenging ones. Germany also has quite a high proportion of female golfers.

Germans appreciate the wider tourism offering like meeting local people and experiencing local culture rather than only playing golf during the trip. Some segments of the market seek luxury accommodation, but many would rather a 4 star standard so that they have spending money left over during the trip.

“Wales has some spectacular courses on the coast. It doesn’t need to be Royal Porthcawl or Twenty Ten [Celtic Manor]; the Germans are not bucket list hunters. They want to play nice local scenic courses. They come to Wales for the smaller villages.”

German operator

Dutch golfers can be quite price-sensitive. Many also crave seeing mountains because they don’t have any in their own country. This makes courses in Wales which are based with a good mountain view potentially very appealing.

French golfers tend to be men. The women’s game has not yet caught on in France like it has in Scandinavia or Germany.

## **USA**

Americans coming to Europe to play golf differ from European golf tourists in a number of significant ways:

- They tend to stay for longer on average, typically at least 7 nights, sometimes 10. This has implications for whether a destination has enough attractive courses to fill the time.
- They tend to spend big. They typically seek high profile courses and high end luxury accommodation, and are prepared to pay for it.
- They are particularly wedded to Scotland and Ireland because they value being able to say they have played somewhere prestigious for golf. History and ancestral connections to Scotland and Ireland also play a role.

“Americans spend a lot of money and want to say they’ve been to well known places and courses. Ireland and Scotland cater for this.”

US operator

“I cater for the European market, which is vastly different to the North American market. The European market is typically smaller groups, shorter stays and they are more budget conscious than the Americans.”

Dutch operator



Conwy Golf Course

## How well does Wales sell for tour operators?

### Strong destination for domestic market

For UK-based operators, Wales sells reliably well. Whilst Wales doesn't have the same golfing prestige as Scotland and Ireland, it makes up the difference in volume from having the very large capacity of the Celtic Manor and easier access from most parts of England, especially compared to Ireland. Wales does not need to be combined with parts of England for a domestic golf trip: it sells well enough by itself.

“We send 10,000 UK golfers to Wales each year. Volume to Scotland and Ireland is similar. A lot of that is to do with the Celtic Manor having 750 rooms, whereas smaller groups go to Scotland and Ireland, and Ireland involves catching a flight.”

UK operator



“In 2024, we sent approximately 11,000 people to Wales on golf trips and booked 21,000 rounds”

UK operator

UK operators tend to view Wales in two distinct parts: North Wales and South Wales. Both are easily accessible from England, although one large operator feels that North Wales is a close drive time for a larger part of the English population than South Wales. This has implications for the number of nights stayed.

## **Lacking in consumer awareness overseas**

Wales does not sell well overseas compared to Scotland and Ireland. Its golf offering lacks awareness among consumers and so it doesn't get requested as much, and golf operators tend to be rather customer-led. Scotland and Ireland by comparison are perceived to have a strong golf product with history, quality courses, luxury accommodation in the right places and further attractions such as distilleries in Scotland.

“It's going to be a record year for us for Americans coming over to Scotland and Ireland ... but we've really struggled to bring US golfers into Wales”

UK operator (also serving inbound market)

Lack of consumer awareness of Wales overseas can to some extent be countered by combining trips with nearby parts of England, especially the popular area around Liverpool with North Wales.

“We've done a couple of group extensions to North Wales from the Open courses in the Liverpool area”

Scandinavian operator

Other overseas operators however do not see the same potential to combine North Wales in this way as the Liverpool area sells well enough by itself with its premium courses.

“The Southport area of England has so many premium courses that I feel the incentive of including [North] Wales in the trip is not there”

Swedish operator

The operators themselves have better awareness of golf in Wales than their customers, having come over to play, but lack of awareness of suppliers can be a hindrance to making the effort to put packages together.

“If I had good contacts who want to work with tour operators, I could put in a much bigger effort to grow sales in Wales but my main problem is a lack of suppliers to correspond with.”

French operator

## **When do golfers visit Wales?**

### **April to October**

Echoing feedback from the clubs in Wales and in line with demand for the UK more widely, the main season is April to October. Overseas visitors are more likely to come May to September, but they currently represent a very small proportion of the market compared to UK visitors.

## **On which days of the week do golf visitors play in Wales?**

### **Good demand through the week**

Demand for Wales (and the UK generally) from UK golfers is highest Friday to Sunday, but because it can be hard to play as a non-member on Saturdays, this spreads out bookings onto weekdays. The resorts such as the Celtic Manor, the Vale and St. Pierre however have multiple courses and so have more capacity for weekend bookings.

Demand for Wales (and generally anywhere) from overseas golfers is well spread across the week because trips are longer than for UK golfers (e.g. 5 nights or 7 nights). Operators may avoid relying on Saturday as a playing day, knowing that it's the hardest day for golf visitors to play anywhere.

