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“Analysis of Golf Tourism: British Tourists in Marbella”

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SUMMARY:

This study consists of analyzing golf tourism and the British tourist who visits Andalucía and in particular Marbella.

In order to carry out the above, sources have been used from the Autonomous Community Government, Málaga Tourist Board, Marbella Town Hall, and by researching articles and information about golf and the British tourist who visits Marbella. Questionnaires have been prepared and distributed throughout the fifteen golf courses in Marbella. An analysis of the web pages from the golf courses has been realized. In addition own graphs have been produced and graphs created by the different institutions have been used.

The British golfer has been analyzed using different criterias and obtaining percentages of the different golf courses that they play on. Finding out if the courses have contracts with hotels in the area and confirming when it is high season for the golfer, in particular the British.

INDEX

Chapter 1 Introduction	1
1.1 Objectives of the study	1
1.2 Methodology used for undertaking the study	1
1.3 Structure of the study	2
Chapter 2 Background of golf	3
2.1 Definition of golf tourism	3
2.2 History of golf	3
2.2.1 Golf tourism in general	3
2.2.2 Golf tourism in Spain	4
2.3 Types of golfers	5
2.4 Types of golf courses	7
Chapter 3 The practice of golf in Marbella	8
3.1 About Marbella	8
3.2 Golf courses in Marbella	8
Chapter 4 Golf related institutions	15
4.1. Autonomous Community Government	15
4.1.1 Distribution of golf courses in Andalucía	15
4.1.2 Average stay and average expenditure	16
4.1.3 Reasons for visiting Andalucía	17
4.1.4 Competitors to Andalucía	18
4.2 Málaga Tourist Board	18
4.3 Marbella Town Hall	21
4.4 Local news	22

Chapter 5 Analysis of golf courses in Marbella	23
5.1 Analysis of web pages of Golf courses in Marbella	23
5.1.1 Online reservation	25
5.1.2 Pay online	26
5.1.3 Promotions and offers	26
5.1.4 Activity calendar	28
5.1.5 Languages	29
5.1.6 Photo gallery	30
5.1.7 Social network	31
5.2 Analysis of questionnaires of golf courses in Marbella	32
5.2.1 Percentage of British golfers	33
5.2.2 Reservations	34
5.2.3 Contracts with hotels	37
5.2.4 Seasons	37
Chapter 6. Conclusions	39
Bibliography	42
Annex	45

CHAPTER 1 INTRODUCTION

1.1. OBJECTIVES OF THE STUDY

The objectives of this study are the following:

- Give background information about the relationship between golf and tourism in Spain and more specifically in Marbella
- Demonstrate that the study is necessary because of the scarcity of information and statistics on the golf industry in Marbella
- Find out the effect the British Golf Tourist has had on the golf area in Marbella
- Differentiate between the types of golfers and golf courses available in Marbella
- Show the close connection between the institutions and the golf sector at a regional (Andalucía), provincial (Málaga) and a local level (Marbella)
- Investigate the percentage of how many British golfers play at the different golf courses in Marbella
- Find out how the majority of the British golfers reserve and if the golf courses have any contracts with hotels
- Analyze the official web pages of golf courses in Marbella

1.2. METHODOLOGY USED FOR UNDERTAKING THE STUDY

The reason why I have chosen to analyze Golf in Marbella is, because of the many golf courses in Marbella it is well known as the “Golf Valley” to the British golfers. Also golf is one of the great attractions for people to come to Marbella in addition to its microclimate, its facilities, good communications and large hotel capacity etc. It is a good opportunity to make an in-depth study as I have been brought up on the Costa del Sol and live in Marbella; I have seen the construction of some of the golf courses themselves over the years and have noticed the positive effect it has had on the tourist industry.

The information in this report has been collected from various sources, commencing with internet research of the different related golf pages. In addition many books, newspaper and golf related articles have been consulted, for example Diario Sur newspaper, Euro Weekly and Costa del Sol Golf News.

Over a period of two weeks I visited the fifteen golf courses in Marbella which gave me a first-hand experience at the golf courses, interviewing golfers, directors, masters, receptionists, secretaries, public relations officers and a well known property developer. I have also been in contact with presidents and

founders of golf societies without golf courses (Asociaciones de Golf Sin Campo de Golf)¹.

The Autonomous Community Government was approached to supply statistics and information about the British golfers who visit Marbella. This institution is responsible to publicize golf information and statistics annually for Andalucía and not specifically for Marbella. The Málaga Tourist Board and the Marbella Tourist office were contacted for further information about the British tourist and golf tourist.

1.3 STRUCTURE OF THE STUDY

Chapter 1: Introduction that includes the objectives of the study and the methodology, contacts, and how the sources were used.

Chapter 2: Provides deep background information of golf tourism. Firstly giving the definition of golf tourism and the history of golf and outlining the origins of this sport. Secondly giving an insight of Spain as a golf tourist destination, followed by the types of golf tourist and golf courses.

Chapter 3: Describes Marbella itself, the chapter gives a small description of each golf course in Marbella and classifies the types of golf courses available.

Chapter 4: Gives more detailed information on three institutions which have a close relationship with golf. They also include a study from the Autonomous Community Government.

Chapter 5: This chapter presents the research findings from the qualitative and quantitative study which gives a better understanding and clearer insight of the British golf tourists. It concentrates on the analysis of the questionnaires which were personally handed out to the fifteen golf courses in Marbella. As with the web pages, the responses have been analysed following various criterias. There is a subchapter where the web pages of each golf course is analysed according to different criterias.

Chapter 6: Presents an overall conclusion of the study, as well as an evaluation to see if the objectives of the study have been achieved. Lastly this chapter also provides recommendations for the future of the British golf tourist who visits Marbella.

¹ "Club de Golf Marbella" and "San Pedro Golf Club" are examples of these associations

CHAPTER 2 BACKGROUND OF GOLF

2.1. DEFINITION OF GOLF TOURISM

Golf tourism² is the type of tourism directed at people whose specific aim in visiting a location is to practise the sport of golf. Additionally golf might be played during a beach holiday as an alternative activity. Although the golf courses benefit from this type of tourist, as far as overseas tour operators are concerned it is not included in their statistics as they have little to gain from independent travellers, unless they have reserved on one of their golf holidays³.

The importance of practising and competing in golf is that it is a sport that is in continuous development and people from all walks of life and any age all over the world play it. People play for different reasons, it can be a social benefit or a competitive challenge which can result in personal satisfaction as the golfer's game improves.

The golf industry has great effect on local economy, the golfer doesn't only come to play golf, during his stay he also spends large amounts of money on transport, accommodation, restaurants, etc. therefore making a knock-on and indirect effect.

2.2 HISTORY OF GOLF

2.2.1 Golf Tourism in general

How the game of golf evolved is not certain. The ancient Romans played a game with a stick and a feather ball, although other historians think the origins of golf came from the Netherlands, as "Kolf" in Dutch means stick. Also in 1297, the Dutch had a game with a stick and a ball where the objective was to hit the ball as far away as possible with the least number of strokes.

In addition the origin of golf is also debated in China and is mentioned in Chinese books in the memoirs of Dongxuan XI century; however other evidence is that in Scottish history golf started in the XI century and has 18 holes as there is a legend that a bottle of whisky contains 18 drinks measures.

Generally the number of holes on a golf course has been adapted over the years according to the land available for the golf course. In the olden days there were golf courses of 11 holes, and the player used to play two rounds to make it 22 holes, this was very different, nowadays courses are of 9 or 18 holes. Golf originally was played by royalty, nobility and commoners.

² www.onecaribbean.org/content/files/Golf.pdf

³ <http://www.golfparatodos.es/principiante/historia-del-golf>

The first golf association was formed in Scotland in 1744; a year later in 1745 it was formed in the United Kingdom, simultaneously in this year the first rules of the game of golf were invented. Further golf associations were created in East India (1829), Canada (1873) and New York (1888). After many debates, it is now accepted that the origins of the game of golf were in Scotland.

Major changes in the equipment used in the game occurred in the 19th century, such as advances in grass cuttings, the design and materials used for the golf balls allowing the ball to travel further across the golf course and the invention of the tees was also another factor that assisted the drive.

Another material that caused debate and made an important change in the game are the golf clubs. Up until the 1930`s the clubs were made out of wood but from this year onwards they changed to a metal. The latest design for the golf clubs is graphite, which owing to the club`s flexibility and lightness allows a better swing.

2.2.2 Golf Tourism in Spain

Golf in Spain dates back to the eighteenth century when it was first introduced by the British. Although there are records from 1814 in France, of Scottish soldiers playing golf when they were in the peninsular war on the Spanish- French border.

The British founded the pioneer Spanish golf club in 1891 in Las Palmas of the Canary Islands which they built on some land called "Loma del Polvo" which was later abandoned and now known as Bandama. An innovating way to calculate the handicap developed with the invention of "Par" and golf underwent new regulatory changes to the game in 1900.

Later, other golf courses were constructed in Madrid, Barcelona, Bilbao and Malaga (Real Club de Campo in 1925), amongst others. The Real Club de Campo was the pioneer club in Andalucía and above all on the Costa del Sol. The relation between tourism and sport was already becoming apparent in those years.

There were four important golf clubs in Spain which were already founded before the Spanish Civil War. They were in Cantabria (1929), Madrid (1930) and Tenerife (1932).The locations of these golf courses were constructed near the large cities and holiday resorts. Golf was becoming fashionable and was popular among the wealthier classes.

In those days golf was not a business, and club expenses were divided and paid for by the club members. Over time, as in America and due to demand and the large number of golfers, from a passion it was converted into a business and a money-making sport.

Spanish golf professionals such as Severiano Ballesteros, through their great achievements on international levels, brought the attention of the mass media and so created popularity for the game in Spanish society. This publicity multiplied the number of federates of golf.

Due to many factors, the Costa del Sol, Canary Island and Balearic have now become consolidated international golf tourist destinations. It is important to say that the golf courses add value to the area, hence the fact that many golf courses are situated near hotels and high quality urbanizations.

2.3 TYPES OF GOLFERS

To find an exact classification of golfers is a hard task. After many searches through the internet and books I have decided to use the definition of types of golfer from Aymerich Consulting. They produced a report on economy and perspectives of the golf sector in Spain in 1996⁴. Although not updated, I found this the most interesting and informative classification. There are 4 types of golfers which are as follows:

Golfing enthusiasts: The golfer makes the practice of this sport into one of their main activities during their leisure time. He is usually a consistent and frequent player who is a member of some club, and plays many rounds each week all year round. He is a player prepared to travel to compete in different competitions and try out new golf courses although they must be difficult and challenging. This type of golfer has a great social economic level, which means he is very demanding of the quality and service provided. He stays in luxury hotels very near where he plays and avoids wasting unnecessary time organising. He likes things to be done for him, for example through Agencies, hence the fact that the player is usually a more mature golfer.

