Positioning Bulgaria as international golf destination

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Positioning Bulgaria as international golf destination

Master Dissertation

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I hereby declare that this dissertation is wholly the work of Yulia Atanassova. Any other contributors or sources have either been referenced in the prescribed manner or are listed in the acknowledgements together with the nature and the scope of their contribution.

Signature:

December 2011
Preface

The Tourism destination management master program fascinated me not only because of the courses and study trip in Asia-Pacific, but also because of the possibility to learn more and be part of the tourism development process in my home country.

I was always interested in tourism and never liked the way tourism evolves in Bulgaria – without proper planning, resulting in overbuilding, aimed at the mass market and with niche tourism always put aside.

Golf tourism however grows slowly and steadily and stands for nice differentiation. This evoked my interest to look at how this sport can offer different future. This dissertation would not exist without the support of various people whom I would like to express my gratitude.

- I would like to thank my father for the hints about the topic and for the unconditional support during the process of gathering data.

- I also want to express my sincere thanks to my supervisor Keith Dinnie, who supported me during the whole process of writing the thesis by encouraging me, giving me valuable feedback and never putting pressure on me.

- Special thanks to Wesley Put who spend so much time with me browsing through topics and helped me to choose the right one.

- I am thankful to all interview participants who made this study possible.

- I am truly grateful to all TDM students, who supported me not only during the writing process, but during the whole last year. Without them I would not be able to succeed.

- My warmest thanks to my family and friends, who truly supported me, believed in me and never complained about me not being there for them in the last three months.
Executive summary

In a world of increasing competition among holiday locations branding is successful tool for positioning a destination in visitor’s mind and gaining competitive advantage over its competitors. Bulgaria is also a destination that has to deal with the growing battle for tourists’ attention and thus it aims to differentiate its tourism offerings and increase its competitiveness. Although with old traditions in Western Europe golf is now gaining popularity in Bulgaria and it is a way for the country, which is heavily dependent on summer holiday and winter ski tourism to boost its attractiveness to visitors. Thus the purpose of the dissertation was to examine the development of this new kind of tourism for Bulgaria and consequently the following research goal was formulated:

“To find out how Bulgaria can position itself as international golf destination, by analyzing the golf tourism in Bulgaria and the golf tourist profile in order to be able to give recommendations.”

In order to be able to achieve this goal the following research questions have been formulated:

- What is the profile of the international golf tourist?
- What is destination positioning and how it can be applied?
- What are the golf travellers looking for when choosing a golf trip destination?
- What are destination’s strengths?
- What are the main competitors for Bulgaria in terms of golf tourism?
- What steps has to be taken in order to receive higher numbers of golf tourists to Bulgaria?

The research was conducted by employing both primary and secondary research, as primary research encompassed quantitative and qualitative methods and whereas the quantitative research could not contribute with enough data, qualitative methods comprised semi-structured in-depth interviews, hermeneutics and participant observation and resulted in enough qualitative data, which was analyzed by creating themes. By using this combination of research methods the author was able to answer the research questions and also give recommendations.

The topics discussed with the interview participants included the profile of the golf tourists and why they prefer Bulgaria for their golf vacation. The destination attracts them firstly with its novelty, but also with the quality golf courses, affordable prices, beautiful nature and possibilities for combination of golf and beach holiday. Furthermore the destination strengths encompass the long golfing season and not overcrowded courses, good dining and wines and hospitality of the locals.

Destination’s weaknesses together with the main competitor’s advantages and disadvantages are also discussed in order to be able to find the strongest positioning for the destination. The weak
points of Bulgaria are the presence of only few dispersed courses, the lack of governmental support and the deficiency on regular flight connections.

The main competitor identified is Turkey which boasts year-round golf, concentration of courses, good infrastructure, regular flight connections and governmental support; but on the other hand is considered overcrowded, unbearably hot in the summer months and expensive.

Furthermore by using both interview results and hermeneutics the marketing campaigns undertaken by the golf resorts are analyzed. Travel markets and fairs, work with tour operators, printed ads, both in golf and non-golf specialized editions, radio and TV, social media, indirect ads in form of participation in reality shows and tournaments awards, familiarization trips for golf journalists, word of mouth and golf pros are the manifold ways the golf business employs to popularize Bulgaria as golf destination.

The future of golf in Bulgaria is seen as optimistic and tourism is expected to increase, boosted by the “Undiscovered golf destination of 2012” IAGTO award Bulgaria won this year. To facilitate this growth the right positioning message needs to be chosen, thus the positioning model of Bil Baker, was used, which identifies the strongest destination positioning to be dependent on customer needs, destination strengths and competitors strengths. Thus based on its advantages over Turkey and the travel motivations of the golfers Bulgaria can be positioned as nearby destination, with excellent, uncongested golf courses, which offer value for the money 10 months a year and great possibility for sunny beach holiday and great game of golf.

In order to achieve successful positioning it is highly recommended to work closely with the government and provide framework for the development of golf in Bulgaria, but also better accessibility and improvement of the existing infrastructure. Furthermore investments in education and continuous training of the human resources are needed, as well as better collaboration among the stakeholders, in particular the golf resorts. Stronger cooperation will facilitate the creation of powerful brand, which will present Bulgaria as one destination, rather than gathering of golf courses and will contribute to its holistic image of golf hot spot.

The dissertation findings make valuable contribution to the scientific field by providing input in a sparsely investigated topic and presenting further research recommendations such as quantitative research on the golf tourists in Bulgaria and local population attitude towards golf tourism development; and to the managerial field by providing helpful contribution by analyzing information and providing recommendations.
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List of abbreviations

BGA Bulgarian Golf Association
IAGTO International Association of Golfing Tour Operators
EGA European Golf Association
EMA region Europe, Mediterranean, and Asia region
ROI Return on Investment
TO Tour operator
IGTM International Golf Travel Market
IGF International Golf Federation
1. Introduction

1.1. Background of the study

Nowadays several destinations still rely on their natural features and often, as in the case with Bulgaria, develop mostly mass tourism – “sun, sea, sand” or winter ski holidays. The result is lack of niche tourism, high seasonality, image of “cheap” destination and low spending tourists. Golf tourism on the other hand assumes attracting tourists, who tend to spend more money and stay longer. Additionally golf tourism reduces seasonality, as golf can be played all year round. By developing an additional tourism product Bulgaria can gain better image internationally and position itself as a competitive golf destination.

1.2. Golf tourism

According to Higham & Hinch (2002) sport tourism is one of the fastest growing sectors in the tourism industry. The term sport tourism describes the sport-related travel, which can be categorized in three forms: watching sport events, celebrity sport tourism, e.g. meeting famous sport players and participating in sport activities as a part of vacation. Golf tourism can be defined as a form of sport tourism or special interest tourism (Hall, 1992) or as an active sport holiday type (Gibson & Pennington-Gray, 2005). Furthermore Readman (2003, p.166) classifies golf tourism as “travel for non-commercial reasons to participate in golf activities away from the traveller’s local environment.”

Golf is considered to be the largest sports tourism segment (Mintel, 2010; Redman, 2003) with 56 million golfers and 32 000 golf courses worldwide. (Kim et.al, 2008) The leading market for golf tourism by number of golf courses is USA, followed by Europe. In terms of number of golfers however second after the US comes Asia. According to the European Golf Association (2010a) there are over 6700 golf courses and more than 4.4 million registered players in Europe, but the total number of golfers is estimated to be more than 8 million (Mintel, 2010).

Traditionally the golfer is a man (76% of the golf players), aged between 40 and 64, with the overall age being 39. 23% of the golf players play more than 8 times a year and are classified as avid golfers. Golf is considered to be relatively expensive sport (Mintel, 2010) thus the golfers tend to be high-value adding tourists, who generate above the average per capita revenues (Tassiopoulos & Haydam, 2008). Furthermore golfers tend to travel more frequently, to stay longer and to spend more money on their vacation than non-golfers (Petrick & Backman, 2002). Golf tourist are additionally classified into three main groups – tourists with the main purpose to play golf, tourists who play golf as a secondary activity and tourists who are spectators of golf tournaments (Tassiopoulos & Haydam, 2008).

England and Scotland are considered to be two of the leading European golfing destinations in terms of number of golf courses (Mintel, 2010), whereas Spain and Portugal, together with France and Italy take more than 51% market share of the European golf tourism (Mintel, 2010). In Asia golf players are estimated to be more than 18 million, of which 13 million are Japanese and Thailand is the leading country for golf tourism, with China and Japan experiencing a rise. According to the International Association of Golf Tour Operators (IAGTO) the most popular destinations for golf tourism worldwide are Florida in the US, Mexico, the Caribbean, England, Scotland, Spain and Portugal, Turkey is considered to be an emerging destination. Japan, China, Thailand and Malaysia are popular destinations in Asia and additionally South Africa is considered to have ideal climate for golfing.

1.1.1. Golf tourism in Bulgaria

The development of golf tourism in Bulgaria started in 2000 with the opening of the first golf course situated 40 km from the capital (BulgariaTravel.org, n.d.) and today the country has 8 golf courses and several projects for new ones. Three of the golf courses are located on the Northern Black sea coast – Lighthouse Golf Club and Spa Resort, BlackSea Rama Golf and Thracian Cliffs, another three –
Air Sofia Golf Club, St. Sofia Golf Club and Pravets Golf Course are situated nearby the capital, whereas one golf course – Pirin Golf and Country Club is situated in the proximity of the biggest ski resort in Bulgaria; and another one is situated 90km from the southern Black sea coast (VisitBulgaria.net, n.d.).

Golf tourism in Bulgaria is still in its infancy, as the major golf courses are built within the last two years and the country opened up for golf tourism just recently. Many practitioners, developers and golf gurus however (Manuel Ferry Sanchez, Jussi Yakonkari, Peter Walton) predict bright future in the golf tourism development. Furthermore golf tourism is expected to boom in the following years, as Bulgaria won the IAGTO award for “Undiscovered golf destination” of 2012 on the International Golf Travel Market in Belek, Turkey in November 2011.

The favourable climate in Bulgaria permits golfers to play all year round, with more than 200 days and even more than 300 active days in some regions. The topography of the country allows building golf courses of different kinds and the availability of natural springs implies supplementing the golf with spa and wellness centres (Bg-Golfer.net, 2008).

1.1.2. Branding and positioning

Branding is widely seen as a differentiating tool for gaining competitive advantage (Pike, 2004; Anholt, 2007) for products, services or destinations. Although the destination branding is a relatively new concept, which started to expand in the late 1990s (Pike, 2002; Blain et al., 2005) and its definition is still unclear (Park & Petrick, 2006) it is considered vital tool in destination management practice, as the competition between destinations is increasing (Pike, 2005).

Destination branding is roughly defined as “selecting a consistent mix of brand elements in order to identify and distinguish a destination through positive image building.” (Cai, 2002, p.722) and it aims to fill the gap between the actual and perceived image of a destination.

The branding process involves brand identity, brand image and brand positioning, as brand positioning is the attempt to improve the congruency between identity and image, i.e. between the desired self image and the actual image, held by the visitors (Pike, 2012).

Positioning of a tourism destination is the term used to explain how a destination compares to similar destination in regional, national and international terms. The aim of this process is to create a unique image for the potential customers (Kim et.al, 2005). Furthermore positioning is defined as one of the steps of destination branding process (Balakrishnan, 2009). According to Pike (2011) the effective positioning into consumer’s minds guarantees advantages for the destination, as it facilitate the ‘tourists’ decision making and allow customers to link the key attributes to the destination (Balakrishnan, 2009).

Creating focused proposition is part of the positioning process and perhaps one of the greatest challenges in branding (Gilmore, 2002). This is due to the fact, that the proposition should have narrowed focus; decision should be made about which features are to be included. According to Myers and Alpert (1986) “Not all attributes that differentiate a product from competitors are actually important to the consumer, and not all important attributes are used in decision making.” It is claimed, that destinations should focus on a unique combinations of few tangible and intangible destination attributes, rather than try to “have it all” (Woodside and Dubelaar, 2002).

The positioning process aims to identify the needs of the target customers, the destination strengths (both tangible and intangible) and the competitor strengths (Baker, 2007).

1.2. Research goal and research questions

The topic of golf tourism in Bulgaria lacks any research, mainly due to the fact, that this type of tourism is rather new to the country. Therefore the goal of the present research is to find out how Bulgaria can position itself as international golf destination, by analyzing the golf tourism in Bulgaria and the golf tourist profile in order to be able to give recommendations.
In order to achieve this goal the following research questions have been formulated:

- What is the profile of the international golf tourist?
- What is destination positioning and how it can be applied?
- What are the golf travellers looking for when choosing a golf trip destination?
- What are destination’s strengths?
- What are the main competitors for Bulgaria in terms of golf tourism?
- What steps has to be taken in order to receive higher numbers of golf tourists to Bulgaria?

### 1.3. Structure of the study

The present dissertation consists of six chapters. The first chapter gives brief introduction into the background of the study, the research goal and research questions. The second chapter focuses on golf tourism, destination Bulgaria, and the development of golf in Bulgaria. The third chapter is the literature review on branding, destination branding and positioning and the fourth chapter explains the methodology employed to conduct the research. The fifth chapter presents the results from the data analysis and the last, sixth chapter encompasses the conclusions and aims at giving recommendations. The structure of the study is shown at Figure 1.

**Figure 1: Structure of the study. Source: Own illustration**
2. Background analysis

2.1. Introduction

This chapter gives introduction in golf tourism by providing short history on the golf, industry overview, further elaborates on the most popular golf destinations worldwide and also attempts to draw a picture of the average golf tourist. The subchapter is concluded by future outlook in the golf tourism business. The second subchapter encompasses short overview of Bulgaria as tourism destination, supplemented by a SWOT analysis. The chapter concludes with review of the development of golf in Bulgaria.

2.2. Definition of golf tourism

Golf tourism is defined as a type of sport tourism. Sport tourism can be traced back to the ancient times, when the Olympic Games took place (Weed, 2008). Today sport tourism is defined as “Leisure based travel that takes individuals temporarily outside their home communities to participate in physical activities, to watch physical activities, or to venerate attractions associated with physical activities” (Gibson, 1998, p.49). Another definition is offered by Standeven & De Knop, according to which sport tourism comprises “all forms of active and passive involvement in sporting activity participated in casually or in organised way for non-commercial or business/commercial reasons that necessitate travel away from home and work locality” (Standeven & De Knop, 1999, p.12). Both definitions communicate the idea of combination of physical activity – sport and travelling away from home for leisure or business – tourism.

Golf tourism, as a kind of sport tourism is also defined as “travel away from home to participate in or observe the sport of golf or to visit attractions associated with golf” (Hudson & Hudson, 2010, p.5). Golf tourism is complex business that includes not only playing golf, but also golf hotels and real estate, transportation and travel agents, equipment, events and attractions, golf schools, etc. Figure 2 shows the holistic picture of the business of golf tourism (Hudson & Hudson, 2010, p.5)

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Figure 2: The business of golf tourism. Source Hudson & Hudson (2010)
2.3. History of golf tourism

The game of golf was born more than 500 years ago in Scotland, where the players used long sticks to hit a pebble into rabbit holes (Mintel, 2010). Golf was popular both with the royalty and the common people, resulting in new golf courses all over England and Scotland, as the most renowned was St Andrews, established in 1552 (Hudson & Hudson, 2010). St Andrews is still an existing public course; moreover it is considered one of the best in the world (Mintel, 2010).

In the 19th century golf clubs started opening up in India, Thailand, Japan, Australia and New Zealand, South Africa, USA and Canada. Golf experienced huge growth in USA, where by 1900 American golf courses outnumbered the British ones. Worldwide the 20th century was the time when the game of golf experienced the big boom. All over Europe the number of golfers increased by approximately 50%, just in the 1980s. Additional to golf courses development the development of real estate and new resorts took place, attracting the first golf tourists and on the golf course home owners (Hudson & Hudson, 2010).

As golf was expanding and travel became easier and cheaper after the Second World War the first golf tourists started to travel for the purpose of playing golf. Golfers could travel on day trips or weekend to try different golf courses (Mintel, 2010). Numerous destinations started opening up golf clubs with the intention of attracting players. Building of infrastructure, new resorts and diversifying the existent golf tourism products facilitated drawing foreign tourists resulting in economic growth (Hudson & Cross, 2005). Furthermore golf tourism helps reducing the seasonality in many destinations, which are traditionally summer or winter holiday resorts (Hudson & Hudson, 2010). By building golf courses those destinations manage to attract new markets or to create new attractions for their existing market and in this way extend their stay.

The notion of golf being an expensive sport originated from the reason that the equipment was handmade and thus very expensive. Therefore golfing was considered to be an elite sport and only after the mid-19th century, when the introduction of production lines made the equipment cheaper and the average people had more time and money for leisure and sport, the game was made available to the common people (Mintel, 2010).

Although it is more than 500 years old, today golf continues expanding and taking over new markets. The opening up of the huge economy of China means millions of golf players ready to travel; Dubai is considered to be future hot spot and Eastern Europe is quickly catching up to the global trends, as golf was forbidden sport during the communist regime. Certainly golf will keep on being one of the biggest contributors to the sports tourism segment globally (Mintel, 2010).

2.4. Industry overview

According to estimations of Mintel (2010) in 2009 the golfing holidays were over 63 million, with total value of US$ 25.3 billion. Table 1 shows the distribution of trips worldwide

<table>
<thead>
<tr>
<th>Region</th>
<th>Trips (mn)</th>
<th>Value (US$bn)</th>
<th>Average spend per trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td>39.5</td>
<td>18.0</td>
<td>456</td>
</tr>
<tr>
<td>Europe</td>
<td>8.8</td>
<td>2.8</td>
<td>318</td>
</tr>
<tr>
<td>Canada</td>
<td>4.5</td>
<td>1.7</td>
<td>378</td>
</tr>
<tr>
<td>Asia</td>
<td>4.0</td>
<td>1.2</td>
<td>300</td>
</tr>
<tr>
<td>Africa</td>
<td>3.5</td>
<td>0.6</td>
<td>171</td>
</tr>
<tr>
<td>Rest of World</td>
<td>2.0</td>
<td>0.6</td>
<td>300</td>
</tr>
<tr>
<td>Middle East</td>
<td>0.9</td>
<td>0.4</td>
<td>444</td>
</tr>
</tbody>
</table>
Table 1: Volume and value of the global golf tourism market, 2009. Source: Mintel, 2010

<table>
<thead>
<tr>
<th>Region</th>
<th>Total</th>
<th>Value</th>
<th>Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>63.2</td>
<td>25.3</td>
<td>400</td>
</tr>
</tbody>
</table>

Similar evaluation of the market shows the International Association of Golfing Tour Operators (IAGTO), according to which the global golf tourism market is worth over US$20 billion (Hudson & Hudson, 2010).

