

Happy Life Region
West Mediterranean



GOLF TOURISM SECTOR REPORT



WEST MEDITERRANEAN DEVELOPMENT AGENCY
February, 2011

FOREWORD

Regional development agencies whose history dates back to old times in developed countries are the models newly adopted in Turkey. These agencies aim to accelerate regional development, ensure sustainability and reduce interregional development disparities in accordance with the principles and policies set in the development plans and programs, through a cooperative networking between local authorities, private sector and civil society.

One of the tasks given to agencies to achieve their aim is whether to do research on determining the resources and opportunities of the region, accelerating economic and social development and enhancing the competitiveness or to support the researches done by other individuals, organizations and institutions.

West Mediterranean Development Agency which largely completed its process of establishment and institutionalization is responsible for providing free consulting services to investors in Antalya, Isparta and Burdur. In addition, through a one-stop shop approach, the agency offers an extensive range of services including coordinating and following-up the permits, licensing procedures and other administrative works within the scope of public institutions and organizations of investors. Furthermore, the agency promotes the investment opportunities of the region both at national and international level in cooperation with relevant organizations.

In line with the mentioned task above, the sector reports were prepared to guide the investors willing to invest in the region and promote the investment opportunities of the region.

At first, Marble, Milk and Dairy Products, Solar Energy, Golf Tourism and Health Tourism Sector Reports of West Mediterranean Region, Tourism Potential of Egirdir Report and Antalya – Konya High Speed Rail-Line Report have been prepared. Over time, many sector reports related with the region will be prepared and investment opportunities of the region will continue to be promoted. Being helpful with these sector reports to investors and all other institutions operating in the region is our greatest wish.

Tuncay ENGIN

Secretary General of WMDA

Dr. Ahmet ALTIPARMAK

Governor of Antalya
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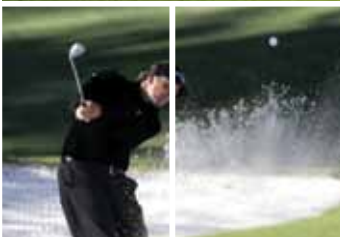




1. A SHORT HISTORY OF GOLF

It is thought that Golf has a past about 1000 years and it is not known where or when the golf was first discovered. The main thought is golf was played by Scotches in 1100s (ABC of Golf, 2008). Many authorities accept, "The Scotch King II. James' prohibition announcement" about golf and football sport in 1457 is the first written document about golf (Turkey and Golf, 2003). In 1659, golf was played in Albany State in ABD. The first written rules of golf were published in 1754 by St. Andrews Golfers (Turkey and Golf, 2003).





In Turkey, the first golf club is Constantinople Golf Club in Maslak (Constantinople Golf Club) , and then the second one was founded in İzmir in 1905, named İzmir-Bornova Golf Club and followed Bebek Golf Club in 1911. But some of this clubs were closed for some reasons. In 1980s, golf has experienced a decline in Turkey. Then in middle of 1990s some investments have been done and a federation has been established in 1995 for golf sport. At the end of 1980s, Antalya/Belek has become a touristic area. After 2000s, the Turkish golf has succeeded considerable achievements.

“In Turkey, the first golf club was founded as Constantinople Golf Club in 1895 and still-functional in Maslak as Istanbul Golf Club.”



2. DATA ABOUT GOLF FIELDS AND GOLFERS IN THE WORLD

The golf sport has become popular in 1920s and it continued ascending its popularity following years. According to a Sport Marketing Survey's report in 2003, there are 61.1 million golf player in the world, 37.1 million from America, 6.9 million from Europe, 13.6 million in Asia 1.7 million from Southeast Asia Islands and 500,000 from South Africa (World Golf Tournament, 2008).





According to a study about golf fields in 2006, 30,730 golf fields exist in the world and 7,000 of them have been built in last ten years. In Europe there are 5.896 fields. In last ten years, field numbers in Europe have grown %80 and player number %5. There are 19 golf fields, 41 golf clubs and about 1.500 licensed players in Turkey in 2010.

“Turkey has become one of the most attractive places for golf tourism in Europe.”





3. THE ECONOMIC ASPECT OF GOLF

Golf sport affects many sectors directly and provides new development fields and high profit margins by pepping up the economic actors. The tourists coming for playing golf provide five times more income than regular holiday tourists.