Regular golfer: As its own name suggests, these are golfers who like to play with the same people on a regular basis at different level golf courses, eg. once every week. These are usually younger golfers with families who have less time to play, if they go on holiday it is one of their main activities, however, they also do like to have alternatives so, therefore, are interested in location, not only for themselves but for their family members while they are playing.

This golfer looks for good quality accommodation with a first class gastronomy. Regarding how he chooses the golfing holiday, it is through a travel agency and they are looking for a golfing weekend with friends or partners.

Interested golfer: These are not regular players, to the contrary they are irregular, and the reason is because they are professional men on business trips. Sometimes these trips are paid for by companies so that the business person, in this case also a golfer, makes connections related with other business people while playing golf. It is important to mention this type of player in Spain is very rare to find as the majority of players in Spain come to improve their golf and their social relationships and not to make connections related to

⁴ Aymerich consulting, (1996): "Informe económico y perspectivas del sector del golf en España. Madrid Aymerich consulting.

business deals. On the other hand, I have met a local businessman who plays golf for the business benefits that contact with the golfers give him. It is important, therefore, to differentiate the interested local who is a resident, in this case in Marbella, and the interested golfer who comes from abroad.

Occasional golfer: This type of golfer can be divided into two subcategories which are the following:

- People who join a golf club for social reasons, not so much for the sport of playing golf but for the social status of belonging to a private club.

- or those who have been practising the sport of golf for long periods of time and prefer not to be club members but to play on a golf course whenever they are able to and at an average level of golf. These golfers comprise of young people on a lower budget who eventually may be regular golfers and club members.

In general the occasional golfer organises his holidays depending where he would like to travel to as a tourist but, if possible and if he gets the chance to play one or two games, he will do so.

It is important to identify what type of golfer comes to Marbella to play in order that an appropriate marketing strategy can be devised by the local Town Hall. After visiting the many golf courses in Marbella and gathering information the conclusion is that there is no majority of any of the types mentioned above.

A Golf Enthusiast would be well suited to play in Marbella, as this type of golfer has a high budget and seeks to spend his money on luxury goods. A recent article from www.noticias.com⁵ states that Marbella is the second highest on the list of cities in Spain who have luxury goods for sale. An interesting course for him to play on would be the Real Club Golf Guadamina South as it is a challenging course on which he would enjoy playing. As he likes to stay in luxurious accommodation he could stay at Hotel Melia La Quinta which also has its own golf course. The golf course at la Quinta is for experienced players and has been designed for this purpose. Hotel Melia La Quinta should seek to work with a prestigious British Tour operator.

Promotions for Regular Golfers can be offered during British school holidays or on British bank holidays when the golfer's family is able to travel together. This type of family will require extra facilities such as additional sports where they are staying and a tour operator who caters especially for families would be able to suggest the best accommodation for their requirements. Perhaps this family will be better suited to stay in an apartment with the golf on site; in this case the ideal accommodation could be Greenlife Golf Club. The golf course also has a famous restaurant in the same complex with a Michelin star and is only five minutes away from the best beaches in Marbella.

⁵ A online Spanish newspaper, article published on the 01.12.13

The Interested Golfer who is looking to combine his golfing visit with business would probably have his accommodation booked by his company. As he is not a demanding golfer regarding the course he plays on, he could choose a golf club which is frequented by other business people. A suggested golf club could be Los Naranjos.

An Occasional Golfer could go to Dama De Noche whenever he wanted to play, as golf is not his main motivation and this club does not require prior reservation. If this golfer comes to Marbella, he might want to come because of the climate and nightlight life, and therefore leaves golf as a secondary option. In nearby Puerto Banus he can find accommodation for example Hotel PYR.

2.4 TYPES OF GOLF COURSES

The number of holes being 9 or 18 depends on the golf course; also differences in design can make the game more difficult. In addition courses may consist of other obstacles like lakes, rivers and bunkers.

According to Brent Kelley “A Sports Journalist since 1986”, however in the golf area since 2002 and who now works for “about.com”, the golf courses are classified in four types⁶:

Public courses: this type of course is open to anyone who would like to play, in other words as its own name says, public. It can be sub-divided into municipal courses which do not exist in Marbella, but belong to a city or county, or daily fee courses as are all courses in Marbella with some exceptions. Public courses are also known as “Pay and play”; In Marbella there is only one type of course strictly like this and it is located in Puerto Banus, La Dama de Noche, has no members or previous reservations. The golfer just arrives and asks to play.⁷

Resort courses: as its own names says, it is a course that is surrounded by a resort or a large hotel, etc. these courses usually have a daily fee for golfers just playing and a different fee for those who also stay at the resort, for example preferential tee times or discounts, etc. Examples of resort courses in Marbella: Golf Rio Real, La Quinta.

Semi-private courses: These courses allow non-members to play as well as members, for example visitors, tourists, etc. similar to the Resort Courses; members have preference over the visitors. An example of this club in Marbella is: Real Club Golf Guadalmina.

Private courses: these are courses only for members, those who pay a annual fee to be able to use the club, this is exclusive so, therefore, the price can be high. These clubs allow the member to invite a guest member, which is

⁶ <http://golf.about.com/od/golfcourses/a/The-Different-Types-Of-Golf-Courses.htm>

⁷ When I went there to interview the Caddie Master, he told me that the maximum time the player will wait is 20 to 30 minutes and then he will be on the course playing.

a privilege for the guest to be able to play on such a course. An example of this course in Marbella is: Real Club de Golf Las Brisas.

CHAPTER 3 THE PRACTICE OF GOLF IN MARBELLA

3.1 ABOUT MARBELLA

Marbella is on the southernmost tip of Spain and the Mediterranean Sea. It is a “golfing paradise”, words quoted by Marbella Exclusive website with a micro climate (320 days of sunshine per year and an average temperature of 18,5 °c) which is the envy of the whole world. Having grown from a small village to a travel destination with visitors from all over the world, Marbella has retained its history and Andalucian culture.

Numerous beaches, golf courses and sports activities are major attractions, not to mention its gastronomy. There are many first class restaurants featuring international and local cuisine (600 to choose from) and many luxury hotels.

Extraordinary sea and mountains views are to be enjoyed from many different locations within Marbella and the surrounding areas. The Marbella old town is another tourist attraction which may be a second reason for any golfer to visit Marbella, some of the buildings to see are: The Illustrious Town Hall of Marbella, Chapel of San Juan de Dios, etc.

Improved road systems in the last ten years make Marbella easily accessible from Málaga airport (40 minutes) resulting in more visitors as the majority of foreign tourists come by plane. This easy access is also an advantage for the golfer's families who may like to visit areas close by, such as Gibraltar, Málaga itself, etc.

3.2 GOLF COURSES IN MARBELLA

Once again figures of the exact number of golfers, who come to stay in Marbella, as well as play, is a figure that no one really can measure. It is difficult to know; as many golfers might stay in Marbella as the hotel capacity is higher than in other golf area, but they play on different courses in the Costa del Sol.

On the other hand, the golfer might stay in Málaga or Fuengirola and then decide to play a round of golf in Marbella. Therefore, from the different golf courses in Marbella, it appears that most of them estimate that in Marbella in the year 2012 there could have been around 80 thousand golfers who actually played in Marbella. Another reason why it is hard to identify who is a golf player and who is not, is according to Mátias Nuñez, Accountant at Santa Clara, that nowadays many players come without their own equipment and instead rent it. For example on the website of Greenlife Golf Marbella: I found an article about

details of a promotion for the summer of 2013, which included, unlimited access to the course, tee fees, hire of trolleys, clubs and five balls, all for the price of 45 €.⁸

Golf courses originally started to be built in Marbella during the property boom, the golf course was an attraction to sell the apartments around the golf course, this was in addition to the location, the weather, etc.

I interviewed⁹ Mr. Carlos Alvarez Garmon, a well known property developer in the Marbella area for the last 40 years; he pointed out the fact that the existing golf courses in Marbella helped the construction industry in particular during the years 2000 to 2010. As many of European property buyers were attracted to purchase properties near or on a golf course, he did point out that not all the buyers were golfers but they were buying on a golf course to be assured of an uninterrupted view. To this we have to add the birth of the low cost airlines which encouraged people to travel more frequently and increased the amount of British tourists visiting Marbella.

After explaining some background about golf and giving an overall view, I can now concentrate on my analysis of Marbella which is the objective of the study. There are a total of 15 Golf courses which is the highest number of golf courses in the area. Below is a small summary of each course in order of when they were opened:

- **Real Club Golf Guadalmina South:**
This golf course is one of the oldest on the Costa del Sol, it was opened in 1959 and designed by Javier Arana. The course comprises of a total of 45 holes, two eighteen hole courses and one short nine hole course, overall the course is known to be quiet difficult. Later in 2002 it was refurbished with better watering systems and a new tee called “super senior”.
- **Golf Rio Real:**
This is one of the many pioneer golf courses in Marbella. An 18 hole course designed in 1965 by Spain’s leading Architect, Javier Arana, who is also well known for designing other golf courses in the Costa del Sol. Due to its proximity to the sea and its design, golfers enjoy tranquility and magnificent views of the Mediterranean Sea in a peaceful atmosphere which is a short distance from the town centre.
The golf course crosses the River Real four times, hence the name of the golf course Rio Real.

⁸ <http://www.greenlife-golf.com/2812-massimo-filippa-y-el-director-de-greenlife-golf-marbella-lanzan-la-propuesta-all-inclusive.html>

⁹ On the 20.11.2013, Carlos Alvarez Garmon was interviewed and asked :How the golf courses had helped the construction industry, and what brought the majority of tourist to Marbella.