Figure 1 reveals the USA as the main generating market, with Americans taking nearly 40 million trips and spending the most on trips averagely. Although more than half of the Americans prefer to travel with USA for golfing, golfers travel more often than other sport tourists. Western Europeans generate 50% of the trips undertaken from Europeans, altogether spending US$2.8 billion (Mintel, 2010).

Worldwide there are around 32,000 golf courses located in 140 countries (Mintel, 2010). More than a half of them (17,000) are in the USA, where golfers spend $24.3 billion on green fees and equipment and another $26.1 billion on golf vacations, including transportation, accommodation and food & beverages. Another 6000 golf courses are situated in Europe and although it is considered a mature market, mainly due to the high supply and demand in countries like UK, it still has huge potential for growth – the participation rate in the old continent is still less than 1% of the population (Hudson & Hudson, 2010).

According to Rees (2008) there are 59 million golfers worldwide; 5-10% of which regularly undertake trips with the main purpose of playing golf. This estimates the golf tourism market between 2.9 and 5.9 million players. Besides the registered “core” golfers, who play golf on a regular basis, the number of occasional golfers continues to grow worldwide (Hudson & Hudson, 2010).

The top generating markets of golfing holidays in the world are USA and Europe with revenue of US$18 billion and US$2.8 billion respectively. Despite this fact, Asia comes second after the US by number of golfers (Mintel, 2010).

<table>
<thead>
<tr>
<th>Region</th>
<th>Golfers (mn)</th>
<th>% share</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>28.6</td>
<td>58</td>
</tr>
<tr>
<td>Asia</td>
<td>18.0</td>
<td>24</td>
</tr>
<tr>
<td>Europe</td>
<td>8.0</td>
<td>12</td>
</tr>
<tr>
<td>Oceania</td>
<td>1.5</td>
<td>3</td>
</tr>
<tr>
<td>South America</td>
<td>1.0</td>
<td>2</td>
</tr>
<tr>
<td>South Africa</td>
<td>0.5</td>
<td>1</td>
</tr>
</tbody>
</table>

Table 2: Number of golfers by region, 2009. Source: Mintel, 2010

In USA there are 30 million golfers, 1/3 of which travel within USA, as the most popular destinations are the states of Florida, South and North Carolina, California and Arizona (Hudson & Hudson, 2010).

Mostly American golfers prefer to stay within the USA for golfing vacation, but many also choose to travel to the Caribbean or Scotland. China and Thailand are considered to be the future hot spots for the American market. Canadian golf players are estimated to be 6 million, with participation rate of nearly 22% - more than every country in the world; spending US$1.7 billion on golf tourism (Mintel, 2010).

According to the European Golf Association (EGA) there are 6741 golf courses and more than 4.4 million golf players in 38 countries in Europe (European Golf Association, 2010a). According to Mintel (2010) however, there are another approximately 4 million players, which are not registered with EGA, which estimates that there are 8 million European golfers. This is result of significant growth in the last 20 years, both in demand and supply (KPMG, 2010a). Figure 3 shows the increase in both
players and courses in Europe for period of 15 years.

![Development of golf in Europe 1985-2010](image)

Figure 3: Development of golf in Europe 1985-2010. Source: EGA with KPMG elaboration

Although more than 50% of the direct revenue in 2009 (US$ 2.8 billion) was generated in Western Europe, only 19% of the supply of golf courses is in this region.

<table>
<thead>
<tr>
<th>Region</th>
<th>% share</th>
<th>Value (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe Total</td>
<td>100</td>
<td>2.2 bn</td>
</tr>
<tr>
<td>Western Europe: France, Italy, Spain, Portugal</td>
<td>51.3</td>
<td>1.1 bn</td>
</tr>
<tr>
<td>GB and Ireland</td>
<td>12.1</td>
<td>266.2 mn</td>
</tr>
<tr>
<td>Central Europe: Austria, Germany, Switzerland</td>
<td>7.2</td>
<td>158.4 mn</td>
</tr>
<tr>
<td>Northern Europe: Denmark, Finland, Iceland, Norway, Sweden</td>
<td>6.9</td>
<td>151.8 mn</td>
</tr>
<tr>
<td>South East Mediterranean: Cyprus, Greece, Turkey</td>
<td>2.8</td>
<td>61.6 mn</td>
</tr>
<tr>
<td>Benelux</td>
<td>0.9</td>
<td>19.8 mn</td>
</tr>
<tr>
<td>Eastern Europe</td>
<td>0.1</td>
<td>2.2 mn</td>
</tr>
</tbody>
</table>

Table 3: Market share of European golf tourism, 2009. Source: KMPG; Mintel

Golfers in Europe (92%) are highly concentrated only in 10 countries and equally golf courses (90%) are situated in only few countries (KPMG, 2010a). Table 3 shows the distribution of demand and supply in Europe.
According to the graph the top four countries in Europe in terms of supply and demand are UK & Ireland, Germany, France and Sweden.

“Mature” countries in terms of participation rate could be considered only Sweden and Iceland, where more than 5% of the population plays golf. To this cluster could be included also UK & Ireland, when the number of people per golf course is taken into account – i.e. the lower the number of people, the more “mature” is the country.

Currently golf tourism in Asia is experiencing significant growth, with numerous destinations developing new products trying to attract domestic golfers and foreign tourists. Asian golfers are estimated to be around 17-18 million, with Japan being the most mature golfing market. More than 10% (13 million) of the population of Japan plays golf (Hudson & Hudson, 2010). Thailand is one of the fast developing countries in Asia in terms of golf tourism, marked by growth in the revenue of 10% each year, which for 2009 is worth US$880 million. Although the number of golfers in China is uncertain – estimations range from 300 000 to 5 million; the number of golf courses in the country
grows by 30% a year. The marketing strategy of China will be “lower prices and greater public accessibility” (Mintel, 2010).

Golf courses often they are part of resorts, which include luxury hotels with amenities such as spa, beach and other sports. Such resorts are destinations by themselves and do not count on outside the resort attractions. Furthermore residential developments are not uncommon in the golf resorts. In the EMA region more than 17 000 villas, houses and apartments generated $24 billion in 2006 only (Hudson & Hudson, 2010). In addition the golf industry encompasses other sectors, such as tournaments, golf retailers, golf tour operators, golf schools and cruises.

The global economic crisis did not leave the golf tourism market untouched. In a KPMG survey among golf courses in 2010, 66% say they were affected by the economic downturn with decrease in revenues ranging from less than 10% to more than 20% (KPMG 2010b).

![Changes in revenues by region](image1)

**Figure 6:** Changes in revenue by region. Source: KPMG 2010b

![Rounds and Revenues](image2)

**Figure 7:** Impacts on rounds and revenue from 2008 to 2009. Source: KPMG 2010b

Although 2009 was characterized by stagnation, some emerging regions such as Eastern Europe and Middle East still experienced growth, which however is believed to be lower, that it would have been under better economic conditions. The overall reduction of revenues in EMA region was 3-5% averagely (KPMG, 2010b).

### 2.5. Destinations

The nearly 60 million golf players worldwide can choose from a range of golf courses, situated in destinations nearly in every country in the world. USA, UK & Ireland, Spain and Portugal seem to be among the most renowned destinations. According to Golf Magazine, golf courses in US, Scotland and Ireland rank the first top ten in “Top 100 golf courses in the world” (Golf Magazine, 2011). Golf courses in Spain, Portugal, France, Italy, along with UK & Ireland however are distinguished among the most popular in Europe pursuant to European charts (Your Golf Travel, 2011; Howard, 2010).

#### 2.5.1. USA, Canada and the Caribbean
In USA Florida, South and North Carolina and California are the most popular states, with the greatest number of courses. Orlando in Florida was “Destination of the year” for North America 2010 IAGTO Awards (IAGTO, 2010). Myrtle Beach is one of the top destinations in South Carolina with more than 100 courses, situated on 70 km long stretch. California offers great variety of landscapes, including the glam of Hollywood and the most popular ocean golf course in the world – Pebble Beach Golf Links. Furthermore Alabama, Texas and Las Vegas in Nevada can offer several top-notch courses. Canada is home of some great courses, mainly situated around Vancouver, Ontario and Quebec (Mintel, 2010). Mexico is for a reason the most popular destinations for the American golf tourists after Hawaii – it offers great diversity of landscapes – desert, jungle and high altitude and signature courses, designed by famous architects. The Caribbean is popular location for combination of beach holiday and golfing that suits both for golfers and non-golfers (Mintel, 2010). Jamaica and the Bahamas feature some golf courses with beautiful scenery and Punta Cana in the Dominican Republic won IAGTO 2011 “Golf Resort of the Year” Award (IAGTO, 2011).

2.5.2. Europe

Europe comes second by the number of golf courses after USA and it is also considered second most developed, although high percentage of the supply and demand are concentrated in just few countries, mainly in Western and Southern Europe (KPMG, 2010a).

Scotland is undisputedly the Mecca of golf, being the birthplace of the game and the British Open Championship. It boasts the oldest golf course St Andrews, which today is the biggest public complex in Europe and includes 6 more golf courses besides the historic Old Course. Furthermore Scotland is home of the most difficult in the world – Carnoustie (Howard, 2011).

Ireland offers not only outstanding coastline, but also many golf courses, some more than 100 years old. One of the well-regarded is the second oldest Royal Dublin Golf Club and of the most overcrowded is the Old Course at Ballybunion is south-western Ireland, where the greatest concentration of courses is (Golf Europe, n.d.a). Additionally North West Ireland was awarded as “Destination of the Year” for 2011 by IAGTO (IAGTO, 2011). Additional feature that gives certain charm is the personalized golf route guided by Irishmen.

England has the greatest number of courses in Europe – just over 1800 in 2010 (European Golf Association, 2010b). It boasts numerous luxury clubs, such as Wentworth and Sunningdale around London and has hosted several championships and tournaments. The 80 km stretch from Liverpool north to Blackpool is England’s most famous tour where legendary clubs such as Royal Liverpool golf course mix with old castles and beautiful landscape (Golf Europe, n.d.b). Wales has more than 150 golf courses and long tradition in golf. Additionally it offers national parks, old steam railways and distinctive Welsh culture. Courses in England, Scotland and Ireland occupy the top 10 positions in the ranking” The best of the rest” 2009 by Golf Digest, with only one Australian golf course taking up the 9th position (Galyean, 2009).

Spain and Portugal are among the most favoured destinations in South Europe, mainly due to the fine weather, which results in big number of playable days. Both countries are popular beach destinations and golf is excellent addition (Golf Europe, n.d.c). Portugal has 84 golf courses, nearly one third of which are located in the famous Algarve area, with the oldest being Penina. Another 12 courses are located near Lisbon, including Troia, considered to be Portugal’s most difficult one (Mintel, 2010). Spain undisputedly boasts one of the best regions for golf in the Mediterranean – Costa del Sol – home of more than 40 golf courses. And this is only a part of the 345 golf courses in whole Spain (European Golf Association, 2010b). France and Germany have more golf courses than Spain and Portugal and offer range of courses, thanks to the varied landscapes in these countries. Golf is believed to be not widely popular, because it is still considered elitist (Golf Europe, n.d.d).

Scandinavia has one of the highest participation rates in Europe and features more than 1000 golf courses, as half of them are located in Sweden, where the game is popular and accessible (Mintel,
An exclusive feature that Scandinavia can offer is golf in midnight sunlight – golfing season is between May and September, when tourists can get as much as 21 hours of sunlight. Furthermore, the high standard is a must and the green fees are affordable (Golf Europe, n.d.e).

### 2.5.3. Asia

Japan is the most mature market in Asia and it has more than 2300 golf courses. Golf is limited to the elite, since most clubs are membership-based and fees can be extremely high (Mintel, 2010). Kobe is the most popular destination in the country, where the first golf course in Japan is located (Oliver, n.d.). Likewise in China fees are very high and thus courses are located close to the biggest, wealthiest cities of Beijing, Shanghai, Guangdong and Hainan; Hainan is China’s most popular destination. Unsurprisingly China boasts the biggest golf club in the world – Mission Hills China, with 12 golf courses (Mintel, 2010).

Malaysia is highly promoted as golf destination and boasts more than 200 courses. Golf in Malaysia is accessible and affordable and offers the varied landscapes of Penang, Langkawi and Borneo (Golf Asian, 2011a). Thailand has even more-260 courses and offers great value for the money golf experience in the clubs in Pattaya and also more luxury options in Bangkok and Phuket (Golf Asian, 2011b). Although countries like Vietnam and Cambodia are still developing, they also boast huge developments in golf tourism – Vietnam has 25 existing courses and 65 under development and it was awarded “Undiscovered Golf Destination of the Year” for 2008 by IAGTO (IAGTO, 2008).

### 2.5.4. Other countries

Another key destination is South Africa, where climate is perfect and scenery is amazing, featuring desert, coast and altitude courses. The 450 golf courses offer favourable green fees (Mintel, 2010). It boasts The Legend Golf and Safari Resort with the “Extreme 19” – bonus hole in the bottom of a cliff; the tee is reachable only by helicopter, as it is situated nearly half a kilometre above the green, near the tip if a mountain (The Legend, n.d.).

UAE, especially Dubai offer few, but exclusive golf courses, with extremely high fees and consequently the country has the highest revenues from golf in the EMA region (KPMG, 2010c).

Golf in Australia and New Zealand is also extremely popular, being the favourite sport for men and second favourite for women in New Zealand and one of the most important national sports in Australia. Golf courses around Melbourne rank 13th and 27th in Golf Magazine Top 100 Golf courses in the world (Golf Magazine, 2011) and in the top 10 in Golf Digest charts (Galyean, 2009). Furthermore Australia boasts the longest golf course in the world – the Nullarbor Links, where every hole is located in different town. The course stretches for 1365 km from Western to South Australia (Nullarbor Links, n.d.).

### 2.6. The golf tourist

In “Golf Tourism” the average golfer worldwide is defined as male, middle-aged and with above the average income, although this profile is to some extent changing with more female golfers entering the game (Hudson & Hudson, 2010). The existing variations worldwide are examined below.

The average American golfer is male, 37 years old with higher than the average income. 75% of the golfers in USA are men and participation rates are reciprocal with income levels - above $150 00 income guarantees more than 30% participation rate. Regular golfers, although smaller in numbers induce 75% of the expenditures. The golf tourists from USA are believed to earn more, be older, and play more often than non-travelling golfers. Canadians also have above the average income levels, hence prefer more luxury accommodation. 65% of the golfers are married men with dependent children and mostly they prefer sport related events and care less about other cultural activities and entertainment (Hudson & Hudson, 2010).
In Europe besides UK & Ireland and Scandinavia, participation rates are relatively low. In UK for example golfers are mainly (75%) male and mostly (62%) aged 35-60. In France the average golfer tend to be older – 55 years.

Statistics show that French golfers prefer to travel within France for golfing or in other French-speaking countries like Morocco or Tunisia. Germans and Swedish choose mainly Spain or stay in Germany or Sweden respectively. British also frequent Spain, Portugal, USA or their own country (Hudson & Hudson, 2010).

While in France and Germany social status and income are more important determinants for participation than age and sex; in Sweden golf is widely popular and accessible and it is no longer considered elitist sport.

The countries from New Europe experience huge growth in golf tourism. Croatia, Bulgaria and Montenegro are attracting new developments and world famous architects and observe escalating numbers in the domestic market. Courses in Poland and Czech Republic are mushrooming (KPMG, 2010a). Turkey is also attracting golfers with affordable prices of green fees and real estate (Hudson & Hudson, 2010). Besides that Turkey is popular with the all-inclusive hotel packages and is benefitting from word-of-mouth recommendations (Stanley, 2010).

Japan is the most mature Asian market with participation rate of 10%. Moreover it is also highly dominated by male golfers (87%). There are few public courses and majority of them are membership based with fees as high as $150,000. Some of the peculiarities of the Japanese golf are that the players tend to play in two halves, stopping for lunch and take hot baths (onsen) after the game – a ritual, due to which all golf clubs have one.

Furthermore Thailand and Malaysia are other popular golf destinations in Asia. Thailand receives 400,000 golf tourist a year and golf tourism arrivals in Malaysia are 2.4% or around half a million tourists.

Golf is undisputedly men dominated sport. In Europe averagely 65% of all golfers are men, 25% women and 10% juniors. Germany, Austria, Switzerland and Benelux however lead the market in terms of female participation with a rate above 30% and Turkey has the highest participations of junior golfers – 51% (KPMG, 2010a). Figure 8 shows the male, female and junior participation in countries across Europe.
Furthermore a KPMG survey among tour operators (KPMG, 2010d) determines that the golf tourists usually spend 3-4 days on short-haul and one to two weeks on long-haul destinations. The table below summarizes the key findings.

<table>
<thead>
<tr>
<th>Length of stay</th>
<th>Rounds</th>
<th>Courses</th>
<th>Package Price (flights, accommodation and golf)</th>
<th>Additional expenditures</th>
</tr>
</thead>
<tbody>
<tr>
<td>7 days</td>
<td>4-6</td>
<td>3-5</td>
<td>EUR 1000-1500</td>
<td>EUR 150-200</td>
</tr>
</tbody>
</table>

Table 4: The average golf holiday. Source: Own illustration, adapted from KPMG, 2010d

Although one week holiday can be as inexpensive as EUR 400, luxury trips can reach to EUR 5000. Most golfers however choose vacation ranging between EUR 1000 and EUR 1500 with additional spending around EUR 200 per day.

Additionally the survey shows that mostly golfers care about the quality of the golf course, the price and the accessibility, leaving the entertainment and golf tradition way behind. Figure 9 shows the key factors, motivating the destination choice.
The graph reveals that a destination needs a wide range of different in design and difficulty courses in order to be competitive. Furthermore, as golfers are becoming more price-sensitive (Stanley, 2010) package prices and promotions are essential. Accessibility is also highly valued, as due to the economic downturn, more golfers choose to undertake short-haul vacations close to home (Stanley, 2010).

