TURISMO DE GOLF EN PAÍSES DEL SUR DE EUROPA. UN MERCADO EN POTENCIA

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RESUMEN

El deporte en general, se ha consolidado como una de las principales actividades recreativas de nuestra sociedad, además de un indicador significativo del bienestar y calidad de vida de los ciudadanos, y de un pretexto para el disfrute de nuestras vacaciones en áreas diferentes al de nuestra residencia habitual, dando lugar al turismo deportivo. El deporte del golf contribuye a este tipo de turismo, principalmente en las regiones costeras del sur de Europa, apoyado esencialmente en la excelente climatología que se disfruta en ellas, y en la fuerte penetración de este deporte en algunos países europeos. En este trabajo realizamos una breve presentación de la práctica actual de este deporte en estas regiones (situadas entre los paralelos 37 y 41), así como de los factores adicionales que contribuyen a la promoción del turismo de golf en estas zonas, y el impacto económico sobre ellas.

Palabras clave: oferta y demanda de golf, indicadores de mercado, turismo de golf, sur de Europa, políticas de turismo.

Golf tourism in southern europe. a potential market

ABSTRACT

Sport has become one of the major recreational activities, a meaningful indicator of citizen well-being and quality of life, as well as a pretext for enjoying our vacation time in places other than our habitual residence, thus giving rise to sport tourism. The practice of golf contributes to this kind of tourism mainly in the coastal regions of southern Europe, largely thanks to their excellent climate and to the strong penetration of this sport in European countries. The paper undertakes the current situation regarding the practice of golf in these countries (situated between parallels 37 and 41) as well as additional factors that contribute towards the promotion of golf tourism in such regions and the economic impact of this activity.

Keywords: golf supply and demand, market indicators, golf tourism, southern Europe, tourism policies.

Clasificación JEL: Z28, Z32 y Z38

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Sport is undergoing a change in its status since it has ceased to be regarded as a means of filling our leisure time and instead has become one of the major recreational activities, as well as a meaningful indicator of citizen well-being and quality of life. It provides a pretext for enjoying our vacation time in places other than our habitual residence, thus giving rise to sport tourism. The practice of golf contributes to this kind of tourism mainly in the coastal regions of southern Europe, largely thanks to their excellent climate and also to the strong penetration of this sport in European countries whose climate conditions are not suitable for this activity.

The paper undertakes a presentation of the current situation regarding the practice of golf in European nations with a strong golf tradition, which demand golf-related tourist services in southern European countries. The paper includes a review of the present-day scene in these geographic regions (situated between parallels 37 and 41) as regards their supply of golf courses targeted at tourist-players, as well as additional factors that contribute towards the promotion of golf tourism in such regions and the economic impact of this activity in the latter.

1. INTRODUCCIÓN

Today's society demands a more active experience of leisure and vacation time and this goes hand in hand with a growing concern over health and personal well-being, as well as the enjoyment of life outdoors. All of which favours the development of sports activities in natural environments. To the local population's engagement in such activities we should add that of external visitors, which means that promoting this kind of recreation can turn into a driving force of tourism in these areas. That, together with other attractive assets (climate, culture, trade fairs, gastronomy, wildlife, etc.), provides a breeding ground for the startup and growth of what is beginning to be called alternative or "thematic" tourism. Thus, by merging both elements (sports and tourism), we may qualify the sports-oriented activity as a tourist attraction —one that is beginning to play a major role in today's economy.

In this context, the practice of golf has gradually expanded its focus and its vision, since comes to be regarded a key contributor to active and thematic tourism. As a result of this, golf tourism• has come to designate the activity of visitors whose main motivation is to practise this sport in diverse locations, which in turn enables them to discover areas and regions within their own territories and beyond. The golf could be an element of tourism and sports qualification —one that can be used to support and develop quality tourism policies (Villar & Fernández, 2013).

One of the factors that influence the choice of these tourist sites for the practice of golf is their climate conditions. So, southern European countries provide fine temperatures and long daylight hours: advantages that turns these destinations into ideal ones for the development of golf tourism.

The present paper will discuss the common features and/or the specific factors associated to the countries of southern Europe which make them particularly attractive for the expansion of golf tourism. By focusing on the number of registered golf licences and on the number of affiliated golf courses in each of these countries, we will gain a deeper understanding of the sector's market indicators, and his approach towards golf tourism. The characteristics and similarities, that we have detected among most of the countries under scrutiny suggest the need to define a common, participatory strategy for the international promotion of golf-related tourism, given the growth prospects and the optimistic expectations concerning the evolution of this sector of sports tourism (SQW, 2011). Golf is a dynamic and growing activity for tourists globally and, if developed and marketed appropriately, it can become a highly successful and profitable niche tourism product (Hinch & Higham, 2001). Even more so when one remembers that many golfers around the world are looking for new and not-yet-experienced tourist destinations and new golf courses, thus becoming an important niche market that presents a significant opportunity to grow, while generating substantial revenues for the tourism industry and the government (Hennessey, Macdonald & Maceachern, 2008).

• "Flow of travellers whose main motivation is either to play golf or to take part (both actively or passively) in sports competitions" (CECIFT, 2008, p.47) [our translation].