- **Real Club de Golf Las Brisas :**
Designed in 1968 by the American Robert Trent Jones (Jr), a world famous golf course designer, and consisting of 18 holes. The course is well known for hosting the World Cup twice, the Spanish Open three times and the Mediterranean Open once. Las Brisas is one of the most excellent golf courses in Europe, including 10 artificial lakes and numerous elevated greens making it a challenge of intelligence to all golfers.
- **Real Club de Golf Guadalmina North:**
Opened in the mid-seventies and designed by Folco Nardi. The golf course has 27 holes in total in addition it is an easier course than Guadalmina South although more extensive. Most of the clubs competitions are played on this North course. Its outstanding features are the lakes at the 7th, 9th, 11th and 18th holes and a stream at the 17th hole.
- **Aloha Golf:**
This course is one of the most popular on the coast, developed at the beginning of Spain's initial golf promotion in 1975. Designed by Javier Arana who utilized the natural surroundings, consisting of bordering lakes and vegetation to make playing golf at Aloha an unforgettable experience. The 18 holes are varied, some of which are difficult and none of which are the same .Aloha welcomes visitors, although those who are members have priority.
- **Los Naranjos:**
One of the most outstanding golf courses on the Costa del Sol founded in 1977 by the famous golf architect Sr. Robert Trent Jones (Jr). Members and visitors alike are made to feel very welcome in this recently refurbished and friendly clubhouse. Famous for its flat landscape and abundance of orange trees from which the course gets its name. The 18 holes are made up of 9 front holes and 9 back holes providing two very different courses. Los Naranjos gives employment to a large amount of people to maintain the golf course in optimum conditions.

- **La Quinta Golf & Country Club:**
One of the more recent golf courses from late 1989. Built by two Architects, Antonio Garrido y Manuel Piñero ¹⁰. Due to the nature of the course, accuracy is required to avoid the various obstacles. Fitness and stamina are also necessary to tackle the mountainous terrain. The 27 holes of the course appear easy, but are, in fact, difficult because of the design of the golf course. Beautiful panoramic views of the Nueva Andalucía Golf Valley will be enjoyed while playing a round of golf.
- **Club De Golf La Dama de Noche:**
Enrique Canales, was the first Architect to design a 24-hour golf course in Europe in 1991. Outstanding features of this course are the opportunity to play at any time of the day or night. The golf course gets its name from the flowering plants “Dama de Noche”, which perfume the night air and keep the mosquitoes away. The golf course consists of 9 holes played on a fairly flat ground. Floodlights provide daylight visibility.
- **Santa María Golf & Country Club:**
Consisting of a mixture of short and long lanes, the course is set in two valleys of outstanding natural beauty. Throughout the course players will be surrounded by an abundance of trees, plants, streams and lakes. The 18 holes were designed in 1991 by Antonio García Garrido and followed on by Santa Maria’s technical team.
- **Marbella Golf and Country Club:**
Robert Trent Jones(Jr) designed this 18 hole golf course and it was opened in the year 1994. It has curved greens, many bunkers and wide open spaces. The first few holes of this course are challenging and require skillful shots. Amateurs and professionals are well suited to the course, which is within an outstanding location.
- **Cabopino Golf Marbella:**
Is an 18 hole course designed by Juan Lignes Creus in 2001. This course is found to the far east of Marbella. An abundance of beautiful trees and lakes which affects the play on some of the holes are irrigated by the use of recycled water. Beautiful views and the possibility to use all 14 clubs, make this a very challenging enjoyable course for high handicap players.

¹⁰ Former Ryder Cup Player and World Cup Champion and who now runs the Golf Academy at La Quinta.

- **Greenlife Golf Club:**
This golf course opened in the year 2000 and was designed by the technical staff of Greenlife Estates. The club has a golf school making it ideal for beginners. Additional facilities are tennis courts, gymnasium, sauna, a pro-shop and the famous El Lago Restaurant which in 2005 was awarded a Michelin Star. A picturesque view has been created by building a large lake immediately between the restaurant and the golf course.
A variety of accommodation is available. The course has 9 holes, as well as a driving range. It has been carefully designed to include many plants and trees including palm trees and oaks.
- **Santa Clara Golf Marbella:**
An 18 hole golf course, designed by the famous Architect Enrique Canales in 2001. A mainly flat course technically difficult but enjoyable to play on. Good views within natural surroundings, well located and excellent service for the golfers.
- **Monte Paraiso Golf**
One of the most recent courses consisting of 9 holes designed by “Target Ingenieros & Asociados” and architect Manuel Piñero in 2003. The course is located on the mountain side, with wonderful sea views and only 2 minutes away from Marbella centre. The greens are in excellent condition and the course features lakes and gentle slopes. In addition to the club house there is a putting area and a heated pool.
- **Magna Marbella Golf:**
This is the last golf course that has been built in Marbella in 2005 by Jose María Elguezábal. It is located in the centre of Nueva Andalucía, only two kilometers away from Puerto Banus, allowing easy access and short game possibility.
The first rate golf school is equipped with all the latest technology for both beginners and experienced players to practice. The club house is a well known place designed especially for the golfer. The restaurant “The Magna Café” is above the club house it has outstanding views to Gibraltar and Africa as well as dinners being able to enjoy a high quality restaurant service and gastronomy.

See appendix for Image of Marbella with the 15 golf courses shown.

In the following table are the golf courses in Marbella and the types you can find:

Golf Courses	Types of courses			
	Public	Resort	semi-private	Private
Real Club Golf Guadalmina :South			X	
Golf Rio Real	X	X		
Real Club de Golf Las Brisas				X
Real Club de Golf Guadalmina North	X		X	
Aloha Golf			X	X
Los Naranjos			X	
La Quinta Golf & C.C		X	X	
Club De Golf La Dama de Noche	X			
Santa María Golf & Country Club	X		X	
Marbella Golf and Country Club			X	
Cabopino Golf Marbella	X		X	
Greenlife Golf Club	X	X		
Santa Clara Golf Marbella	X		X	
Monte Paraiso Golf	X	X		
Magna Marbella Golf	X		X	

Table 1. Golf courses in Marbella and their type. Source: own elaboration

As shown, the most common typology of golf courses in Marbella are public and semi-private. This is because an experienced golfer from Marbella has informed me that if the club has less than one thousand members it is not financially viable to be private. Due to the type of people wanting to play the odd game of golf, the tourist who comes 2 or 3 times a year and therefore goes to a public golf club (non- member), or the resident who lives all year round and it is more worthwhile for him to join a semi- private club or a public club.

There are some golf courses that are shown as private although they are also on the table as semi-private this is because, for example at Aloha Golf, 90 % of its players are members, however, there are various months of the year that only a few members play on the course, therefore to be able to maintain the courses and meet costs, the club is also open to non-members (10%). It is important to mention that members will always have priority over the normal public.

Below are opinions from Trip Advisor from some British golfers who have played on golf courses mentioned above:

Aloha golf

Written on the 10th October 2013 by a British golfer from St. Albans, England, - translated to English as the comment was in Spanish.

“I have played on the course a few times, it has a few interesting holes and some not so interesting. I played with a member; the game was quiet slow, as there were many people on the golf course. A lovely club with excellent service.”

Marbella Golf Country Club

Written on the 21st September 2013 by a British golfer from London, England.

“We love this course and the warm welcome we always receive from the staff. The course is still in excellent shape and such a beautiful setting with magnificent views from the 8th. My golf wasn't great that day but lunch afterwards made up for it! The restaurant food was superb with the addition of Sushi from their new chef addition. As ever everything we had there was tasty and beautifully presented, we plan to play on Christmas day and then attend their Christmas Day lunch as we heard from our friends who live in the area that last year it was superb and fun.

Marbella Golf has just won the 2013 Award of Excellence and that isn't given lightly. The food at the club has improved dramatically since the new management and the great service is constant. Way to go Marbella Golf.”

La Quinta Golf & Country Club

Written on the 6th July 2013 by a British golfer who is from County Durham, UK.

“Played 18 holes (A + B) and enjoyed every one of them. Tight layout with lots of doglegs and water. In good condition and for 50€ with buggy its a bargain. Changing facilities excellent. Lovely bar/cafe for halfway drinks. Will return.”

As seen the two comments given to “Aloha Golf” and “Marbella Golf & CC” show that the British golfers are satisfied with the golf clubs and courses they have visited in Marbella.

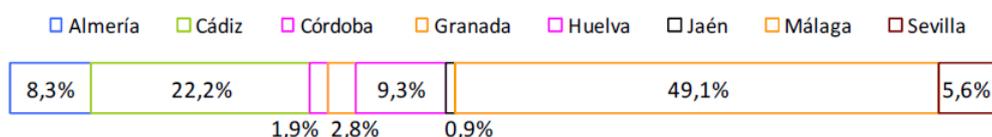
CHAPTER 4: GOLF RELATED INSTITUTIONS

There are three institutions which, after research I consider are important in relation to the golf industry and should therefore be part of my study. The first institution that will be discussed and which information will be analysed is the Autonomous Community Government¹¹, secondly the Málaga Tourist Board¹² and lastly the Town Hall of Marbella¹³.

4.1 AUTONOMOUS COMMUNITY GOVERNMENT

The Autonomous Community Government is responsible to produce a yearly report about golf tourism in Andalucía. I have used information in general from the 2012 study related to golfers, to give an overall view of the situation, all graphs and tables have been taken from this site.¹⁴

4.1.1 Distribution of golf courses in Andalucía 2012



Graph 1. Distribution of golf courses in Andalucía in 2012. Source: Council for Tourism and Sports.

The percentage shows that nearly 50 % of the 108 golf courses of which courses were operative and administrated by businesses concerns in Andalucía, are situated in Málaga, therefore, the province of Málaga has a total estimation of 53 golf courses of which 15 are in Marbella, this means the percentage of golf courses in Marbella is 28,3 % in comparison to the province of Málaga.

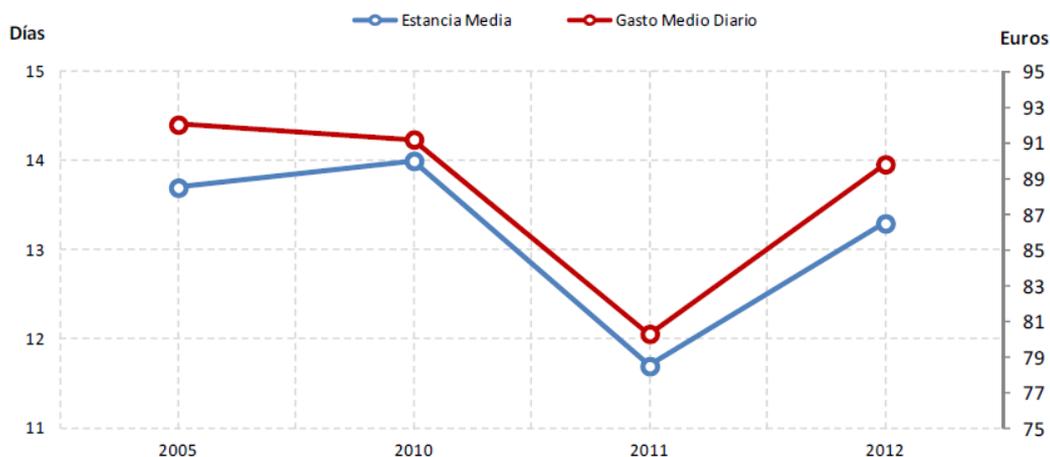
In 2012 Andalucía received 429,000 golf tourists as calculated by the Council for Tourism and Sports, this is a positive increase compared to last year's golfers received in Andalucía.