According to Stanley (2010) customers tend to prefer all-inclusive packages, as they are seen as good value for the money and furthermore golfers, similar to recreation tourists tend to book last minute.

Stanley states the average length of a golf break in Europe is 3-4 nights with 3 rounds of golf.

In addition to this Petrick (2002) find out that younger golfers seek originality and uniqueness more than older participants and are more often motivated by “thrill”, “boredom-alleviation,” and “surprise”, thus more innovative and challenging design is more appropriate for them.

Numerous researchers have tried to segment the golf tourists (Hennessey et al., 2008; Petrick, 2002; Scott Parker Research, 2006; Correia and Pintassilgo, 2006). According to Golf 20/20 golfers are classified into occasional, core and avid. Occasional golfers play less than 8 rounds a year, core golfers play 8-24 rounds a year and avid golfers play more than 25 rounds a year (Golf 20/20, n.d.).

Kim and Ritchie (2010) define three main golf clusters:

- Golf-intensive golfers – younger male with low handicap levels who have started playing golf as juniors, travel longer and spend large amounts on golf trips, together with social club members. They plan to visit Thailand or Vietnam in the next 2 years.

- Multimotivated golfers – those are middle-aged males, who are defined as moderate in terms on handicap, expenditure and length of stay. They travel with colleagues and would prefer Australia and the Philippines.

- Companion golfers are mostly older female, who travel with family and relatives, stay short time and spend less than the other groups. They tend to be inexperienced golfers and favor China, Japan and Malaysia.

Furthermore Hinch (2004) categorizes the golf tourists into five types, according to their motivations.
<table>
<thead>
<tr>
<th>Sport tourist types</th>
<th>Primary Motivations</th>
<th>Destination attributes</th>
<th>Secondary activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>General holidays with sport elements</td>
<td>Various business or leisure travel motivations</td>
<td>Vary with primary motivations (existence of a golf course is incidental)</td>
<td>Playing golf, amongst other things</td>
</tr>
<tr>
<td>Specialist sport holiday</td>
<td>Pilgrimage to the heartland of golf; emulating icon players</td>
<td>Grand slam and other championship courses</td>
<td>Nostalgia sport tourism</td>
</tr>
<tr>
<td>General sport holidays</td>
<td>Golf as one part of a suite of visitor activities</td>
<td>Single integrated resorts</td>
<td>Family-based activities</td>
</tr>
<tr>
<td>Upmarket holidays</td>
<td>Golf as a specialised visitor activity</td>
<td>High degree of luxury: second home developments adjacent to golf courses</td>
<td>Domestic and social activities</td>
</tr>
<tr>
<td>Elite training</td>
<td>Seeking competition and challenge from a range of golf courses</td>
<td>Networks of golf courses forming golf regions</td>
<td>Coaching clinics; professional advise; purchase of equipment</td>
</tr>
</tbody>
</table>

Table 5: Sport motivation profiles of sport tourists who play golf. Source: Hinch and Higham (2004)

According to another study, conducted by Scott Porter Research and commissioned by VisitScotland in 2006 there are 8 golfer segments (Scott Porter Research & Marketing, 2006):

**Golf buddies**: For this group of 40-70 years old male the social element is as important as the golf, i.e. they look for good facilities, such as restaurants and pubs. They travel in big groups and spending time together.

**Golfing escapees**: This group consists of younger male (25-45) who travel in small groups and put strong emphasis on the golf. They undertake vacations to spend valuable time with friends who share the same interests.

**Luxury golfers**: They are keen on the exceptional experience, where golf stands in the center. Those 30-50 years old mostly couples seek luxury, good service and outstanding accommodation.

**Golfing tourists**: Golf is just a part of the experience for this group of mixed genders, aged 45-70, consisting of close friends or couples. While undertaking leisurely breaks they seek good value and accessible courses.

**Activity golfers**: They are keen on spending time outdoors; families or couples, aged 45-70 who look for beautiful landscape while golfing and are cost-conscious than other groups.

**Golf purists**: This is the group of golfers with low handicaps, who always look for challenges and top quality courses. They are aged 25-40, competitive golfers, who travel in small groups.

**Serendipity golfers**: For them golf just fits around other activities. They are both males and females aged 25-50, who travel with families, have mixed handicap and look for courses with good value.

**Golfing opportunists**: They are similar to the above mentioned category, but are more enthusiastic golfers.

### 2.7. Future trends

Although the economic downturn has put on hold many developments, golf tourism continues to expand. 69% of the surveyed golf tour operators in 2010 KPMG Golf Travel Insight report believe that golf will experience steady growth and 11% expect “spectacular growth” (KPMG, 2010d).
In terms of destinations Spain, Portugal and the traditional golf destinations – Ireland, Scotland and also USA are believed to be the hot spots in the next few years. Turkey ranks high in the chart, expected to experience massive growth, offering great value for the money.

Another KPMG survey from 2008 shows the hot spots for golf development – countries for significant development in golf tourism in the next 10 years. Mostly those are emerging destinations, discovering the great added value of golf tourism – tourists with higher expenditure and a way to face seasonality. China, Eastern Europe and UAE are in the top three, followed by India and Russia.
As the competition in golf tourism worldwide is becoming fierce with numerous destinations on the rise, golf courses need to invest in new methods to retain the existing members and attract new ones. Such benefits could be lower membership fees, membership rights in more than one club, improving facilities and packaging golf with other tourism products. The tour operator “Wide World of golf” offers combinations of golf and other country specific activities, such as whiskey distilleries in Scotland, wine tasting in New Zealand and France, cooking classes in Italy and Spain, etc. Furthermore due to the increased female participation in golf, itineraries such as Christmas shopping and golf, spa and golf and Fashion Week and golf are advertised (Hudson & Hudson, 2010).

With more younger and middle-class participants entering the game, golf tries to do away with the image of exclusivity. Few clubs introduce more casual dress code and reduce the private club spirit by new clubhouse design and involving the local community into the sport (Hudson & Hudson, 2010).

Golfers tend to demand more and seek for specific tailored golf vacations, where not only the value for the money matters, but also the experience. According to IAGTO` CEO 70% of the golfers are always looking for new destinations – either the undiscovered emerging countries or the well-established destinations with traditions in the game (Walton, 2010).

In accordance to this fact the CEO of GolfBreaks.com Andrew Stanley mentions that the golf companies will need to increase their marketing budgets in the future in order to be innovative and meet the higher demands of the customers. GolfBreaks for example rewards its customers with “Break Points” they can use with GolfBreaks.Com or other partner business.

Furthermore he predicts growth in the golf tourism market in the future, despite the effects of the economic downturn (Stanley, 2010).

2.8. Bulgaria as tourism destination

Bulgaria is located in Southeast Europe and it is a European, Balkan, Black Sea and Danube country. This geographic location places it on the crossroad between Europe, Asia and Africa. The territory of Bulgaria is distinguished by varied relief, which combines lowlands, plains, hilly areas and plateau lands, river valleys, basins and mountains various in height. The climate is favourable for development of various types of tourism. The country boasts a combination of mountains, sea, mineral waters and multiple natural landmarks – caves, waterfalls, alpine lakes.

The eastern parts of the country are occupied by the Black Sea coast; where the vast beach stripes, attracting Bulgarian and foreign tourists are located. The beaches and the sea offer conditions for
practicing various types of water sports (surfing, water ski, diving, underground archaeology) and fishing (including underwater).

Besides the combination of sun, sand and sea, the Black Sea resorts offer hiking, biking and horse riding tourism, as well as eco tourism, photo safari, visiting of natural, cultural and architectural landmarks. In the northern part of the Black Sea there are 3 golf courses, offering conditions for world level practicing of this type of sport. Along the coast line there are also mineral springs, and the combination of these natural facts is the reason for the successful combination of spa, balneology and wellness tourism with sea holiday.

As 30% of the territory of Bulgaria is occupied by mountains the country offers favourable conditions for winter sport tourism; the thicker snow cover and the lower temperatures, which maintain it for a longer period allow skiing for up to 4 months (Bulgaria Travel, n.d.a). In summer the mountains offer climbing and hiking, numerous eco paths, rafting and kayaking are also possible for the adventure seekers – especially in spring, along the river currents when the rivers are with the highest waters, paragliding and bungee jumping. In terms of biodiversity, Bulgaria is on the second place in Europe, thus eco tourism and niche tourism such as ornithological tourism are possible.

Bulgaria is a successor of ancient civilizations - Thracians, Romans, Byzantines and proto-Bulgarians have left on these lands exceptionally valuable artistic and architectural evidence of their advanced culture.

The tradition of using the power of mineral springs dates back to ancient times. Its roots come from the age of Thracians, who were famous as excellent healers. Bulgaria boasts abundance and diversity of thermal mineral waters and curative mud deposits and great diversity of herbs and plants for the needs of aroma- and phytotherapy (Bulgaria Travel, n.d.b). This, together with the favourable climate, high number of sunny days and low rainfalls make up great combination for spa tourism and provides opportunities for all-year-long visiting the country, effective treatment and prophylaxis of multiple diseases or simply creates excellent conditions for relaxation.

The long history and the heritage left of ancient civilizations are conditions for attracting tourists, interested in history, culture, ethnography, religion, architecture and arts. Unique archaeological discoveries are scattered all over the country – ancient settlement mounds of the Neolithic age, Thracian sanctuaries and tombs, remains of Roman cities, Byzantine and Medieval fortresses, architectural reserves, ethnographic complexes, churches and monasteries, tekkes and many others. 40,000 historical monuments have been registered in the country, 36 cultural reserves, 160 monasteries, about 330 museums and galleries. Emblematic for Bulgaria are the monuments, included in the UNESCO List: two Thracian Tombs, a rock relief, a 10th century church, rock churches, monastery, well preserved old town and two natural sites – national park and lake natural reserve (Bulgaria Travel, n.d.c). In the country there are also many options for acquaintance with the traditional economic activities – manufacturing of rose oil, wine, pottery, wood carving, etc.

The unique local cuisine, the well preserved folklore and customs, arts and crafts and the architectural settlements make rural tourism the best way to get to know Bulgaria. Furthermore the trends of experience and learning as a part of tourism (Hudson & Hudson, 2010) where tourists aim to immerse in the culture of the visited country and learn something new make this type of tourism more popular worldwide. Getting involved in the agricultural work, hiking along the nearby landmarks, picking herbs, berries or mushrooms are part of the experience. Tourists have the option to participate in cow milking, making of cheese and yoghurt, preparation of jams, homemade wine and brandy.

In the last few years a new sport is becoming more popular – golf. 8 modern golf courses, designed by globally famous experts, function in the country. They are located in a number of areas – three along the Northern Black Sea coast, three in the region around the capital, one next to the mountain resort of Bansko and one near the town of Sliven, 90 km from the Southern Black Sea coast (Bulgaria Travel, n.d.d).
The following figure gives an overview of Bulgaria’s strengths, weaknesses, opportunities and threats.

**STRENGTHS**

- Rich and varied natural, historical and cultural resources
- Favorable geographical location – crossroad between Europe, Asia and Africa
- Varied topography
- Suitable and favorable climate
- Resources for development of all types and forms of tourism: recreational sea and mountain (ski)tourism; and specialized - health (Spa and wellness), cultural, rural, eco, business and adventure tourism
- Rich and internationally recognized heritage with unique characteristics and development potential
- Image of a safe destination
- Delicious cuisine and quality wines
- Well-preserved rituals and traditions
- Attractive arts and crafts
- Existing facilities for tourism
- Cheap labor force

**WEAKNESSES**

- Lack of a clearly defined image
- High dependence on sea and ski tourism
- Underrating of alternative forms of tourism – both from government and tourists
- Regional imbalance of tourism development
- Underdeveloped infrastructure (airports, roads, public transport)
- Lack of experienced and trained staff
- Initial stage of renovation of the existing attractions
- Poor coordination of state institutions in terms of organization, management and sale of tourist services (products)
- Insufficient use of e-marketing, i.e. on-line reservations, web pages, communication, presentation of the country
- Lack of reliable statistical and marketing data
- Frequent changes in tourism laws and regulations
- Insufficient depth of promotional activities due to insufficient funding, inefficient marketing campaigns for the presentation of Bulgaria as a destination offering various forms of tourism
- Inadequate zone planning

**OPPORTUNITIES**

- Continuous improvement of business climate in the country
- Development of specialized types of tourism
- Improving qualifications and skills of staff in tourism
- Attracting foreign investors in tourism
- Improving the image of the country in relation to EU membership
- Overcoming regional disparities and the development of tourism throughout the country
- Intensifying the professional contacts between academic education in Tourism (theory) and the tourism industry (practice)
- Increasing the efficiency of marketing and promotional programs and activities for imposing image of Bulgaria as a destination for practicing various forms of sustainable tourism
- Development of cross-border cooperation
- Transfer of innovative technologies from the EU
- Effective use of modern technologies for the development of tourist products and services
- Create travel offices abroad
- Developing of legal framework with accent on specialized tourism (e.g. adventure, eco, rural)
- Improving the public and tourist infrastructure
- Focusing on quality of the services

**THREATS**

- Development of competing destinations
- Lack of interest from strategic investors
- Inadequate use of natural and anthropogenic resources
- Violation of the principles of sustainable development - an irresponsible use of natural resources, environmental pollution in tourist resorts
- Negative image of the country and repelling wealthy tourists due to the increasing tendency of accepting Bulgaria as cheap destination
- Climate change and global warming
- Ineffective marketing campaigns
- Lagging from the new communication technologies
- Prices and packages attracting marginal groups of tourists and creating image as “cheap” and “of poor quality” destination
- Withdrawal of tourists as result of uncontrolled overdevelopment of the Black Sea, mountain and spa resorts
- Disappearing of the traditional crafts and abilities
- Overuse of specific tourist sites, that leads to decrease in value of local resources
- Chaotic planning of the tourist development on regional and national level
Conclusions

As seen from the SWOT analysis Bulgaria still does not have clearly defined tourism destination image. The country is known as a beach summer and ski winter destination, due to ineffective advertising campaigns, lack of branding, lack of national tourist offices in major generating markets, uncoordinated development of tourist information centres.

Tourism in Bulgaria still suffers strong seasonality and the lack of experts with professional qualifications and language skills outcomes to insufficient exploitation of different kinds of tourism.

Despite its rich geographical, natural and historical resources, Bulgaria is still dependent on summer and winter tourism and cultural, business, rural; spa, spa tourism, religion, hunting, sports, extreme sports and hobby tourism are not yet developed enough. The lack of adequate database of tourism resources results in forming the image of Bulgaria as a cheap tourist destination.

Therefore Bulgaria should focus on more consistent image building that promotes better quality, the nature, cultural and historical heritage of the country and the many and varied opportunities for tourism that the country offers.

2.10. Golf tourism in Bulgaria

Golf - the most elitist sport with a long tradition worldwide is already gaining popularity in Bulgaria. The first golf course in the country was built in 2000, 50 km from the capital Sofia. The course was built according to international standards with 18 holes and par 71, a length of 6425 meters. The second golf course was opened 4 years later, even closer to the capital. "St. Sofia" Golf Club and Spa consists of 18 holes golf course, putting green and a Golf Academy. The course has a length of 6175 meters and offers excellent conditions for golfers of all proficiency levels. "St. Sofia" Golf Club and Spa is the first golf course in Bulgaria with an official rating by the European Golf Association (Big.Bg, 2007). Together with the newest golf course – Pravets Golf Club (60 km from Sofia) there are 3 golf courses in distance of 50-60 km from the capital.

Pravets Golf Club opened up in May 2011 and it is part of the new Pravets Golf & SPA Resort, surrounding the popular lake of the town of Pravets. The course is a parkland style, par 72, 6469 m in length. Its designer is the world famous architect Peter Harradine and his company Harradine Golf, based in Dubai, built more than 200 golf courses in the world (Pravets Golf Club, n.d.)

Another area that has the potential to become golf destination is the Signature Golf Coast, or the northern Black Sea coast, where three golf courses are located, only 50km from the second biggest city’s airport in Varna. Lighthouse Golf Resort, Black Sea Rama and Thracian Cliffs are located in an 8 km radius from each other, whereas Lighthouse Golf Course and Black Sea Rama share a border and there is a direct pathway from one to another (Lighthouse Golf & Spa Resort, n.d.a).

Lighthouse Golf & Spa Resort combines a five-star Lighthouse Hotel, choice of luxurious private villas and apartments, an 18-hole Signature Golf Course, designed by Ian Woosman, Golf Academy, 3000sqm luxurious SPA and Wellness centre, Fitness Centre, numerous sports facilities, exclusive Private beach, and a variety of Bars and Restaurants (Lighthouse Golf & Spa Resort, n.d.b).

BlackSeaRama is a classic links golf course with 18 holes, par 72, length of 6648 meters and it is the first completely project of Gary Player in Eastern Europe. BlackSeaRama residential area consists of one or two-storey villas . Furthermore the complex boasts infinity swimming pools, bistro and Gourmet restaurant, golf academy, two tennis courts, a gym, a therapeutic massage centre, cycling, table tennis, riding, fishing, hunting, diving and yachting (Black Sea Rama, n.d.).

Thracian Cliffs Golf Course is Gary Player Signature Golf Course with 18 holes Par 72. It offers accommodation in two villages, which are separated by lake and also offer a stunning landscape view of the sea; spa, clubhouse and gourmet restaurant (Thracian Cliffs, n.d.).

Another designed by Ian Woosnam golf course is situated near the well-known ski resort Bansko – Pirin Golf and Country Club. The resort features two golf courses, exclusively for the use of residents.
and guests of the resort, as well as guests of the hotels Katarino SPA, Perun, Bulgaria and Razlog. The pride of the club is the outstanding 18-hole, Par 72 championship course designed by the winning 2006 Ryder Cup Captain. The second course is named after the surrounding area, i.e. Pirin Pine Course and at the moment features 5 fully constructed holes (Pirin Golf & Country Club, n.d.).

The first recognition was when Bulgaria was presented for the first time in the golf catalogue of the Association of British Travel Agencies in 2007. The country was presented as a year-round tourist destination, crossroad of ancient cultures and civilizations with natural beauty, numerous water springs and rich variety of flora and fauna. The catalogue draws attention to the nine sites in the UNESCO list of World cultural heritage and highlights the objective of Bulgaria to compete with Spain and Portugal as a major golf destination in the future. Bulgaria can offer golfers sun, sea, gorgeous beaches, and clean mountains. All this provides excellent recreation at affordable prices. The edition of 30 000 copies is distributed among golf tourism companies worldwide (HoReMag, 2006).