"Most of our trips are Sunday to Friday because we know that courses are pretty full at weekends. When we have a week-long trip, we try to travel Saturday to Saturday because Saturday is a members-only day everywhere in the world."

German operator

## **What are the perceived positives of Wales as a golf destination?**

### **Far better value than Scotland and Ireland**

Wales' current USP over the much better known golf destinations of Scotland and Ireland is that its value for money is far better. Scotland and Ireland have seen significant price hikes in green fees in recent years (post-Covid), leaving Wales now set apart in its value for money offering. This is seen as a particular advantage among UK and European operators, who see a clear opportunity for Wales to take market share from Scotland and Ireland.

"Rates have gone up massively for the top end courses across Scotland and Ireland. Yes they've gone up a bit in Wales too, but we're finding that the links courses of North and South Wales are great value for money."

UK operator

One large UK operator also feels that North Wales offers much better value for money golf than the popular nearby Liverpool area.

“North Wales offers exceptional value. North West England is a very popular golf destination but the cost of that really since Covid has accelerated. It’s a great option being able to move people to North Wales.”

UK operator

The only downside of Wales’ much lower green fees is that some overseas golfers, especially the Americans, judge the likely quality of a course by its fees. This could result in courses in Wales being perceived as inferior quality.

## **Welsh golf courses are less inundated with other tourists**

One of Scotland’s and Ireland’s downsides of being so popular with the overseas market is that visitors can find themselves surrounded by other visitors. This may take away some of the experience of being in a new destination and meeting local people. Wales does not have this issue.

“Wales has a different kind of tourism to Scotland and Ireland. I’d consider it to be even more luxury because you have things to yourself; you’re not surrounded by crowds. People just don’t know about it.”

US operator

## **A few top quality courses for shorter trips**

Whilst green fees are much cheaper in Wales compared to Scotland and Ireland, the question is how the quality of the courses compares.

The general view is that Wales has a few top courses which are in the same league as the top courses in Scotland and Ireland. In particular, Wales has Royal Porthcawl, which is seen as a flagship course that can be used to sell a tour. Wales also has several other good courses with stunning coastal views. It therefore offers sufficient quality for short trips.

“It’s vital to have at least one flagship / bucket list course to show my clients. Porthcawl would fit the bill ... and looks loads cheaper than St. Andrews.”

Scandinavian operator

## **Further positive of Wales**

- Quaint experience beyond the golf, with small towns & villages and beautiful scenery
- Some UK and European operators find the quality of accommodation adequate if not seeking luxury and do not experience issues with capacity if groups are fairly small

“North Wales is ‘pubs with rooms’. It’s ok as we sell it that way.”

UK operator

“Wales is completely underrated in the German market. It has all this beautiful scenery and courses which the Germans are looking for but they don’t know about it.”

German operator



Porthmadog, North Wales

## **What are the perceived barriers to golf in Wales?**

### **Lack of consumer awareness overseas**

Wales misses out on the lion’s share of overseas business coming into the British Isles because consumers don’t know to ask for it, and therefore operators don’t try and push it. It also doesn’t have the same claim as Scotland as being the ‘home of golf’, which is a particular draw for the Americans.

“Scotland is the home of golf and the Americans love that history. You can’t replicate that elsewhere.”

UK operator (serving also inbound market)

### **Perceptions of flight access**

International flight access from Cardiff Airport is currently limited, and so usually the most realistic chance of finding a suitable flight is to explore options to Bristol, Birmingham or Manchester. Some operators understand this and do not see it as a barrier, but others are put off by flying to an airport outside of Wales, even though the onward journey time might not be long. Even where Cardiff does have direct flights, there is often not as much choice of times and dates as operators would like.

### **Some issues with accommodation**

Whilst some operators have no issues with the quality or capacity of accommodation in Wales for golfers, others do. Those seeking high end luxury accommodation, especially for American customers, generally do not find it or perceive they would find it if they looked properly in Wales. Key competitors Scotland and Ireland however are perceived to offer it.

“I feel that Wales has a strong offering for mainland Europe and Scandinavia. The American market is too luxury for what Wales offers.”

Scandinavian operator (serving also the US market)

Operators seeking hotel capacity for larger groups often struggle in Wales.

“If you’re a tour operator you need a hotel with 30 to 40 rooms. You’re not going to invest in making a package with a B&B with 6 rooms. You need a big enough place. It’s just not available in Wales.”

Dutch operator

Some overseas operators also struggle to find accommodation suppliers in Wales who want to work with the travel trade. There is reluctance among some suppliers to offer trade rates or free cancellation policies.