2. THE PRACTICE OF GOLF IN EUROPE

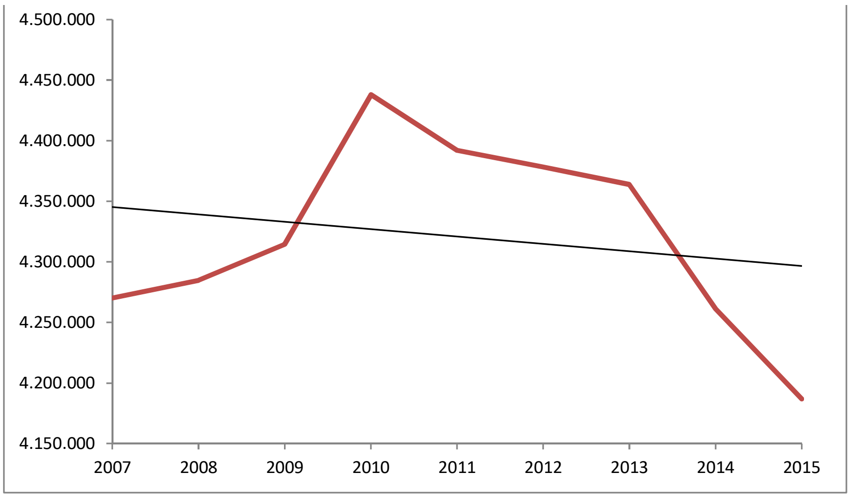
While initially classified as a minority sport, the practice of golf in European countries is broadening its presence in today's society. To this we should add the increasing number of affiliated players (a tendency, however, checked over the last few years as a result of the widespread economic crisis) as well as the growing supply of golf courses, all of which has positioned golf as one of the fastest-growing sports over the last few years in terms of both supply and demand (CECIFT, 2008, p.61). Moreover, the market of travelling golfers has been steadily increasing, as a result, among other factors, of golf remaining the number one individual outdoor sport. More specifically, "golf in Mediterranean countries has grown significantly over the last two decades as a result of not only an increase in domestic players, but also in golf tourists from Central and Northern European countries" (Pastor, Del Campo, Vidal & Aguló, 2013, p.597).

Our paper includes a brief review of the situation of Europe's golf market since 2007, a period that is considered a turning point in this market's behaviour following, as we pointed out earlier, the generalised economic crisis that impacted on golf tourism demand. And yet, "despite the recession and the continuing economic challenges, golf tourism appears to have been relatively resilient... due to the varied demographics of its participants ... so that future prospects are now largely optimistic" (SQW 2011, p.4).

As regards the number of golf licences issued, and according to data supplied by the European Golf Association (EGA) -Table 1-, in 2015 as many as 4,186,778 golfers were registered in Europe (66.08% were male players by contrast with 25.07% female licences, while only 8.85% corresponded to junior golfers). Such global data confirm a continuous growth tendency lasting until 2010 (Figure 1) and even featuring a relatively stable licence split-up. Thereafter we see a mild drop, which becomes somewhat steeper over the last two years, 2014 and 2015, when figures even fell below the trend line (with percent variations of -2.35 and -1.75 by contrast with percentage drops of about 0.30 in previous years).

Figure 1

Evolution of the total number of golf licences in Europe and trend line



Source: Own construction on the basis of data supplied by EGA (2014, 2015).

In spite, however, of the high general decrease percentages in the number of licences issued, the number of registered golf licences in Germany, Belgium, Switzerland and the eastern countries (Azerbaijan, Bulgaria, Croatia, Slovakia, Estonia, the Russian Federation, Poland, the Czech Republic, and Serbia) has experienced a significant rise over the last few years which has cushioned the effect of European mean global variations, countries which represent an important market potential for golf tourism in southern Europe. Moreover, Greece, Portugal and Turkey has seen a rise in the number of registered national golf players fuelled by the support given to the construction of tourism-oriented golf courses, mainly in coastal areas.

Table 1

Evolution of number of licences, golf courses and SI in Europe

YEAR	LICENCES	COURSES	SATURATION INDEX
2007	4,270,156	6,560	650.94
2008	4,284,777	6,614	647.83
2009	4,314,365	6,691	644.80
2010	4,437,873	6,723	660.10
2011	4,392,018	6,749	650.77
2012	4,378,364	6,797	644.16
2013	4,363,843	6,844	637.62
2014	4,261,190	7,020	607.01
2015	4,186,778	6,840	612.10

Source: Own construction on the basis of data supplied by EGA (2014).

Figures differ widely, on the other hand, regarding the number of golf courses by country, in Europe (Table 2)[•]. Golf is a particularly relevant phenomenon in central and northern European countries (Nordic and English-speaking countries), where the number of both players and golf courses is certainly high (Completo & Gustavo, 2014) and where the demand for golf tourism services is significant (Hudson & Hudson, 2014).

By combining several indicators in order to characterise the market in this sports sector, we may be able to define the relationship between the number of European licences and the number of golf courses in terms of a saturation index (SI).

An estimation of the saturation index for the golf federations integrated in the EGA (Table 2) shows that the European countries with a stronger tradition in the practice of this sport —the British countries— consistently have a number of licences per course of about 400[•]. These figures rocket, however, in a few countries that even exceed a thousand licences per course (Finland, the Netherlands or Sweden). These values are better adjusted in countries like Germany, Spain or France, which reach an average of 800 players per course (still a high number and clearly above the European average of 612.10 licences per golf course). On the other hand, if we pay attention to the lowest figures in the table, we will find out that there are ten countries[•] where the small number of registered licences is responsible for a licence/course ratio which does not exceed 100.

Table 2 also includes the penetration rate (PR) of this sport (the ratio between the total number of licences and the total population in a territory), as well as the density rate (DR) (the ratio between the total population and the number of golf courses), both for every thousand inhabitants. The outcome of both indexes is precisely the saturation index (PR*DR=SI).

