



**PHD CHAMBER**  
OF COMMERCE AND INDUSTRY



भारत 2023 INDIA  
वसुधैव कुटुम्बकम्  
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# 5th PHDCCI **GOLF** TOURISM CONCLAVE & TOURNAMENT

**'Golfing in India: Beyond Tees and Greens'**

**March 2023**

**Ahmedabad, Gujarat**

**ORG india**



# **GOLFING IN INDIA: BEYOND TEES AND GREENS**



**PHD CHAMBER**  
OF COMMERCE AND INDUSTRY



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अरविंद सिंह, भा.प्र.से.  
Arvind Singh, IAS



सचिव  
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SECRETARY  
GOVERNMENT OF INDIA  
MINISTRY OF TOURISM  
NEW DELHI

### MESSAGE

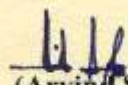
I am pleased to learn that PHD Chamber of Commerce and Industry (PHDCCI) is organizing the 5<sup>th</sup> edition of **PHDCCI Golf Tourism Conclave & Tournament** with the theme '*Golfing in India: Beyond Tees and Greens*' from 17-18 March 2023 in Ahmedabad, Gujarat.

One of the latest trends in Golf Tourism is the fact that there has been a recent surge in the interest levels amongst youth, the world over. India has several golf courses of international standards. Further, high profile golf events held in India attract domestic as well as international tourists.

The Ministry of Tourism, Government of India endeavours to work as a catalyst and active supporter for the development of Golf Tourism in the country. In order to tap this growing segment, Ministry of Tourism is creating a comprehensive and coordinated framework to promote Golf Tourism in India.

I am certain that this initiative of PHDCCI will bring more Golf tourists to India enabling them to experience the magnificent array of Golf facilities at incredible destinations across necessary.

I wish the programme a grand success.

  
(Arvind Singh)  
13.03.2023





### MESSAGE

Golf is a game enjoyed all over the world by both players and fans. Many people consider golf an easy game to learn, but it's a sport that requires a lot of concentration and precision.

The sport of Golf is gaining momentum in India at a breezy pace. The emerging trend of playing golf among the youth has motivated the government and private players to improve infrastructure, including golf courses of international standards and trained manpower.

According to the India Golf Tourism Association (IGTA), Golf Tourism is growing at 9.3% year on year and about 1.6 million people travel for Golf Tourism every year. Golf Tourism is at the nascent stage and needs to be promoted with great intensity across the globe.

Recognizing this potential to develop Golf as a niche tourism product for attracting both international and domestic tourists, the Ministry of Tourism, Government of India is working to evolve a roadmap for formulating strategies for development and promotion of Golf Tourism in India.

PHD Chamber of Commerce and Industry (PHDCCI) has been working as a catalyst for the promotion of Indian industry, trade and entrepreneurship for the past 118 years. It is a forward looking, proactive and dynamic pan-India apex organization. This report by PHDCCI and ORG India provides ample scope and opportunities towards developing Golf Tourism in India.

On behalf of PHDCCI, I would like to extend my warm greetings to those participating in the **5<sup>th</sup> PHDCCI Golf Tourism Conclave & Tournament** and wish it great success!

(Saket Dalmia)



**PHD CHAMBER**  
OF COMMERCE AND INDUSTRY

**Saurabh Sanyal**  
CEO & Secretary General



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### MESSAGE

Golf is a growing sport in India and has the strength to provide round the year tourism to the country. It has been observed that golf-linked tourists possess a higher purchasing power and spend more than the regular visitors.

With an objective to promote Golf Tourism, PHD Chamber of Commerce & Industry is organizing the 5<sup>th</sup> PHDCCI Golf Tourism Conclave & Tournament with the theme '*Golfing in India: Beyond Tees and Greens*' from 17-18 March 2023 in Ahmedabad, Gujarat.

Golf Tourism is rapidly setting a strong foothold in India. Looking at the interest and potential in this sport, the Indian government is now keen to explore Golf Tourism in its true potential. The Ministry of Tourism, Government of India feels this will also help in the development of overall ecosystem of tourism in India.

With top class golfing facilities, developing infrastructure, air and land connections, hotel facilities, stunning golf courses and beautiful weather, India holds the potential to become the leading Golf Tourism destination.

PHDCCI is committed to create such meaningful platforms to do its bit in enabling all the parameters of the tourism industry to grow and flourish further.

We are thankful to all the stakeholders for their support and I wish the conclave a grand success!

(Saurabh Sanyal)



**"Voice of Industry & Trade"**



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## MESSAGE



Tourism creates immense opportunities for inclusive growth and sustainable development through job creation, regeneration of rural and urban areas and appreciation and protection of natural and cultural heritage.

The sport of Golf is gaining momentum and the Ministry of tourism along with the various stake holders is promoting it as a niche product.

ORG India is proud to be associated as the knowledge advisor for the 5th PHDCCI Golf Tourism Conclave being organized by the PHD Chamber of Commerce and Industry (PHDCCI) on 17-18<sup>th</sup> March 2023 in Ahmedabad with the theme *Golfing in India: Beyond Teens & Greens*

The report has been compiled predominantly from trusted secondary sources and telephonic interactions with golfers and tourists showing interest in golf. A few sources referred to include the, Ministry of Tourism GOI, Bureau of Immigration, State Tourism, IGTC

Both the Central as well as the State government over the last couple of years have drawn up schemes and taken measures to develop this growing sport and in turn the tourism around it with all the stakeholders.