¹¹ Junta de Andalucía

¹² Patronato de Turismo de Málaga

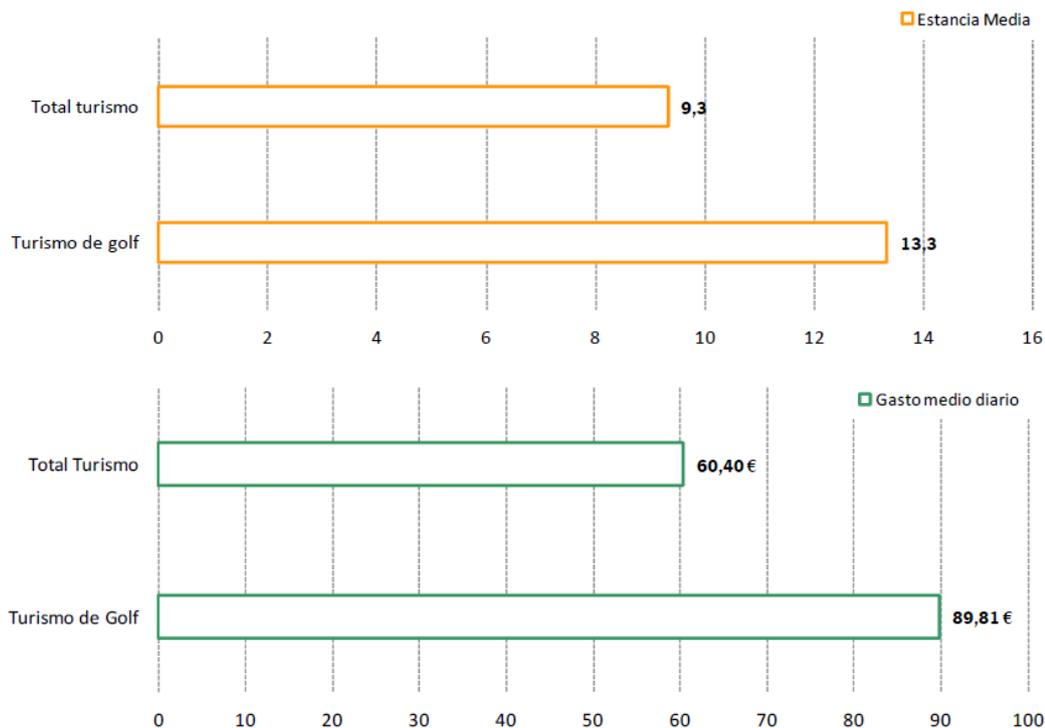
¹³ Ayuntamiento de Málaga

4.1.2 Average stay and average daily expenditure



Graph 2. Evolution of average stay compared to the evolution of average daily expenditure of golfers who visit Andalucía from 2005-2012. Source: Council for Tourism and Sports.

This graph demonstrates the highest average stay and daily expenditure in 2005, however, it experiences a reduction in 2011 possibly reflecting the crisis. After 2011 onwards the situation improved, therefore, in 2012 expenditure and average stays increased.



Graph 3. Average stay (orange) compared to average tourist and daily average expenditure of a golf tourist compared to an average tourist in Andalucía 2012. Source: Council for Tourism and Sports.

The average stay of a golf tourist who comes to play in Andalucía in 2012 is of 13.3 days, which is higher than that of an average tourist whose visit is not motivated by golf. This is seen in the following graph of the average stay of a golf tourist compared to the stay of the total amount of tourists. Also the average daily expenditure of a golf tourist compared to an average daily expenditure of the total tourism in Andalucía 2012 is shown on the graph.

Golfers in Andalucía spend 20.51 € more daily on average than the normal tourist, a golf tourist spends daily 89.81 € in comparison to 60.40 € of an average tourist. This increase of expenditure in 2012 compared to 2011 is due to additional VAT that has risen since the previous year. The cost to the golfer also depends on the different policies applied by each golf course and how this extra cost is absorbed.

Increases on the VAT in 2012 that affected the golf courses directly and indirectly:

1. Increase of VAT from 8% to 10% for hotels and transport companies
2. Increase of VAT from 18% to 21% for travel agencies and tour operators
3. Increase of VAT from 8% to 21% for other segments, such as commercial golf courses.

In an article of Costa del Sol Golf News from September /October 2013, it reports that up until now the golf clubs have either absorbed this extra VAT cost themselves or have divided it between themselves and the golfer. They state that in the future the full amount of the VAT increases will be passed onto the golfer.

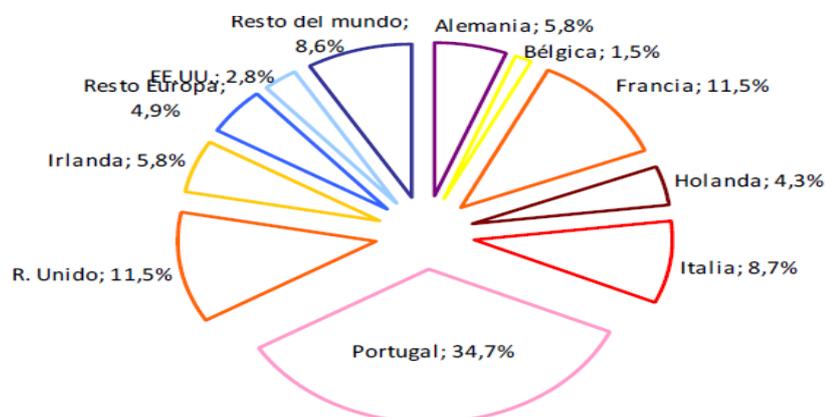
For the golf tourist who visited Andalucía in 2012 eating out and shopping make up 60% of their budget. With the remaining 24.8% spent on purchasing green fees for the golf courses.

4.1.3 Reasons for visiting Andalucía

The majority of golf tourists who visit Andalucía come to practice golf as their first and only motivation these golf tourists account for 78.9%. Although a small percentage of golf tourists, (8.8%) do have a second motivation to come to Andalucía which is to visit friends and family as well as a 6.7% of golfers who also have a second motivation which is to enjoy of the sun and beach.

A golf tourist goes to the golf course to play golf on average 4.8 times during his visit as compared to 4.6 in the year 2011. The distribution of these visits are spread over 3 different golf courses during their stay.

4.1.4 Competitors to Andalucía (2011)



Graph4 Competitor visiting Andalucía. Source: Council for Tourism and Sports 2011.

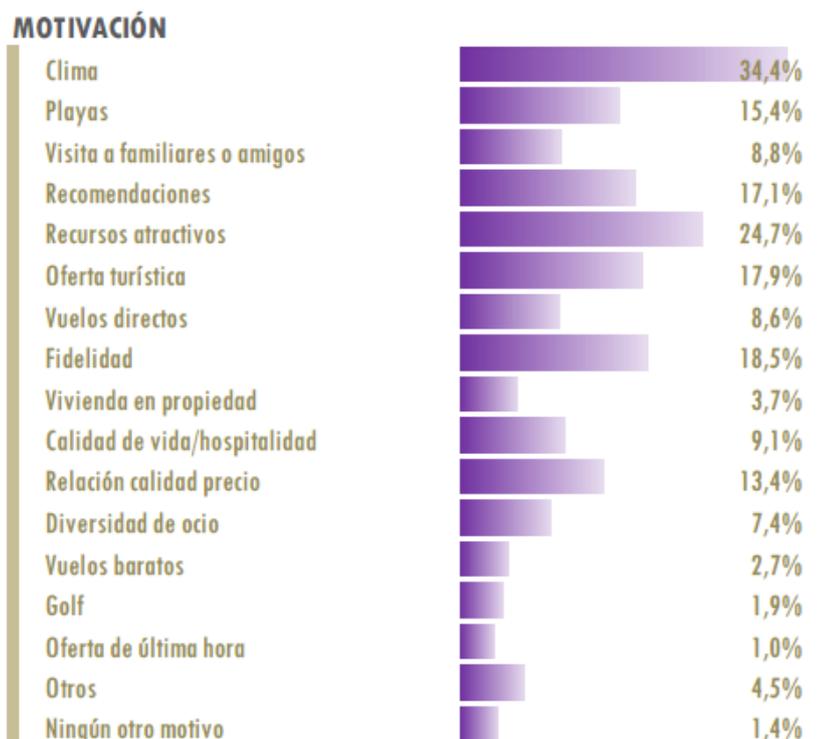
As seen on the above graph the main competitor is Portugal, and specifically the Algarve, although this study of the competitors is from 2011 it is still at present a threat to Andalucía as a golf destination. Although the UK has the most golf courses, due to the weather conditions people are not able to play on them as frequently as they are Andalucía.

4.2 MÁLAGA TOURIST BOARD

The principal tourist board for the Costa del Sol is in Málaga. It is a non-profitable organization which helps, gives information and advice, not only for visitors but also residents on the Costa del Sol. It provides a wide range of information ranging from accommodation to maps, deals, weather etc. There is even the opportunity to plan your trip from home using the internet.

This institution provides results of researches and statistics although not specifically about the British golf tourist nor the golf tourist in general, however, some of the figures and statistics about British tourists are important as they can be related to golf. The Málaga Tourist Board and "www.sopde.es"¹⁵ issued a report about the British tourist in general who visits Malaga and the Costa del Sol for the year 2013.

¹⁵ A society for planning and development, a public company within the Málaga Council. Created to help growth of the economy and to execute and design projects for private companies, public and government entities.



Graph 5. Motivation of British tourist to visit the Costa del Sol in 2013. Source: Malaga Tourist Board.

In this graph golf shows 1.9% of British tourists are motivated by this sport. This may seem a low percentage; however it is taking into consideration the whole of the Costa del Sol as well as all other motivations for the British tourists to visit, for example climate (34.4%) which is important to a golfer as the weather can affect his enjoyment of the sport and his visit.

DESTINO ELEGIDO FUERA DE SU PROPIO PAÍS 2013		
TOP 8 DESTINOS	Reino Unido	Europa
España	22,0%	12,0%
Italia	7,0%	8,0%
Francia	9,0%	7,0%
Austria	1,0%	4,0%
Alemania	4,0%	4,0%
Grecia	5,0%	4,0%
Reino Unido		4,0%
Croacia		3,0%

Fuente: Eurobarometer. Attitudes of Europeans towards tourism 2013

Graph 6. Destinations chosen by British tourists in 2013. Source: Málaga Tourist Board

The above is a graph from 2013 showing that 22 % of the British market chooses Spain as their destination of choice out of 8 different European countries. Additionally 12 % of other Europeans also choose Spain.