Once again Britain[•] and the Nordic countries[•] exhibit the highest figures for the golf penetration rate, with average values respectively of 16.22 and 33.63 (i.e., 1 out of every 61 inhabitants or 1 out of every 30 inhabitants for each group of countries): a far cry from the situation in places like Germany, Spain or France, where the proportion on people playing golf falls considerably (an average of one player for every 149 inhabitants, which corresponds to a mean penetration rate of 6.70, and a completely different picture from that found in other EGA countries where penetration rates are close to 1 (Cyprus, Slovakia,

[•] There is a total of 47 affiliated members according to EGA data (2015). However, and even though the UK's golf unions are regarded as independent federations, for the purposes of our table we have treated Britain as a single country, so that our estimations as based on a global number of 45 members countries.

[•] These golf courses do not show a particularly high saturation rate, despite the elevated number of registered licences. Mention must be made, however, of the larger number of real golfers in these Anglo-Saxon countries, since the licence-related data that we have recorded exclusively refer to affiliated players, who are reported to represent only 45% of golf practitioners in these areas (Cámara Oficial de Comercio, Industria & Navegación de Valencia, 2010).

[•] Albania, Andorra, Armenia, Azerbaijan, Bosnia and Herzegovina, Georgia, Kazakhstan, Lithuania, Romania and Russia.

[•] Figures for the British countries are just rough estimates, since data gathering by Britain's Golf Unions (which are independent from one another) does not follow a homogeneous pattern. It is worth mentioning as well that in these countries not all golf players hold a registered licence.

[•] Denmark, Finland, Norway and Sweden.

Italy, Malta or Portugal), where only one out of every thousand inhabitants plays golf) or even below that figure•.

On the other hand, those countries that have lower saturation indexes typically show higher density rates and lower penetration rates, which point at the weak presence of this sport among their populations. Once again, however, it is those countries with a stronger golf tradition (the Nordic countries and Great Britain, Germany, the Netherlands and Switzerland) that have both lower values for the ratio population/number of golf courses (density rate) and higher ones for saturation and penetration indexes. In these countries, moreover, golfers add the qualifying term "tourist" to their status as players, since they resort to the practice of golf in sites and environments other than their habitual courses as an additional motivation for travelling to different regions or countries where the weather provides a more suitable and pleasant setting for the pursuit of their sports interests.

3. GOLF TOURIST PROFILE: FOREIGN DEMAND OF GOLF-RELATED SERVICES

Despite the varying degree of golf's social penetration shown by the above data, we may state that there is a widespread tendency: golf is on the rise in the whole of Europe and, while already qualifying as a "mature" market, it still possesses a large potential (Hudson & Hudson, 2014) not only as pure sports practice, but as a tourist activity. Golf tourism can be regarded as a driver of economic and social growth, since it brings together sport-related aspects and others that are environmental, social and economic.

However, golf has not been the subject of a great deal of analysis within the field of tourism research, even though mention must be made of a few papers an studies conducted on specific territories where this kind of thematic tourism takes place. Thus, for example, Garau-Vadell & Borja-Solé (2008) highlight golf tourism as an alternative that is "very appropriate to compensate the traditional imbalance of tourist flows" that is detected in the island of Majorca (Spain). Correia, Videira, Alves, Ramires, Subtil & Martins (2006), in turn, conduct a sustainability asssessment of golf courses in the Algarve region (Portugal) from an economic, financial and environmental perspective, while Pestana, Batler & Correia (2010) put the focus on the length of golf tourism stays in the same geographic location. To these we should add the several studies performed in countries with long-standing golf traditions like the US and Britain. Tassiopoulos & Haydam (2008) attempt to generally describe the golf tourism behaviour patterns, and to determine the profile of golf tourists attending an international golf event in South Africa; while Kim, Chun & Patrick (2005) apply their lens to the choice of golf-related overseas tourist destinations by Korean tourist-players. By contrast, Priestley (2006) inquires into the general process of golf tourism planning, since "the development of golf as a tourism product generates a profound impact on the location in which it takes place and can provoke conflicts and even imbalances where it is implanted". Also CECIFT (2008) generally approaches the study of golf tourism in Mediterranean countries, while Pastor et al. (2013) analyse the efficiency of the Internet in attracting golf tourists to these countries.

Several other research papers and studies underline issues like the connection between golf practice and golf tourism, on the one hand, and, on the other, environmental aspects (Markwick, 2000; Videira, Correia, Alves, Ramires, Subti & Martins, 2006; Woodside, 2009), the territorial perspective (Villar & Fernández, 2013), the service quality as perceived by users of golf clubs (Serrano, Rial, García & Gambau, 2013) or the quality in the management of the golf courses (Iglesias & Sanz, 2017).

• Albania, Armenia, Azerbaijan, Bulgaria, Croatia, Greece, Hungary, Israel, Kazakhstan, Latvia, Lithuania, Republic of Macedonia, Poland, Romania, Russia, Serbia, Turkey and Ukraine.

Table 2

Distribution of licences, golf courses and population in European countries. SI, PR & DR (2015)