We would like to thank the stakeholders, tourism experts and PHDCCI for their enormous support and wish the conclave a grand success



**Chandramouli Guin**

**Director**

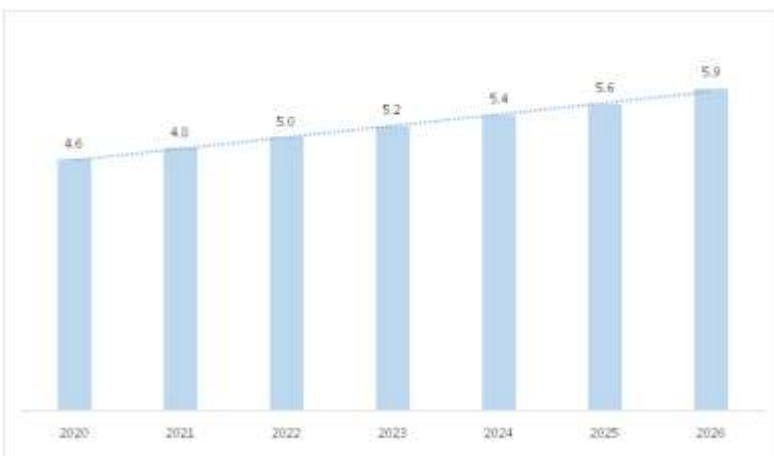


## Golf Tourism: An Overview

Golf is both a sport and a leisure activity with an immense potential of growth post its inclusion in the Rio de Janeiro Olympics Games in 2016. It is originated in Scotland in the 15th century and the word 'golf' is derived from the Old Scots word 'goulf' or 'gouf' which means 'club'. Over time, the game evolved and spread beyond Scotland, with the first golf club being established in England in 1603. In the 19th century, golf became popular in the United States and other parts of the world, leading to the creation of many new courses and the standardization of the rules of the game. Today, the game is played by millions of people around the world, from amateur enthusiasts to professional athletes. It has become a popular spectator sport and a significant industry, with golf tourism contributing billions of dollars to economies around the world.

Golf is closely associated with tourism and the golf tourists make higher average spending than other types of tourists. Further, the golf courses also attract tourism investment, provide quality tourism, improve employment and regional competitiveness and compensate for the seasonality of traditional tourism. It is estimated that the global golf tourism market is expected to achieve US\$ 23.1 billion in 2023 with a CAGR of 5.8% from 2023 to 2033<sup>1</sup>. It is estimated that in 2021, there were 66.6 million golf players worldwide with regions such as Asia (23.3 million), Europe (10.6 millions) and North America (30.6 million) witnessing a positive trend in participation levels<sup>2</sup>. According to a study, the Golf Industry Association (GIA), is expected to earn revenue of Rs. 75 crores and is most likely to grow between 20 to 25 percent annually<sup>3</sup>.

Fig 1: Global Golf Tourism Market Size, 2020-2026 (USD Billion)



All the market research report suggests that there will be an upward trend in the market size of global golf tourism. The growth in the market can be attributed to the rise in number of domestic and international tournaments across the globe, heavy investment in the sport to attract the golfers and expand the local economy and a rise in the number of professional and amateur golfers across globe.

<sup>1</sup><https://www.futuremarketinsights.com/reports/golf-tourism-sector-overview>

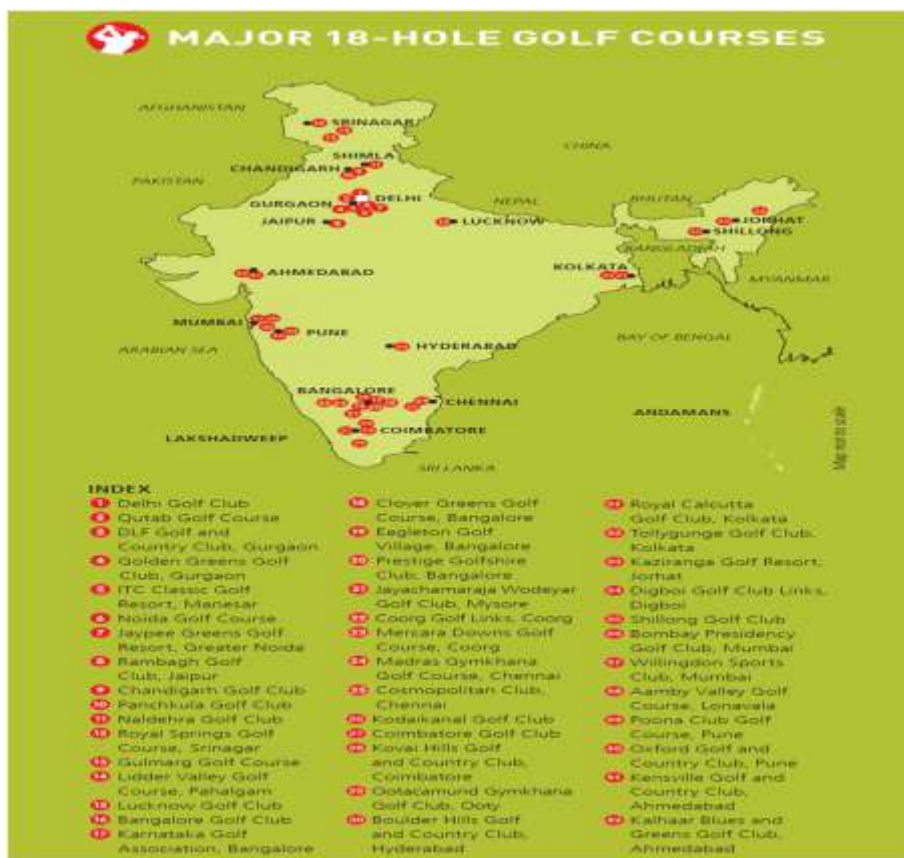
<sup>2</sup><https://api.randa.org/en/news/2021/12/record-numbers-now-playing-golf-worldwide>

<sup>3</sup><https://www.businesstoday.in/bt-golf-club-tournament/story/golf-posed-for-high-growth-as-a-pastime-across-india-349581-2022-10-11>

One of the key factors of positive trend in golf tourism market is the emphasis on improvement of golf infrastructure across the globe. In spite of the fact that golf is concentrated in 20 golfing countries, there numbers are steadily growing. In 2020, there were approximately 38,000 golf courses across globe<sup>4</sup>. North America alone accounted for nearly 50 per cent of the golf courses followed by Europe and Asia (jointly they account for 80 per cent of all golf courses across world)<sup>5</sup>.