“Accommodation is undeniably the biggest hurdle in Wales. I prefer to work with hotels directly but it’s not always possible. They’re not travel trade friendly. To build interesting packages you need a bit of a margin. If hotels are only interested in charging the full rate then I look for something else.”

Dutch operator

## **Lack of awareness of suppliers**

Operators tend to know the top few clubs and their onsite or nearby accommodation, but beyond that, awareness is lacking. It takes time and effort for an operator to find and make contact with potential suppliers, in particular those who are willing to work with the travel trade.

Wales is said not to promote golf actively, whereas Scotland and Ireland organise regular meet the buyer events for their golf suppliers, making it easy for the buyers to form connections.

As well as finding the right golf clubs and accommodation providers, some overseas operators need to find suitable transport providers because visitors are reluctant to drive on the ‘wrong side of the road’ and so transport is needed. Suitable transport is not always easy to find and this issue is linked to some operators’ lack of awareness of suppliers generally and so they may not have tried very hard to find solutions.

“Our biggest challenge is transport. The Germans don’t want to drive on the wrong side of the road; they need transport. We don’t have a network of transport suppliers from Bristol or Cardiff airports to the various hotels, or to take around during the trip.”

German operator

## **Not enough high profile courses for longer trips**

If Wales is to attract longer trips, especially from America, it may struggle with its current limited number of high profile courses. Some European operators also cite this as a barrier.

“Domestically yes, I can see growth for Wales, but I just can’t see the US client coming because Wales doesn’t have the breadth of top courses. The Americans come over for at least 7 nights and 5 rounds. Once they’ve played Royal Porthcawl, there isn’t another course in the [world’s] top 100. In Scotland, they can play five courses all within the top 100.”  
UK operator (serving also inbound market)

## **Lack of a top figure head player**

Rory McIlroy, recent winner of the Masters and with a distinguished career, is a figure head for Northern Ireland as a golf destination. Demand for golf there is perceived to be flourishing. Wales by comparison has arguably not had a world leading player since Ian Woosnam.

## **What are the opportunities for women’s golf?**

### **No major barriers**

Women now make up a sizeable proportion of operators’ business – especially for Scandinavian and German operators. They rarely come across barriers to playing golf such as lack of adequate changing facilities anymore, either in Wales or generally anywhere.

“We rarely hear about barriers for ladies anymore. Nothing like ‘ladies can only get changed in the car park.’”  
UK operator

### **The package is more important for women**

One important difference from men that operators recognise when marketing to women is that the non-golf elements of the package matter more. This includes the quality of the dining experience and possible add-ons such as a spa and afternoon tea.

“A spa becomes important in the overall package. It’s more perception rather than: do they actually use it? The dinner element becomes more important for a group of ladies compared to a group of guys. And you can do those little add-ons like afternoon tea.”  
UK operator



Bethan Roberts, Machynys Peninsula Golf & Premier Spa

## **AIG Women's Open**

Operators are positive about Wales hosting the Women's Open. Most UK and European operators were already aware of this happening in Wales before being asked during interview, although prior awareness among US operators was much more limited. One UK operator is using the event as a talking point when selling South Wales to customers.

"It's a talking point on the phone. Porthcawl are great to work with and it's great to say it's the home of the Women's Open ... we definitely use it when talking to customers about the South Wales area."

UK operator

Like the golf clubs however, some operators say that Wales needs to attract the (men's) Open if it is serious about breaking through as a major golf destination.

"Trips to the UK tend to feature Scotland, Ireland and England. Wales does not feature much. Americans want to play the Open rotation courses."

US operator

## **What will encourage operators to feature Wales more in future?**

### **Initiative rests in Wales' court**

Operators are generally open to considering featuring Wales (more), but the initiative has to come from Visit Wales, especially if overseas business is to grow. Operators are content to just keep selling destinations that are currently in demand. There is an element of inertia regarding operators trying to set up new destinations for their portfolio and so they want Visit Wales and partners in Wales to make it easy for them.

Wales already sells well for UK operators, but some see significant potential for the domestic market to grow further if Visit Wales invests in joint promotions with them.

“We do a lot of co-operative marketing channels with Tourism Ireland ... Wales features highly on our channels because it converts well commercially for us. But if the funding was there from Wales, there’s a huge opportunity to grow the visitor numbers.”

UK operator

## **Trade shows and familiarisation trips**

Numerous operators cite Scotland and Ireland as organising successful events in their destination which bring the operators together with all the relevant suppliers. Operators find this very effective for getting any new products off the ground. The events are then usually followed by trips to see the courses and accommodation first hand. This gives operators the confidence to put a package together and sell it convincingly to customers.

“For their golf tourism week, VisitScotland bring all the hotels from different regions, different levels of hotels, different levels of golf course, the transfers. They’re introducing everyone to different aspects of the golf tourism industry.”