COUNTRIES	LICENCES	COURSES	POPULATION (in thousands)	SATURATION INDEX	PENETRATION RATE	DENSITY RATE
ALBANIA	64	1	2,894	64.00	0.02	2,894.00
ANDORRA	79	2	73	39.50	1.08	36.50
ARMENIA	55	1	3,006	55.00	0.02	3,006.00
AUSTRIA	103,225	156	8,534	661.70	12.10	54.71
AZERBAIYÁN	104	2	9,538	52.00	0.01	4,769.00
BELGIUM	60,867	84	11,225	724.61	5.42	133.63
BOSNIA-HEZERGOVINA	118	3	3,817	39.33	0.03	1,272.33
BULGARIA	843	7	7,224	120.43	0.12	1,032.00
CROATIA	1,420	6	4,238	236.67	0.34	706.33
CYPRUS	1,303	9	1,154	144.78	1.13	128.22
CZECH REPUBLIC	56,438	102	10,510	553.31	5.37	103.04
DENMARK	150,699	188	5,640	801.59	26.72	30.00
ESTONIA	2,668	9	1,314	296.44	2.03	146.00
FINLAND	142,757	129	5,464	1,106.64	26.13	42.36
FRANCE	408,388	597	66,207	684.07	6.17	110.90
GEORGIA	50	1	4,504	50.00	0.01	4,504.00
GERMANY	639,137	728	80,889	877.94	7.90	111.11
GREECE	2,350	8	10,958	293.75	0.21	1,369.75
HUNGARY	1,498	12	9,862	124.83	0.15	821.83
ICELAND	16,371	65	327	251.86	50.06	5.03
IRELAND	194,151	413	4,613	470.10	42.09	11.17
ISRAEL	795	2	8,215	397.50	0.10	4,107.50
ITALY	91,713	275	61,336	333.50	1.50	223.04
KAZAKHSTAN	650	9	17,289	72.22	0.04	1,921.00
LATVIA	1,004	2	1,990	502.00	0.50	995.00
LIECHTENSTEIN	623	1	37	623.00	16.84	37.00
LITHUANIA	568	6	2,958	94.67	0.19	493.00
LUXEMBOURG	3,557	6	543	592.83	6.55	90.50
MACEDONIA	119	1	211	119.00	0.56	211.00
MALTA	546	1	423	546.00	1.29	423.00
NORWAY	102,007	165	5,080	618.22	20.08	30.79
PAÍSES BAJOS	387,429	201	16,854	1,927.51	22.99	83.85
POLAND	3,739	32	37,995	116.84	0.10	1,187.34
PORTUGAL	14,094	86	10,397	163.88	1.36	120.90
ROMANIA	300	6	19,911	50.00	0.02	3,318.50
RUSSIA	1,341	28	141,820	47.89	0.01	5,065.00
SERBIA	747	2	7,129	373.50	0.10	3,564.50
SLOVAKIA	7,644	22	5,418	347.45	1.41	246.27
SLOVENIA	8,762	13	2,062	674.00	4.25	158.62
SPAIN	280,712	348	46,405	806.64	6.05	133.35
SWEDEN	474,777	448	9,689	1,059.77	49.00	21.63
SWITZERLAND	88,523	96	8,190	922.11	10.81	85.31
TURKEY	6,776	18	75,932	376.44	0.09	4,218.44
UKRAINE	547	4	45,363	136.75	0.01	11,340.75
UNITED KINGDOM	927,220	2,545	64,510	364.33	14.37	25.35
TOTAL	**4,186,778**	**6,840**	**841,748**	**612.10**	**4.97**	**123.06**

Source: Own construction on the basis of data supplied by the World Bank (2014), EGA (2015).

All of the above contributions emphasize that the practice of golf may thus become a major tourism incentive in those geographic areas, especially in view of the specific characteristics of golf tourists themselves: people with a medium to medium-high purchasing power, motivated to travel and highly mobile.

When planning their trips, golf tourists look for places that provide fine weather conditions and a range of pleasantly designed golf courses including top quality facilities. Such courses should be close to one another, thus facilitating transport between them thanks to modern communications infrastructures. This, together with a suitable hotel and catering network and good value in the services provided, will make it possible for travellers to enjoy a pleasurable and satisfactory stay. Customer satisfaction will moreover increase if the tourism supply is further enriched by additional activities targeted at wildlife enjoyment, attendance to cultural events, acquaintance with cultural, artistic or historical heritage assets in the area, the local gastronomy or even some shopping. And this will ultimately strengthen the tourists' destination loyalty, since they will not just repeat their trip (over 83% do so), but moreover promote their destination among family and friends (Hosteltur, 2012).

The United Kingdom and Ireland are the strongest markets within the golf sector thanks to their robust golf traditions. Even so, their climate conditions represent a drawback for much of the year. Climate, therefore, constitutes one of the main motivations for golf tourism in Mediterranean countries (SQW, 2011).

The Nordic countries are also major sources of golf tourism. Sweden, for example, ranks second in terms of outbound golf tourism as a result of its population's high purchasing power and excellent travel-readiness, which together with the country's unfavourable climate conditions for the practice of golf at certain times of the year spur the golfers' exodus to golf-friendlier destinations. Another major source of golf tourists is Germany: a country with a high growth potential regarding the number of affiliated players, yet with a penetration rate considerably lower than other countries[•] (7.90). A similar pattern can be observed in eastern European countries, where the practice of golf is beginning to consolidate itself among middle-income citizens.

All of these countries are considered major outbound golf tourism markets, whereas the main destinations are the countries of southern Europe, particularly Spain and Portugal (KPMG's Golf Advisory Practice in Europe, Middle East and Africa, 2015a). For Britons, Germans and Swedes Spain is the main golf tourism destination[•]: one which retains a 40% market share of that outbound tourism[•]. A report written by Sports Marketing Surveys INC (2013) on the habits of European golfers[•] states that 28.5% of golf tourists chose Spain as their top destination, notwithstanding the popularity of other countries in this regard: 17% visited Portugal, 16.1% travelled to Britain and Ireland, 7.5% chose Turkey, 7.1% France and 6.9% the United States.

More specific details regarding the main tourist destinations of countries with a strong golf tradition are provided by Hudson & Hudson (2014), who report that English players choose Spain (21.2%) as their favourite destination, followed by Portugal (13.1%) and Scotland (11.7%), while 26.5% spend their golf holidays inside their borders. Another outbound tourism country is Sweden, since Swedish golfers are characterised by their readiness to travel, whether it be to domestic destinations (41.3%) or to foreign ones like Spain (15.7%) or, to a lesser extent, Tunisia (7.2%), Ireland (6.9%) and Denmark (5.3%). French golf tourists, on the other hand, tend for the most part (47.7%) to choose domestic destinations, and when they travel abroad, they prefer countries where French is spoken (Morocco 19.3% and Tunisia 7.3%), while only 4.7% cross the French-Spanish border. Germany's figures, in turn, are lower for domestic trips (19%) by contrast with foreign ones, where Spain is once again a favourite destination (21.9%) followed by neighbouring Austria (10.5%)[•].