## Golf in India

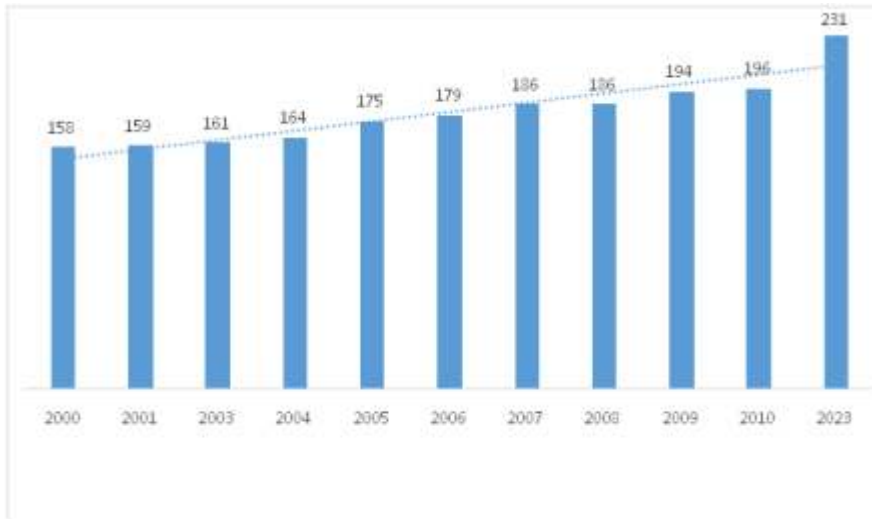
India was the first country outside Britain to have a golf course in 1829 named as the Royal Calcutta Golf Club. Post this the Bangalore Club (1876) and the Shillong Golf Club (1886) was established. The first national golf tournament - the All India Amateur Golf Championship was organised in 1892 by the Royal Calcutta Golf Club. The Hero Indian Cup which is the leading golf tournament in Asia was inaugurate in 1964 and was known as Indian cup. In 1982, golf was also included in Asian games and was hosted in Delhi. Apart from the country's rich golf history, India also boasts of having the world's highest golf course in Gulmarg, Kashmir.



<sup>4</sup><https://www.futuremarketinsights.com/reports/golf-tourism-sector-overview>

<sup>5</sup>ibid

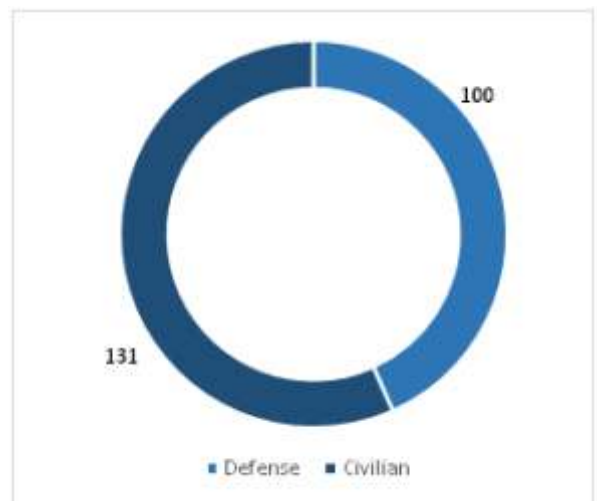
Fig 2: Golf Courses in India



As of today there are about 230golf courses<sup>6</sup> and 231 golf clubs affiliated with Indian Golf Union (IGU) in India which are surrounded by mountains, beaches, desserts, trees, etc. With the expanding golf tourism across the globe, India is also promoting golf tourism with new numbers of golf courses which has acted as a push factor for the sport in India.

Fig 3: Defence and Civil Golf Course in India

In India, there are nearly 100 golf courses that are maintained by the Indian Armed Forces and nearly 131 courses maintained by the civilians. Some of the defence golf courses are restricted to the military personnel and their families, including the Army Golf Course (Delhi), the United Service Club (Mumbai) and the Air Force Golf Course (New Delhi). These courses are maintained by the respective service branches and are generally not open to civilians. However, some of these courses may be made available for non-military tournaments or events.



There are also several golf courses in India that are open to the public, including both private and public courses. These courses are open to both Indian and foreign golfers and often host major golf tournaments and events. Many luxury resorts and hotels in India offers guests a combination of both golf and leisure activities such as Jaypee Greens

<sup>6</sup><https://www.businesstoday.in/bt-golf-club-tournament/story/golf-posed-for-high-growth-as-a-pastime-across-india-349581-2022-10-11>



Golf Resort (Greater Noida), the JW Marriott Bengaluru Prestige Golfshire Resort and Spa (Bangalore), The Lalit Golf and Spa Resort (Goa), etc.

<b>9 holes</b>	<b>37%</b>
<b>18 holes</b>	<b>61%</b>
<b>27 holes</b>	<b>2%</b>



According to reports by Indian golf union, 61 per cent of the civilian golf clubs consist of 18-hole courses, 37 per cent consists of nine hole and only 2 per cent of the courses have 27 hole. This diversity in the golf courses attract many golfers (both domestic and international) and contributes significantly to the growth of golf tourism in India.

The success stories of players such as Aditi Ashok in the Tokyo Olympics in 2021 and players such as Shiv Shankar Prasad Chawrasia and Anirban Lahiri has played an important role in making the game popular among the young players. Further, the recent COVID pandemic has led to a positive growth in golf as players can play alone with reasonable precautions, without the fear of getting infected as the game does not require close contacts.

### Golf Tourism in India

Tourism is an essential sector of the Indian economy and is a significant source of foreign exchange earnings. India has a rich cultural and historical heritage, diverse landscapes, and a variety of tourist destinations, including beaches, mountains, wildlife parks and historical monuments. In recent years, India has seen significant growth in its tourism industry, with an increasing number of domestic and international tourists visiting the country. However, the COVID-19 pandemic has had a significant impact on the tourism industry in India, with the closure of tourist destinations and the restrictions on travel and gatherings. During 2021, 5.8 per cent of the total tourist arrived in India were for leisure and recreational purpose. Reports suggest that pre-COVID, the total number of tourist arrivals for leisure and recreational purposes in India was to the tune of CAGR of 12 per cent between 2005-2019 and the total revenue generated from the foreign tourist arrivals for leisure, holiday and recreational activities was evaluated at INR 60,840.0 crore (USD \$27 billion) in 2017. However, post opening of the borders the number of registered NRI arrivals have a growth of 52.6% in 2021 over 2020. The International Tourist Arrivals in India has also registered a positive annual growth to the tune of 10.6% in the same period (Table 1).