Dutch operator

Tourist boards and suppliers representing Scotland and Ireland also have a strong presence at industry trade shows taking place in other locations.

Wales by comparison is felt to be absent from this space. The result is that operators don’t feel they know where to find the right suppliers, especially as many don’t reply when contacted, and they lack the confidence to sell Wales to customers because they don’t know it well enough themselves.

Some US operators say that Wales should invite influencers to visit. These could be high profile end-customers who influence many golfers to go where they recommend.

“I would bring some of my key clients. It would pay bigger dividends as they have sway within their clubs. They’re the decision-makers in these private clubs.”

US operator

That said, organising successful events or familiarisation trips in a destination is not straight forward to achieve. A few operators point out that these initiatives do not always result in bookings, and some can’t find the time to attend, even though they would like to.

## **Further initiatives**

- Webinars are cost-effective and time-efficient for busy operators
- Promoting Wales’ golf history, as Wales has interesting stories to tell

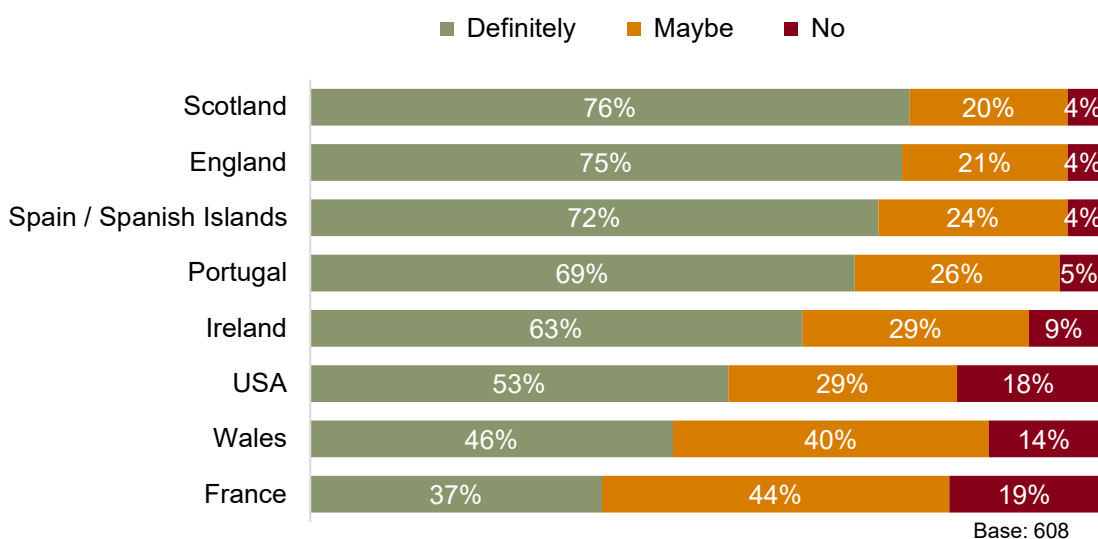


## 5. Consumers

This section is based on an online panel survey with 525 consumers in Britain and Ireland who take golf breaks.

### Consideration of Wales and competitor destinations

**Figure 1: Q8 “Which of the following destinations would you consider for a golf holiday / break involving overnight stay, where golf is the main purpose of the trip?”**



After the filter question (Q8) shown above, only those answering they would 'definitely' or 'maybe' consider Wales for a golf holiday / break qualified for the remainder of the survey

### Wales is a lower consideration than nearby competitors

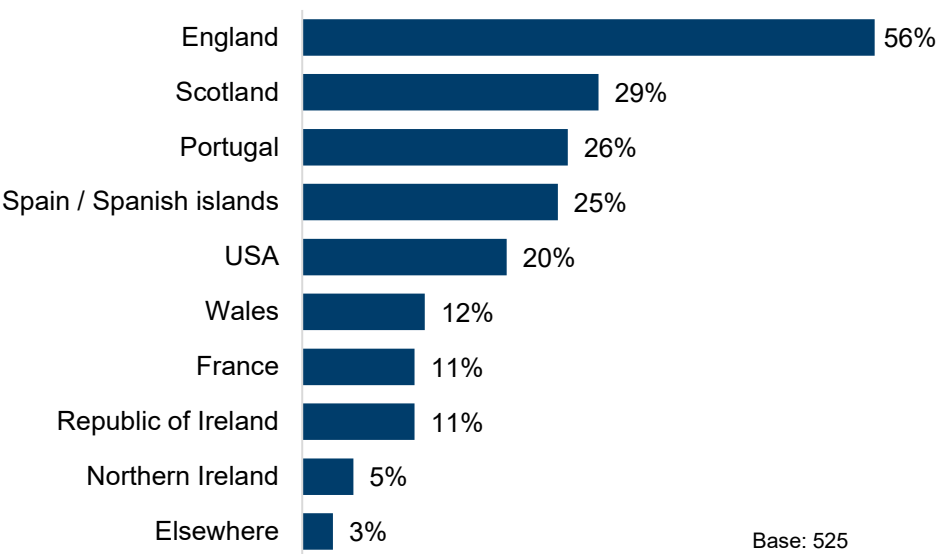
Close to half (46%) of those who take golf breaks would consider doing so in Wales. The proportion saying they would 'definitely' consider Wales is higher among British residents (48%) than Irish residents (29%). Answers do not vary significantly by gender, age or type of party.