Furthermore Bulgaria was listed as key golf destination in the largest forum of golf tourism-IGTM, held in Valencia, Spain in 2010. It was also cited as a successful example that has succeeded despite the financial crisis (Pochivka.bg, 2010a).

According to Rumen Todorov, a member of World Association of golf Journalists, at least ten internationally certified courses are required to establish Bulgaria as a golf destination. There are 8 existing golf courses in the moment and the construction of new ones is gaining popularity and most of them are built by world famous designers. Gary Player, Ian Woosnam, Peter Harradine, Jack Nicklaus are celebrities in this sport and courses, collected in one place, planned by many great designers is a big advantage for Bulgaria, according to BNR.bg (2010).

Bulgaria can in very short time become one of the most important golf destinations in the Balkans. The nice climate, water resources, mineral springs, the numerous tourist sites are all the prerequisites for rapid development of golf tourism and golf can be played 7, 8 even 9 months of the year, predicts Manuel Ferry Sanchez, designer and owner of famous Spanish golf club (Property Index.bg, 2007a). According to Karanova (2006) golfers in Bulgaria can play 200 days a year, and in some places in the country even 300 days a year. The presence of numerous springs involves building quality SPA centres and hotels near golf courses and water resources in Bulgaria favour the maintenance of high quality golf places in the country.

Golf tourists in Bulgaria can reach 500 000, according to Jussi Yakonkari, the president of the world organization of golf journalists. Bulgaria maintains low prices that make the country very attractive as a golf destination and it is new and interesting for fans of this sport. However Bulgaria needs to make advertising campaign for golf courses and to improve infrastructure so tourists can have easy access (Pochivka.bg, 2010b).

Furthermore Peter Walton, the president of IAGTO believes that Bulgaria can reach 70% of its full capacity up to 3 years, considering the fact, that for the last 3 years the capacity of the golf terrains in the country tripled and now it is 15-20% (Obretenova, 2011).

The four key conditions to be met by the country, in order to become golf centre are: quality of service, easy access to the courses by the air, sea and land transport, competitive prices, good publicity, according to Walton. He estimates Bulgaria’s opportunities for golf as unique — combination of distinctive terrain, panoramic sea views, excellent cuisine and wines and an abundance of ancient cultural and historical monuments and landscapes (Obretenova, 2011).

Turkey and Spain are considered as main competitors for Bulgaria in terms of golf tourism, as they have almost identical offers, according to Boris Borisov, manager of golf tour operator. Spain however have 10 years experience, while in Bulgaria this is new kind of tourism that is not well established yet. Nevertheless this has its positive side, as all fans of this sport from the European continent constantly feel the desire to try a new destination (Tourism News Blog, 2010). Turkey’s golf courses on the other hand are located near Belek and Antalya, where in the summer is impossible to
play due to heat, according to Georgi Chouklev, vice president of the Bulgarian Golf Association. And in Bulgaria, under mild winter conditions the season could last 8-9 months (Property Index.bg, 2007b).

Golf tourists, who come to Bulgaria, are mainly from England, Germany and Scandinavia (Tourism News Blog, 2010; Property Index.bg, 2007a). The buyers of golf villas and apartments also mainly come from Western and Northern Europe, dominated by English and Irish, and Scandinavians.

Three different types of customers can be distinguished, according to Manuel Ferry Sanchez: the golf player who does not buy property on golf course where he plays, and rents an apartment or hotel room, the people who want to live on a golf course as first or second home, thirdly, the small investor who buys to be able to use his apartment sometimes and at other times to make profit by subletting it (Property Index.bg, 2007d).
3. Literature review

3.1. Introduction

This chapter outlines the relevant literature on the topic of branding. First the concept of branding is explained and then it is clarified how it is applied to destinations. The difference between place branding and destination branding is covered, as well as product and destination branding is compared. Furthermore it is elaborated on the relation between image and personality – namely positioning, where extensive overview of the positioning process and positioning strategies is given.

3.2. The branding concept

3.2.1. What is branding?

Branding is considered to be one of the most powerful strategies for market positioning which makes the product noticeable for the customers among its competitors (Crawford- Welch, 1998).

According to Kolb (2006) branding of a product or service is a process of creating a slogan that together with a symbol or logo communicate to the customers the image of the products or services along with its features, benefits and values it offers. Branding is however not only imposing the created image; the consumers also influence the brand through their perceptions (Wilson et al, 2009). Thus the branding process aims to make sure customers perceive the product or service in the desired by the company way by basing the branding strategy on real facts and product strengths.

According to Keller, “the key to branding is that consumer perceive the brand different compared to other brands in the same product category” (Keller, 2007). Consequently branding aims to differentiate products and services and create good image.

3.2.2. The brand definition

Branding is competitive tool for differentiating products and services from others and gaining competitive edge and advantage (Pike, 2004; Usakli & Baloglu, 2011; Morgan et al., 2003; Anholt, 2007). Probably the most often used definition for a brand is the one by the American Marketing Association – “brand is a name, term, design, symbol, or any other feature that identifies one seller’s good or service as distinct from those of other sellers.” (American Marketing Association, 2011).

Another popular definition is expressed by the guru of marketing Philip Kotler, who defines brand as “any name, term, sign, symbol, or any combination of these elements that is intended to identify a product or service and to differentiate them from the competitors” (Kotler & Armstrong, 2007).

Furthermore Kevin Keller elaborates on the tangible and intangible features of a brand by stating that: “A brand is a product that adds either rational and tangible dimensions; or symbolic, emotional and intangible dimensions that differentiate it from products designed to fulfil the same need” (Keller, 2003).

Moreover it is important to notice, that “brand is not a logo, a slogan, a product or a marketing campaign” it is the combination of all these elements and it is “the fundamental building block from which all marketing communications and behaviour should flow” (UNWTO, 2009 p. 41). A brand is the source of a promise to the customer (Pike, 2004). Important brand-related concepts include brand identity, brand image, brand equity, brand personality, which are discussed below.

3.2.3. The brand equity

Brand equity is the value of the brand. According to Kotler and Keller, “brand equity is the added value endowed on products and services, which may be reflected in the way consumers, think, feel, and act with respect to the brand” (Kotler & Keller, 2008).

Moreover brand equity is seen as a “set of assets linked to a brand’s name and symbol that adds to (or subtract from) the value provided by a product or service to customers.” (Aaaker et al, 2000) These categories of assets are:
• brand loyalty – this is the key consideration when placing a value on a brand, because a highly loyal customer can be expected to generate very predictable sales
• brand name awareness – refers to the strength of a brand’s presence in the consumer’s mind
• perceived quality – brand association that is elevated to the status of a brand asset
• brand associations – all associations that consumers make with a brand such as product attributes, a celebrity spokesperson, or/and a particular symbol.
• other assets, such as patents and trademarks

3.2.4. The brand identity

Brand identity “should help establish a relationship between the brand and the customer by generating a value proposition involving functional, emotional or self-expressive benefits,” stated by Aaker (1996). The brand identity is defined as a unique set of brand associations that the marketer aims to create or maintain. These associations represent what the brand stands for and imply a promise for customers from the organization members.

3.2.5. The brand image

The brand image is “the mental perception of the brand in the minds of consumers” (Kolb, 2006). Thus the brand image is the sum of the beliefs about the product and it can be derived from different information sources. The concept of brand image is closely related to positioning, however brand image represents customer’s perception of the product, whereas positioning involves action from the organization (Kolb, 2006). Additionally Anholt (2007) states that “often the owner of the trademark is not the owner of the brand, as the brand image resides in the mind of the consumer and not in the company’s offices”.

3.2.6. The brand personality

The brand personality is the outward face of a brand, according to Aaker (2005). It is “the set of human characteristics associated with a given brand; like a human personality it is both distinctive and enduring (Aaker, 2005).”

3.3. Branding and destination branding

3.3.1. Definition of destination

In order to give clear insight of destination branding, the terminology should be first explained. Thus the definition of destination is provided in the following paragraphs.

The most detailed definition of destination is by UNWTO (2007, p.1): “A local tourism destination is a physical space in which a tourist spends at least one overnight. It includes tourism products such as support services and attractions and tourist resources within one day’s return travel time. It has physical and administrative boundaries defining its management, and images and perceptions defining its market competitiveness.” Furthermore destinations have various stakeholders and they could be of any scale – country, region, city or self-contained centre (UNWTO, 2007).

Vengesayi (2003) looks at a destination as a mix of attractiveness and competitiveness; attractiveness is the ability of the destination to deliver benefits, it represents the pull factor for the potential visitors and competitiveness is associated with the ability to deliver better experience than other destinations. Thus it can be concluded that a destination is not only characterized by its physical feature of a place where tourism takes place (Shaw and Williams, 2004), but it is also a blend of products, facilities and services that together comprise the travel experience. This view is supported by Franzen and Bouwman (2001) who claim that physical space and attractions are just elements of the destination that tourists interpret in their minds. Furthermore the following factors are believed to have influence on the way destination appeal to visitors and the experiences it offers to the tourists: (UNWTO, 2007)
• Attractions – often the main purpose for visiting the destination. They can be natural, built or cultural attractions.
• Public and Private Amenities – services and facilities that support the visitors’ stay; include public transport, accommodation, visitor information, recreations facilities, guides
• Accessibility – refers to easiness to reach the destination by road, air transport, rail or ship.
• Human Resources – includes the local communities as they are part of the experience by delivering quality service.
• Image and Character – vital factor for intention to visit the destination; includes uniqueness, sights, safety, service levels, and the friendliness of people
• Price – important aspect in competing with other destinations

3.3.2. Destination branding

3.3.2.1. Place branding vs. destination branding

Because of the co-existence of the different concepts such as “destination branding”, “place branding”, “nation branding” and “country branding” it is crucial to distinguish between them.

“Place branding”, “nation branding” and “country branding” refer to holistic branding of a place, nation or country (whereas place is used as general term and can refer to country, region or city). Those concepts explain the way in which a place represents itself in terms of business, investments, manufacturing, education, culture, tourism and its efforts to build an image of a good place to visit, live, study and do business with. Destination branding represents the tourism dimension of a place branding and it needs to appeal to a tourism-specific market (UNWTO, 2007).

3.3.2.2. Differences and similarities of branding a product and destination

One of the first differences between branding products and destinations is that the name of the destination is fixed and it can be rarely changed (Ooi, 2004). Furthermore destinations are multidimensional and include diverse mix of natural resources, built attractions, culture, activities amenities and accommodation (Pike 2005) and also many more stakeholders than products (Therkelsen and Halkier, 2004; Kotler et al., 1999) such as national, regional and local authorities, the business community and citizens. When branding a product, the interests of the group of active stakeholders are heterogeneous (Pike, 2005), while when branding a destination, due to the diversity of the stakeholders the ideas of how to brand the destination might be different and even controversial. Thus the process of destination branding is complex and decision making can take long time (Cai, 2002). Destination brands can however provide an umbrella of trust, a guarantee of quality (Anholt, 2002) and they deliver, similarly to product brands, benefits of increasing the value for the consumer and also use similar tools to build and maintain their brands.

3.3.2.3. Definition of destination branding

Destination branding is crucial in destination management practice as the tourist opportunities are broadening due to ease of access and information and the competition between destinations is increasing (Pike, 2005). Thus achieving a competitive advantage is important for destinations (Baloglu & McCleary, 1999).

The idea of branding tourism destinations is relatively new and started to expand in the late 1990s (Pike, 2002; Blain et al., 2005; Cai, 2002; Gnoth, 1998) and it still lacks consistency in definition (Blain, et al., 2005; Park & Petrick, 2006; Tasci & Kozak, 2006).

Ritchie and Ritchie (1998, p. 103) define a destination brand as “a name, symbol, logo, word mark or other graphic that both identifies and differentiates the destination; furthermore, it conveys the promise of a memorable travel experience that is uniquely associated with the destination; it also serves to consolidate and reinforce the recollection of pleasurable memories of the destination
experience”. Cai (2002, p. 722) further identifies destination branding as “selecting a consistent mix of brand elements in order to identify and distinguish a destination through positive image building.”

The most comprehensive definition belong to Blain et al. (2005, p. 337): “Destination branding is the set of marketing activities that support the creation of a name, symbol, logo, word mark or other graphic that readily identifies and differentiates a destination; that consistently convey the expectation of a memorable travel experience that is uniquely associated with the destination; that serve to consolidate and reinforce the emotional connection between the visitor and the destination; and that reduce consumer search costs and perceived risk.”

All the above definitions outline the most important task of destination branding – to enable tourists to identify a destination and differentiate it from its competitors (Vengesayi, 2003).

Furthermore destination brand is described as “the essence of the destination”, a view that preferably shared from both the visitors and residents (UNWTO, 2009). The brand gives the destination the opportunity to stand out above its competitors by creating a unique identity. As it can rarely change its topography, culture or heritage, a destination has to identify its most important assets and promote them in a way that differentiates it from other destinations (UNWTO, 2009). The process of differentiation is actually the process of branding, of identifying the unique aspects of the destination and communicating them to the potential visitors.

The aim of destination branding is to fill the gap between the actual and perceived image of a city, region or even country. According to Aaker (1996) the main constructs in destination branding are brand identity, brand positioning and brand image. Figure 14 shows the relationship between these components.

![Figure 14: The brand components. Source: Aaker (1996)](image)

The brand identity represents the desired self image and brand image stands for the actual image, held by the visitors. Brand positioning is the attempt to improve the congruency between identity and image (Pike, 2012).

### 3.3.3. Destination image and destination identity

Destination branding and destination image are related in a sense that the purpose of branding is to build a positive image that provides the destination with competitive edge (Cai, 2002). Destination image is commonly defined as “the sum of beliefs, ideas and impressions that a person has of a destination” (Crompton, 1979, p. 18). Researching the destination image began in the 1970s, when Hunt (1975) studied the role of image in tourism development. Now destination image is considered one of the most studied areas in tourism research (Ekinci & Hosany, 2006).

It is widely accepted (Gunn, 1972; Fakeye and Crompton, 1991) that there are three types of images individual can have about a destination – organic, induced and complex. An organic image is based on information from non-tourism sources such as books and media, whereas induced image is derived from tourism specific information, such as brochures, websites and marketing campaigns. The difference between the two types is that a person could have organic image, even though he/she has no intention to travel, while when the desire to travel arises individuals seek travel information and thus hold an induced image (Hanzae & Saeedi, 2011). Complex image can be derived as a result of direct experience of the destination (Fakeye and Crompton, 1991).
Furthermore, Gunn (1972), supported later by Baloglu and MacCleary (1999) and Beerli et al. (2002), defines destination image as a sum of cognitive and affective beliefs that visitors have of the destination. The cognitive component represents the belief and knowledge about the physical features of the destination and the affective refers to the feelings towards the destination’s attributes (Baloglu and MacCleary, 1999). Gartner (1993) however in a previous study states that image is formed by three components – cognitive, affective and conative (Cai, 2002). The third component conative refers to decision to visit or make recommendations to others to visit. Gartner’s typology is similar to Keller’s typology based on three types of associations – attributes, benefits and attitudes.

Attributes are descriptive features, that characterize the destination and correspond to Gartner’s cognitive component. Benefits represent personal value and meaning attached to the attributes and thus communicates to affective level. Finally attitudes, which represent overall evaluations and basis for actions and behaviour, match the third, conative level in Gartner’s typology.

What distinguishes the brand image from the brand identity is that identity is created by the sender, while image is perceived by the receiver (Kapferer, 1997). Brand identity provides a direction, purpose, and meaning for the brand and is central to a brand’s strategic vision and the driver of brand associations (Aaker, 1996). The brand image and brand identity have reciprocal relationship.

Tourists build an image of the destination based on the projected from the destination identity and destination marketers establish brand identity based on their knowledge about tourists’ image of the destination (Qu et al, 2011).

Brand personality is defined by Aaker (1997, p.347) as “the set of human characteristics associated to a brand”. When applied to destination these perceptions of destination personality can be influenced from direct or indirect contacts visitors have with the destination. As customers select brands with satisfactory to them personalities (Aaker, 1999), the concept of brand personality is considered significant to understand and employ in destination branding. Ekinci and Hosany (2006) suggest that destination personality can be used for building destination brands, understanding visitors’ perceptions of destinations, and creating a unique identity for tourism places by developing strong emotional ties between consumers and brands, thereby resulting in greater trust and loyalty (Fournier, 1998).

Gartner’s image components

Cognitive

Affective

Conative

Keller’s types of association

Attributes

Benefits

Attitudes

Figure 15: Garner’s and Keller’s typologies. Source: Cai (2002)

### 3.4. Positioning

#### 3.4.1. Definition and key concepts

Positioning is defined as “establishing and maintaining a distinctive place in the market for an organisation and/or its individual product offerings” (Lovelock, 1991, p. 110). Its purpose is to create certain image in the minds of the potential customers (Dimanche & Sodja, 2007; Eraqi, 2007). Positioning is however more than just image creation. It aims to establish the image and create a competitive edge to the brand, product or destination (Hooley, Saunders, & Piercy, 2004).

The positioning concept was first introduced by Jack Trout in a article published in Industrial Marketing Magazine in 1969 and then popularized by Al Ries and Jack Trout in their bestseller book "Positioning - The Battle for Your Mind", first published in 1981. The main concepts in their theory are: (Ries & Trout, 2000)
• Positioning is not what you do with the product. The positioning is what you do with people's minds, i.e. you position the product in people's minds.
• Positioning is an organized system for the detection of free slot in the consumer's mind. This means that advertising communication can be place only at the appropriate time and under appropriate conditions.
• In the era of positioning is not enough to invent or discover something. This may not even need. It is important to be first to enter into the mind the user.
• If you are not the first, which takes place in the minds of user, then you have a positioning problem.
• You can establish your product or brand in the customers’ minds by finding a gap and filling it up.

Al Ries and Jack Trout argue that companies could not hope for success, if not position their products clearly in their customers’ minds. They also claim that customers have a ladder for each product category in their minds and establish possible suppliers on this ladder for 1st, 2nd and 3rd position. This is an opportunity for a company to position themselves, even if not always on the first place (Blythe, 2006). Furthermore in their book Ries and Trout (2000) state that the concept of positioning is not only applicable to a brand but also to a company, service, person, or place. Additionally the process of positioning is applied in respect of consumer products and services, business to business relationships (Keller, 2001); marketing of hotels (Bramwell & Rawding, 1996); images of regions or countries as tourism destinations; as well as in political campaigning (Ries & Trout, 2000). This is consistent with the broad concept of the product, which can be defined as physical goods, service, place, person, or idea (Kotler, 2000).