Generally speaking, among the basic characteristics of these sports tourists (middle-aged males with a university degree and working in the liberal professions sector) mention must be made of their strong involvement in the practice of golf and of the fact that they travel with their partners or with a small group of friends[•] (THR & Global Golf Company, 2004).

Modes of transport most commonly used in these trips are the combination flight and car rental or the use of the private vehicle. Golf tourists prefer to stay in four- or five-star hotels that are close to the golf courses or in resorts whose facilities include a golf course. Even so, they try to play in at least two or three different courses while on their golf vacation, so that a key factor in choosing a destination is

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[•] Sweden or Ireland with penetration rates of 49.00 or 42.09 respectively, Denmark (26.72), Finland (26.13), the Netherlands (22.99) and Norway (20.08).

[•] In 2011 the United Kingdom contributed 36% of all foreign golf tourists visiting this country (316,882), while Germany's share was a little bit over 20%, to which one must add players from Sweden, Finland or Ireland (Hosteltur, 2012).

[•] Already in 2012, 1.6 million foreign golfers visited Spain, generating sales worth over €1,500 million. (Hosteltur, 2013).

[•] European Spotlight on Golf Tourism to Spain (http://goo.gl/GoqyWe, retrieved in January 2016).

[•] Britons and Germans show a certain tendency to travel as far as the US (5.1% and 5.0% respectively), by contrast with a bare 1.6% or 1.3% of golf breaks spent in that country —a golf powerhouse in the world scene— by Swedish and French golf tourists (Hudson & Hudson, 2014).

[•] A different profile is that of the business-oriented golf tourist, who usually travels in groups of eight to sixteen people and uses golf as a means of launching a business initiative.

the concentration and proximity of golf courses in the area (KPMG's Golf Advisory Practice in Europe, Middle East and Africa, 2015a). The average length of a golf vacation ranges between three and five days in the case of domestic tourists and a little longer for foreign visitors (between seven and nine days). Golf tourists usually enrich their stays with additional activities (gastronomy, shopping, trips and visits, nights out, outdoor recreation, health & beauty treatments, etc.), whether enjoyed by themselves or by partners and friends who do not practise golf themselves. The golf tourist's average daily spend during a golf break is somewhat higher than that of a traditional tourist[•]. In the estimated breakdown provided by KPMG and Oxford Economics (2008), only 26% of those expenditures are specifically golf-related, a global 59% covering the costs of accommodation (20%), restaurants (18%) and travel (21%), while the remaining 15% goes into other activities (shopping, entertainment, etc.).

Golf tourists like to organise their own vacation, contact the golf facilities directly (KPMG's Golf Advisory Practice in Europe, Middle East and Africa, 2013) and benefit from agreements and alliances reached by golf course and the hotel sector. They generally learn about golf facilities and destinations thanks to the information they gather from friends, even though the use of social networks is beginning to be a prevalent habit (Sport Illustrated Golf Group and Sports&Leisure Research Group, 2013). In general, these tourists remain fairly loyal to their chosen destinations. Indeed, satisfied golf tourists become excellent promoters and disseminators of their destination's positive image, thus generating a wealth of synergies that even involves non-golfing tourists.

When it comes down to choosing a golf destination, a key factor is the climate conditions of the area and the weather forecast for the length of the break (long and sunny days). This is why the peak season for golf does not only confine itself to the summer months, since golfers prefer to travel from March through June and from September through November. In this way, golf-related tourism promotes an alternative and complementary seasonality to mainstream tourism.

There are other factors, however, that have a bearing on the planning of golf vacations, like the quality of golf courses (KPMG's Golf Advisory Practice in Europe, Middle East and Africa, 2012b), their design and typology, the additional facilities and services provided by the golf course and the optional activities offered in the surrounding area.

Additional aspects are the prospect of a hospitable reception and a fluent and direct communication with the course managers and staff. To these one must add easily accessible golf courses and correct course signage, as well as accurate directions concerning their location (fully reliable GPS coordinates) and attractive natural surroundings and views (Turespaña, 2005).

Golf tourists are usually demanding with regard to the quality of the product they seek. In the last few years, the demands of golf tourists have gradually evolved towards a better-defined, more specific profile, so the golf tourism industry has had to cater for the needs of customers who have high expectations and are knowledgeable about the product they seek; this in turn generates a reciprocal effect on tourist destinations, insofar as it encourages them to update and enhance their own image by associating it with development and modernity. Ultimately the whole process induces a multiplying effect on the economy and reduces the impact of seasonality that characterises traditional tourism.

4. GOLF TOURISM IN SOUTHERN EUROPEAN COUNTRIES

As pointed out before, the practice of golf has generally experienced an important growth in terms of both supply and demand. Moreover, the popularisation of this sport has given rise to the "development of a new subsector within tourism focused on selling, creating and operating golf-oriented pleasure trips" [our translation] (Turespaña, 2005, p.1). More specifically in southern European countries, golf tourism has emerged as the ideal supplement and the cost-effective alternative to the so called "sun-and-sand" tourism. These countries, mostly located along the coastline of Southern Europe, enjoy ideal conditions for playing golf nearly all year long, and provide an excellent opportunity for the sector's expansion while meeting the demand of those tourist-players (Pastor et al., 2013), thus

[•] The average spend of this kind of tourist is between 70% and 202% bigger than that of a conventional tourist (Hosteltur, 2012).

promoting the de-seasonalisation of summer tourism. In addition, new tendencies in the demand are noticed —new motivations in holiday planning, changes in vacation length and frequency, greater fragmentation of holiday periods, demand for high quality tourist services, etc.—. Thus, golf tourism must be regarded as an activity worth promoting, since it can help those tourist destinations gather momentum.