Table 1: Inbound Tourism: Foreign Tourist Arrivals (FTAs), arrivals of Non-Resident Indians (NRIs) and International Tourist Arrivals (ITAs) - 2011-2021

Year	FTAs in India (in millions)	% Change Over Previous Year	NRIs arrivals in India (in Millions)	% Change over Previous Year	International Tourist Arrivals in India (in Million)	% Change over Previous year
<b>2011</b>	6.31	9.2	-	-	-	-
<b>2012</b>	6.58	4.3	-	-	-	-
<b>2013</b>	6.97	5.9				
<b>2014</b>	7.68	10.2	5.43	-	13.11	-
<b>2015</b>	8.03	4.6	5.74	5.7	13.76	5.0
<b>2016</b>	8.80	9.6	6.22	8.4	15.03	9.2
<b>2017</b>	10.4	14.1	6.77	8.8	16.81	11.8
<b>2018</b>	10.56	5.2	6.87	1.5	17.42	3.6
<b>2019</b>	10.93	3.5	6.98	1.6	17.91	2.8
<b>2020</b>	2.74	-74.9	3.59	-48.6	6.33	-64.7
<b>2021</b>	1.52	-44.5	5.48	52.6	7.00	10.6

Fig 4: Foreign Exchange Earnings from Tourism in India from 2016-2021 (in Million US\$)

Due to COVID, there was a drastic downfall of Foreign Exchange Earnings from tourism in India in 2020. However, post COVID, the earnings have started improving. In 2021 foreign exchange earnings was to the tune of US \$ 8797 million (8.7970 billion). There has been a growth of 26.4 per cent in 2021 as compared to 2020. This is due to initiatives introduced by the Indian government such as the "Incredible India" campaign, which aims to promote India as a tourist destination globally. The government has also implemented measures to improve the infrastructure and services in the tourism industry, such as building new airports, improving road and rail connectivity, and promoting the development of hotels and resorts.

The COVID-19 pandemic has also affected golf tourism in India. Golf courses in the country were closed for several months during the pandemic, and the industry has faced significant

challenges. However, in recent months, golf courses in India have started to reopen, and some golf resorts have implemented safety protocols to ensure the safety of players and staff.

These safety protocols include social distancing measures, mandatory mask-wearing, and increased sanitation efforts. The demand for the golf has increased as players can play alone with reasonable precautions, without the fear of getting infected. “The first thing that opened after Unlock 1.0 were the golf courses. They opened all over the world. Even the ones in Delhi-NCR are full. This is because they offer open space, give us a chance to connect with nature and physical distancing is maintained. I think golf tourism in India will be in great demand after the monsoons because Indian golfers, who used to travel to Sri Lanka, Thailand, Malaysia and Vietnam for golf, will now travel within India,” said Mr. Rajan Sehgal, President, Indian Golf Tourism Association (IGTA)<sup>7</sup>.

The Indian government has also introduced several initiatives to promote golf tourism during the pandemic. The Indian Golf Tourism Committee (IGTC) is the coordinating body of golf tourism in the country. Its aim is to promote golf destinations in the country and give suggestions and recommendations in relation to the identification and upgrading of golf courses and managing golf events. It also maintains and evaluates a corpus with various stakeholders and the Union government to promote golf tourism. The committee is also responsible for identification of promotional materials to be developed, events for participation in abroad and showcasing golfing facilities in India.

### Tourism Boards promoting Golf Tourism in India

The Indian government has recognized the potential of golf tourism and has taken steps to promote it which includes providing financial support for development of golf tourism. According to the India Tourism Statistics 2022, the Foreign Exchange Earnings pre-COVID, through tourism in terms of Crore Rupees for the 2018 and 2019 was INR 194881 & 211661 respectively. Thus, urging the government to invest in the tourism sector. The Ministry of Tourism organized a workshop on ‘Promotion of Golf Tourism in January 2011 to evolve a road map for formulating strategies for development and promotion of golf tourism in India. In 2014, the Ministry of Tourism with a mission to promote India as a multiple tourism attraction destination offering varied niche tourism products making India a 365 days destination revised the guideline for promoting golf tourism. The objectives were as follows:

<sup>7</sup><https://tourismbreakingnews.com/domestic-golf-tourism-will-be-in-demand-post-monsoon-rajan-sehgal/>





Promote India as a golf destination for domestic and international tourists.



Earning of additional foreign exchange through development of this niche product and thereby contributing to economic growth



Socio economic development through employment generation, both for men and women.



Encourage the creation of additional world class golf infrastructure in the country

The strategy was to focus on the entire chain of steps required including creating awareness, encouraging stakeholders and targeting established and new markets to promote Indian Golf Tourism. Building major golfing events in India by building relationship with sponsors, broadcasters and the other stakeholders; improved access to India's signature & other golf courses and working closely to make such courses more accessible to the tourists and raising the profile of golf courses and other golf infrastructure were some of the strategy introduced in the framework.

Being the nodal body, the India Golf Tourism Committee (IGTC) would function with the core objective to promote India as a preferred golf destination. Its role is to make necessary suggestions and recommendations with respect to the following:



Identification and grading of suitable golf courses



Approval of calendar of golf events



Recommending events for the Ministry of Tourism's logo support.



Identification of events for participation abroad to showcase golfing facilities in India.



Assessing the need for creation and managing of a corpus with contributions from the stakeholders/industry/corporate sector and the Government for promotion of Golf Tourism.



Identification of promotional materials to be developed.



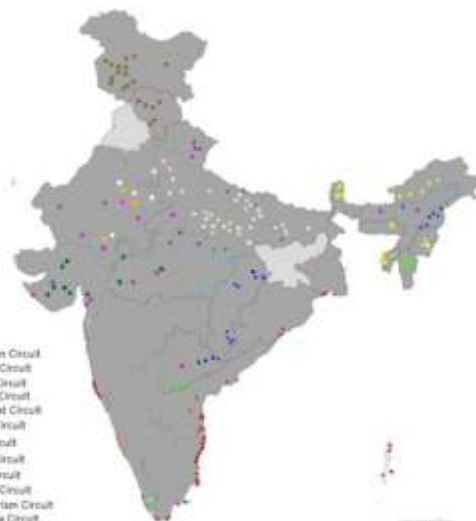
Introduction of a golf card for tourist



Make recommendations for financial support under these guidelines except MDA

Under the framework, financial assistance (maximum of Rs. 10 Lakhs) would also be provided by the Ministry of Tourism for organizing workshops /events/meets/ seminars to promote Golf Tourism.