Jobber (2004) further contributes to the concept of positioning by defining the key factors to a successful positioning. Those are:

• Clarity – The positioning must be clear in terms of target market and differential advantage.
• Consistency – To break through noise of different ads attacking customer's mind daily, a consistent message is required.
• Credibility – Differential advantage that is chosen must be credible in the mind of the target customer.
• Competitiveness – The differential advantage should have a competitive edge and should offer something of value to the customer that the competitors cannot supply.

The greatest challenge in positioning is to create a message that can “cut through the noise of competing places offering similar attractions and be noticed by the right audience, for the right reasons, at decision time” (Pike, 2012). Therefore the narrow focus is considered to be the heart of positioning.

Furthermore Kapferer (1997) states that there are four questions to be asked when creating a positioning strategy, that can ease the positioning process.

1. Why? –Refers to the brand promise and consumer benefit aspect.
2. For Whom? –Refers to the target aspect.
3. When? –In what occasions will the product be consumed?
4. Against Whom? –Who are the main competitors, what clients/customer the organization thinks they can conquer?

"Effective positioning is the act of linking products and services to the solutions that customers seek." (Jobber and Fahy, 2009), therefore the positioning process should be preceded by segmenting and targeting the right markets. This idea is also supported by Kotler, according to whom “the formula - segmentation, targeting, positioning (STP) - is the essence of strategic marketing." (Kotler, 1994, p. 93).
As mentioned earlier the concept of positioning can be applied not only to product or brand, but also to a place. Since the focus on the present work is positioning of a destination, the specifics of destination positioning process will be discussed.

### 3.4.2. Destination positioning

The positioning of a destination is the process of establishing a distinctive place of that destination in the minds of potential visitors (Gartner, 1989). As destinations consist of diverse mix of features and not all can be included in the positioning, decisions should be made about which attributes are important (Pike, 2012).

The positioning process consists of three steps, according to Kotler et al. (2006):

1. Identify the set of possible competitive advantages upon which to build a position.
   These advantages could include price, high level of service and particular benefits such as a unique, additional or attractive extra service that is delivered to the customer.

2. Select the right competitive advantages.
   Choose the most unique advantage that will lead to the destination occupying a distinctive position in the marketplace by asking the following question: Which competitive advantage should the company promote?

3. Communicate effectively the chosen position and deliver to target markets.

The third step to communicate and deliver the selected position to the target segments by using a marketing mix.

Few studies (Gartner, 1989; Echtner and Ritchie, 1993; Chacko, 1996; Botha et al., 1999) have investigated the positioning as based on image creation using a number of attributes that reflect the destinations’ most attractive products. Other authors suggest that the strong attributes that are perceived as important by visitors should be first identified (Fakeye and Crompton, 1991). Furthermore according to Ibrahim & Gill (2005) examining what already exist in the customer’s mind can provide guidance and/or inform the decisions of the destination’s positioning strategy.

Positioning is not about what you do to the product, but what you do to the customer and how the customer perceives you (McDonald, De Chernatony & Harris, 2001). Positioning also concerns competition, as the customers compare in their minds how the brand is similar or different from competing brands (Blankison & Kalafatis, 2001). Therefore a destination should create a position that takes into consideration not only the destination’s own strengths and weaknesses, but also the strengths and weaknesses of competitors (Blankison & Kalafatis, 2001).

Positioning should not only rely on images, but could also create an emotional relationship between a destination and the potential visitor. The process of positioning includes both the products and services and how they are communicated to the target market. Furthermore it is important to keep narrow focus and not aiming at wider markets in order to avoid creating to fuzzy image of the destination (Aaker & Myers, 1996).

### 3.4.2.1. The positioning process

The positioning process comprises various approaches, such as effective positioning; market positioning and psychological positioning that are needed to develop an effective positioning strategy (Chacko, 1996).

- **Effective positioning**

Effective positioning is based on the marketing principles that products and services exist to solve customers’ problems, i.e. to satisfy their needs and deliver the promised benefits. The effective
positioning should promise the benefit and create the expectation that it solve the customer’s problem. Under the best circumstances the solution should be different from and better than the one offered by the competitors.

- **Market positioning**

Market positioning is defined as the process of identifying and selecting market segments. The market segments could be the existing visitors of the destination or new segments could be targeted. It is based on the knowledge of the needs, wants and perceptions of the target market together with the benefits offered by the destination. To achieve the desired market position, the following questions should be answered:

- What is important to the target market?
- How does the target market perceive the destination?
- How does the target market perceive the competitor?
- What attributes should the destination use to differentiate itself in order to make the best use of its limited resources? (Kotler et al. 1996).

- **Psychological positioning**

Psychological positioning employs communication to convey the destination’s identity and image to the target market. It converts the customer’s needs into images and positions a destination in the visitor’s mind. Psychological positioning is a strategy employed to create a unique image of a product with the objective of creating interest and attracting visitors (Kotler et al., 1999). As it happens only in visitor’s mind it does not need any effort from the marketer, but as failure to select a position in the marketplace, to achieve, and to hold that position may lead to various consequences, such as the visitors perceiving the destination in undesirable way. It is distinguished between objective positioning and subjective positioning.

  a. **Objective positioning:**

Objective positioning aims to create an image about the destination that reflects its physical characteristics; what actually the destination is and what exists there. If a destination has some unique feature, that feature may be used to objectively position the destination, to create an image, and to differentiate it from the competition. Consequently the positioning is less successful if the feature is not exceptional, thus one of the first rules of effective positioning is uniqueness.

  b. **Subjective positioning:**

Subjective positioning reflects the image not of the physical aspects of the destination, but what is perceived by the tourists, their mental perceptions. These perceptions may not necessarily reflect the true destination’s physical characteristics and could differ, e.g. visitors could perceive the destination in different ways, depending on their experiences.

Aaker & Shamsby in Chacko (1996) propose the following five approaches to the positioning process:

1. Positioning by Price Value – International destinations are not usually positioned on the basis of price because lower prices may be perceived as connotation for lower quality. However offering great value for the money strategy can be effectively utilized.
2. Positioning with respect to use or application – Here a destination is positioned based on the reasons for visiting it, e.g. beach or ski holiday, MICE, sports, etc.
3. Positioning according to the users or class of users – In this case, positioning features the people who should visit the destination – seniors, young couples, business travellers, etc.
4. Positioning with respect to a product class – This technique is often used to associate a destination with experiences that are extraordinary and/or unique. For example, “If you looking for an ideal meeting place, here’s one that’s close to heaven” for Israel.
5. Positioning vis-a-vis the competition – This approach is used when it is necessary to meet the competition head-on; to bring out differences between destinations. This approach is not used frequently in international tourism destination marketing since it may involve negative statements about another country or region. However, it is regularly employed in product and services marketing.

Furthermore Bill Baker (2007) in his book “Destination branding for small cities” suggests a simple model of destination positioning. It consists of three dynamic elements: the needs of the target customers, destination strengths (both tangible and intangible) and competitor strengths. The proposed model is shown in figure 16. The strongest positioning is in the centre of intersection of the three circles, as shown with the arrow.

Figure 16: Opportunity modeling for optimum positioning. Source: Adapted from Baker (2007, p.91)
4. Methodology

4.1. Introduction

This chapter outlines the methodology used to reach the research objectives. The methodology employs both primary and secondary research and further in primary research quantitative and qualitative methods have been used. The employed qualitative research methods are pointed out, as well as the process of sampling. The chapter provides an overview of the used methods for research, as well as methods employed for data gathering and data analysis and also addresses the concept of triangulation.

4.2. Methodology overview

Table 6 is aimed as summary and overview of the used methods, research questions and achieved results.

<table>
<thead>
<tr>
<th>Research question</th>
<th>Used methods</th>
<th>Answer can be found in</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is golf tourism and what is the profile of the international golf tourist?</td>
<td>Secondary research – desk research</td>
<td>Chapter 2 Background analysis</td>
</tr>
<tr>
<td>What is destination positioning and how it can be applied?</td>
<td>Secondary research – literature review</td>
<td>Chapter 3 Literature review</td>
</tr>
<tr>
<td>What are the golf travellers looking for when choosing a golf trip destination?</td>
<td>Primary research, quantitative method – Questionnaire-based survey on golfers</td>
<td>Chapter 5 Results, only partly</td>
</tr>
<tr>
<td>What are destination`s strengths?</td>
<td>Secondary research – desk research &amp; primary research, qualitative method – in-depth interviews</td>
<td>Chapter 2 Background analysis and Chapter 5 Results</td>
</tr>
<tr>
<td>What are the main competitors for Bulgaria in terms of golf tourism?</td>
<td>Primary research, qualitative method – in-depth interviews</td>
<td>Chapter 5 Results</td>
</tr>
<tr>
<td>What steps have to be taken in order to position Bulgaria as golf destination and to receive higher numbers of golf tourists?</td>
<td>Analysis of the qualitative and quantitative data and elaboration on recommendations</td>
<td>Chapter 5 Results and Chapter 6 Conclusions and Recommendations</td>
</tr>
</tbody>
</table>

Table 6: Methodology overview. Source: Own illustration

4.2.1. Secondary research

In order to get insight into the topics of golf tourism and branding secondary research has been conducted, as secondary and primary data have been used. As “the review of literature ...indicates the state of knowledge on a topic and is a source of, or stimulant for ideas...” (Veal, 2011, p.124) gaining broad overview of the research area is essential.

Secondary data describes this type of data that has already been collected for any other purpose, but can be used a second time (Veal, 2011, p.186) and comprise sources such as articles in journals, books and websites (Saunders et al., 2009). Moreover information from newspapers, magazines, blogs and social media website has been used in the present research. Furthermore primary sources,
such as KPMG and Mintel reports, conference proceedings and theses have been consulted in the desk research process. Secondary research however can often only provide limited information (Saunders et al., 2009) therefore primary research has been used.

### 4.2.2. Primary research

Consequently, primary research can be described as “new data specifically collected in the current research project” (Saunders et al., 2009, p. 598).

In the current research primary methods employed are qualitative and quantitative methods, where an important clarification needs to be given here. The initial attempt was to conduct both types of research, but due to extremely low response rate in questionnaire-based surveys (less than 1%), the research process continued with employing only qualitative research methods. Nevertheless results gathered from questionnaires also are presented.

#### 4.2.2.1. Quantitative vs. qualitative research

The difference between quantitative and qualitative methods is the most discussed issue in leisure and tourism research and it is now widely accepted that the two approaches complement one another (Veal, 2011). Differences between the two methods are outlined in the following paragraphs.

Quantitative research is based on meanings derived from numbers, the data collection results in numerical and standardized data and the analysis is conducted through the use of diagrams and statistics. In comparison qualitative data is based on meanings expressed through words, the data collection results in non-standardized data requiring classification into categories and the analysis is conducted through the use of conceptualization (Veal, 2011). The following table further summarizes the difference between the two approaches.

<table>
<thead>
<tr>
<th>Concepts usually associated with quantitative method</th>
<th>Concepts usually associated with qualitative method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of reasoning</td>
<td></td>
</tr>
<tr>
<td>Deduction</td>
<td>Induction</td>
</tr>
<tr>
<td>Objectivity</td>
<td>Subjectivity</td>
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<tr>
<td>Causation</td>
<td>Meaning</td>
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<tr>
<td>Type of question</td>
<td></td>
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<tr>
<td>Pre-specified</td>
<td>Open-ended</td>
</tr>
<tr>
<td>Outcome-oriented</td>
<td>Process-oriented</td>
</tr>
<tr>
<td>Type of analysis</td>
<td></td>
</tr>
<tr>
<td>Numerical estimation</td>
<td>Narrative description</td>
</tr>
<tr>
<td>Statistical inference</td>
<td>Constant comparison</td>
</tr>
</tbody>
</table>

Table 7: Difference between quantitative and qualitative methods. Source: Burney, 2008

#### 4.2.2.2. Qualitative research

The qualitative approach to research is generally not concerned with numbers but typically with information in the form of words, images and sounds. Furthermore qualitative research methods make it possible to gather a relatively large amount of information about the research subjects (Veal, 2011). Therefore no claim is made that the sample studied is representative of a larger population.

Furthermore results of qualitative research are more understandable to people who are not statistically trained (Saunders et al., 2009). According to Peterson (1994) one of the potential uses of qualitative research is “to develop new product, service or marketing strategy ideas – the free play of attitudes and opinions can be a rich source of ideas for the marketer”. (Veal, 2011, p.236) Therefore
qualitative methods have been employed for this research in forms of in-depth interviews, hermeneutics and participant observation.

Semi-structured in-depth interviews were conducted with general managers, owners and marketing & sales managers of the golf resorts, as well as with representatives of the BGA between October 20th and November 29th. List of all participants interviewed can be found in appendix A. The nature of the interviews can be described as semi structured, as certain guideline for the interview was prepared, but also customized questions were formulated, depending on the interviewee and circumstances. During the conversations in the personal interviews several topics were arising which then led to further spontaneous questions. The interviews duration was between 30 and 120 minutes and they took place in several locations, outlined on the following map.

![Map of Bulgaria with the research areas. Source: Own illustration based on Google maps](image)

To choose the interview participants purposive sampling was used, which is argued to allow selecting cases that best enable the researcher to answer the research questions and often involves working with very small samples, as the cases chosen are particularly informative (Saunders et al., 2009). Furthermore homogenous sampling was used, as all the sampling members were similar – interview participants chosen occupy managerial positions in the golf resorts or golf association. Furthermore homogenous sampling is believed to enable the researcher to study the group in great depth (Saunders et al., 2009). Additionally snowball sampling was used, as the interview participants were asked to identify further cases. This technique was used mainly because the researched sample is closed society and successfully contacting its members without recommendations is not easy.

Although the numbers of interviews can be considered quite small and thus not representative, “key informant-based studies... are typically characterised by small samples that reflect the limited
population of sufficiently knowledgeable respondents” (Dinnie, et al, 2010). Furthermore golf development in Bulgaria is still in its infancy, golf courses are only 8 and a relatively small amount of people are engaged in managerial level in golf.

In addition a hermeneutic approach has been adopted, which is referred to “analysis and interpretation of the content of published text... (or) content analysis, when is quantitative or hermeneutics when the analysis is of a more qualitative nature” (Saunders et al., 2009, p.135). Text includes more than just written word, it also encompasses advertising material, websites, pictures, posters, recorded music, film and television (Saunders et al., 2009). Therefore wide variety of websites have been scrutinized, such as Facebook, Youtube, Flickr, Tripadvisor, the home pages of the golf courses and various golf dedicated web pages; as websites are the second most solicited source for initial information gathering (Balakrishnan, 2009). Furthermore various magazines and newspapers were analyzed.

Participant observation has been employed, as researchers of tourist destinations are themselves considered as visitors of those destinations (Veal, 2011, p.246) and mostly the interviews were conducted within the golf resorts.

4.2.2.3. Quantitative research

The quantitative approach to research involves numerical data, studies large numbers of people and often uses computers to analyze the data. For this research a questionnaire-based survey was adopted, as they are “the most commonly used method in leisure and tourism research” (Veal, 2011, p.127). The questionnaire was developed based on both adopted and adapted questions from other questionnaires. A set of closed questions was included, such as list of questions with options to select, ranking questions and also open ended questions, which were used to gather qualitative data (Veal, 2011). Surveys were distributed both on site and online. The onsite surveys were conducted in end October, as the period was chosen because of major championship taking place in this period of time. Online surveys were sent to a database of 3000 golfers, provided by the golf courses. In both cases extremely low response rate was noted. Onsite golfers often refused to fill out the survey and from the online survey only 1 result came back. Due to this fact the attempts to conduct quantitative research were ceased. Further facts that complicated conducting onsite surveys were the beginning of the low season for golf vacations and thus low number of tourists and the closure of the airport that service the destination Cape Kaliakra. Despite the low number of responses the outcomes of the questionnaires are analyzed in the results chapter.

4.2.3. Data analysis method

The qualitative data was analyzed using emergent themes (Veal, 2011) or as some authors claim the themes were rather created by the author (Bailey, 2006). Themes are defined as recurring patterns, topics, viewpoints, emotions and concepts (Veal, 2011). Colour coding was applied to distinguish between the different themes and visual representations in means of tables and drawings were further used to facilitate and clarify the analysis.

4.2.4. Triangulation

Triangulation is referred to the use of more methods to focus on the same phenomenon. Four different ways of triangulation have been identified (Duffy, 1987:131, as cited in Veal, 2011), namely

- Analyzing data in more than one way
- Using more than one sampling strategy
- Using different interviewers, observers and analysts in one study
- Using more than one methodology to gather data

Thus it can be claimed the triangulation method has been employed in the present paper, since several sampling strategies are used and different qualitative methods are employed. Furthermore the use of triangulations guarantees higher validity and reliability of the results (Bailey, 2006).
5. Results

5.1. Introduction

This chapter presents the research findings. It includes the results from the quantitative research, although the results are not analyzed in detail and do not aim for high validity, due to the extremely low response rate, but are still presented in the following chapter. Further the analysis goes into detail in presenting the qualitative research results, such as interviews and analysis of the image of Bulgaria projected in social media, print media and several videos. The interview results are arranged into several sections, based on the themes touched upon –

- The Golfer, which aims to identify what is the profile of the golfers in Bulgaria, both locals and tourists, what are their travel motivations and what are the specific target markets;
- The Destination – identifies the destination strengths and weaknesses in terms of golf tourism;
- The Stakeholders – gives details on the competition and collaboration;
- The Advertising aims to depict the marketing efforts to position Bulgaria as golf destination;
- The Future focuses on the future plans and the perceived image.

5.2. Survey results

The results of the survey show that the prevalent golf players are male, aged 35-45, married with children. They occupy managerial positions, with the most mentioned positions being engineer, economist, consultant, manager or owner. 100% have college or university degree. Mostly guests come from Romania, UK or Germany and all of them state this is not their first golf vacation. The countries respondents usually go to for golfing are Bulgaria, Turkey, Egypt and Spain.