The most popular tourist destinations are Spain and Portugal, followed by Scotland and Turkey. Other increasingly popular international destinations are Thailand and Vietnam, whereas Italy and Bulgaria are beginning to emerge as new inbound markets for golf tourism (KPMG, 2013).

In this regard, southern European countries have engaged in the construction of golf courses largely to attract foreign tourist golfers rather than to cater for the demand of the local population. According to data supplied by the EGA, the registration of affiliated golf courses in southern European countries (Spain, Greece, Italy Portugal and Turkey) has experienced an important breakthrough, the highest increase having taken place in the late 90s, while the following decade saw a diminution of this trend (Table 3).

Table 3

Evolution of the number of golf courses in southern European countries

YEAR	SPAIN	GREECE	ITALY	PORTUGAL	TURKEY
1990	89	5	101	21	-
1995	163	5	180	36	6
2000	201	5	216	59	13
2005	266	6	229	67	9
2010	345	7	269	84	18
2015	348	8	275	86	18

Fuente: Own construction on the basis of data supplied by EGA (2014, 2015).

If we exclusively focus on the last year for which data were published (EGA, 2015), we may estimate several market indicators illustrative of the introduction and popularization of this sports practice in these countries (Table 4). The saturation index (number of licences per golf course) gives us an idea of the massification of golf facilities by country (or lack thereof). Spain shows the highest value, far above the other countries appearing in the table: Portugal, Turkey, Italy and Greece. The latter, moreover, exhibit penetration rates (number of licences for every 1,000 inhabitants) that are relatively low and point at the small popularity of golf among the local population of these European coastal countries whose golf facilities are nevertheless aimed at visiting players.

On the other hand, the density rate (the ratio between the total population and the number of golf courses) is quite similar in all countries under scrutiny with the exceptions of Greece and Turkey, whose values are exceedingly high for this parameter as a result of the limited number of golf courses existing in these territories. The situation becomes the opposite when we estimate the ratio golf courses to land area (Table 4), which produces considerably lower figures for the two countries, thus underscoring their capacity to devote more land to golf courses and related facilities aimed not just at their local populations but also at receiving golf tourists from other places.

Following these indicators, it may be observed that the practice of golf is not widespread among the local population (affiliated licences) in these southern European countries which nonetheless make their sports facilities available for a more intensive use by tourist golfers, especially from foreign countries.

Table 4

Golf market indicators in southern European countries

COUNTRY	LICENCES	COURSES	POPULATION (in thousands)	LAND AREA (in thousand km²)	SAT. INDEX	PEN. RATE	DENS. RATE	RATIO COURSE/AREA
SPAIN	280,712	348	46,405	505.94	806.64	6.05	133.35	0.69
GREECE	2,350	8	10,958	131.96	293.75	0.21	1.369.75	0.06
ITALY	91,713	275	61,336	301.34	333.50	1.50	223.04	0.91
PORTUGAL	14,094	86	10,397	92.22	163.88	1.36	120.90	0.93
TURKEY	6,776	18	75,932	783.56	376.44	0.09	4.218.44	0.02

Source: Own construction on the basis of data supplied by EGA (2015), World Bank (2014).

In this sense, Spain —with as many as 348 affiliated courses•— takes the second position in the list of world countries (behind the US) as recipient of international golf tourists and tops the European ranking of golf destinations (nearly one million tourists•), thus generating a yearly revenue of €1,200 million (Aguirre Newman, 2011, p.3). According to Hosteltur (2012), the average daily spending of these players has been estimated at €171.40 —the equivalent to an average stay of about seven days. In this way, golf tourism can be regarded as one of the fastest-growing products in Spain's sports tourism, not just in terms of its general contribution to revenue generated by the sector, but also as an input into the promotion and advancement of quality tourism and the diversification of the country's supply of traditional tourism products. The Spanish regions that receive the largest number of golf tourists and are therefore regarded as preeminent golf tourist destinations are: Andalusia (with golf tourism receipts worth €400 million), the Canary Islands (€177 million) and the Balearic Islands (€161 million).

Andalusia has the broadest supply of Spanish golf courses and is indeed the region that has drawn the greatest benefits from the expansion of golf in Spain, being the home to nearly a fourth part of the total number of golf courses. It has a wide array of diverse facilities with fairly competitive prices that are suited to the range of services available to players and the quality of their courses. This results in a consolidated brand image (Costa del Golf) recognized by tour operators and customers. Yet in spite of the sector's strengths and opportunities in this region, the last few years have seen clear weaknesses and a number of gaps that must be identified and bridged, as pointed out in the report by Junta de Andalucía (2012)•. This may lead not so much to a direct loss of visitors, but to a slackening of their flow and a certain tendency for this destination to cease to be a favourite one.

The Canaries and the Balearic Islands, in turn, exhibit similar characteristics (an abundance of courses, a modern hotel infrastructure, a wonderful climate all year long) and the additional advantage of the short distance between courses, which makes it possible for the tourist to play in several facilities.

Portugal is another golf tourism inbound destination par excellence (second most popular for English and Irish golfers•). Its mild temperate climate, the numerous golf courses (Algarve region), its scenic beauty and landscape contrasts make it particularly attractive for a large number of European tourist-golf players for most of the year. Portuguese golf courses have diverse layouts providing several levels of difficulty and characterized by high quality standards as regards both the facilities themselves and their environmental quality.