The Sectors Affected by Golf Tourism Directly or Indirectly



INDUSTRIES INTERESTED DIRECTLY

Capital Investments For Golf Field

Irrigation System Installation
Field Renewal
Infrastructure Renewal
Infrastructure Investments
Equipment/Golf Car Buying
New Field Constructions

Golf Facility Activities

Lessons
Membership and Game Fees
Equipment Rental
Foods and Drinks

Golf Player Spendings

Soft Goods
Hard Goods
Clothes
Magazine

Press, Tournament Association

Tournaments
Televisions
Associations
Helping Associations
Player Sponsorships

INDUSTRIES INTERESTED INDIRECTLY

Tourism ant Entertainment

Car Rental
Air Transportation
Entertainment
Foods & Drinks
Accommodation

Real Estate

Real Estate Revenues İlgili
Dwelling Constructions



Source: (SRI International, 2008)



“One of the most important profits of golf tourism is creating more employments.”

Golf sector plays a very important role by employment in direct or indirect sectors. In USA golf has provided employment to 2.066.404 people in 2005 and has created 61 billion dollars wage income.

Because having same climatic characteristics, Portugal and Spain being in first ranking among some other countries which in a competition with Turkey, listed with their golf field numbers in the schedule below.

Turkey golf incomes are lower than the others, because there are not many golf fields in Turkey. There is a high investment potential for this area.

Initial Countries in Golf Field Numbers

Country	FRANCE	ITALY	PORTUGAL	SPAIN	TURKEY
Golf Field Numbers	110	40	55	52	19

Source: (Golf Advisory Practice EMA, 2007)





In countries which have golf fields for touristic purposes, the game prices are higher than other countries which have public fields and club fields. The high game prices are the most bothersome aspect for golf tourists coming to Turkey.

Since Turkey serves some package tourism programs including game fees, transportation and accommodation, these make Turkey one of the most attractive places for golf tourism in Europe(Golf Advisory Practice EMA,2007).

Game Prices in Some Countries (Euro)

	PORTUGAL	CYPRUS	SPAIN	FRANCE	ITALY	TURKEY
Lower Season	71	76	59	39	42	73
Intense Season	78	76	66	46	51	76

Source: (Golf Advisory Practice EMA, 2007)

“There are currently 19 golf fields in Turkey, as 15 in Belek, 3 in İstanbul, 1 in Muğla-Bodrum.”



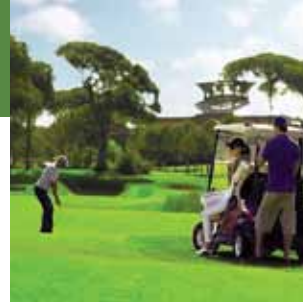
4. GOLF IN TURKEY

Turkish golf sector has improved itself, especially with fields in Antalya/Belek, in the world. International Association of Golf Tour Operators has chosen Antalya/Belek as “the best golf area of the year in Europe” in 2008. It is shown the golf tourism in Turkey grows rapidly in recent years. Another indicator about this, Turkey will be the householder for the most prestigious amateur golf tournament, 2012 World Amateur Golf Championship in Belek.

There are currently 19 golf fields in Turkey, as 15 in Belek, 3 in İstanbul, 1 in İzmir-Bodrum. Turkey Golf Federation has started in 2004 a project called “100 Golf Fields in 4 Years” and continuing its studies to achieve this aim.

“It is expected that 125.000 players will come to Belek and income will be 165.590.000 Euro in 2011.”

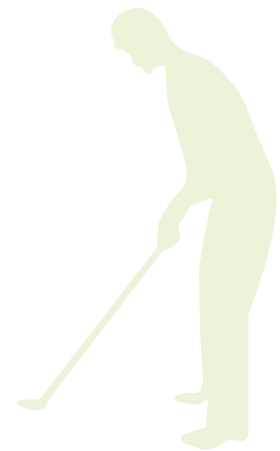




Antalya/Belek has other advantages like perfect climate, near international airport, high quality hotels and special design golf fields (Ağaoğlu, 2007).The income from golf sport reaches 16% of tourism incomes in other countries while it is 1% in Turkey.

In Antalya-Belek occupancy rates varies 27% to 95% according to months in year. In Table below the golf game numbers are given.

“In 2009, 100.000 golfers came to Antalya/Belek, played 437.000 games and 33.240.000 Euro incomes were gained from golf sector.”