The Ministry of Tourism also promotes Golf tourism under Incredible India Brand. The ministry has also launched programme such as "Swadesh Darshan" (2014-15) to develop theme-based tourist circuits in the country, including a golf circuit. The Golden Triangle Golf Circuit (covering Delhi, Agra and Jaipur), Himalayan Golf Circuit (Uttar Pradesh and Himachal Pradesh)<sup>8</sup> were launched to promote golf tourism. These circuits were designed to showcase India's rich cultural heritage and natural beauty, while also promoting its golf courses and facilities. Under this



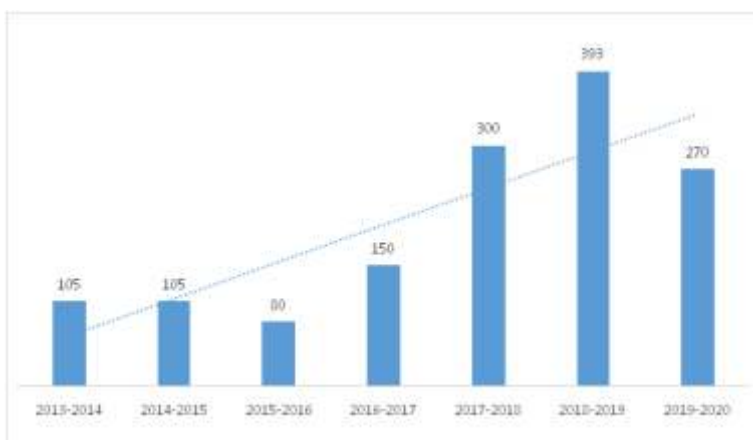
<sup>8</sup><https://swadeshdarshan.gov.in/index.php?Theme>

scheme it is envisioned to synergise other schemes like Swachh Bharat Abhiyan, Skill India, Make in India, etc. with a vision of positioning tourism sector as a major engine for job creation, driving force for economic growth, building synergy with various sectors to enable tourism to realise its potential.

The National Tourism policy of 2022 also give emphasis to golf tourism. In order to create a favourable environment for the growth of golf tourism in the country, the Ministry of Tourism has also constituted the India Golf Tourism Committee (IGTC) with Secretary (Tourism) as the Chairman, which acts as the nodal body for golf tourism in the country. The initiatives includes measures such as developing new golf courses and facilities, promoting golf events and tournaments, and providing incentives to golf tour operators and travel agents.

Further, various golf tourism promotion events are held in India, such as the India Golf Expo and the Golf Travel Mart, which bring together golf tour operators, travel agents, and golf course owners to showcase India's golfing assets and explore potential business opportunities. Indian golf tourism is also partnering with international golf organizations to promote India's golfing destinations to the global golfing community. The golf tourism sector in India has also been growing steadily, with many international tourists visiting the country to play on its world-class golf courses. The Indian government has been actively promoting golf tourism, with initiatives such as the Incredible India Golf Tourism campaign.

Fig 5: Budget Allocation for Golf in India (in Lakhs)



For 2018-20, the Government of India earmarked US\$262 million (Rs 1,756 crore) budget for its 'Khelo India' program. Government of India has also increased the budget allocation for Golf in India from Rs 105 Lakhs in 2013-14 to Rs 270 Lakhs in 2019-2020. In addition, the Indian Golf Union, in collaboration with state governments and private sector partners, is promoting golf tourism in various parts of the country.

Overall, these initiatives are aimed at boosting India's profile as a golfing destination and attracting more international golfers to the country. With India's unique combination of world-class golf courses, rich cultural heritage, and natural beauty, there is ample opportunity for the growth of golf tourism in India



## Stakeholders Involved:

The stakeholder plays a vital role in the golf tourism industry while making decisions on account of the growth and policy designing. The stakeholders of golf tourism in India can be categorized into the following groups:

**Golf courses and clubs:** Golf courses and clubs are one of the primary stakeholders of golf tourism in India. They provide the infrastructure and facilities required for golf tourism and attract domestic and international tourists.

**Tour operators and travel agents:** Tour operators and travel agents play a significant role in promoting golf tourism in India. They create packages and itineraries that include golf courses and clubs, accommodation, transportation, and other services.

**Hotel and resort owners:** Hotel and resort owners are also important stakeholders of golf tourism in India. They provide accommodation, food, and other services to golf tourists, making their stay comfortable and enjoyable.

**Government agencies:** The government of India and its agencies, such as the Ministry of Tourism, Tourism Boards, and State Governments, also play an essential role in promoting golf tourism in India. They provide funding, support, and guidance to promote golf tourism and attract more tourists to the country.

**Golf associations and federations:** Golf associations and federations in India, such as the Indian Golf Union (IGU), are responsible for promoting golf as a sport and promoting golf tourism in the country. They also organize national and international golf events and tournaments to attract tourists.

**Golf equipment manufacturers:** Golf equipment manufacturers are also stakeholders in golf tourism in India. They supply golf clubs, balls, and other equipment to golf courses and clubs, which are used by tourists and local golfers.

**Local communities:** Local communities around golf courses and clubs are also stakeholders in golf tourism in India. They provide services such as transportation, food, and accommodation to tourists and benefit from the economic opportunities generated by golf tourism.

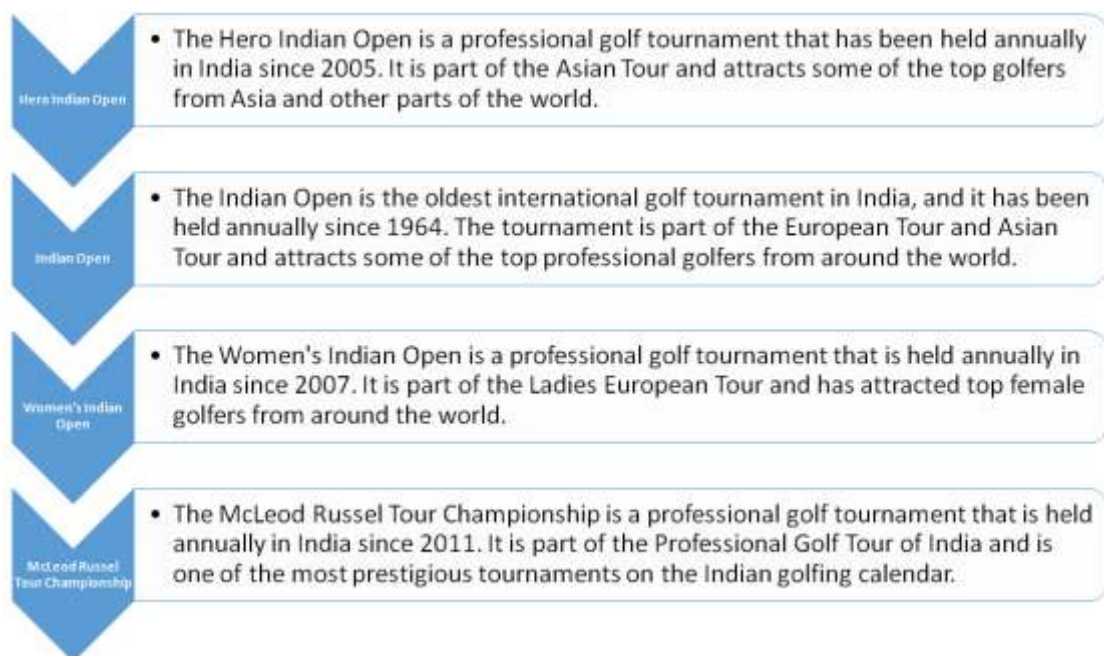
According to the 2014 guidelines all the stakeholders engaged in Golf Tourism activities would endeavour to form a Golf Tourism Association of India., which will have all India membership. Stakeholders which may form part of such Association may include:

- Corporate Houses
- Golf Clubs
- Golf Courses
- Golf Event Managers
- State Governments/UT Administrations
- Tour Operators/Travel Agents engaged in promotion of Golf Tourism

IGTA had been formed to further the cause of Golf promotion and to strengthen the initiative of the Ministry on providing service and promoting Golfing activity aggressively through its membership.

IGTA works closely with Ministry of Tourism, Golf Courses, Hotels, Airlines, International Tourism Board as well as Media to ensure more golfers visit the country and explore India as a hidden golf gem.

**Golf Tournaments in India:** India today has number of golf courses of International standards which host some major golf tournaments and these events already attract some international and domestic tourists. Nearly 112 tournaments are organised in the country for both professional and amateur golf players. There were 41 men's golf tournaments, 28 women's tournament and 43 junior boys' tournaments were conducted in 2016. Annually, the professional tournament market is more than 100 crore. The popular international tournaments include Panasonic Open, Hero Women's Indian Open, Hero Indian Open, the Classic Golf and Country Club International Championship (hosting global players). Some of the major golf tournaments held in India are as follows



In order to have successful golf events (both domestic and international) the ministry of Tourism provides financial assistance on the basis of number of participation and tournaments the financial assistance is fixed. Further, the Professional Golf Tour of India (PGTI) was established in 2006 and serves as the official sanctioning body for professional golf tournaments in India. The PGTI organizes over 20 tournaments each year, with prize money ranging from INR 40 lakhs to INR 1.5 crores

These international and national tournaments have been hosted in the popular golf courses in India such as the Delhi Golf Club, the Royal Calcutta Golf Club, and the Karnataka Golf Association in Bangalore. It also symbolises that India's has a number of world class golf courses and such tournaments will boost the tourism sector of the economy.

Reports suggests that the junior golf market is expected to grow at 40% and there is a need to promote the sport. It also provides various avenues of employment at golf courses, academies, clubs, tournaments, which makes it more important to encourage golf as a sport.

### Rules of Golf Tournaments

Post pandemic, golf tourism has bounced back compared to other sports. The common rules which are being followed has been modified with minimum physical contact but keeping the spirit of the game alive.

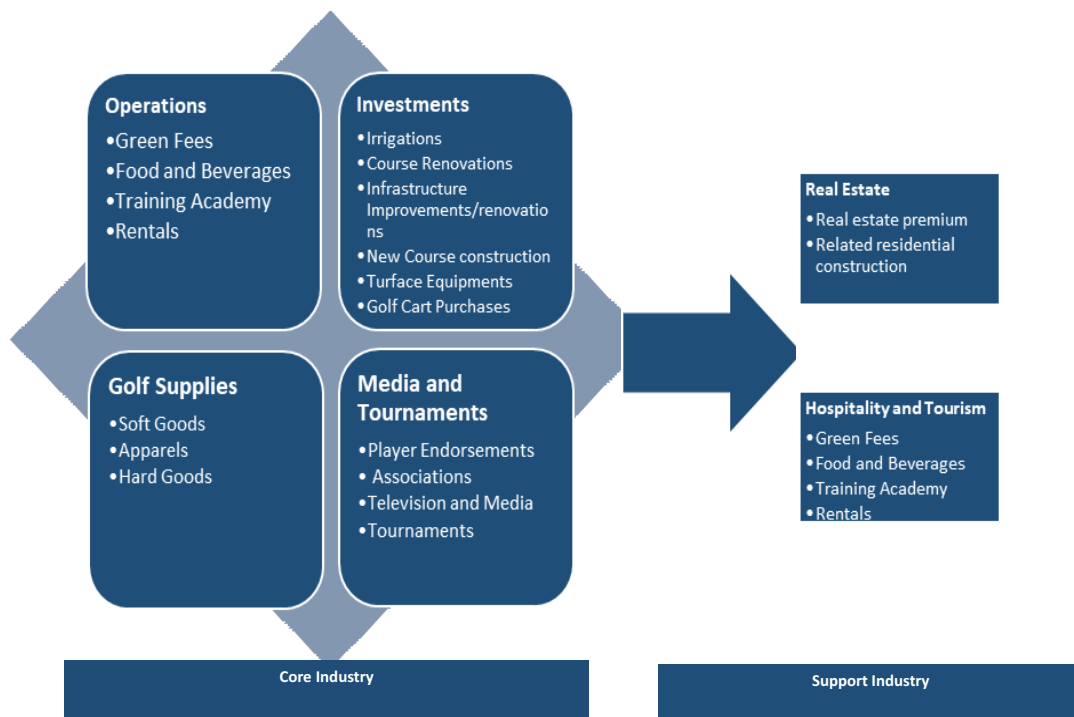


As social distancing is maintained in golf and one doesn't have to share any sport equipment's which helps in facilitating and maintaining the pandemic rules. Post pandemic many golf clubs had started implementing one-rider-per-cart policy to avoid contact. This further helped the sports to be more popular.

## Golf Economy

The golf economy can be divided into a number of subsectors of which golf tourism is just one (see Figure). The core industry of golf includes golf facilities, goods and services used to operate these facilities and to play the game, golf equipment and apparel manufacturers, golf course architects, and club management services. Further, Golf further supports a number of other industries such as golf-related tourism and real estate development.