According to data supplied by Banco Espirito Santo (2013), in the last few years this market has grown at a rate of nearly 7% a year and currently expects to reach the figure of two million trips in a relatively short period of time. The average spending of these tourist players is higher than that of conventional tourists. On average they stay in their foreign destinations for about 6-7 days and

• According to data provided by Spain's Golf Federation (RFEG), 265 are 18-hole courses if not longer, while 83 are 9 holes (RFEG, 2015).

• In 2005 and 2007 the number of foreign golf tourists exceeded one million, even though this figure diminished somewhat in 2011 (largely as a result of the widespread economic crisis), when Spain received 884,848 tourist golfers from abroad (58% males and 42% females). The expectation, however, is to return to the one million figure in the next few years (Hosteltur, 2012).

• The report points at a number of negative aspects that are somehow checking the sector and must therefore be addressed, given the high value of the golf-related tourist segment for the region's economy. Some of these hitches have to do with the emergence of new rival destinations, the need for staff cuts during the recent economic crisis, the low professional standards of some employees or the decrease in the number of low-cost flight connections with European outbound tourism markets.

• http://goo.gl/XFnzGo (retrieved in January 2016).

contribute a total of €316 million to this tourist market segment•. According to data published by Portugal's Golf Federation•, the majority of golf courses are situated in the Algarve region and in the Lisbon district (respectively 35 and 25), the most demanded areas, to which we must add some other 12 courses in the northern region, 4 in central Portugal and 6 in the islands.

Tourism in Portugal is an essential and strategic element in invigorating the country's economic growth. This is why its tourism authority —Turismo de Portugal— has launched an online platform called "Portugal Golf Membership" in order to internationally promote the practice of this sport and support the association between Portuguese golf courses and nearby accommodation facilities as well as a supplementary services like those provided by car rental and flight booking companies.

Another destination that has powerfully emerged in the tourism sector at large and strongly competes with the previous two is Turkey•: it offers not just its favourable Mediterranean climate, but also quality sports facilities together with more specific attractions (the culture and archaeological heritage as well as its rich and varied gastronomy). Turkey's growing supply of modern top-quality accommodation allows for highly competitive prices which in turn, and in combination with hospitable and well trained staff, make this country a destination of choice for a large number of tourists.

A report published by KPMG (KPMG's Golf Advisory Practice, 2015b) positions Turkey as a leading country among emerging markets in the golf tourism sector thanks to its competitive and attractive supply of golf-related services, particularly in its coastal territories. The report highlights Turkey's large potential for growth in this tourism segment as a result not only of its pleasant climate, publicly funded campaigns (following a law to incentivise tourism) and private initiatives (strong support by Turkish Airlines), or large investments conducted within the hospitality sector, but also of a highly successful programme for the promotion of golf among junior people•, the organization of golf championships included in the professional circuits and the commitment by all stakeholders and sponsors to continue supporting this sport —all of which points at an open and bright future for golf in Turkey.

According to data provided by the Turkish Golf Federation•, in 2012 the country received 327,037 international players, who represent 71.1% of the total number of tourist golfers: 29.4% came from Germany, and 24.3% from the Russian Federation, while the percentages lower from Britain (7%), the Netherlands (4.2%) or France (3%). All of them prefer to visit the country's southern coast (Antalya province•), where the city of Belek (in the Serik district) is an outstanding highly performing golf destination (KPMG's Golf Advisory Practice, 2015b•).

Italy, on the other hand, is beginning to emerge as destination for golf tourists (both domestic and international), even though its figures are a long way from those of Spain or Portugal. The country promotes its golf tourism sector by leveraging its traditional tourism assets as well as its huge heritage and natural spaces of great scenic beauty.

Those who do visit this country mainly come from Germany (northern Italy) and, to a lesser extent, Sweden and France (central Italy), British tourist players being few•. As happens in other countries, the

• Soares, Sánchez-Ollero and García-Pozo (2014).

• http://goo.gl/L9zALa (retrieved in January 2016).

• The evolution of tourism in this country has experienced an important growth during the last decade, when the figure of 17 million foreign inbound tourists in 2004 (Hosteltur 2015) more than doubled in 2014 (36.8 million). Among the segments that are playing an ever more significant role in this process is golf tourism (KPMG's Golf Advisory Practice, 2015b).

• It is the only country in Europe to boast 45% of junior licences (KPMG's Golf Advisory Practice, 2015b), whereas the European average is 8.85%.

• http://goo.gl/VVwYDj (retrieved in January 2016).

• Visited by 34% of foreign tourists, a percentage that greatly decreases in other provinces along the Aegean coastline (Mugla 9%, Izmir 4% or Aydin 2%). Moving into inland Turkey, Denizli (Pamukkale) and Nevsehir (Cappadocia) received 3% of foreign visitors each (http://goo.gl/pjbaPw, retrieved in January 2016).

• According to KPMG's report(KPMG's Golf Advisory Practice, 2015b), Turkey's global supply of golf clubs is 18, of which 89% have courses featuring at least 18 holes, while only 11% have 9-hole courses (http://goo.gl/JndpZt , retrieved in January 2016).

• Major foreign markets for Italy's golf tourism sector are Germany (48.8%), Austria (16.3%), the United Kingdom (13.4%) and France (9.3%) (Federazione Italiana Golf & Protiviti, 2011).

usual profile of golf tourists upper middle income level as well as a high purchasing power and readiness to spend, which results in an average daily spending that is somewhat higher than that of traditional tourists.