Another reason why I have included this institution in my project is because there is a close relationship between tourists and the golf sector. The webpage of the Málaga Tourist Board has a section dedicated just to golf, which demonstrates the importance of the sport. There are also companies who offer golf services which are detailed on their webpage¹⁶. Another example of the importance of golf is that on its webpage it guides you to a link where you can reserve green fees for any golf course on the Costa del Sol. Their webpage is in various languages: Spanish, English, French and German.

This institution has various affiliates with the golf courses themselves, which is as seen in the image below: “Marbella Golf & Country Club”, “La Quinta Golf & Country Club”, “Real Guadalmina Golf Club”, Santa Clara Golf Marbella”, and lastly “Los Naranjos Golf Club.” Even the golf school at La Quinta, “Escuela de Golf La Quinta” also has an affiliate with the institution.



Image 1 Affiliated tourist attractions from the Costa del Sol Tourist Board. Source: Málaga Tourist Board viewed 23.11.2013

¹⁶ <http://www.visitcostadelsol.com/discover-costa-del-sol/travel-for-all/golf/companies-offering-golf-services>

4.3 MARBELLA TOWN HALL

Marbella Exclusive website is an offshoot of the official Marbella Town Hall website; it was created in 2010 with the purpose to promote Marbella. There is a full section dedicated to golf, the page gives detailed information about all the golf courses in the area, such as: how to get there, their webpage, contact numbers, facilities,¹⁷ etc, there is also a golf forum for golfers to share their experiences. Also details are available about the various golf shops and companies. For example Golf Pro Shop, Golf USA.



Image 2 screen capture of the Marbella's Exclusive webpage viewed 25.1.2013

In 2009 a film company produced a promotional video¹⁸ about Marbella for the Town Hall of Marbella; the theme of the video was golf. A golf ball was used to show the beauty of the touristic places of Marbella. The golf course filmed at the beginning of the video was, Real Club Golf Guadalmina South, one of the pioneer golf courses in Marbella. Below is an image of the golf course.



Image 3 Real Club Golf Guadalmina South. Source Official web page of the course

¹⁷ <http://www.marbellaexclusive.com/planifica-tu-visita-categoria.php?pag=1&plan=24>

¹⁸ Link to view the video :<http://www.marbellaexclusive.com/galeria-video-detalle.php?vid=23>

On a visit to the Tourist office in Marbella I met Oti Garcia Díaz-Ambrona, who works in the Department for Tourism and Foreign Residents. She gave me a brochure of all the golf courses in Marbella; she was very helpful and informed me that there were no specific statistics on golf tourists in Marbella, there are only estimations. Also I was told by another employee at the Tourist Board that Marbella doesn't have any agreements directly with any golf course in Marbella but they are members of the Association of Golf Courses in Marbella (Asociaciones de Campos de Golf de Marbella). An article was published on the Marbella Town Hall official website about this agreement. The association was formed in 2009 and was inaugurated by the Tourism Councillor, Jose Luis Hernandez. The purpose of the association was to promote Marbella's golf courses worldwide.

4.4 LOCAL NEWS

In 2010, Marbella Town Hall promoted the golf courses in Marbella to attract foreign tourists worldwide to visit Marbella. They sponsored golf tournaments in Great Britain and various other European countries and they used publicity banners on the golf courses in these countries. They exploited the internet communication to promote Marbella's golf courses through Spain and overseas by making business arrangements with travel agencies and tour operators. This article was found in a local newspaper "Diario Sur" from 2010¹⁹.

An article from 2011 in "Diario Sur"²⁰ states that Marbella was awarded a prize at 'Madrid Iniciativas 2011' for being one of the best tourist destinations in Europe. The Mayoress pointed out that its outstanding feature had been its ability to adapt to this type of tourism by increasing the golf infrastructure and taking advantage of its excellent transport communications. In this article there is an estimation of 180.000 tourists coming to Marbella attracted by the golf offers the majority of which were British.

Another newspaper, in this case a free local English weekly newspaper called "Euroweekly", has a page dedicated to Golf, on this page there are various offers and articles of golf courses on the Costa del Sol. Two advertisements that caught my attention were of Santa Maria Golf & Country Club and an advertisement of Santa Clara Golf Marbella, hence the fact later explained that the highest percentage of golfers play on Santa Maria Golf & Country Club.²¹

Recently an agreement was made between the Town Hall of Marbella and the British airline company "British Airways" to allow promotional material about Marbella to be available on the aircraft for the passengers. This was

¹⁹ <http://www.diariosur.es/20100112/turismo/marbella-apuesta-golf-para-20100112.html>

²⁰ <http://www.diariosur.es/v/20111027/turismo/premian-apuesta-marbella-estepona-20111027.html>

²¹ Euroweekly edition from 21-27 november 2013

published in the newspaper Tribuna Sur Marbella²² in November. These passengers in general belong to a higher spending class, therefore, this presents an opportunity for tourists interested in golf to spend and enjoy time in Marbella on the golf courses.

CHAPTER 5: ANALYSIS OF GOLF COURSES IN MARBELLA

5.1 ANALYSIS OF WEB PAGES OF GOLF COURSES IN MARBELLA

After visiting the 15 web pages of each golf course in Marbella, I have designed and drawn the following two tables on which the information is clearly visible. I decided to analyse certain aspects such as:

- Online reservations
- Payment online
- Promotions and offers
- Activity calendar
- Languages
- Photo gallery
- Social network

²² <http://www.tribunasur.es/marbella/marbella-renueva-su-compromiso-de-colaboracion-con-british-airways-para-2014.html>

A table with the 15 different golf clubs in Marbella analyzing the different criterias:

Golf courses in Marbella	Online reservation	Pay online	Promotions	Activity calendar
Real Club Golf Guadalmina South	X	X		X
Golf Rio Real	X	X	X	
Real Club de Golf Las Brisas	X			X
Real Club de Golf Guadalmina North	X	X		X
Aloha Golf	X		X	X
Los Naranjos	X	X	X	X
La Quinta Golf & C.C	X	X	X	X
Club De Golf La Dama de Noche				
Santa María Golf & Country Club	X	X	X	
Marbella Golf and Country Club	X	X	X	X
Cabopino Golf Marbella	X	X	X	X
Greenlife Golf Club	X	X	X	X
Santa Clara Golf Marbella	X	X	X	X
Monte Paraiso Golf			X	X
Magna Marbella Golf	X	X	X	X

Table 2 Classification of golf courses in Marbella from the internet. Source: Own illustration

Golf courses in Marbella	Languages	Photo gallery	Social network
Real Club Golf Guadalmina :South	SPAN/ENG	X	
Golf Rio Real	SPAN/ENG/GER	X	x
Real Club de Golf Las Brisas	SPAN/ENG/SWE	X	x
Real Club de Golf Guadalmina North	SPAN/ENG	X	
Aloha Golf	SPAN/ENG	X	x
Los Naranjos	SPAN/ENG/SWE	X	x
La Quinta Golf & C.C	SPAN/ENG	X	x
Club De Golf La Dama de Noche	SPAN		
Santa María Golf & Country Club	SPAN/ENG/GER	X	x
Marbella Golf and Country Club	SPAN/ENG	X	x
Cabopino Golf Marbella	SPAN/ENG	X	x
Greenlife Golf Club	SPAN/ENG/RUS	X	x
Santa Clara Golf Marbella	SPAN/ENG	X	x
Monte Paraiso Golf	SPAN/ENG	X	
Magna Marbella Golf	SPAN/ENG	X	

Table 3 Another classification of golf courses in Marbella from the internet. Source: Own illustration

5.1.1 Online reservation

Improvements in the internet have encouraged the golfer to reserve online and use internet with more confidence. As seen on the above table all golf courses have a web page as well as the facility to reserve online; however Club De Golf La Dama de Noche is one of the few that does not allow the possibility to reserve prior to going to the golf club.

This club allows golfers to arrive and just “play and pay” without needing a previous reservation, hence the fact they cannot pay online either. Monte Pariso Golf is the other golf course which does not allow the player to make a previous reservation.

There are some clubs such as Marbella Golf and Country Club who use “Golf Switch”²³ which is a “real-time access to over 40 tee sheet software programmer” as quoted from their website, this allows the golfer to reserve his game of golf making the golf is no overbook and, therefore, does not affect the rhythm of the game.



Image 4 Logo of “Golf Switch” seen on Marbella Golf and Country Club. Source Webpage of golf course



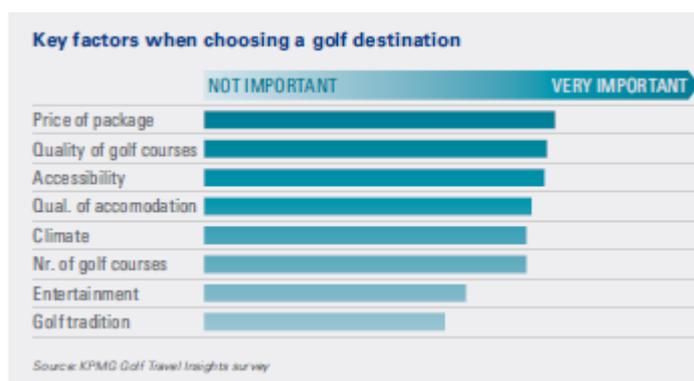
Graph 7 Timing of the booking. Source: KPMG Golf Travel Insights 2013

This graph shows that although at international level, the majority of the bookings made in advance are 50 % with one to six months before the actual golf trip is made. The well in advance bookings were also 31 %, this means that the booking has been made well over six months in advance, usually by large group or for golfers who would like participate in upcoming tournaments.

²³ <http://www.golfswitch.com/>

5.1.2 Pay online

All clubs allow the possibility to pay online, however clubs that have more memberships consider themselves more private, therefore, with members and they have an annual membership fee. There is the possibility to freeze the membership during a period of time although a penalty must be paid when reactivating it. Club De Golf La Dama de Noche and Monte Paraiso Golf are exceptions as they do not offer this service/facility.



Graph 8. Variables considered to make the choice of golf destination. Source: KPMG Golf Travel Insights 2013

This graph is the result of a survey carried out by KPMG, an advisory company, to International Golf Tour Operators for 2013. As stated in the report, the “British are still the biggest golf travellers”, also as seen in the graph the price of the package is a very important factor in selecting in which country to play golf. The least important factor is the entertainment and golf tradition.