The nearby regions of Scotland, Ireland and England are all considered more strongly than Wales, as are some overseas destinations, most notably Spain / Spanish islands and Portugal.

However, consideration and actually following through with a booking are two different things, and Wales has a key advantage of easy access from most of England. We discuss this in more detail under perceptions later.

# Most frequently chosen golf destinations

Figure 3: Q10 “Where do you most often go on golf breaks?” (Tick up to three)



## Answers correlate with home region

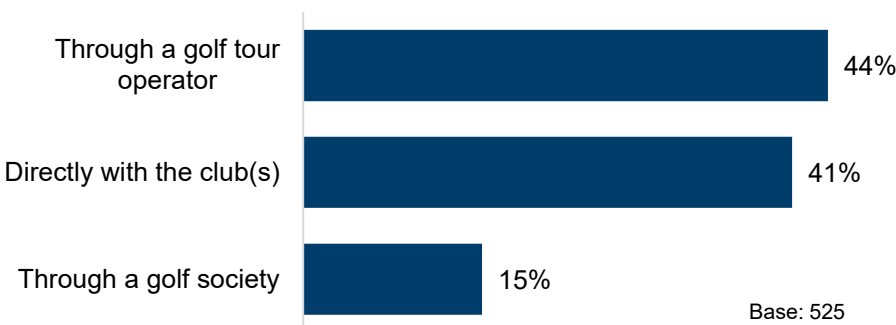
In each main region of residence, England, Scotland, Wales and Ireland, the golfer’s home region is the most common answer to the above question. So as well as sometimes taking breaks in other destinations, easy access seems to play an important part in the conversion of interest into bookings. Answers do not vary much by gender, age or party type.

Higher proportions answering Wales are among:

- Wales residents (42%)
- English residents (12%) compared to Scottish residents (4%)
- Women (17%) compared to men (10%)

## Making the booking

Figure 6: Q13 “How are the tee times on your golf breaks most often booked?”



## Balance between direct bookings and tour operators

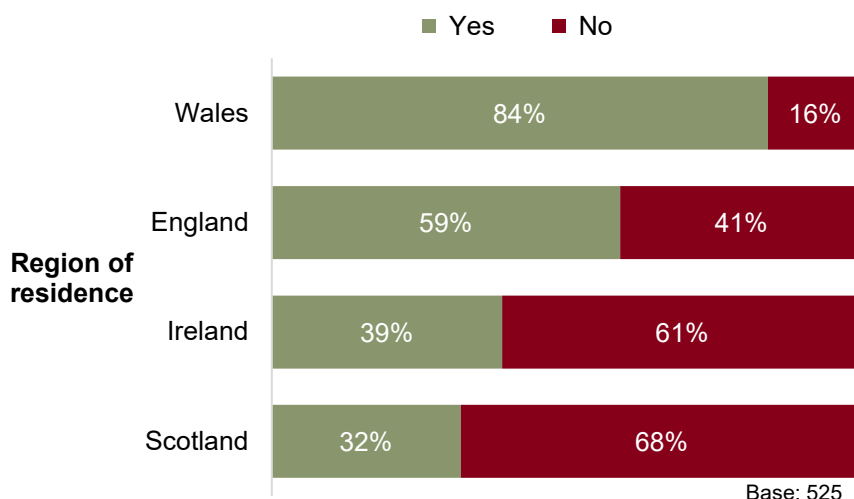
As the golf clubs also report, bookings direct to the club and bookings through golf tour operators are quite well balanced. There are many golf tour operators selling breaks in the UK, but the two very large players in the market are Your Golf Travel and Golfbreaks.com.

Answers vary by age and gender. Those most likely to book through tour operators are:

- Women (57%) compared to men (40%)
- Under 45s (54%) compared to over 45s (38%)

## Taking golf breaks in Wales

Figure 8: Q15 “Have you ever been on a golf break in Wales?”