Antalya-Belek Area Game Numbers in Last Years

	2003	2004	2005	2006	2007	2008	2009
January	7,513	7,399	10,11	9,92	12,39	22,17	23,05
February	13	16,46	19,38	15,91	26,68	41,69	42,81
March	15,19	24,71	39,24	32,85	46,65	64,72	81,98
April	7,739	19,25	33,24	31,6	38,62	54,66	62,21
May	6,945	13,22	23,27	22,3	25,2	33,32	33,58
June	4,218	7,094	8,503	8,599	9,895	11,01	13,29
July	2,646	4,097	5,467	4,830	6,271	7,296	6,837
August	4,141	5,217	6,12	6,121	6,808	7,539	7,228
September	7,921	9,382	12,81	12,17	16,6	19,77	22,76
October	20,36	26,84	32,93	28,2	41,09	50,75	57,97
November	24,83	30,2	32,54	28,25	49,11	50,26	60,98
December	11,5	8,697	9,192	15,27	17,82	20,07	24,58
TOTAL	126	172,6	232,8	216	297,1	383,3	437,3

Source: Belek Tourism Investors Association, BETUYAB (2010)

“Turkey Golf Federation has prepared Golf Tourism Investors Handbook to accelerate the golf tourism, in 2004.”





West Mediterranean Region, Turkey Occupancy Rate of Golf Tourism Hotels

Occupancy Rate [%]	2004	2005	2006	2007	2008	2009
January	50	46	38	41	38	42
February	53	54	36	52	46	42
March	57	62	37	55	53	45
April	67	59	48	54	51	48
May	85	83	59	72	76	65
June	89	90	87	94	89	86
July	93	91	85	89	87	85
August	95	92	90	95	90	83
September	91	87	80	92	87	86
October	91	81	60	68	73	72
November	73	50	50	50	51	47
December	37	29	34	34	33	27
	73	69	59	66	65	61

Source: Belek Tourism Investors Association, BETUYAB (2010)





5. IMPORTANT INFORMATION FOR GOLF INVESTORS

Turkey Golf Federation has prepared Golf Tourism Investors Handbook for acceleration in tourism, in 2004. The main information in handbook is given below.

The golf areas for possible investments in Turkey are shown, below.

“Land size, transportation, water capacity, ground scheme situation, micro climate, last fifty years meteorological data, soil quality, etc. must be considered when choosing the golf field.”





Preferential Golf Areas in Turkey



Source: Turkey Golf Federation (2004)

“Golf fields are not restricted with standards like other sports.”

5.1. Golf Field Land Choosing



Land size, easiness of transportation, water capacity, ground scheme situation, micro climate, last fifty years meteorological data, soil quality, etc. must be considered when choosing golf field. But we can write 3 basic criteria for an 18 holed golf field.

- Averagely 750.000 m² land
- Averagely 2.000 m³ water
- Accessibility (Accommodation places should not exceed 60 km near the fields)

5.2. Golf Field Standards



Golf fields are not restricted with standards like other sports. Every field has its own design according to land shape and standards of USGA and Royal&Ancient Golf Club metric norms.

In these standards, golf fields are formed 9 and multiples of 9 golf courses. 18 holed fields accepted as an ideal golf championship field.

In 18 holed fields, there are 4 three- strike, 4 five- strike, 10 four- strike opportunity. Total strike number is 72 for male golfers.

Golf course total lengths are approximately 6.200- 6.400 meters.

- 3 vuruşluk parkurlar 0- 220 m.
- 4 vuruşluk parkurlar 220-440 m.
- 5 vuruşluk parkurlar 420-500 m. dolayındadır.





5.3. Golf Field Investment Costs

In resort type fields, workers, machine, maintenance, fuel, insurance, fertilizer, medicine, amortization, etc. costs are 400.000 dollars and in club type fields cost 300.000 dollars totally.

About 750 m2 club building included 18 holed field needs 25-30 workers for things to do. An 18 holed field needs 2250-2500 m3 water in Antalya. Golf field grass must be Bermuda type in Antalya for long life usage.

Golf Field Investment Costs

	RESORT TYPE FIELDS	CLUB TYPE FIELDS
Antalya Region	4.000.000 \$	4.250.000 \$
Ege Region	4.250.000 \$	4.500.000 \$
Marmara Region	4.500.000 \$	5.000.000 \$

Source: Turkey Golf Federation (2004)

5.4. Time of Investment Return

In resort type fields return time of the investment is 4 or 5 years. If golf clubs work well it is possible the return time will be shorter.