Fig 4: The Golf Economy



The recent popularity of Golf in India in both the growing middle and upper classes has a positive impact on the sport. The steady increase of popularity in the sports is attributed to factors such as rising income levels, increased tourism, and a growing interest in the sport. A report by KPMG in 2019, estimated the industry to be worth INR 21.8 billion (approximately USD 292 million), and was expected to grow at a compound annual growth rate (CAGR) of 8.5% over the next few years. The report identifies the development of golf courses and the increasing number of golf tournaments as key drivers of growth in the industry.

The golf equipment market in India is also growing, with a number of international brands such as Titleist, Taylor Made, and Callaway establishing a presence in the country. Local companies such as



Karma golf, Jeev Milkha Singh Golf and Kridangan are also gaining popularity among Indian golfers. There is a need to promote a golfing culture in the country to encourage the consumption of golf. This would, in turn, facilitate the creation of an environment that is conducive to golf environment leading to India's vision to achieve \$5 trillion economy.

## Success Stories

**Case Study 1- Morocco:** Morocco has emerged as a leading golf tourism destination in Africa, with courses such as Royal Golf Dar Es Salam (Rabat) and the Rotana Palmeraie Golf Club (Marrakech) attracting visitors from all over the world. Tourism accounts for seven percent of Morocco's economy<sup>9</sup>. According to 2021 estimates, tourism contributed US \$9 billion to the country's GDP<sup>10</sup>. The country has invested in new courses and facilities in recent years, with plans to further expand the industry. Studies conducted by the Moroccan National Tourism office (ONMT) suggests that golf playing tourist spent up to three times more on leisure tours and each golf tourist generate 2.5 indirect jobs in hotels, restaurants, grounds keeping and air transport sector<sup>11</sup>. In 2019, ONMT reached an agreement with the Royal Moroccan Golf Federation and the International Association of Golf Tour Operators (IAGTO) to promote golf tourism in the country. In 2015 and 2017, Morocco was named Africa's top golf destination by the World Golf Awards Organization<sup>12</sup>.

**Case Study 2- Thailand:** Thailand has become a popular golf tourism destination in Southeast Asia and is home to more than 200 golf courses and golf resorts. The country's warm climate, beautiful scenery, and affordable prices make it an attractive destination for budget-conscious golfers. The golf business has attracted foreign investments due to its competitive prices in green fees and other related services when compared to others. Thailand boast of its beautiful golf courses such as the Black Mountain Golf Club and the Siam Country Club which attracts visitors from across the region. Survey suggests that there has been an increase in the inflow of golfers in Thailand and every year Phuket hosts over 2,00,000 golfers from across the globe contributing to THB 1 to 2 billion and has a potential to grow over 10 per cent per year. An average spending of THB 4000 per day is estimated per player per day. In order to boost the tourism in Thailand, the Tourism Authority of Thailand announced the "Thailand Golf Expo" to promote golf tourism<sup>13</sup>.

### Case Study 3 - The World's Largest Golf Resort: Mission Hills, China

The world's largest golf resort-Mission Hills, located near the border of Hong Kong is owned by China's Chu family. It boasts about 12 courses and is registered in the Guinness Book of Records in 2007. Mission Hills also boast of hosting China's first international golf event in 1995. Mission Hills has hosted numerous international golf events, including the World Cup of Golf. These events have

<sup>9</sup><https://www.hindustantimes.com/lifestyle/travel/morocco-breathing-again-as-tourists-back-after-covid-shutdown-101652936254827.html>

<sup>10</sup><https://www.statista.com/statistics/1278534/contribution-of-tourism-to-gdp-in-morocco/>

<sup>11</sup><https://www.moroccoworldnews.com/2022/10/351984/study-golf-tourists-spend-more-than-leisure-tourists-in-morocco>

<sup>12</sup><https://www.moroccoworldnews.com/2019/10/284976/onmt-increase-golf-tourism-morocco>

<sup>13</sup><https://www.thailandgolfexpo.com/en/#:~:text=Recent%20surveys%20found%20that%20more,of%20revenue%20to%20the%20Island.>

helped to raise the profile of Mission Hills and China as golf destinations, and have attracted top professional golfers and fans from around the world.

There are 219 rooms at Mission Hills Resort and 90 in the adjoining Savannah Wing, plus 35 meeting rooms throughout the \$400 million resort with facilities such as spas, pools and diverse fitness facilities. The resort provides employment opportunity to 7000 employees, including 3000 mostly female caddies. A report suggests that 2000 new golf courses would be needed in China to keep pace with the interest in the sport and the burgeoning population. The club hosted Tiger Woods' first visit to China, for publicity.

It also actively promotes golf tourism in the region, offering golf packages and travel services to visitors from around the world. The company has also developed golf academies and training facilities, attracting golfers of all skill levels to learn and play the sport in China. It also partners with international golf organisations and actively promoting golf tourism. These efforts have helped to put China on the map as a top golfing destination and have attracted visitors from around the world to experience golf in China.



## Challenges and Opportunities in the sector

Golf tourism in India has the potential to be a major contributor to the country's tourism industry, but there are several challenges that need to be addressed. Some of the challenges for Indian golf tourism are:

**1. Expensive:** Golf is played in high end golf courses which requires high investment which is paid from the player's pockets. Majority of the golf course in India are privately owned and charge high membership charges and accommodation charge which becomes difficult for the players to pay. Further, the golf equipment's that are used are also very expensive this can be partly attributed to the high tax structure associated with the equipment making it expensive. This restricts the access to the sport by many people.

**2. Lack of Awareness:** Many tourists are not aware of the golf courses in India and the facilities available for playing golf. There is a need to promote golf tourism in India through targeted marketing and advertising campaigns. There is also a need to spread awareness with respect to affordability part of the game. Since most of the times the sport is considered to be exclusive because of the high costs involved to set up the course and then high operational costs to run and maintain the course, it is not favoured by major part of the population. However, it was seen that nearly 75-80% of the professional golfers have been caddies in the past and have come from humble backgrounds.

**3. Lack of Infrastructure:** The lack of world-class golf courses and facilities is one of the biggest challenges for Indian golf tourism. Many of the golf courses in India do not meet international standards and are not well-maintained. Moreover, lack of public driving ranges (at present, there are only five public driving ranges) restricts people from taking up golf as sometimes people don't want to take up memberships or don't have access to golf courses as some of them are located in remote areas.