According to the survey results, the most important features when choosing a golf vacation are (in this order) good golf course, quality and service in the destination and nice climate, ranking evenly with additional services, such as spa, sport facilities and others. Furthermore respondents consider spa & wellness and beach as the additional most important features when choosing golf trip.

Analysis also reveal that golfers prefer the shoulder season – spring and autumn for golf vacation, but many apparently avid golfer state they prefer playing golf all year round. Strong preference towards hotel accommodation can be observed. Furthermore golfers mostly stay one to five days while on a golf trip and play two to four days. Generally golfers state that they are repeat visitors to either Bulgaria or Turkey, which supports the widely accepted idea of Turkey as Bulgaria biggest competitor in terms of golf tourism.

Bulgaria is chosen because of its good quality of the service, price and golf courses (all items ranked evenly in the responses). All of the respondents state they will consider coming to Bulgaria again, mainly because they are pleased with the location, facilities and staff and because of proximity, but still some of the voices call for better quality of the service, wider choice in the dining options and entertainment.

It is very important to be stated that this analysis has no aim to be representative, because the response rate was extremely low and thus the sampling size is undersized. This section only intends to present the scarce results of the conducted survey.

5.3. Interview results

5.3.1. The Golfer

5.3.1.1. Profile
Golfers in Bulgaria tend to fall into two categories – golf tourists and local golfers, which are quite different in some aspects. The statistics of EGA shows that Bulgaria has 166 registered golf players, but according to other sources this number rises to 200, 500 or even 700 (which includes the Bulgarian players and the expats). In fact every club has its own statistics and estimations are mainly based on the number of golfers participating on tournaments (Underwood, 2011). With the statistics on golf tourists the situation is even more complicated, as every club has its own database with members, golfers and non golfers visited the resort, Bulgarians, expats, etc. and the government does not have statistics on golf tourists visiting the country.

The average golfer tourist appears to be male, aged 30-50 and comes from Scandinavia, UK, Germany, Romania, and some also from the Netherlands, Czech Republic and Macedonia (Slavova, 2011, Cosanova, 2011, Stoychev, K, 2011). Golf tourists, especially the big male groups of avid golfers tend to choose the shoulder months for their golf trip; but some also like to combine the holiday with their families and the game of golf and thus travel in the summer (Velkova, 2011). Therefore golf resorts aim to cater for different target markets by providing variety of entertainment options, such as game rooms, DJ parties, folk music with theme evenings, different sports, spa & wellness center. According to Stoimenova (2011), the older golfers prefer the shoulder months, because they enjoy not too hot weather, peace and quiet time.

Local golfers are mostly over their 30ties, slightly younger than the golf tourists, CEOs, businessmen, investors and ambassadors and expats (Ikonomov, 2011). In Bulgaria golf has many prejudices – that it is very expensive, which is partly true, because the courses are private, and thus the investments in them are huge, as in most countries golf is widely supported by the state and there are many public courses (Stoychev, M, 2011). Moreover due to the lack of available support from the government and low standard of the Bulgarians golf indeed is rather expensive. Different programs initiated by the golf clubs aim to change that, e.g. Introduction to golf is aimed to introduce the sport to the mass market; some clubs succeed and managed to motivate to try more than 2000 people just for the last summer and attracted few new members this way (Velkova, 2011). Furthermore Golf for free campaigns are planned to launch next year, which aim to create more players (Ikonomov, 2011). Generally all the golf courses aim to depict the game as accessible for all people, to popularize it through junior camps and different events and to break down the prejudices golf is only for rich and elderly. Evidently they are succeeding, because interviewees report more young and middle class golfers since last year.

The nationality of the golf instructor tend to play role for the nationality of the tourists too – in Pirin Golf the Dutch pro attracted some of his clients from the Netherlands (Cosanova, 2011), German tourists visit Thracian Cliffs, partly because of the German General Manager there (Stoimenova, 2011) and Romanians like not only the proximity of Lighthouse Golf, but also the Romanian golf pro Demis (Papillon, 2011).

Proximity tends to affect the choice of the golfers – Macedonians and Greeks visit Pirin golf due to this reason and Romanians drive for the weekend to Cape Kaliakra, moreover they do not have big golf courses in Romania and they have more than 1000 players, while Bulgaria has only around 300-400 (Papillon, 2011).

The "real" golf tourists are believed to visit mainly Cape Kaliakra, the northern Black Sea Cost, where they have undisputedly a golf destination – concentration of three golf courses, situated into resorts, with all the surrounding amenities – villas and apartments for rent, hotel accommodation, spa, bars and restaurants, etc.; and the golf courses around the capital are mostly frequented by locals, expats or vacationers, based in Sofia (Tchouklev, 2011 ; Velkova, 2011; Cosanova, 2011; Stoychev, K, 2011; Underwood, 2011). Sofia region could be a destination for long weekend, and the golf course of Sliven does not fit in terms of location, as Ihtiman could fit in, because it is close to the capital, but it has local design, and one of the first things golfers look at is who designed the golf course; the name
of the designer means a lot (Stoychev, M, 2011). Golf tourists mostly frequent Cape Kaliakra and only very small percentage of absolute dedicated golfers could come and play on both destinations.

Furthermore golf tourists are believed to be travelers, who like to visit new destination and there is hardly any pattern for the tourists who come to Bulgaria – they tend to travel everywhere, but still Spain or Turkey are the most frequented destinations (Tchouklev, 2011). Romanian golfers are considered to be very loyal, as some visit the Cape Kaliakra every weekend and thus the clubs there heavily rely on them (Stoychev, M, 2011). Moreover in the shoulder months (March to June and September to November) many Finnish and Swedish frequent the destination, as the season in Scandinavia is too short and in the summer months golfers prefer to play in their own country, as the memberships in their clubs are very expensive.

5.3.1.2. Travel motivations

Golfers always look for new destinations and as there are no two exactly the same golf courses in the world they like to travel and try to new courses. They are attracted by the idea of visiting new location, which features beautiful nature, quality golf courses, nice food and all at reasonable prices (Tchouklev, 2011). Besides the quality of the golf courses, the price and the logistics are very important to them. Furthermore the brand, the name of the designer is important, as it gives the certainty, that the golf course is going to be good and worth the travel and the money (Stoychev, M, 2011).

Some argue that golfers mostly look for privacy and quiet time, they like to spend some time within the group and talk about golf, they do not like loud animation and prefer silent games (Slavova, 2011). Others disagree and state that golfers like to be entertained after a good game of golf and want to go to a bar, dance club and enjoy nightlife (Velkova, 2011). According to some (Cosalnova, 2011) both statements are true, they only refer to different target groups – big male groups coming in the shoulder months prefer entertainment, family holidays, when the game is just part of the experience people need to relax and seek for comfort, spa facilities, beach and family time enjoying the nature and beautiful views.

5.3.1.3. Target markets

The target markets are principally Scandinavia, Germany, Romania and UK, but also the Netherlands, Russia, Czech Republic.

Scandinavia has the highest golf participation rate in Europe and short summers, which results in many golfers and lack of enough golf courses. Germany also has more than 610 000 players and “only” 708 courses, and as one golf course can fit up to 600 members, golf courses there result to be overcrowded (Tchouklev, 2011). This great market potential is assessed by the Bulgarian golf managers and thus they aim their marketing strategies at those markets. Furthermore Germans do travel very frequently and there is strong German presence in the holiday market in Northeast Bulgaria. Golf is tradition in UK, which combined with the wanderlust of the golfer result in British being targeted as potential visitors to the golf resorts in Bulgaria (Slavova, 2011).

Romania is local market for Bulgaria, moreover there are more Romanian golfer players than Bulgarian golfers, and the golf courses in Romania are just few, thus ½ of Cape Kaliakra’s tourists come from Romania, and not only for golf, but also for MICE tourism, beach holidays and weekends (Papillon, 2011). Although some Macedonians visit Pirin Golf, due to its proximity, Serbia and Macedonia are not considered developed markets for golf yet and thus the interest to market these neighboring countries is low (Tchouklev, 2011; Cosanova, 2011).

Czech Republic and Poland could be target market, as they have tradition to come to Bulgaria for holiday, thus they are expected to be interested in combining golf and holiday, but as golf there is developing faster, than in Bulgaria, the visit of avid golfers is rather rare (Tchouklev, 2011). The Dutch market is also targeted, as some golf courses feature Dutch pros and they attract their own clients.
Austria is also seen as target market for some (Black Sea Rama, Thracian Cliffs) as Varna has direct flight connections with Vienna, there are more than 100 000 golfers and 150 courses in Austria and the Austrian national team has its training camps in Bulgaria. What hiders the Austrian golfers is the extremely bad image of Bulgaria projected by their television – of overbuilt Black Sea coast and huge corruption (Stoychev, M, 2011).

The Russian market can be interesting in the future as Russians develop high spending sports, such as tennis; there is possibility to attract them. They can be attracted by holiday tourism, where golf is an add-on or with possibilities to buy properties on golf resorts, where they get attracted by the game (Tchouklev, 2011). Some however argue that Russia will be rather competitor in the future, as they build new golf courses fast and golf spreads out quickly among Russians (Velkova, 2011).

Bulgarians, as well as Russians and Romanians are mainly targeted as holiday tourist, who come for beach holiday or skiing and play out of curiosity, as for some golf is even like exotic attraction (Stoimenova, 2011).

According to the Secretary General of BGA however targeting specific markets depends mostly on the availability of flights, as golfers see Bulgaria as close destination and thus do not plan to travel long and have to change flights. The rule in golf is that the course should be 60-70km from the airport, i.e. one should not have too long transfers (Underwood, 2011).

### 5.3.2. The Destination

#### 5.3.2.1. Strengths

Bulgaria’s advantage as golf destination is considered to be that is still new and undiscovered destination, that offers beautiful nature, peace and quietness, good quality of the golf courses and possible combination of golf and ski holiday or golf and beach holiday, as well as golf and sightseeing nearby the capital. The temperate climate in Bulgaria allows a golf season of 10 months, with more than 250 sunny days. The location of the country is good – in a crossroad on Europe and Asia, East and West and it is close to the target markets. The golf courses are only few, but are of very good quality, of higher the average level for Europe, some are unique, signature courses of famous designers (Stoychev, K, 2011; Cosanova, 2011).

Furthermore the hospitality of the people, the quality of the food, the good wines and reasonable prices make the destination attractive. Additionally as Bulgaria is new and the local golfers are only few, the golf courses are not overcrowded and busy, which allows the golfers to play peacefully. Moreover now traditional destinations now are becoming more expensive, destinations such Spain, Portugal and even Turkey, which is very successful in the last couple of years and thus Bulgaria now has big opportunity to be on the market place, as it offers reasonable prices (Underwood, 2011).

#### 5.3.2.2. Weaknesses

Bulgaria has only few golf courses and they are dispersed throughout the country; in golf to fly 3000 km and play at only one course is almost impossible, thus for now Cape Kaliakra is considered to be the destination for golf tourists. It is also argued, that there are not enough surrounding facilities (Tchouklev, 2011). Additionally the lack of governmental support slows down the development. The lack of enough courses is an obstacle for attracting tourists; Bulgaria needs another 4-5 courses to attract journalists and media which can make Bulgaria famous. Furthermore the number of golfers in Bulgaria is low and the investments are big, the maintenance is expensive and the return of investments takes longer, normally it takes 5-6 years, in Bulgaria – up to 10 (Stoychev, M, 2011). Although Bulgaria boasts long season, it is not year-round destination, because when the European golf course are closed in winter time, Bulgaria cannot cater to the golfers.
The accessibility is still considered the main obstacle; the lack of flights hinders many tourists, as the closest to Cape Kaliakra airport does not support enough flight connections to major European cities. Furthermore the airport is currently closed for renovation and although the high season is to its end, the resorts lost many tourists in 1.5-2 months. The lack of infrastructure and appropriate signage on the main roads is also seen as a hindrance. The golf resorts are beautiful and well-maintained, but the road to there is horrible. Although geographically at your fingertips, Bulgaria results to be terribly far away due to the bad accessibility. To Scandinavia, where the main target market is located for many, there is lack of any flights at all in the shoulder months, which are the high season for golfers there. Despite the reasonable prices for golf and accommodation however the lack of regular flights result in very high price for the transportation and the price of the golf packages rises up to the levels in Spain, Portugal and Turkey (Underwood, 2011).

Additionally the human resources are seen as problematic and they need serious improvement according to the interview participants. Staffs generally need more training and education in service. Underwood (2011) however sees tremendous development as compared to 5-6 years ago, where local people knew nothing about golf tourism. Furthermore Bulgaria has very bad image in some marketed countries, due to local media reportages about overbuilding in the summer resorts and high levels of corruption.

### 5.3.3. The Stakeholders

#### 5.3.3.1. Competition

Turkey is undisputedly the biggest competitor of Bulgaria, according to all the respondents. Some of the reasons are that Turkey has nice climate and beautiful nature and it is year-round destination; other reasons feature the concentration of 14 courses around Belek, additionally 50 hotels, good infrastructure, regular flight connections and the governmental support and policy in golf development (Tchouklev, 2011). Moreover Turkey boasts very high quality of the service, has become popular destination in the last few years and is considered cheaper, same price of slightly more expensive than Bulgaria from different interviewees.

Turkey however starts to get overcrowded and golfers need to book tee time; something that golf pros do not favour; as in Bulgaria tourists can still play with their own pace and enjoy the game (Slavova, 2011). Furthermore the summer months in Turkey are sometimes unbearably hot, which is not the case in Bulgaria. According to Underwood (2011) the peak season in Turkey is autumn and spring, as in Bulgaria is April to October, so there is no direct competition in the summer months.

Furthermore Bulgaria is situated closer than Turkey to Western Europe, golfers can combine golf with holiday, which is difficult in Turkey, due to the heat in the summer and Bulgaria is believed to overmatch Turkey by offering family type of holiday and competitive prices (Tchouklev, 2011). Spain and Portugal are not considered as direct competitors because they are too high class. By some interviewees Russia is also considered to become competitor in the future, as many golf courses are being built there now (Velkova, 2011).

Czech Republic is considered by some as both potential target market and competitor, as Czechs have a positive attitude towards Bulgaria, because they are used to come for summer holidays on the Black Sea Coast and moreover there are many golfers in Czech Republic, but at the same time golf there is developing fast, new courses are being built up and the infrastructure there is better and the courses are more and better (Stoychev, M, 2011).

According to Stoimenova (2011) it is hard to talk about competition, as Bulgaria is very new destination, it is now developing now in terms of golf tourism and hardly has any image yet to compete with other destinations.
As for in between the golf clubs no competition is believed to exist – there is no real competition, the courses should help each other. Competition is only in terms of memberships (Ikonmov, 2011). Moreover the two destinations – Sofia and Northern Black Sea Coast have different target markets; even the three golf courses in Cape Kaliakra are different and cater for diverse class of golfers, but they also supplement each other, as hardly any tourist will come just to play on one course only.

5.3.3.2. Collaboration

The 3 golf courses in Northeastern Bulgaria seem to work the closest together by promoting themselves together as destination Cape Kaliakra, participating together at fairs and travel markets, by keeping a shared system for the golfers’ handicaps, exchanging buggies when needed and organizing tournaments together (Slavova, 2011). The two closest to the capital golf courses also try to work together and create package deal for tourists staying in Sofia. This could be good opportunity to differentiate the tourism product of the capital and offering more free time options for visitors. Courses around Sofia mainly aim at promoting the sport and getting local golfers, which is also important. They can hardly form any destination, as they are too dispersed. Sofia might be very successful though, because of the nightlife and entertainment options there, which golfers like (Stoychev, M, 2011).

The golfer managers seem to be communication all the time, to keep up and try not to organize tournaments at the same time for example. The golf courses in the two destinations generally are keeping in touch, but they have very different target markets; even the Bulgarian golfers mainly play around Sofia in the shoulder months and on the coast in summer, when they combine golf with summer holiday. As a whole the collaboration efforts are considered as weak (Stoychev, K, 2011) and despite the resorts in Cape Kaliakra, every golf course stand for itself.

Moreover golf managers have contracts with hotels in the nearby resorts, which offer golf to their guests; they even have promoters in hotels and bars in another big summer holiday resort, which is another 150km south from the golf courses (Tchouklev, 2011).

The lack of governmental support is seen as one of the main obstacles in the golf business. The government needs to give financial, regulation; policy and infrastructure help and work on strategy for golf tourism which is now missing, together with any statistics and official data on golf in Bulgaria. The reason for lack of support is lack of education and vision, many prejudices and no awareness about the benefits golf can bring to the economy. The government is not hostile though; it does not obstacle the development, but it does not support it either. One of governmental plans is the attempt to make a team for the Olympics in 2020 (Stoychev, K, 2011).

Worldwide golf development is funded by the state, which is not the case in Bulgaria, where even the participation and the stand at IGTM in Belek was sponsored by the participants themselves. In Turkey for example the government supports financially the development of golf tourism and the advertising campaigns and consecutively the country enjoys mass and broad advertising. The hope among the golf community is to convince the state that golf is meaningful and useful and can bring money into the economy. Moreover many believe that the government first needs to help in promoting the country and establishing good image and only than advertise golf (Stoychev, M, 2011).

The flights are the biggest challenge afore the development of the golf tourism and the business expects support from the government. There is possibility to reopen an old airport, even closer to the Cape Kaliakra destination, which can develop the whole region by bringing many tourists that can boost also the golf tourism. The reopening of the airport is not sure yet, no work has been done. Furthermore the airport is smaller and could offer lower fees than Varna airport, which is important to bring more golfers, as they are price sensitive to anything but golf, i.e. prefer to spend their money on golf, rather than on expensive business class flights.

The role of the Bulgarian Golf Association (BGA) is to create and adapt international rules in golf, to maintain the professional attitude in competitions, to help juries and give ratings of the holes and
more important – to support and promote golf in Bulgaria, prepare Bulgarian players, organize junior academies, etc. (Stoychev, K, 2011). It cannot give financial support though, but it helps in establishing relationships within the golfing world – EGA, IGF; over the last 5-6 years, the BGA has managed to get Bulgaria in the forefront of development of South-eastern Europe; “when we talk about golf in this region, we talk about Bulgaria mostly” (Underwood, 2011)

5.3.4. The Advertising

In terms of marketing golf managers widely use tour operators, as the TOs have already structure for advertising, connection with the clients, sell packages with flights, so it’s cheaper for the client. Those are TUI, Jahn Reisen, the two Bulgarian golf tour operators, own agencies, with which they are open to work with other agencies and many more, which often come with the golf management (as the case with Breamer Golf in Pravets). The tour operators have their own catalogues and they prepare the advertising with the logo, pictures and information provided by the golf club; as they know their markets the best. Some tourists still prefer to book with tour agencies, mostly British, German and Scandinavian tourists, as Bulgarians and Romanians still do not book at all and just show up. Some tourists also use websites as booking.com, expedia.com and HRC, where they can book their tee times (Slavova, 2011; Velkova, 2011; Cosanova, 2011).