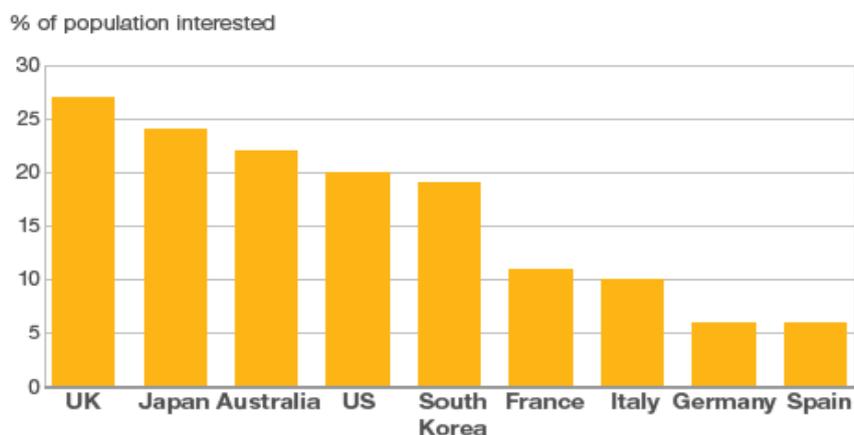
When it comes to accessibility and quality of accommodation Marbella scores highly, firstly it has very good connection between the airport and the town and the opening of the AP-7 motorway was a turning point in improving accessibility to Marbella. When golfers arrive at Málaga airport there are a great variety of car rentals available which can give them independence during their stay. The quality and variety of the accommodation is something always valued positively by the British golfer visiting Marbella

5.1.3 Promotions and offers

Due to the present financial situation worldwide the British golfers have reduced their budget and, therefore, are continuously looking for discounts either on a particular course or in general for their golfing expenses.

The graph below is taken from a report by the BBC NEWS on “Global Golf Industry facing challenges” and shows the percentage of the population of people showing interest in golf in 2011 by attending events, following the sport on television or radio and in newspaper or magazines. This information can be

exploited for advertising purposes in certain countries. Novel marketing ideas are needed to attract the golfers in this case to Marbella.



Graph 9 Percentage of interest of the golf in different countries in 2011. Source: BBC news sports

Guadalmina Club de Golf, both the north and south course, do not have any offers advertised on the webpage of the club. Neither does Club de Golf La Dama de Noche.

A few examples of promotions from the different web pages are:

-La Quinta Golf & C.C has “Connect card” where the following is included²⁴:

Green Fee 18 holes - from 55€

Up to 10% discount in the Pro-Shop

Special Rates in the Golf Academy

Handicap Certificate with La Quinta Golf Club

²⁴ <http://www.laquintagolf.com/hot-deals.html>

-Magna Marbella Golf

Special Offers Magna Marbella Golf

Green Fee 18 holes + Menu at Magna Café: 38€ per person

1 Hour Individual lesson + 1 guest: 50€

1/2 Hour Individual Lesson: 30€

Twilight Rate only in low season, from 27th October till 29th March, from 15:30 pm.....10€ (9 or 18 holes)

Every first Friday of the month, WOMEN DAY, we do 2x1 every two women.

¡Special Offer! From 9th September 2013, every 3 Green Fees paid, we give you one free. You can't lose this opportunity!

Images 5. Special offers of Magna Marbella Golf. Viewed 21.11.2013. Source Magna Marbella website

Although not a promotion directly on the webpage, on one of my visits to the Tourist Office in Marbella, there was a display rack on which there were brochures on local businesses, surprisingly there was only one on golf from Greenlife Golf Marbella, regarding an offer of green fee and lunch included. The objective of this advertising at the Tourist Office could be a very positive way to attract a passing tourist who is interested, or likes golf, to play at this golf course in particular, attracted by the offer.

5.1.4 Activity calendar

When the Activity Calendar was referred to, it was meant that there is a calendar available with the next tournaments, activities etc in the golf course or surrounding areas. This is good for any player as reminder and to be up to-date with the games. It was surprising but Rio Real Golf did not have this on their website. As the webpage of Club De Golf La Dama de Noche is very poor regarding layout and information they did not include an Activity Calendar. Lastly "Santa Maria Golf & Country Club" did not have a calendar of activities which was also slightly surprising. The image below shows the upcoming events on the activity calendar at Santa Clara Golf.



Image 6. Upcoming events at Santa Clara Golf viewed on 1.12.13. Source Santa Clara Golf webpage

5.1.5 Languages

The languages all websites are in is Spanish, which is normal as the golf courses are all in Marbella, however, it was interesting to see that English as the most important international language worldwide was on every page apart from Club De Golf La Dama de Noche. A third language was different depending on the webpage of the golf course, shown as follows:

German: "Golf Rio real" and "Santa María Golf & Country Club"

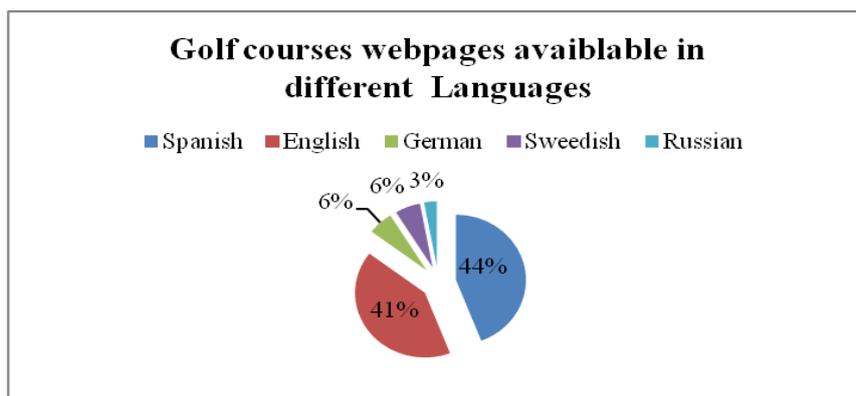
Swedish: "Real Club de Golf Las Brisas" and "Los Naranjos"

Russian: "Greenlife Golf Club"

Having viewed the different languages available on the websites of the golf courses, a conclusion can be reached of which nationalities are in the majority who visit the course or make reservation via the webpage.

As all businesses the golf clubs are aware that they should have staff who speak the languages, of the player as this will make the golfers game more enjoyable and even facilitate communication. In fact, when I visited Aloha Golf the receptionist was of Russian nationality, also as it has been seen from the analysis, Greenlife Golf Club has the option to put the webpage in Russian.

Below is a pie chart that clearly shows the languages available on the different web pages from the golf courses.



Graph 10 Golf course web pages available in different languages. Source: Own elaboration

5.1.6 Photo gallery

These photos are very important as if anyone from aboard, for example a British tourist, sees them, it will be their first impression of the golf course and could even be what makes the golfer decide if he should visit this golf course in particular or not.

All the websites of the golf courses, with the exception of Club De Golf La Dama de Noche, have photos of the course, the restaurant, the club house, etc. Additionally one of the web pages, Greenlife Golf Club, includes a video on their website of photos. Below are photos of Santa Maria Golf and Country Club and Magna Marbella Golf taken from their websites.



Image 7 Photos from websites. Source: Websites of golf clubs

These photos are an attraction to any golfer, but more so to a British golfer who is at home when looking at a course that he cannot play on in his own country, as it has rained, it is cold...etc. These photos give a first impression to the golfer, as if he sees many lakes, holes, buildings, and then gets to the golf club and does not see this he will be disappointed and even feel cheated.

5.1.7 Social network

After browsing through some web pages I found out that 1.4 billion people use Facebook alone according to Browser Media, Socialnomics, MacWorld in a study carried out on the 12th August 2013²⁵. Not only is Facebook used by the different golf courses but also Twitter and/ or YouTube.

The main reason these social network pages are used is probably because it is a free way of marketing and it reaches people all over the world. There is evidence that golfers are very active on these social networks, as “The Social Media Coach for Athletes”²⁶, although an American site, gives an idea of who is using the social networks. The following has been quoted directly from the website mentioned:

Take a look at some of these shocking statistics:

- 60% of core golfers maintain a profile on at least one social network
- 3.7 million core golfers regularly read blogs about brands, courses, travel and professional golf
- 6.9 million core golfers visit their primary social network at least once per week
- 3.9 million core golfers visit their primary social network every day!

A quote taken from the KPMG 2013 Golf Travel Insights 2013, reads as follows, “With the revolution of social media, word of mouth has gained further importance in recent years. Golf tourists are strongly influenced by referrals on Facebook, Twitter, Tripadvisor and various other golf and travel blogs.”²⁷ This quote shows the importance of the social media nowadays.

“Marbella Golf CC” has the highest amount of followers out of all the golf courses in Marbella who have social networks in this case Twitter. The followers were individuals as well as a high number of other companies related to golf, hotels, etc.

²⁵ <http://www.statisticbrain.com/social-networking-statistics/>

²⁶ <http://socialmediacoachforathletes.com/golf-and-social-media-golfers-are-engaged/#comment-491>

²⁷ KPMG 2013 Golf travel insights 2013, page 3.



Image 8 Screen capture of Twitter Marbella Golf Club &Country 30.11.2013 Source: Marbella Golf Club & Country

5.2 ANALYSIS OF QUESTIONNAIRE OF GOLF COURSES IN MARBELLA

All the fifteen golf courses in Marbella were visited personally by myself, some with more success than others. Although I visited all the courses, there were some with who I had to make appointments for other days, or I was able to interview them on the spot. Some clubs asked me to send the questionnaires by email and they did reply to me, I was also given responses by phone.