## Ease of access shows in results

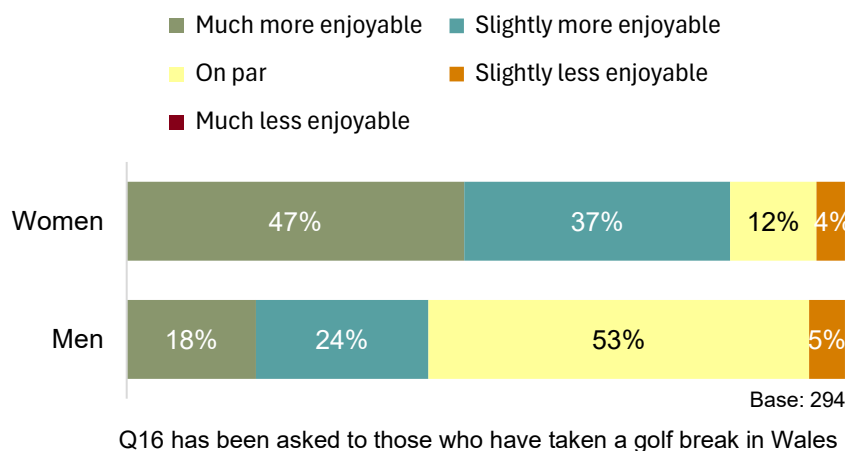
Overall, 56% of consumers have been on a golf break in Wales. Answers vary significantly by region of residence, with likelihood correlating strongly with proximity to Wales.

Those answering ‘yes’ are also more likely to be found among:

- Women (68%) compared to men (52%)
- Under 45s (70%) compared to over 45s (48%)
- Couples (68%) compared to groups of friends (49%)

## Golf in Wales compared to other destinations

Figure 9: Q16 “How do golf breaks in Wales compare to other destinations?”



### Positive feedback on Wales

About a quarter (27%) of those who have taken a golf break in Wales describe the experience as ‘much more enjoyable’ than golf in other destinations, and a further 28% describe the experience as ‘slightly more enjoyable’. Only a small minority (5%) describe golf in Wales as ‘less enjoyable’.

Answers vary significantly by gender of respondent, shown above, with feedback from women being much more positive.

The proportion describing golf in Wales as ‘much more enjoyable’ is also higher among:

- Under 45s (48%) compared to over 45s (8%)
- Couples (44%) compared to groups of friends (14%)

Sample sizes by region of residence are too small for reliable comparisons.

### How Wales fares better than the competition

Respondents have been asked to say how they think golf in Wales fares to golf in other destinations. We discuss the main positives for Wales below.

#### Stunning scenery

Welsh golf courses are often set near attractive coastlines or in rolling hills. This forms an important part of the golfing experience and is considered to be a key positive for Wales by both previous visitors and non-visitors.

“Wales has super stunning and natural scenery, which is so important to me”  
Female visitor, East Midlands, 25 to 34

## **Better value for money than Scotland, Ireland and South East England**

Echoing the feedback from tour operators, many consumers also feel that Wales offers much better value for money than its key competitors. The quality of Welsh courses is not compromised by the cheaper prices. Many clubs in Scotland and Ireland are felt to be charging high prices for their prestigious reputation, capitalising on the American market in particular for its price-insensitivity. Wales by comparison is perceived as unpretentious.

“Wales tends to be more affordable than top-tier destinations like Scotland, Ireland or the Algarve. You can often play high quality courses and stay in charming accommodation without breaking the bank.”

Female visitor, Scotland, 25 to 34

## **Less crowded than better known golfing destinations**

Whilst Scotland, Ireland and parts of England are all much better known for golf than Wales, their downside is that courses can become overcrowded with tourists. This takes away some of the relaxed, authentic feel.

Golf in Wales by comparison has a more laid back atmosphere. This fits with the relaxing experience that many golfers seek when playing the sport.

“Golf in Wales is not so crowded, giving me a more relaxed experience”

Female visitor, East Midlands, 25 to 34

## **Further positives of Wales**

- Some world-class courses, especially Porthcawl and Celtic Manor
- Courses generally perceived as well maintained
- Some luxury resorts for those seeking top end accommodation, as well as a variety of mid range and budget accommodation for those simply needing a place to sleep
- Friendly, down to earth hospitality of Welsh people, which adds to the golf break experience of relaxing somewhere different
- Convenient to get to from many parts of England, which means that Wales performs well on converting interest into bookings
- Rich golfing history, albeit less well known than Scotland's

“The golf courses are very scenic and of a high standard. Prices are good value for money and the golf clubs are very hospitable.”

Male visitor, London, 55 to 64

“People are nicer in Wales compared to England”

Female visitor, Republic of Ireland, 25 to 34

“It's less travelling for me so I can get back home quickly if there's a problem”

Female visitor, West Midlands, 55 to 64

## **How Wales fares less well than the competition**

### **Unpredictable and often poor weather**

The weather is a significant barrier to golf in Wales. This is both an experience among visitors and a perception among non-visitors. Whilst golfers can play in the rain, they wouldn't choose to. Poor weather can tarnish the experience of a relaxed game and attractive scenery.