Different marketing campaigns are often used to attract different markets – Russians and Romanians are attracted by beach and mountains; these natural features sell. British and Finnish tourists are mainly attracted by the concentration of golf courses and the presence of spa. For Bulgarians more conventional advertising campaign is used, that encompasses more features of the resort besides golf – “not to scare them away, that the resorts are for golfers only”, as Stoychev, M (2011) shares. Furthermore packages for golfers and non-golfers are offered, i.e. packages including game of golf and others including only accommodation and for visitors from neighbouring countries such as Romania and Macedonia shorter packages are offered, as they come for weekends. Additionally the advertising in the foreign media is golf related, as in Bulgaria it is directed to all, as the golfers are just few (Ikonomov, 2011).

The Cape Kaliakra project is presented with ads on airports, magazines and tour operators’ catalogues. Furthermore the Cape Kaliakra destination has strong presence in Romania as they have many golfers, but no courses, thus ads appear on billboards and business centres, in the subway and video clips, as the one shot by the Romanian national television, which features places in Bulgaria that are worth visiting. Indirect advertising is also used in form of project with TUI that includes publishing of articles in famous magazines written by golfers who explain how they spend incredible vacation in Bulgaria. Fashion 1 TV which has video clips for top hotels and restaurants in the world will start soon airing video about Lighthouse (Slavova, 2011).

Still the best way to promote the destination is the participation on fairs and travel markets, particularly when they are golf specialized. Furthermore trade shows are considered to be still strong, as many golf tourists are in the 3rd age and they still prefer tour agencies. “Fairs are very strong way to advertise, because you have direct contact with the clients; this is very concentrated ad – people come, meet you, ask questions; they also have strong echo - tour operators see us, meet us” (Slavova, 2011).

Some of the travel markets with Bulgarian participation until now are the Varna tourism forum, where golf was presented as possibility to extend the season; fair in Dobrich for MICE tourism, where the possibility for groups to organize meetings, team buildings and conferences was presented; their add-on is free golf lesson for all participants; the IGTM in Valencia last year and of course the most important is the one which just took place in Belek, Turkey, the International Golf Travel Market, where Bulgaria won the 2012 award for “Undiscovered golf destination” and where all the tour operators and golf courses were present.
Mostly the advertisings try to combine the ads presenting the resort as attractive both for golfers and non-golfers. Unsurprisingly the focus during the high summer season is put on holiday options and during the shoulder seasons – on golf. Furthermore social media, mainly Facebook is used, as golfers are believed to be very active on it (Cosanova, 2011).

Many publications in German, English, Romanian, Bulgarian and Scandinavian media are used to promote Bulgaria as destination, both golf specialized and not. Shared print advertising is used with Scandinavian golf related magazine, where the ad is shared with a tour agency. Furthermore the marketing campaign in 2011 was very strong and golf was very well presented in the Bulgarian media – women magazines, Manager; Bravacasa, Golf and Spa magazine and many more. Despite this the media coverage is lower in Bulgaria than in abroad, because in Bulgaria there are fewer golfers. Billboards are used, in the whole country, but mainly on the way to the golf courses (Stoimenova, 2011).

More advertising options include the use of indirect advertising in Bulgarian reality shows; fam trips for golf journalists, which are supposed to report about destination Bulgaria; word of mouth is reported to be very important for all the participants; video clips about golf in Bulgaria on famous websites such as Golfing world and golf pros, who work here or come here for trainings and can bring also their clients, as the case with Lighthouse Golf and their Romanian pro Demis (Papillon, 2011). Further programs include junior camps and Ladies Golf & Wine, who aim at different targets than the avid male golfers; they try very hard to make different offers and break the idea of golf as snobbish (Velkova, 2011). Another advertising option is giving awards such as weekends in the golf resort on tournaments in other countries and using the local golf courses as training camps for national teams, e.g. Austrian (Stoychev, M, 2011).

Furthermore it is important to popularize golf in the country and the attempts to do so is with campaigns for promoting golf in schools – introducing some theory about golf, information campaigns, which the golf community is expecting from the government to do. As for the clubs, they organize golf lessons for the children in the region, for a symbolic fee in order to attract more people to the game. Golf courses are even changing completely their layout in order to attract more golfers with outstanding design by top-notch designers (Ikonomov, 2011).

Customer feedbacks are widely used and recognized as a way to connect with the clients, and as the interviews show the feedback is paid attention to – i.e. wedding on the island green happened, because the customers shared their wishes namely in the feedback form.

Many admit their marketing budget is reduced, due to the crisis and due to the fact many investors wait now for their ROI. From all the above paragraphs it comes clears the golf managers try as hard as possible to use different advertising means.

5.3.5. The Future

5.3.5.1. Future

The future of golf tourism in Bulgaria is seen more as bright and optimistic. The economy starts slowly to improve, so does the purchasing power of the middle class, more local are able to play and are interested in the game. As for inquiries some notch up 100% growth for next year, compared to this year and big growth in memberships (Velkova, 2011).

New golf courses however are not planned within the next 3- 4 years, mainly due to the crisis, or more precisely the plans and ideas exist, but the money for the realization of the plans are lacking. To become golf destination however, according to many Bulgaria needs another 2-3 courses and 4-5 hotels (Tchouklev, 2011; Stoychev, K, 2011).

Growth for the future is however not expected, as the focus now is more on attracting the clients to the existing resorts. The next season is expected to be stronger, as for some of the golf resort this was the first year of actually fully functioning, some have undertaken serious renovation and others
are starting to use their full capacity now. In golf long time and many efforts are needed to promote and position the destination. 5-6 years, and in Bulgaria even 10 years are needed to develop a golf resort and to receive return on the investments, moreover green fees and selling real estate bring the ROI, and the real estate market is now in stagnation in Europe.

As practically most of the golf resorts are brand new, Bulgaria needs to promote itself first, before it continues building new resorts. Due to the slow development in the local market, the lack of enough courses to become famous and popular right away, the next push in development is seen to be in another 5 or even 10 years. A golf resort is huge investment, and people who invest in golf in Bulgaria and only a handful, so they want to see their money coming back now, before they undertake any other big investments and projects. The economic climate general is the reason for stopping the progress and slowing the development.

For the future receiving support from the government is a must, which is likely to happen, as the award made the government aware, that golf can be very profitable for the economy of the country. Working together and promoting Bulgaria as a destination is also seen as necessity and the most important thing is to cater for greater accessibility by providing regular flights to the Cape Kaliakra.

Others however rather see the future as pessimistic (Stoychev, M, 2011) as the internal market is small and cannot be relied on, the number of the tourists is low, the competition worldwide is increasing and the real estate market is in crisis. According to Stoychev, M (2011) Bulgaria should not follow Turkey’s model for golf development, because “we are going to come back to what we are trying to escape from”, i.e. make golf mass tourism. Moreover Turkey has the governmental support and more money for advertising and Bulgaria does not, so it should try to be different – small and boutique.

5.3.5.2. Desired image?

Some of the opinions how Bulgaria should be positioned as destination are: “Destination where you get more than you pay for” (Tchouklev, 2011), “Value for the money” (Underwood, 2011), “Come and play here, we offer quality golf courses in a new destination for reasonable prices” (Stoychev, M, 2011), but undisputedly many believe the image of “Undiscovered destination” can be built upon. This probably is influenced by the winning of the IAGTO award this year. Some believe the image of signature golf course destination can be positive for Bulgaria, as golfers are attracted by the idea of famous designers, and Thracian Cliffs is considered real gem, because of the location and beauty, it is unique, in Europe only few similar golf courses exist (Stoimenova, 2011). Some suggest an image of exotic destination, where new and old blend, by incorporating the new image of Bulgaria and the old reality of communism (Papillon, 2011). Furthermore Cape Kaliakra should be developed as destination, because Bulgaria can hardly be popular as destination, as the golf courses are too dispersed. Bulgaria can be attractive as it is new; Spain and Portugal are already worn out, out of fashion. The collaboration between the golf courses in Cape Kaliakra destination is seen as must in order to provide holistic image of the region. To develop an image, high standards, high quality service and cleanliness are mandatory.

As golfers are price sensitive, but still are ready to pay more for good quality the use of pricing strategy is not recommended, as it can be double-edged sword – if it is too cheap, it might be seen as mass and low quality. Bulgaria however can position itself with good value for the money packages (Underwood, 2011). For the holiday segment however price is important and as the two segments hardly mix – the avid golfers and the holiday tourists no tension is evident.

Furthermore golf tournaments are needed, which will bring the real golfers; most tournaments now are level Bulgaria only – the few foreigners who participate are expats, spend a lot of time here because of business or are real estate owners. More fairs and tourism markets will also bring greater awareness among both golfers and tour agents and is a way people get no know about the destination. The award according to many will bring benefits, such as general awareness, interest...
from other golf clubs; possibility for exchanging of golfers among clubs; the ministry of sport will pay greater attention to the development of golf in Bulgaria, which all will be pointless if the accessibility does not improve (Underwood, 2011).

The undiscovered destination image can be built upon for the next 1-2 years; this can attract many golfers, as they like new places. By then possibly more people will be aware, though word-of-mouth and come here.

### 5.4. Hermeneutics

In order to gain insight of projected image of Bulgaria as golf destination extensive review of social media, print media and several videos is undertaken. Table 8 shows an overview of the presence of the 8 golf courses in the internet. All of the golf courses feature own webpage and almost all of them (besides Pirin Golf and Air Sofia Ihtiman) which have accommodation options are presented in main booking websites such as booking.com and agoda.com. Furthermore all but one have facebook page and videos on youtube and half have own flickr photo stream, while the others are present in users` photos. Four resorts also have user reviews on tripadvisor.

<table>
<thead>
<tr>
<th>Golf course</th>
<th>Web page</th>
<th>Booking</th>
<th>Agoda</th>
<th>Facebook</th>
<th>Youtube</th>
<th>Flickr page</th>
<th>Tripadvisor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black Sea Rama</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Lighthouse Golf &amp; Spa</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Thracian Cliffs</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>St. Sofia Golf Club</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Riu Pravets</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Pirin Golf</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<td></td>
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<tr>
<td>Air Sofia Ihtiman</td>
<td>✓</td>
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<td>Sliven</td>
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Table 8: Online appearance of the golf courses in Bulgaria Source: Own illustration

Overall 25 comments are found on Tripadvisor for the Cape Caliakria Hotels and Golf Courses. The following paragraphs outline the major comments.

The majority of the comments highlight the excellent golf courses and also the nice accommodation options. The additional facilities, such as spa, pools, bars and restaurants are also positively rated. The food is regarded as good, but apparently more is expected, as many respondents feel food need to be improved and/ or it is too expensive and few recommend dining in the nearby town.

A major drawback is considered the fact that the golf courses are “in the middle of nowhere”, i.e. car is needed to go around and the lack of direct access to the beach. Despite this tourists consider the location to be great, which in combination with nice weather contributed to positive reviews from 22 from 25 comments overall (whereas it needs to be pointed out, that the 3 negative comments are more than 1 year old and mostly concern constructions and finishing touches in the resorts, that are now nonexistent).
Furthermore the resorts are considered to offer value for the money and friendly staff, although at this point opinions are controversial — 50% rate service as good or very good, whereas the other 50% of the respondents state that serious improvement in the service is needed.

The reviews about Riu Pravets regard only the hotel services, thus are not taken into account and for the other four golf courses no information is found in Tripadvisor.

The facebook pages of the resorts feature mostly promotion, specials and last-minute deals, as well as results from and comments on the latest championships.

Flickr offers only professional photo streams presented by the resorts themselves. Only few user’s pictures are to be found, which are hardly distinguished by the professional ones. The pictures mostly depict the golf course, hotel, villas and apartments, beach/ mountain and additional features offered by the resort.

To draw media attention the golf resorts often feature promotion options on their websites, such as open door days when playing golf is for free, night golf lessons, “Peek behind the Curtains” and have a look at unopened holes, celebrities weddings at the golf course and even playboy championship.

Most youtube videos depict golf in Bulgaria as luxurious way of living. Videos feature not only the golf courses themselves, but the well-appointed accommodation, the deluxe spa and amenities, the lavish restaurant food, extravagant cars and yachts. Mostly the videos are professional and are aired by the resorts themselves. Only few user videos are to be found and they mostly feature the amenities in the resort. Many videos also show tournaments and interviews from golf pros and managers in sport channels. The most featured golf courses are Thracian Cliffs, Lighthouse Golf and Pirin Golf. It is essential to mention that searching for videos in youtube with key words “golf” and “Bulgaria” gave less than 1000 results, whereas many videos actually concerned the car mode “golf”.

The golf courses – BlackSeaRama and Lighthouse Golf are featured in the magazine Golf Magic and are described as “breathtaking” with “superb layout” (Agran, 2009). Furthermore Lighthouse is defined as “gem” in top100 golf courses, BlackSeaRama as country 1st and Thracian Cliffs as “twice as good as Pebble Beach” by its designer Gary Player. Golf Magic Magazine promises its readers to be surprised by Bulgaria at its “affordable, luxurious and yet undiscovered courses” (Warters, 2010) and features Thracian Cliffs to have “extraordinary design in an extraordinary setting” (Warters, 2010)

Apart from information in internet, many articles are published in magazines, mainly originating from Romania, Bulgaria, UK or Scandinavia. Mainly Lighthouse Golf, but also Thracian Cliffs are the main stars in Romania originating magazines such as Business Magazine, Forbes, FHM, Elle, In style, Playboy, Men's Health, Glamour and National Geographic Traveler where short reviews and whole stories depict the resorts. Moreover Thracian Cliffs frequents German magazines, thanks to its German general manager. Golf dedicated magazines such as Golf review, Golf Time and Golf Magazine, but also tourism related issues such as DeWeZet and FVW feature reviews mostly focused on Thracian Cliffs, but also mentioning the neighbouring golf courses. Mostly articles not only write about the golf course itself, but also tell about culture, history and sightseeing in Bulgaria.

English editions include Golf World, where Thracian Cliffs is included in Europe top 100 golf courses at 65th position, Golf world magazine, Golf vacation and Golf monthly, where the focus is mainly on golf. Furthermore Conde Nast Traveler features possibilities for buying real estate on golf course and Golf Escapes offers extensive review on destination Cape Kaliakra and the off course attractions.

Bulgarian editions on the other hand mostly present the golf resorts as exclusive combination of golf and summer vacation with excellent spa, exquisite cuisine, sport and beach. Focus is rarely put only on golf, even in issues as Golf & Spa. Other magazines, such as Brava Casa and women magazines – Eva, Woman today, Hello and business and tourism related, such as Marketing and Cherga also present the golf resorts as exclusive new vacation spots. Further information on golf is presented in the brochure of Cape Kaliakra, golf courses brochures and pamphlets and booklet about golf in Bulgaria as part of the catalogue of the tourist sites of destination Bulgaria project.
6. Conclusions and Recommendations

6.1. Conclusion

This final chapter aims to conclude the findings in the previous chapter and to offer advice and recommendations both for managerial practice and for further research.

This dissertation aimed at studying how Bulgaria can position itself as golf destination. By conducting in-depth interviews with marketing managers, BGA representatives and golf resort owners it was possible to reveal what is the current development of the golf industry in Bulgaria, how it could evolve in the future and how can Bulgaria become successful and world-known destination, golfers would visit.

The results show Bulgaria has great potential for the development of golf tourism, as huge investments in golf resorts resulted in 5 top-notch golf courses being built in the last 3 years. Tourism is developing fast, with more visitors not only from neighbouring countries, but also from UK and Germany frequenting the destination for both golf and holidays. Visitors seem to be attracted not only by the new destination, but also by the reasonable prices and the signature golf courses. Moreover golf tourism is expected to boom in the next year, enhanced by the “Undiscovered destination” award Bulgaria won at this year’s IGTM. More Scandinavians and Germans are expected next year, also due to the marketing efforts of the managers, featuring work with tour operators, participation in travel markets, wide media coverage, including printed ads, TV, billboards, active involvement in the cyberspace and social media and also fam trips for journalists and word-of-mouth.

As golf tourism is very new for Bulgaria, the destination needs to promote itself first; the focus is on attracting clients to the existing resorts. Although the golf development now is considered to be small at scale, new investments are not expected due to the unfavourable economic climate. Attempts to collaboration are noticed, which however are more at daily operations level, i.e. besides the efforts of three of the golf courses for promotion as destination Cape Kaliakra little is undertaken in terms of collaboration in direction achieving one common brand for Bulgaria as golf destination. It is even believed that this is difficult to manage, as Bulgaria cannot be one destination for golf – facilities are too dispersed.

Furthermore the lack of governmental support in terms of finance, regulation and policy, strategy for development and infrastructure holds back the golf business progress. The poor accessibility is also seen as the major downside of the destination – an issue that can be hardly resolved without governmental help.

Based on these major issues identified in the following paragraphs are outlined recommendations, with the intention to be able to successfully develop golf tourism in Bulgaria.

6.2. Discussion

6.2.1. Positioning model

In order to be able to give recommendations, the positioning model of Baker (2007) presented in chapter 3 has been used, which aims to identify the strongest positioning statement for Bulgaria.