Golf courses	Name	Position
Real Club Golf Guadalmina :South&North	Ignacio Del Cuvillo Cano	Director
Golf Rio Real	Juan Cantos	Golf Director
Aloha Golf	María Marin	Assistent to the GM
Los Naranjos	Cecilia Löwenhielm	Reservation department
Club De Golf La Dama de Noche	Luis	Caddie Master
Santa María Golf & Country Club	Rosa Olmo	Secretary
Marbella Golf and Country Club	Satu Kääriäinen	Golf Manager
Greenlife Golf Club	Tomás Llanza	Director
Santa Clara Golf Marbella	Mátias Nuñez	Accounts Department
Magna Marbella Golf	Silvia Vit	Comercial Department

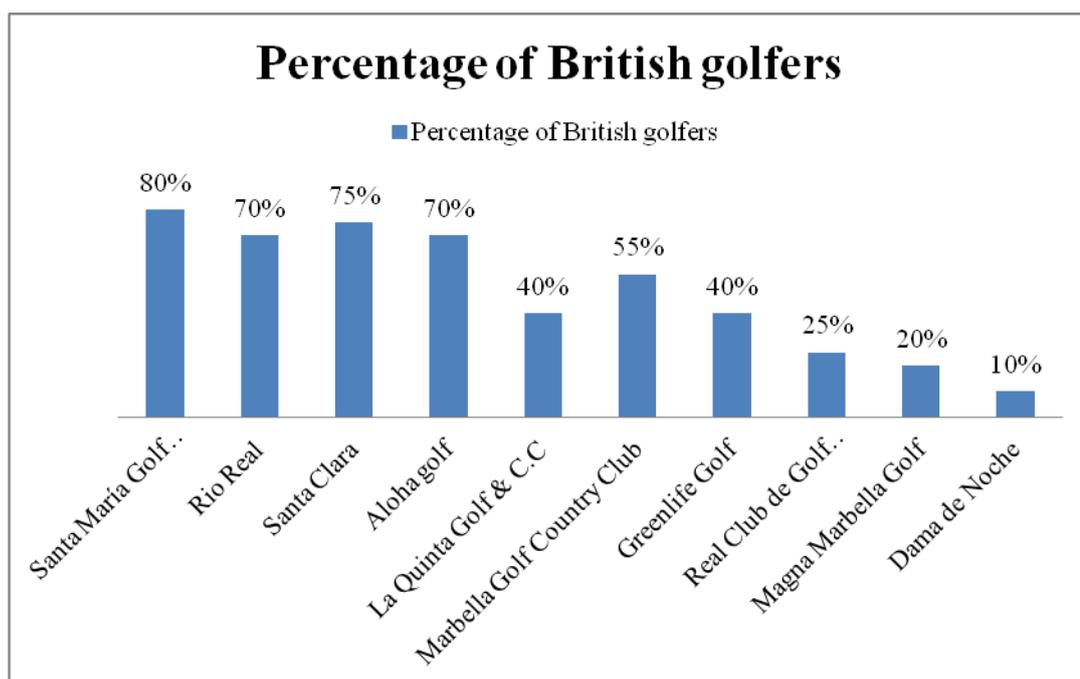
Table 4 Contacts from the different Golf Clubs in Marbella. Source: own elaboration.

The questionnaire was designed by myself, it was a short interview consisting of four questions which I presented to the representatives of the various golf clubs:

1. What is the percentage or the number of British golfers?
2. How do the majority of these British golfers reserve?
3. Do you have any contracts with hotels, if so give examples?
4. When is the high season for British golfers?

5.2.1 Percentage of British golfers on each golf course in Marbella

For me the most important question was to be given the correct percentage of British golf tourists visiting their club as this figure gives me the basis of my study. I received the following results and was able to elaborate the following graphs:



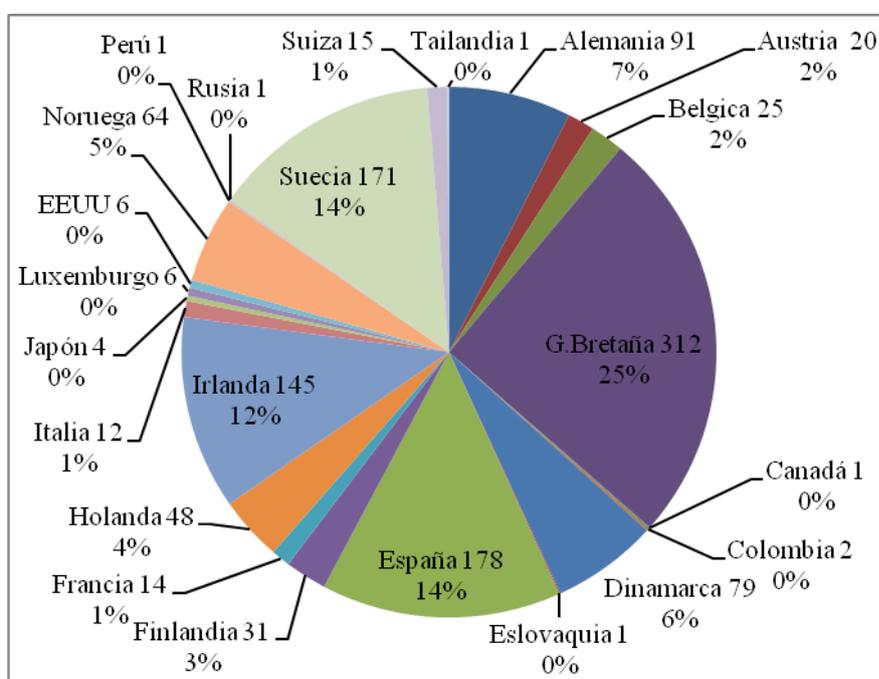
Graph 11 Percentages of British golfers who play in golf courses in Marbella. Source: own elaboration.

As seen, the majority of the British players enjoy or like to play at Santa María golf and resort this is possibly because of its large English expat community in the area who either have their own second home nearby or rent an apartment for example Elviria or El Rosario area. Another reason could be the easy access to the club itself and its good location.

The golf club that least British golfers play at is Club De Golf La Dama de Noche, this information was given to me by the Caddie Master who remarked that the crisis and the Euro exchange against the pound had effected the club. While I was visiting the club I observed that the players were mainly German, who were playing as well as using the bar installations.

Its is remarkable that the results from the ten golf clubs who participated in the questionnaires are very positive, 50 % of their golfers are British, however, other golf courses where there is a greater concentration of British golfers, are Santa María Golf and Resort, Santa Clara Golf, Aloha Golf and Rio Real Golf.

I received some feedback from Aloha Golf in the form of a pie chart that reflects the different nationalities who are members. As seen on the figure, the British golfers are predominate, followed by the Swedish and the Spanish.



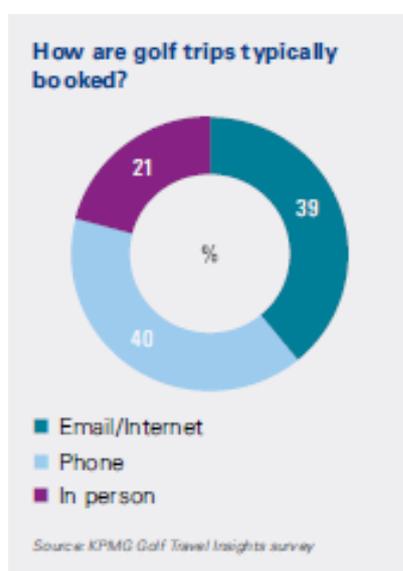
Graph 12 Percentage of nationalities of members Aloha Golf. Source: Administration at Aloha golf

5.2.2 Reservations

The great majority of golf courses use two main channels to reserve, tour operators in their own countries as well as direct channels which means telephone, e-mail or golf course websites and some golfers even arrive without a reservation. Real Club Golf Guadalmina: South and North, was more specific and gave me a more thorough answer, 50 % of the golfers reserved through the tee time reservation system as they were members, followed by 25 % tour operator and 25% through hotels, phone, direct.

These results were expected as the golfer wants to be certain that he has a reservation, and also that by booking through a Tour Operator, if they are a large group of golfers they will be able to get discounts. In addition, all their arrangements are certain as everything has been planned beforehand and therefore they will not have any worries. For example names of Tour Operators working in Marbella are Thomas Cook, which is the most important British TTOO, Golf Break, Golf4U, Your Travel Golf, Golf to Golf, Fairway Golftravel.

The graph below shows worldwide statistics, showing that according to travel agents, the golfers book by phone followed closely by email/internet as they prefer direct contact with personnel in order to receive details personally.



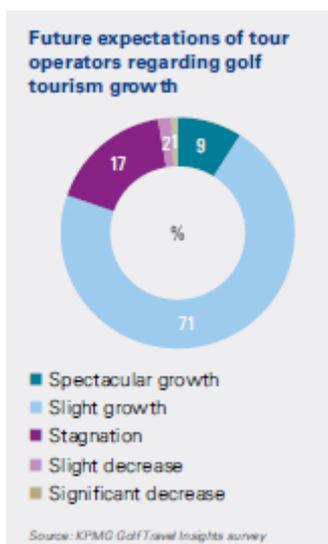
Graph 13 Types of bookings made by golfers worldwide. Source: KPMG Golf Travel Insights 2013

If a golfer has the time while visiting Marbella, he might prefer to reserve his hotel first because he will have the option to choose to play at different golf courses during his stay; the golfer prefers to try out a variety of golf courses. Different price structures are often available from countries outside Spain due to agreements that have been made between the Tour Operators and the golf courses.

Here is a table to show the results from the questionnaires:

Golf Courses in Marbella	Reservation Channels	
	TTOO	Direct
Real Club Golf Guadalmina:South&North	X	X
Golf Rio Real	X	
Aloha Golf	X	X
La Quinta Golf & C.C	X	
Santa María Golf & Country Club	X	X
Marbella Golf and Country Club	X	
Greenlife Golf Club	X	X
Santa Clara Golf Marbella	X	X
Magna Marbella Golf		X

Table 5 Reservation channels used by British golfers. Source: Own elaboration



Graph 14 Future expectations of Tour Operators regarding Golf Tourism growth. Source: KPMG Golf Travel Insights 2013

As seen from the graph above, the expectancy of growth from the tour operator still accounts for an important part, this shows that golfers will still use this intermediary to book their golfing holidays, most probably by using the internet to get in contact with the TTOO of their country.

5.2.3 Contracts with hotels

All of the golf courses had contracts with hotels nearby or within 25 km. Some specified with which hotels they had the contracts, for example Aloha Golf, has contracts with Kimpinski, The Marbella Club and Puente Romano. Also Los Naranjos have some examples with who they have contracts with: Melia La Quinta, Guadalpin, H10 and Hotel PYR. This means to say that if a client of the hotel wishes to play golf the hotel can offer him special prices which have been given to them by the golf courses.