Other parts of Britain and Ireland are hardly famed for having good weather either, but Wales in particular seems to suffer from a reputation of rainy weather among consumers in England. Unfortunately though, feedback on spoilt golf trips in Wales means that this barrier is not entirely a perception issue.

"The experience was on par with other countries that I have holidayed in but the rain spoilt the golf somewhat"

Male visitor, London, 55 to 64

### **Not so many top quality / famous courses**

Whilst Wales has Royal Porthcawl and the Celtic Manor as flagship courses to attract visitors, there is a perceived lack of other famous courses to support the offering, especially outside of South East Wales.

"Wales is not famous for golf clubs but I'm willing to give it a try, time allowing, and if my companions are also willing"

Male non-visitor, East of England, 35 to 44

### **Lack of awareness of golf in Wales**

Among non-visitors there is a lack of awareness of what golf in Wales offers. This means that beyond a superficial level, they are guessing what golf would be like there and so any interest in Wales may remain weak. There needs to be more 'pull' to strengthen interest.

### **Perhaps lacks a bit of excitement**

Some golfers, both visitors and non-visitors to Wales, have no negative feelings towards Wales as a golf destination but feel the prospect of visiting Wales for golf lacks a bit of excitement, especially compared to going abroad.

### **Hilly terrain could make golf difficult**

Wales is known to be hilly. This puts off some non-visitors because they think the terrain could be challenging for playing golf. There are others who see this challenge this as a positive.

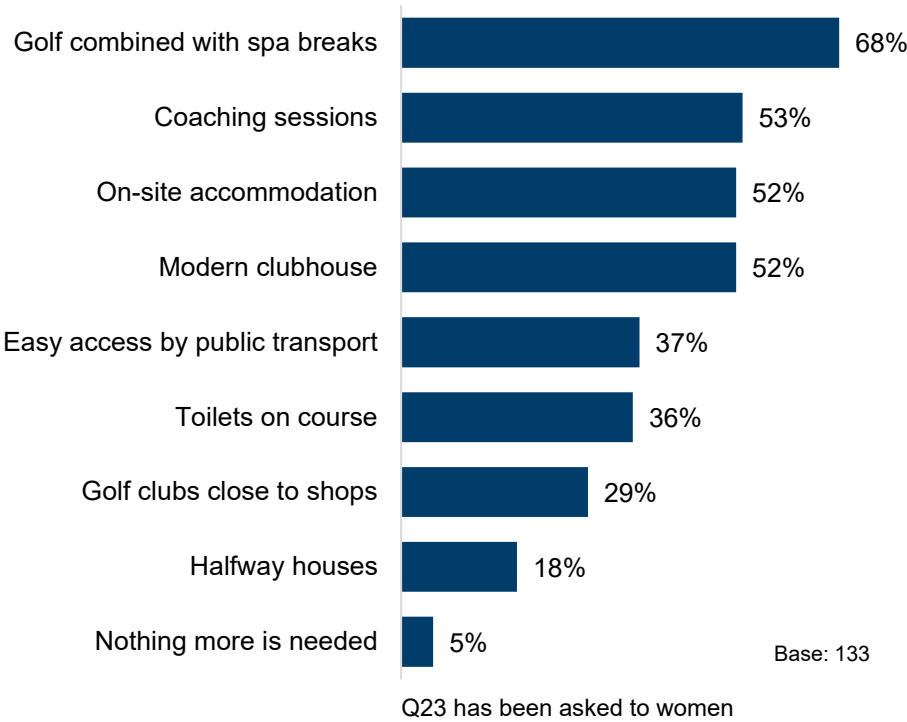
## Otherwise many perceive the golfing experience in Wales as comparable to the rest of Britain and Ireland

Aside from the above barriers cited, there are many golfers (visitors and non-visitors) who perceive the offering in Wales to be comparable to the rest of Britain and Ireland. This can be meant in a positive or an indifferent way.

“Scotland has my favourite golf course and Wales was on par with that. The courses were stunning.”  
Male visitor, South East England, 35 to 44

## Making golf breaks more appealing to women

Figure 12: Q23 “What, if anything, would you like to see golf clubs doing to make golf breaks more appealing to women?” (Prompted)



## Most women see a need for improved appeal

Whilst golf clubs and tour operators generally feel that the offering for women has now caught up and little more development is needed, female golfers themselves still feel that more can be done.

Golf combined with spa breaks is appealing to many, which backs up tour operator feedback. Some clubs interviewed are in the process of building on-site accommodation or are trying to gain planning permission for it, toilets on course and halfway houses.