The customer needs have been indentified only partly, due to the impossibility to fully conduct research among the golf tourists, but still some features have been reported by the interview participants, such as seek for new destination, need for quality golf courses, reasonable price, good accessibility, entertainment options, beautiful nature and good dining. Bulgaria could satisfy the need for excellent golf in scenery settings, can offer good value for the money, especially in times of crisis, where traditional destinations are becoming more expensive. Some of the destination strengths are the beautiful nature, the good quality of the courses, the possibility of combining beach and golf or ski and golf, temperate climate, strategic location, hospitality of the people, the good
food and wines, the reasonable prices and not overcrowded and busy courses. Furthermore the strongest competitor’s strengths (Turkey) are: the concentration of 14 quality golf courses around Belek, good infrastructure and golf-related amenities, good accessibility provided by regular flight connections, well-known destination, year-round destination and governmental support. In order to find out what are the unique selling points of Bulgaria in comparison with its strongest competitor, the strengths and weaknesses of both destinations are compared and the USP of Bulgaria are highlighted in table 9.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Bulgaria</th>
<th>Turkey</th>
</tr>
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<tbody>
<tr>
<td>Undiscovered destination</td>
<td>Beautiful nature</td>
<td>Well-known destination</td>
</tr>
<tr>
<td>Beautiful nature</td>
<td>Quality golf courses</td>
<td>Beautiful nature</td>
</tr>
<tr>
<td>Possibility of combining beach and</td>
<td>Quality golf courses – 14 courses around Belek</td>
<td>Nice climate</td>
</tr>
<tr>
<td>golf or ski and golf</td>
<td></td>
<td>year-round destination</td>
</tr>
<tr>
<td>Temperate climate</td>
<td>Good amenities</td>
<td>Good amenities</td>
</tr>
<tr>
<td>Strategic location</td>
<td>Good infrastructure</td>
<td>Good infrastructure</td>
</tr>
<tr>
<td>Hospitality of the people</td>
<td>Regular flight connections</td>
<td>Governmental support</td>
</tr>
<tr>
<td>Good food and wines</td>
<td>High quality of the service</td>
<td>Lower prices than Spain</td>
</tr>
<tr>
<td>Reasonable prices</td>
<td></td>
<td></td>
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<tr>
<td>Not overcrowded and busy courses</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Weaknesses</th>
<th>Bulgaria</th>
<th>Turkey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Few dispersed golf courses</td>
<td>Overcrowded golf courses;</td>
<td>Perceived as connotation for lower quality</td>
</tr>
<tr>
<td>Lack of surrounding facilities;</td>
<td>golfers need to book tee time;</td>
<td></td>
</tr>
<tr>
<td>lack of governmental support;</td>
<td>Summer months are too hot;</td>
<td></td>
</tr>
<tr>
<td>year-round destination;</td>
<td>No combination of beach and golf;</td>
<td></td>
</tr>
<tr>
<td>bad accessibility;</td>
<td>Start to become expensive</td>
<td></td>
</tr>
<tr>
<td>bad infrastructure;</td>
<td>Further away to the target markets</td>
<td></td>
</tr>
<tr>
<td>human resources</td>
<td></td>
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</tr>
</tbody>
</table>

Table 9: Overview of strengths and weaknesses of Bulgaria and Turkey. Source: Own illustration

The following table highlights the competitive advantages of Bulgaria. The following strengths are identified, which can give competitive edge of the destination:

- Possibility of combining beach and golf or ski and golf
- Strategic location
- Reasonable prices
- Not overcrowded and busy courses

Based on this advantages Bulgaria can be positioned as nearby destination, with excellent, uncongested golf courses, which offer value for the money 10 months a year and great possibility for sunny beach holiday and great game of golf. It should cater rather for the boutique tourists and not aim at the mass market, in order to avoid becoming overcrowded and lose its competitive advantage. The positioning statement could be “Discover the undiscovered Bulgaria, great golf at your fingertips.”

Furthermore short analysis of the five positioning strategies presented in chapter 3 is provided together with reasoning for choosing or not choosing given strategy.

- Positioning by Price Value – could be used only if the focus is on good value for the money, as lower prices may be perceived as connotation for lower quality
• Positioning with respect to use or application – this is the right strategy to use, as it allows Bulgaria to be positioned as golf destination
• Positioning according to the users or class of users – will rather not be used, as Bulgaria aims at wide target market
• Positioning with respect to a product class – could be used as Thracian Cliffs is considered to be unique for Europe, thus it can be the focal point
• Positioning vis-a-vis the competition – instead of facing directly the strongest competitor, the competitive advantages can be highlighted

6.2.2. Recommendations

Based on the findings in this study, the following recommendations can be given to golf managers in Bulgaria in order to be able to successfully position Bulgaria as international golf destination.

Ensure governmental support

The greatest hindrance in the development of the golf tourism in Bulgaria appears to be the bad accessibility. Thus better access to the golf courses will enable to enhance the product and attract more golfers. As this can hardly be influenced by the business, the government should provide charter flights from the target markets – Scandinavia, Germany, UK, Netherlands to the signature golf coast in the golf season, i.e. the shoulder months, because charter flights do exist in the summer months for the vacationers. The success of such initiative will convince the airlines that this is profitable and they could run more direct flights. To encourage the government into such project the managers should provide convincing information about the benefits of golf tourism, such as statistical data, growth in the last 3 years of vast development of golf in Bulgaria and best cases from other countries.

Furthermore strategy for the development of golf in Bulgaria is needed, which shall elaborate on policies and research, as this could further enhance the growth of the sport in the destination. The research and obtaining valuable information on the golf tourists, their demographics and specific wants and needs, travel motivations will facilitate improving the golf related offerings, supplementary products and surrounding amenities.

The improvement of the infrastructure will enhance the development of golf tourism, as it will ease the access and improve the image of the destination. The maintenance of the roads to golf resorts and surrounding facilities will increase the number of visits and enhance the tourism product and disperse the effect of golf tourism in the region. Thus close collaboration with the government is needed to ensure support in financing such infrastructure projects.

Besides the improvement of the accessibility and the infrastructure, continuous improvement and more collaboration are needed.

Improvement and collaboration

As golf tourism is relatively new to Bulgaria, the people employed in golf business know little or nothing about it. Thus investments in education and continuous training of the human resources are needed, as they need to learn how to cater for golfers` needs. Staff requires tutoring in how to service the specific market and managers could use best case examples from other destinations how to design the right marketing message aimed at the golf tourist. Furthermore application of international standards in service and in the quality of tourism product offerings would help building an image, golfers can trusts, as they will know the level of the service will be satisfactory.

Additionally the process of attracting more locals to golf – something that is being done in the moment should continue and spread around even more, as developing local golf will help the courses to strengthen their positions and offer better quality and better price for the tourists.

Collaboration is another important aspect that should be touched upon; golf courses need to work together more closely than they do now in order to provide holistic image of Bulgaria as golf
destination. Although most argue that Bulgaria cannot be one destination for golf, as golf courses are too dispersed, the country can still build one common brand that will feature two destinations. Low cost local flights can enhance the coherence of the destination and allow golfers to stay more and visit both golf concentrated locations.

Sofia golf courses can also work together more, by developing package, including the golf courses close to the capital and also have website that features all golf locations, after the example of Cape Kaliakra. Both website can be part of a portal aimed at promotion of golf in Bulgaria.

Create strong brand

Golf is now developing in Bulgaria as every golf course stand for itself. Despite the efforts of creating Cape Kaliakra as one destination, the lack of distinct brand image of the country is evident. Thus a single message should be created that is focused on Bulgaria’s unique selling points. The image should be relevant to the destination, differentiate it from its competitors and form the basis for brand identity. The logical follow-up is launching marketing campaign that evolves building holistic image of the destination. It can encompass print, radio and TV, cooperative activities with specialist tour operators, and participation at major golf shows and events. The goal is to produce consistent, well-focused and thoroughly considered brand strategy. Furthermore the campaign should not only attract the golfers to the destination but also ensure it continue delivering the right message once they are on-site – i.e. incorporate the brand message in the destination, on the golf course, in the hotel.

As the golf resorts cater for different markets, regional campaigns can be created, which still should fit in the holistic brand of Bulgaria and be united under one motto. Furthermore bundled offers such as Golf and Wellness, Golf and Cuisine, Golf and Sightseeing, Golf and Ski, Golf and Beach, can be used to enhance the product and attract family holidaymakers or couples.

Furthermore the emphasis on value for the money could be strengthened by offering price structures such as seasonal pricing and golf passes for destination or for the whole country. By more focused targeting the various categories of product can easily reach the relevant customer segments.

Additional ideas might include golf dedicated website can be used with possibility to browse all possibilities for golf in Bulgaria and book tee-times and other services and more tournaments with bigger scope abroad, which can attract more avid golfers to the country.

6.3. Limitations and Further research

There are several limitations for this paper. The first limitation concerns the sample size. Due to the extremely low response rate the conduction of the initially planned quantitative research failed, as the number of surveyed participants was not large enough to analyze the results and draw conclusions. Thus the presented results cannot claim to be credible and reliable. External factors, such as the closure of the airport servicing the golf destination also resulted in lower number of tourists than expected. Furthermore the approached golf tour operators were not available for interview, which resulted in loss of valuable point of view on the researched topic.

Consequently the further research suggestions include:

- Quantitative research on the golf tourists in Bulgaria – it is necessary to conduct the research this dissertation did not manage to and namely investigate the profile of the tourists visiting Bulgaria to play golf. Such research will also have valuable implications for the managerial practice.
- Research the local population attitude towards golf tourism development. The locals are important aspect of the development of any kind of tourism, thus their concerns are essential to be taken into account, as they can support or threaten the growth of golf tourism.
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## Appendices

### Appendix 1: List of interview participants

<table>
<thead>
<tr>
<th>Name</th>
<th>Job</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Georgi Tchouklev</td>
<td>Owner</td>
<td>Lighthouse Golf</td>
</tr>
<tr>
<td></td>
<td>Vice president</td>
<td>Bulgarian Golf Association</td>
</tr>
<tr>
<td>Katya Slavova</td>
<td>Reservation manager</td>
<td>Lighthouse Golf</td>
</tr>
<tr>
<td>Demis Papillon</td>
<td>Golf instructor</td>
<td>Lighthouse Golf</td>
</tr>
<tr>
<td>Alexandrina Stoimenova</td>
<td>Sales manager</td>
<td>Thracian Cliffs</td>
</tr>
<tr>
<td>Galabina Velkova</td>
<td>Resident manager</td>
<td>RIU Pravets</td>
</tr>
<tr>
<td>Mania Cosanova</td>
<td>Marketing manager</td>
<td>Pirin Golf &amp; Country Club</td>
</tr>
<tr>
<td>Kyncho Stoychev</td>
<td>Owner</td>
<td>BlackSeaRama</td>
</tr>
<tr>
<td></td>
<td>Vice president</td>
<td>Bulgarian Golf Association</td>
</tr>
<tr>
<td>Seth Underwood</td>
<td>Secretary General</td>
<td>Bulgarian Golf Association</td>
</tr>
<tr>
<td>Marko Stoychev</td>
<td>Pr and advertising manager</td>
<td>Black Sea Rama</td>
</tr>
<tr>
<td>Konstantin Ikonomov</td>
<td>Golf director</td>
<td>St. Sofia Golf and Spa</td>
</tr>
</tbody>
</table>
Appendix 2: Interview guide

1. What is the profile of the typical golfer in Bulgaria (both Bulgarians and tourists who come to play golf? (Age, sex, marital status, nationality, income, etc.)

2. What are the main markets you focus on?

3. Who are your partners? Other courses, hotels, travel agencies and what is the level of cooperation with them?

4. Do you have future plans, as new construction and development, attracting new markets and cooperation with other courses, hotels, travel agencies?

5. What is your position in golf tourism in Bulgaria (market share, unique services offered, etc.)?

6. What other destinations do golfers coming to Bulgaria visit?

7. What kind of advertising (s) you use (print advertising, television and radio, social media, newsletter billboard agencies and others)?

8. Do you use different ads for different markets (age, nationality)?

9. What are tourists looking for when coming for golf in Bulgaria? What attracts them the most?

10. How do you see the future of golf tourism in Bulgaria?

11. Which countries are the main competitors of golf tourism for Bulgaria?

12. What are the advantages and disadvantages of Bulgaria as a golf destination?

13. How do you differentiate yourself from the competition?

14. How Bulgaria can attract more golfers?

15. What image should be created, how can be Bulgaria positioned as a golf destination?

16. What is the role of government in golf tourism?
Appendix 3: Mix of ads
CAPE KALIAKRA

A new project on Bulgaria's north coast seeks to compete with Europe's finest golf destinations.

Spectacular is a word that's often overused when describing golfing venues. While many projects are promoted for sensational views, it is rare for a course that will live up to the anticipation of the world.

Our fan-favourite Cape Kaliakra Golf Resort is not far from Varna. The 18 holes that make up this stunning resort have been thoughtfully designed by world-renowned architect Michael Atkins. The course is a challenging yet enjoyable experience for golfers of all levels.

The resort features two 18-hole layouts: The Links and The Parkland. The Links is a seaside course with panoramic views of the Black Sea, while The Parkland is a more inland course with beautiful natural scenery.

The resort also offers a 9-hole course for those who prefer a shorter game. The layout is designed to provide a challenging yet enjoyable experience for golfers of all levels.

The resort has a driving range, putting green, and practice bunker for visitors to hone their skills. The golf club also hosts a variety of tournaments and events throughout the year.

For golfers looking for a truly spectacular cliffhanger, Cape Kaliakra Golf Resort is an ideal destination. Whether you're a seasoned pro or a beginner, the resort offers a challenging yet enjoyable experience for all.

Bulgaria

Thracian Cliffs

A truly spectacular cliffhanger

By Peter Simon
Farul de pe terenul de golf

Pentru amatori binomului de aur golf – spa, acum există opțiuni. Bulgarii imping ștacheta luxului înspre standardul de aur din târzi cu tradiție în turism.

TEXT SEBASTIAN ISPAS

Imediat ce iați în urmă văele obștitoare româno-bulgare și porneți spre sud, înainte să ajungă la Balchik, pentru că acolo nu mergeți acolo, te vei trezi în Capul Călăraș. Pe stâncile sale de calcar și în apelor sale ale Mării Negre, și ar putea să te înflăcâți cu dinți și șomogia. După un oraș cu nume care semănă cu Duran Duran, dai de stația LightHouse – un inerv teren de golf presărat cu locuitorie de băieți tipuri, de la câteva crocete, la vile luxoase, la un hotel resort cu o piscină exterioară și spa.

Terenul e proiectat de Ian Woosnam, un jucător de golf renumit și fost Ryder Cup Captain, celor 18 cupă pornind de la Clubhouse și desfășurindu-se în spațiu, spre exterior. De locuții se ocupă constantăniul Dennis Papillon, care a emigrat în Bulgaria și a fondat o Academie de Golf. După ce-a jucat, a învățat în State și Australia. Papillon a revenit la malul Mării Negre, dacă vă place, de data asta, la sud de Dunăre. Hotelul de cinci stele cu vedere la mare servește drept punct focal al resort-ului. Are cinci etaje, dintre care ultimul e rezervat unor penthouse suites cu piscină personală, dominate de un negru club. Spa-ul e exhaustiv, oferindu-i băieți terapii înseamnă posibile, inclusiv ceea ce trebuia să apară, cum ar fi servire fredănatoare cu bolonii inimi sau dusurile ambientale care imită ploaie tropicale.

Celelalte șezări ale stației sunt organizate pe districte, fiecare dintre acestea pavând numele locurilor din jur și fiind proiectate pentru a se integra în peisaj. Astfel, Green District e amplasat în mijlocul terenului de golf și aproape de Clubhouse. LightHouse District e în sud-vestul terenului și adâptează farul care dă numele stației, dotată cu cafea la ultimul etaj, Forest District e o combinare de vâl și case amplasate în luminișul unei păduri, în spatele terenului de golf. Lake District e așezat în apropierea locului din partea de est a stației, iar Marina District e situat în sud-estul stației și se deschide de mare printr-o frizer subțire de pământ cu dezlantul împărtelit.

Așa cum ți-i va spune orice a schimbat România pe Bulgarie, oamenii sînt ospitați și plănuși, înălț, pe locuri, semănând destul de mult cu atât de. Serviciile sînt foarte lume, dar, dacă ți se rupe ramă de la ocheiari, ai sfatul să-i ții despărțite după recepție (nu uau Picătura 2) și nici să-mi rezervi stația. Oricum, dacă ți se rupe ramă ocheiarii la o stație de 5 stele, îți comperi alte ocheiari care costă știi o motocicletă.
Appendix 4: Questionnaire

Please tick/complete the appropriate answer

1. Gender
   a. Male
   b. Female

2. Age
   a. Under 18
   b. 18-25
   c. 25-35
   d. 35-45
   e. 45-55
   f. 55-65
   g. 65+

3. Marital status
   a. Single
   b. Married, no children
   c. Married with children
   d. Other .................

4. What is your occupation? ......................

5. Do you have college or university degree?
   a. Yes
   b. No

6. Nationality

7. Is this your first golf vacation?

8. If no, have you previously undertaken golf vacation abroad? Which country/ countries?

9. Please rank these items in order of importance when you are choosing a golf vacation (1 for most important, 2 for second most important)
   a. Nice climate
   b. Interesting culture
   c. Good golf course(s)
   d. Quality and service in the destination
   e. Beautiful Nature
   f. Selection of accommodation options
   g. Additional services, such as Spa, sport facilities, etc.
   h. Other

10. What additional features do you consider important when looking for golf destination?
    a. Shopping
    b. Beach
    c. Visiting festivals and concerts
    d. Sightseeing
    e. Nightlife
    f. Spa and wellness
    g. Other sports
    h. Culinary
    i. Other

11. In which season do you prefer to play golf?
12. What kind of accommodation do you prefer?
   a. Private villa
   b. Hotel accommodation
   c. Rent a flat
   d. Staying with friends and relatives
   e. Remote from the golf course accommodation

13. How many days do you usually stay when undertaking a golf vacation?
   a. 1-3 days
   b. 3-5 days
   c. 5-7 days
   d. 7-10 days
   e. 10-14 days
   f. More than 14 days

14. How many of these days do you play golf?
   a. 1-2 days
   b. 2-4 days
   c. 4-6 days
   d. 6-8 days
   e. 8-10 days
   f. Entire holiday

15. What price is reasonable for a one week vacation, including accommodation, transportation and green fees?

16. Are you a repeat visitor for certain destinations? Which ones?

17. How often do you go on golf holiday?
   a. 1-2 times a year
   b. 3-4 times a year
   c. 5-7 times a year
   d. More than 7 times a year
   e. Every month

18. Please circle your reason(s) for choosing Bulgaria for your golf vacation.
   a. Suitable climate
   b. Nature
   c. Good quality of the service
   d. Accommodation
   e. Price
   f. The golf course(s)
   g. Additional services
   h. Other

19. In your opinion what can be improved in this golf course/hotel?

20. Would you consider coming to Bulgaria for golfing again? Why? Why not?