According to a study conducted by KPMG (2012a), nearly 90% of Italy's golf courses are full-size. Their distribution is, however, not homogeneous. In the northern regions —Lombardy and Piedmont— are concentrated 71% of all Italian golf courses•, visited by German and French players. In the central part of Italy, the most outstanding golfer regions are Lazio and Tuscany. The southern regions and the islands only take up 10% of all golf courses (Apulia, Campania, Calabria, Molise and Sardinia), with a small percentage of registered licences (4%), which suggests that promotion is targeted at golf inbound tourists rather than at the local population.

Finally, Greece is another attractive destination on the Mediterranean coast, visited by tourists from northern Europe. Tourism is a key element of the Greek economy.

Given the very limited penetration of golf among Greece's local population, the sector's present-day development is significantly lower than in the other countries under scrutiny, even though the potential for growth is undeniable in view of the huge demand for golf-related facilities by inbound tourist golfers. According to data supplied by the Hellenic Golf Federation• Greece currently has seven 18-hole golf and one 9-hole golf courses, which are situated on the islands or in the country's peripheral cities. And yet Greece does possess features similar to those of the other southern European countries (climate conditions, natural and scenic beauty, cultural and archaeological heritage, gastronomy, etc.), so that it could certainly host a similarly competitive golf tourism sector just like the other nations in this part of Europe.

It appears, therefore, that southern European countries have the sufficient potential and attraction to provide prominent destinations for golf aficionados and can therefore accommodate golf tourism inside their respective traditional tourism sectors in the benefit of their economies and as a factor of economic growth, thus supplementing the practice of this sport with the development of other tourist events. Exploring and promoting the connection between tourism and the practice of golf is one of the key ingredients of today's policies in support of the sector in geographical areas whose popularity as favourite tourist destinations is nevertheless increasingly threatened by the emergence of new, strongly competitive Mediterranean inbound destinations outside the European territory—Algeria, Cyprus, Egypt, Morocco and Tunisia (KPMG's Golf Advisory Practice in Europe, Middle East and Africa, 2010). Given the increasing competition to destinations, it is becoming increasingly urgent for managers to identify variables that attract or retain clientele to their sites (Petrick & Backman, 2002). In this context, for example, market segmentation constitutes a well-established marketing strategy (Armstrong, Kotler, Cunningham & Cunningham, 2005).

5. CONCLUSIONS

Associated with the enjoyment of leisure and spare time in contemporary society, golf has become a major tourist attraction in the Mediterranean regions of southern Europe. That the practice of golf should nowadays be an integral part of regional tourism strategies can be easily understood in view of the fact that golf tourists travel more often and spend more that mainstream tourists. This is why support for this kind of tourism and for actions targeted at attracting as many tourist golfers as possible should be encouraged.

Climate conditions in such geographical areas make up one the most important attractions as well as a major driver of golf tourism that contributes to the de-seasonalisation of traditional tourism. To this we should add the large number of outstanding golf courses that exist in these locations situated moreover in relative proximity to one another. Golf tourism relies on the high quality standards of golf facilities themselves as well as of hospitality services, both, important guarantees of their international reputation in the world of tourism

• Federazione Italiana Golf & Agenzia Nationale del Turismo, 2013.

• http://goo.gl/FzriWu (retrieved in January 2016).

All these areas, in short, are positioned as highly attractive destinations for international golf players (English, German and Scandinavian) who enjoy a high purchasing power and readiness to travel. In this regard, golf facilities and interest groups involved should undertake a more detailed analysis of the behaviour of such golf tourists and of the underlying motivations behind their choice of tourist destinations. This would make it possible to develop certain market segmentation models that would in turn help provide a solid and stable bottom line for the development of efficient high quality strategies for the management of golf courses' relations with both their regular clients and their exceptional visitors.

It is moreover necessary to bring about a close cooperation between the public and the private sectors in strengthening planning, marketing and communication actions in this subsector of sports tourism. In this sense, both public administrations and private entities are already beginning to express the need for an alternative and more efficient approach to planning and implementation. This would involve the design of broad and collaborative action lines in order to promote the setting up of golf tourism initiatives capable of strengthening and consolidating present-day markets while at the same time attracting new tourist flows. Emphasis is laid on not neglecting the quality of sports facilities or services delivered, since already other countries are emerging as competitors and beginning to take away golf tourists from traditional inbound destinations in the Mediterranean.

For all these reasons, and given the numerous commonalities shared by southern European countries which work as major drivers of golf tourism, it would be highly convenient to set up a collaboration and cooperation strategy in golf-related tourism for all the Mediterranean regions. Such a strategy would provide both greater feasibility and visibility for the supply of golf tourism-related services in the area by enhancing the value of its golf facilities, their locations and the sector's position within the tourism industry in general.

It is also necessary to identify and profile both current practitioners and potential users of this particular brand of sports tourism by clearly detailing their needs and expectations so as to implement action plans leading to high levels of customer satisfaction.

In short, the promotion of golf tourism in southern European countries and regions requires a planning strategy mainly aimed at communicating and enhancing the image of such destinations and also at targeting the services they market at all interest groups involved. This would entail actions leading, for example, to participation in promotional fairs, the organization of events attended by tour operators and other professionals responsible for distribution channels, a stronger presence in specialised media and in the social networks, a closer collaboration among golf course management teams, the coordination of special events aimed at amateur golfers (senior and junior players), the launching of holiday packages that combine the practice of golf with other activities typical of individual destinations, the provision of varied services and the full availability of specifically golf-related facilities, etc.

As pointed out by CECIFT (2008), the Mediterranean countries in the south of Europe try to promote their own identification with the practice of golf and even strive for a common brand image. Golf tourism in southern European countries can in this way take important steps towards its consolidation as a major tourism resource and a fundamental piece in a long-term tourism strategy that can bring about a strong economic impact for the host regions.

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