## **6. Implications for Visit Wales and partners**

### **Should Visit Wales and partners invest in golf tourism?**

There is a strong case for investing in promoting and developing the golf tourism product in Wales:

- Clubs in Wales are committed to attracting more visitors; they have the capacity during the months when visitors want to come
- Wales has a clear opportunity to take market share from Scotland and Ireland because of its far better value for money
- Wales' golf product is already felt to be sufficiently good for the UK and European markets, with visitors rating it favourably; it's the awareness that's lacking
- Secondary research shows that golf visitors to Wales spend more on average on day trips than those doing most other outdoor activities
- Golf attracts visitors during the spring and autumn shoulder seasons when accommodation occupancy rates are lower

A key consideration is how the opportunity of golf tourism compares to other products which Visit Wales is currently reviewing.

### **Which geographical markets should be targeted?**

If Visit Wales decides to invest in promoting golf tourism more, the three main geographical markets to consider are UK, Europe and America.

There is a strong case for targeting the UK. Wales already sells well for this market, and clubs and operators both feel there is more market share to be gained. Easy access from many parts of England is Wales' USP over all of its competitors except England itself.

With the UK market, Wales does not face some of the barriers that overseas markets face, such as flight access and lack of numerous high profile courses for long trips, and accommodation is less of an issue.

Europe also offers opportunity, but targeting this market would require much more resource because there is a considerable lack of consumer awareness to overcome compared to the UK market. There is also a lack of awareness among tour operators about who to work with and how to get to Wales.

However, Wales' golf offering does seem to meet the needs of European golfers, who can be quite price-sensitive, do not generally need or seek high end luxury accommodation and appreciate Wales' natural beauty and quaint towns. The German and Scandinavian markets in particular seem to be a good match for Wales.



Targeting the American market at present would be hard. There are too many weaknesses in the product, including not enough high profile courses for long trips, and a lack of high end luxury accommodation. Also, Wales' USP of excellent value for money over Scotland and Ireland does not hold as well for this market. Many American golfers can afford the high prices and find fulfilment in being able to say they have played iconic courses.

This is not to say that Wales cannot attract American golfers. Some courses already do. But the return on investment seems less certain than for markets which Wales' product is already a good match for.

## **Female market**

Female golfers who visit Wales rate the destination very favourably compared to other golf destinations. There is clearly an opportunity to target this market, using the Women's Open as a springboard.

## **Attracting the men's Open**

Attracting the Women's Open is a good start, but Visit Wales and partners also need to look into how Wales could possibly attract the men's Open. This would give a step change in awareness of Wales as a serious player in golf tourism.

## **Is support needed for new golf product?**

Some clubs are undertaking capital development projects or are seeking planning permission to do so. They seem astute in spotting opportunities and do not need to be told what product to develop. However, an overall golf strategy for Wales may help clubs to make the business case for investment or for local authorities to attract developers, e.g. where there are gaps in the accommodation product.

## **Bringing suppliers together**

There is a role for Visit Wales to play in bringing suppliers together: golf clubs keen on attracting visitors, accommodation providers willing to work with the travel trade, and transport operators. When targeting markets outside of Wales, especially overseas, suppliers generally see each other as partners rather than competitors. They know they will achieve much more if they work together because visitors can be encouraged to stay longer and play multiple courses.

Each region of Wales would benefit from itineraries of which courses to play on which days (taking into account when each course is typically less busy), where to stay and how to travel. If the female market is targeted, accommodation options should include establishments which have a spa and good quality dining facilities.

## **Promotion directly to consumers or through tour operators?**

For the UK market, Wales could be promoted through either channel and so the decision rests on the relative costs and expected returns. As approximately half of business currently comes through tour operators and most of it comes through a few key players, this seems a cost-effective route to market. Wales sells well for domestic operators and so they are likely to welcome working with Visit Wales to grow the destination.

For the overseas market, visitors are more likely to book through tour operators and so this seems the obvious route to market.

## **How should Visit Wales work with tour operators?**

Visit Wales has a role to play in bringing buyers and suppliers together. Buyers, especially overseas, lack awareness of Wales' offering beyond the few well-known courses and resorts. Familiarisation trips and meet the buyer events in Wales are needed.

Tour operators also run co-operative marketing campaigns with other destinations and are open to doing this with Wales.

## **What are the main promotional messages?**

For the UK market:

- Wales' well maintained golf courses are easily accessible from many parts of England
- Play relaxing golf amidst stunning natural scenery and away from crowds
- Unrivalled value for money compared to other golf destinations
- Female-friendly golf destination with appropriate facilities, spa accommodation, high quality dining and Women's Open legacy

For the European market, the key messages are the same except for the first point:

- Wales is easily accessible from airports in Cardiff, Bristol, Birmingham, Liverpool and Manchester