A Resort Type Golf Field Five Year Income and Cost Analysis for Antalya

PERIOD	INCOME	COST	PRE-TAX PROFIT (Thousand \$)
1. yıl	3,148	1,251	1,897
2. yıl	3,254	1,280	1,974
3. yıl	3,361	1,309	2,052
4. yıl	3,467	1,338	2,129
5. yıl	3,538	1,358	2,180
TOPLAM	16,768	6,536	10,232

Source: Turkey Golf Federation (2004)





Sunlight is considered when calculating capacity usage ratio. The Table below shows these ratios for Antalya Region.



A Resort Type Golf Field's Capacity Usage Ratio in Antalya Region

	MAXIMUM PLAYER CAPACITY	ROUND* CAPACITY	EX-POST OCCUPANCY(%)	PLAYER	EX-POST ROUND
January	210	6,51	20	42	1,302
February	220	6,16	60	132	3,696
March	230	7,13	80	184	5,704
April	250	7,5	80	200	6,000
May	270	8,37	50	135	4,185
June	290	8,7	25	73	2,175
July	310	9,61	18	56	1,730
August	310	9,61	18	56	1,730
September	300	9000	25	75	2,250
October	280	8,68	80	224	6,944
November	260	7,8	80	208	6,240
December	240	7,44	40	96	2,976
TOTAL	3,17	96,51	48%	1481	44,932

Source: Turkey Golf Federation (2004) *1 round continues about 4.5 hours.



6. CONCLUSION

In general, German nationals between the ages of 30-40 come to the region who play golf several times a week. Most of them choose to come to Turkey by friend advices. Turkey has been chosen the most favorite country by participants of survey and participants take notice the quality of accommodation facilities' and golf fields quality.

In addition, Turkey is very attractive in terms of weather conditions, security and lower cost of facilities and accommodations. Especially, air conditions are very rare in the world.

Golf is a leading sector in tourism and Turkey is a shining star with achievement of a high degree customer satisfaction in terms of;

- the quality and cost of accommodation facilities
- the quality of the fields
- appropriate climate conditions
- shopping and entertainment
- beach facilities
- historic places

The above mentioned advantages and the major international tournaments being held in the region make golf investments more reasonable and reliable.





Appendix

The Golf Clubs and Their Specialties in Antalya/Belek

GOLF CLUB	SPECIALITY	LOCATION
1- Antalya Golf	18+18 Holes 2 Field	Üçkum Hill Locality
2-National Golf	18+9 Holes 1,5 Field	Üçkum Hill Locality
3-Kaya Eagles Golf	18 Holes 1 Field	Üçkum Hill Locality
4-Tat Golf	27 Holes 1,5 Field	Üçkum Hill Locality
5-Carya Golf	18 Holes 1 Field	Taşlıburun Locality
6-Sueno Golf	18-18 Holes 2 Field	Taşlıburun Locality
7-Cornelia Golf	27 Holes 1,5 Field	İskele Locality
8-Papillon	18 Holes 1 Field	İskele Locality
9-Gloria Golf	18+18+9 Holes 2,5 Field	Acısu Locality
10-Nobilis	18 Holes 1 Field	Acısu Locality



Played Golf Game Numbers in Antalya-Belek According to Countries 2010 Year, First 8 Months (10 country which plays most)

COUNTRY	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	TOTAL	%
Germany	10948	22035	34163	18423	13912	4296	2496	2606	108879	37,44
England	5299	11776	15895	13478	16621	5650	1941	1887	72547	24,95
Sweden	1118	1682	10705	11856	5299	307	223	202	31392	10,79
France	677	1547	2158	2411	3663	671	257	645	12029	4,14
austria	1187	1929	4571	1142	612	245	189	140	10015	3,44
Finland	217	1104	2180	4273	957	256	50	104	9141	3,14
Holland	905	1804	1817	1456	1988	565	247	172	8954	3,08
Switzerland	985	1501	3046	1382	1223	377	190	154	8858	3,05
Norway	427	1446	1118	574	992	94	50	131	4832	1,66
Czech Rep.	331	782	1422	574	344	292	130	160	4035	1,39

Source: Belek Tourism Investors Association, BETUYAB (2010)

The Tournaments Held in 2010, in Antalya

DATE	TOURNAMENT	FIELD	PROVINCE
30.10.2010	Captain's Day Tournament	National	Antalya
18.11.2010	National Golf Club Classics	National	Antalya
20.11.2010	President's Putter	National	Antalya
30.12.2010	Millennium Open 2010	National	Antalya