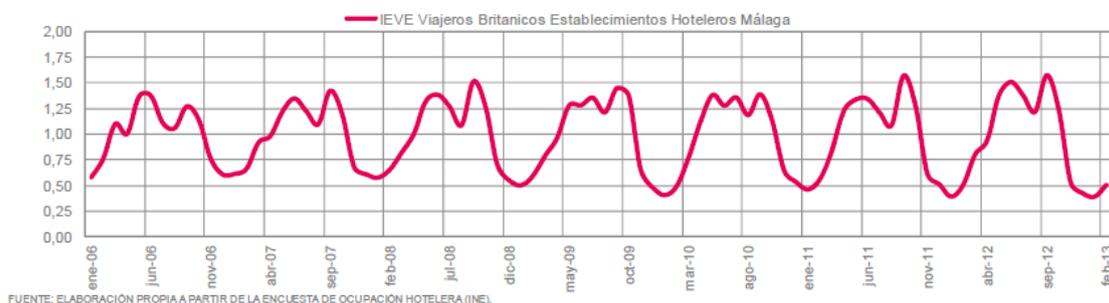
The most attractive hotels for golfers are those who have the golf course on site, and, therefore, the most privileged prices to play golf, for example Golf Rio Real or Greenlife Golf Club.

Depending on the type of golfer and his skills or wishes, and if he prefers to play on all courses or only wants to play on one particular course regardless of the distance between his accommodation and the golf course.

5.1.4 Seasons

As it is already well-known, the sport of golf is a great out-of-season sport for any area. From the golf courses I visited the majority indicated that the high season was from February to May (spring) and then from half way through September to November. Here in Marbella we are lucky to have a micro-climate as mentioned before, which allows the high seasons for golf to be prolonged meaning that more golf tourists will come to enjoy playing in adequate and pleasurable conditions, something which is impossible in their country of origin.

Due to this fact Marbella benefits economically from golf tourism out of season. Although I only interviewed 10 British golfers who were members at Aloha Golf, they all remarked on the weather.



Graph 15 Seasonal tourists who stayed at hotels in Málaga. Source: Málaga Tourist Board

The above is a seasonal graph of the average tourist staying in hotels in Málaga who is not a golf tourist, this type of tourist is distinct from the average tourist as he likes to come as and he prefers to play golf in the cooler months and therefore, he contributes to the all year round economy of the Costa del Sol.

The effects of the crises have been noticed by the British golfers who usually travel three times a year but as their budget has lowered they have renounced their golfing holiday which has affected the off-season hotel reservations.²⁸

²⁸ Interview to José Luque, El Fuerte Hoteles <http://www.laopiniondemalaga.es/costa-sol-occidental/2012/03/25/numero-turistas-bajado-ahora-pagan/495276.html> seen 2.12.13

CHAPTER 6 CONCLUSION

The present study has been satisfactory due to the co-operation of the golf courses in Marbella. The relevant information they provided me with and their response to my questionnaires was essential to be able to make an in-depth study of the subject, although some time elapsed before many of the questionnaires given to the clubs were returned. This, therefore, delayed the completion of the final report.

Some tables and graphs shown in the project do not include the following golf courses, as information was not returned even after I made follow-up calls in person and by e-mail. The golf courses are: Los Naranjos (insufficient information given) and Cabopino Golf Marbella (no answer).

With reference to Monte Paraiso Golf, there were not enough golfers to make a true analysis (opinion given to be by the Caddie Master). On the other hand, Real Club de Golf Las Brisas is a Private Golf Club and did not want to collaborate with me.

It should be noted that out of the 15 golf courses contacted, only 4 are not included (Guadalina south and north are considered as one golf course) as explained in the two paragraphs above.

Other vital information was gathered due to my successful research of the internet, newspaper, golf magazines, etc. Almost all of the limited information available was in Spanish which has taken me time to translate. Only some promotional material was in English, this was in the form of small brochures and flyers from the golf courses describing and illustrating their clubs.

I contacted the Málaga Tourist Office, through their webpage on the 12th of October, 2013 from which I did not receive a reply. I contacted them again by email on the 22 of October, 2013 asking for any information specifically on golf in Marbella and the British Golf Tourists, however, days later their reply was that there was no specific information on Marbella, and they gave me an email address from the Marbella Tourist Board with whom I had already been in contact personally. Two days later I emailed the Marbella Tourist Board again, this time though the email reference the Málaga Tourist Board had given me, but again they informed me that there were no specific statistics for Marbella. The evidence of the emails sent are shown in the annex. It is important to mention that the reports found on the Málaga Tourist webpage were helpful for guidelines on the British tourists.

The “Royal Spanish Golf Federation” did not answer my email where information was requested related to the golfers who visited Marbella. I understand from a confidential source that they do have figures in this area but there is some internal conflict and possibly this is why I they have not answered me.

The difficulties encountered have been in finding golf statistics for Marbella itself because the information and figures given by the Autonomous Community Government are generalized for Andalucía This institution is responsible to publicize golf information and statistics annually for Andalucía and not specifically for Marbella. Most of my statistics are estimated, for example the number of golfers who come to play in Marbella.

Regarding the results of the study the following conclusion can be reached, the objective to find out the percentage of British golfers who play at each golf course was achieved even though four of the golf courses were not included.

The results on reservations are that the Tour Operator are the main source and secure way to reserve when golfers are travelling from abroad. Although less golfers reserved directly with the club, for example, agencies or tour operators. Nowadays people use internet to reserve and travel agencies are used less and are, therefore, closing. British golfers like to reserve in advance and also to pay online, so that they already have their budget calculated, as price is the major decision factor when they choosing a destination, followed by easy accessibility which Marbella has.

New marketing strategies and channels are necessary to maintain existing British Golfers and to attract new British Golfers. It is important to continue marketing campaigns as apart from the fact that Marbella already has an established competitor, the Algarve, new golf destinations are evolving and will shortly be competing with Marbella.

Apart from promotions and offers for Marbella which British golfers are always interested in, the clubs should make sure the golfer is aware of any future activities in that club which may provoke him or his friends to plan future visits to Marbella

The golf courses should ensure that their staff are friendly and pleasant and speak the languages of their players. The number of languages spoken in the clubs are improving however further development in this field should be pursued.

The importance of contracts with hotels in the vicinity has also been reflected in the results as all golf courses in Marbella have contracts with hotels nearby. As known, the golfers are the perfect tourists to combat the off-season in Marbella.

The statistics of an average stay and average daily expenditure of a golf tourist in Andalucía can also be applied to a British golfer in Marbella. The

reduced figures of golf tourists in 2011 for Andalucía due to the VAT and the crisis can also be noted in Marbella.

The golf clubs in Marbella should carry on keeping up to date on social network as it has been proven that they are the best ways to promote and give information.

The Costa del Sol is already well- known because of the image given by Marbella of its quality, life-style and security. The British golf tourist is motivated by its climate, loyalty and recommendations from friends and these are some of reasons they are attracted to Marbella.

Golf is very important for Marbella as the sport of golf is played by millions of people around the world and attracts high income tourism, as well as giving employment to many people living in the area. Therefore, we must continue to use our promotional capabilities and offers to attract golfers from all around the world to Marbella as they are very important to the local economy.

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<http://www.golfdamadenoches.es/Bienvenida.html>
- GOLF RIO REAL : <http://www.rioreal.com/marbella-golf/>
- GREENLIFE GOLF CLUB : <http://www.greenlife-golf.com/>
- LA QUINTA GOLF & C.C: <http://www.laquintagolf.com/es/golf.html>
- LOS NARANJOS : <http://www.losnaranjos.com/>
- MAGNA MARBELLA GOLF: <http://www.magnamarbellagolf.com/>
- MARBELLA GOLF AND COUNTRY CLUB :
<https://www.marbellagolf.com/es>
- MONTE PARAISO GOLF: <http://monteparaisogolf.com/>
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- REAL CLUB DE GOLF LAS BRISAS :
<http://www.realclubdegolfasbrisas.es/>
- REAL CLUB DE GOLF GUADALMINA NORTH:
<http://www.guadalminagolf.com/facilities/northcourse.php>
- SANTA CLARA GOLF MARBELLA:
<http://www.santaclaragolfmarbella.com/es>
- SANTA MARÍA GOLF & COUNTRY CLUB:
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Destino de Golf

Golf Destination

Questionnaire elaborated by student from the university of Malaga to Golf clubs in Marbella

Name of golf course:

1. What is the % or the number of British golfers?
2. How do the majority of these British golfers reserve?
3. Do you have any contracts with hotels, if so which?
4. When is the high season for British golfers?

COSTA DEL SOL Tourist Board

Email sent on the 22 October 2013 to
info@costadelsol.travel

Muy Sr. Mió,

Soy una estudiante de Turismo de la universidad de Málaga y he elegido como trabajo de de fin de grado **“Analizar el turismo de golf de los turistas Británicos que visitan Marbella”**

Ruego que tenga la bondad de informarme el numero de golfistas Británicos que viene ha jugar al golf en Marbella cada año. Si no es así, el número total de golfistas que visitan Marbella.

Gracias de antemano por su amabilidad.

A la espera de su grata respuesta.

Saluda a usted atentamente.

Sta. Leanda Weima
952 823851
670 603606

Answered 23.11.2013

Fatima Oliva <fatima.oliva@visitacostadelsol.com>

Estimada Leanda:

Le aconsejo que para conseguir esos datos tan concretos del municipio de Marbella se ponga en contacto con la Oficina de Turismo de esa localidad.

otnaranjos@marbella.es

Un saludo

Fátima Oliva

Ejecutiva de Servicios Tecnológicos

IT Services Executive

PATRONATO DE TURISMO MÁLAGA - COSTA DEL SOL

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MARBELLA TOURIST BOARD:

Pilar
<practicass@marbella.es>

Garcia 29 oct

Estimada Srta. Weima:

Le adjuntamos listado de campos de golf en Marbella para que pueda contactar directamente con ellos y le informen del nº de golfistas británicos que reciben cada año.

Sentimos no disponer de estos datos estadísticos para facilitárselos.

Un cordial saludo,

La Oficina de Turismo de Marbella.

De: Turismo Naranjos [mailto:otnaranjos@marbella.es]
Enviado el: viernes, 25 de octubre de 2013 14:04
Para: 'Pilar Garcia'
Asunto: RV: Estadísticas Golf Marbella

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De: Leanda Weima [mailto:leanda.weima90@gmail.com]
Enviado el: jueves, 24 de octubre de 2013 11:25
Para: otnaranjos@marbella.es
Asunto: Estadísticas Golf Marbella

Muy Sr. Mió,

Soy una estudiante de Turismo de la universidad de Málaga y he elegido como trabajo de de fin de grado **“Analizar el turismo de golf de los turistas Británicos que visitan Marbella”**

Ruego que tenga la bondad de informarme el numero de golfistas Británicos que viene ha jugar al golf en Marbella cada año. Si no es así, el número total de golfistas que visitan Marbella.

Este mismo correo lo he enviado al Patronato de Turismo, al cual recibí respuesta dandome su correo para información que necesito.

Gracias de antemano por su amabilidad.

A la espera de su grata respuesta.

Saluda a usted atentamente.

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