**4. Lack of Professionalism:** Many golf courses in India lack the professional management and customer service standards expected by international tourists. This can lead to a poor experience for tourists and discourage them from returning.

The increasing government support for the promotion of golf tourism is expected to drive the growth of the golf tourism market going forward. The state tourism boards have started promoting golf destinations to domestic and international tourists as a means of earning additional foreign exchange through the development of the niche product and thereby contributing to economic growth.

Strategic collaborations and partnerships have emerged as a key trend gaining popularity in the golf tourism market. Major companies operating in the golf tourism sector are focused on strategic collaborations and partnerships to reinforce their position.

Besides this equipment manufacturing company that designs, manufactures, markets, and sells golf equipment.

Also, post the Pandemic the work culture has changed specially in India with more & more companies/corporates going in for a hybrid mode of work which implies people are getting an increased amount of leisure time for activities such as golf. These factors drive the demand for golf tourism. Also, significant developments in technology especially in developed countries in western societies are encouraging people to engage in golf activities, thus offering ample opportunities to the market players.





## Way Forward

Addressing the above challenges will require collaboration between the government, private sector, and golf industry stakeholders.

**1. Building Public Infrastructure:** It is expected that international golf tourists will keep on growing at a rapid pace for next few years which makes it necessary for India to offer right product to meet the demands of such tourists. Hence, the Country needs to add certain more international standard golf courses and elite golf courses. This will also help the local players to join the course as the membership charges for public golf courses are relatively lesser than the private ones. It is also necessary to build public driving ranges can be built which can be a part of the sports complex/stadiums. Instead of building full-scale golf courses where 100-200 acres are required, smaller public driving ranges may be explored (2-10 acre) to make the sport more accessible. Easily accessible driving ranges will allow people to explore the sport and promote the sport. There is also need to improve connectivity and transportation infrastructure to make these courses more accessible.

**2. Reduce Tax on Golf Equipment:** The equipment's used in the sports are very expensive and acts as a deterrent to the sport. If the government can support in rationalising the duty structure for certain equipment the sport equipment can be made available to the people at a reduced price or rental agreements can be made more viable. Duties should be reduced which are already 20-40% more than overseas

**3. Better Training Facilities:** With the help of better infrastructure and the driving ranges, it will be feasible to provide better training to the players. These public infrastructures can be used to set up training centres and academy for improving the masses at a lower cost.

Overall, while golf is still a relatively small sport in India, the growing interest in the sport, along with the development of golf courses and golf tourism, is expected to drive continued growth in the industry in the coming years. Improving infrastructure, promoting golf tourism, and providing quality customer service can help India tap into the potential of golf tourism and boost the country's economy. Therefore, promoting golf culture and attracting golf enthusiast tourist from across the world is the need of the hour.

**4. Make in India:** The global golf equipment is expected to be valued at US \$ 10 billion and with government's assistance, India can be made a global manufacturing hub by leveraging its low-cost semiskilled labour. The market for golf equipment and supplies is directly dependent on the demand for the sport. With the inclusion of golf in the Olympics, the golf equipment market in India will see a positive impact as manufacturers will try to leverage the gaining popularity and exposure of the sport. There is a need for the government to help the equipment industry of golf for further promoting the industry.

## Conclusion

Golf as a sport has grown a lot in India and golf tourism shows a very promising future. With the recognition of the sport as an Olympic game and post COVID norms have made golf popular in India. Further, the awareness about the importance of golf tourism is rapidly growing worldwide. This has led to a rise in golf resorts and golf courses across the globe.

The implementation of an integrated golf tourism strategy will deliver not only incremental 'high value low impact' tourism but also help in generating more jobs, education and sports opportunities, additional leisure activities, increased domestic travel, housing and international investment. Better and improved strategies in developing golf tourism in India can attract both foreign and domestic high spending tourists; can increase the revenue generated through tourism in the Country; can provide employment and can enhance foreign exchange earnings which can ultimately uplift the tourism standards of India.



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## About PHD Chamber of Commerce and Industry

PHD Chamber of Commerce and Industry (PHDCCI) has been working as a catalyst for the promotion of Indian industry, trade and entrepreneurship for the past 118 years. It is a forward looking, proactive and dynamic PAN-India apex organization. As a partner in progress with industry and government, PHDCCI works at the grass roots level with strong national and international linkages for propelling progress, harmony & integrated development of the Indian economy.

PHDCCI, acting as the 'Voice of Industry & Trade' with a large membership base of 1,50,000 direct and indirect members consisting of large, medium and small industries, has forged ahead leveraging its legacy with the industry knowledge across multiple sectors to take Indian Economy to the next level.

At the global level, we have been working with the Embassies and High Commissions in India and overseas to bring in the International Best Practices and Business Opportunities.

PHDCCI's Tourism & Hospitality Committee aims to promote tourism activities in and outside the country and endeavours to organize various tourism conclaves, seminars, roadshows and webinars in close cooperation with the Ministry of Tourism, Government of India; State Tourism Boards; International Tourism Boards; and private stakeholders.

Tourism in its various forms like Heritage, Medical, Golf, MICE, Film, Religious, Border, Rural, Sustainable, plays a critical role in the growth of the tourism industry. Our main focus has been to join efforts with the tourism stakeholders for developing an integrated approach and promote the tourism industry.

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## About ORG India

Operations Research Guild India Private Limited (ORG-India) was set up by the senior professionals of ORG-MARG after the holding company AC Nielsen divested its consulting portfolio to a group of employees headed by the then President of AC Nielsen. The new company was registered in Baroda in 2004 and continues to be inspired by the original founder, the visionary Dr. Vikram Sarabhai. ORG India was set up with the objective of applying modern analytical operations research, quantitative techniques, and systems methodology to problems of planning and decision-making in management.

The research team of ORG-India operates out of Kolkata, Delhi, Bangalore, Pune, Baroda & Ahmedabad. The team has rich experience of working with both domestic as well as global majors and relies exhaustively on usage of technology for data collections thereby ensuring reliability, validity checks as also faster turnaround time.

The consultants at the research unit of ORG-India act as the “strategic consulting arm”. In view of competitive global environment, organizations can find themselves short of resources, information, or the specific expertise to carry out first class analysis. This hub provides a source that combines rigorous and objective research enmeshed with creativity.

We have the expertise to draw out and communicate key insights and foresights. This improves understanding of customers and competitors and enhances the ability to exploit new opportunities.







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