

The prospects for the development of golf tourism in Russian regions

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Abstract: *This paper describes the perspectives and opportunities for the development of golf tourism in Russian regions. Having examined current global trends and the Programme for the development of golf in Russia by 2020, the authors of the study have analysed the evolution of this sport in the country, revealed the potential and the most popular destinations for further development of domestic and inbound golf tourism.*

Golf is relatively young and developing sport for Russia. It became popular after 2009, when it was included in the Olympics. In 2014, it was also included in the national development programme of the Ministry of Sports of the Russian Federation. Both facts triggered the development of domestic and inbound golf tourism.

This paper analyzes the dynamics of the development of golf infrastructure by the federal districts and outlines the most popular championships and tournaments hosted by the Russian cities. This data allowed identifying the most promising local destinations for golf tourism. At the moment, the largest local golf centres are the city of Moscow, Moscow and Leningrad Regions, the Republic of Tatarstan and the Krasnoyarsk territory. The Krasnodar territory also has a good perspective to become one of the leading destinations for golf tourism in the nearest future.

According to the authors, currently golf tourism is evolving at a low pace in the Russian Federation. This is due to the poor promotion of golf as a sport and leisure activity among the Russian population. However, there is a strong potential for the development of domestic and inbound golf tourism.

Key words — *golf tourism, golf course, domestic tourism, leisure, sport industry, strategy for tourism.*

I. INTRODUCTION

The preferences of modern tourists are not limited to certain destinations. There is a growing demand for tour packages that meet specific travellers' interests. According to the studies, the development of golf involves new consumer markets of various countries including Russia.

Golf was included in the Olympics again, which attracted attention to this sport. Therefore, the Government of the Russian Federation has developed a programme for the development of golf as sport tourism [1]. The attempts to develop and promote golf in Russia were made before. For example, back in 2003, the Russian Golf Association developed a promising programme called "500 golf facilities in 15 years" aimed to develop this sport [18]. The

programme covered 19 Russian regions. Through its implementation, the programme initiators planned to expand and improve the infrastructure and golf facilities, and to promote it among the Russians [10]. Although the program did not reach its final goal, its implementation triggered golf expansion in many regions of the country.

There is a demand for golf tourism in Russia as there are natural resources in the regions for its development and gradually increasing interest of the local population, who wants to participate in this type of sports tourism.

Currently, this type of tourism is highly developed in Moscow and the Moscow region, Saint Petersburg, the Republic of Tatarstan and the Krasnoyarsk Territory. Krasnodar Territory also shows the positive signs of golf tourism development. Recently, in the city of Gelendzhik, there was constructed one of the largest golf centres not only in Russia but also in Europe.

II. MATERIALS AND METHODS

In 2009, golf was included in the Olympics, which changed the attitude towards its development in Russia. Golf, as a form of recreation and outdoor activities, is gradually gaining popularity and large-scale involvement. However, most Russians consider this type of recreation "as a form of leisure for very wealthy people, unaffordable to most ordinary tourists" [4]. According to many experts, domestic and inbound golf tourism has great prospects for development in the Russian regions [11, 16]. Moreover, the promotion of golf among the Russian tourists may become one of the activities of Russian resort centres [3, 17] and facilitate the diversification of the economy of small towns and mono-industry towns [13]. Researchers believe that "... consumers of sports services and tour operators are considering combining leisure and sightseeing programs with their favourite sport. In this regard, the providers of leisure and entertainment services, as well as tourist destinations, located near golf centres and golf courses, are the significant actors in the golf tourism market" [4].

To analyse the prospects for the development of golf tourism in the Russian Federation, the following programme document were studied: Order of the Ministry of Sports of the Russian Federation No. 779 dated 18 September 2014 "On approval of the golf development programme in the

Russian Federation until 2020” [1], which was developed in accordance with the Concept for the Long-Term Socio-Economic Development of the Russian Federation for the Period until 2020, and Order of the Ministry of Tourism of the Russian Federation No. 369 dated 8 June 2009 “On approval of the procedure for the development and introduction of the programmes for the development of the respective sports activities by All-Russian Sports Federations to the Ministry of Sport, Tourism and Youth Policy of the Russian Federation”.

The programme for the development of golf in Russia is based on the Russian and international best practices of the development of Olympic sports, the proposals of federal executive bodies, leading research and educational institutions, scientists and practitioners. Besides, the programme considers the development of all golf games as an integral process of promotion and introduction of outdoor activities, sports and pursuance of excellence into the everyday life of citizens.

In the course of the study, the data from the literature, statistical information and offers of Russian travel agencies on the Internet were analysed and systematised. The authors also examined and analysed the offers of travel agencies, arranging the golf tours, and the data from golf-specific Internet resources and social networks groups.

Thus, the methods used to study the strategy and prospects for the development of golf tourism in Russia are based on applied investigations of Russian and foreign scientists and practitioners in the field of tourism. To achieve the stated goal and solve the corresponding problems, the following general scientific and special methods were used: analysis and synthesis, induction and deduction (to justify the development of golf tourism in Russian regions), comparative analysis (to study the global golf tourism development experience), systematic approach (to develop the components of the concept and mechanism for implementing the golf tourism development programme).

III. RESULTS AND DEBATE

The availability of golf courses is an important criterion for the development of golf tourism in the country. In recent years, there is a growth the construction of golf infrastructure both in luxury and mass sport segments. There were arranged 13 championship courses with 18 holes in Russia. These courses are suitable for holding the international competitions as they met all relevant standards. Besides, there were constructed 20 golf courses with 5 to 9 holes and 70 mini-golf courses.

According to the statistics, golf sports facilities are unevenly distributed across the Russian regions (table 1).

TABLE I. DISTRIBUTION OF GOLF FIELDS IN RUSSIA WITH A SECTION OF THE FEDERAL DISTRICTS

Federal districts	Number of golf facilities	Proportion (%)
Central	18	55
Volga	6	18
Far Eastern	4	12
Northwestern	1	3
North Caucasian	0	0
Ural	1	3
Southern	2	6
Siberian	1	3

The major part of golf facilities is located in the Central Federal District. Those facilities are preliminary concentrated in Moscow and the Moscow Region, i.e. 8 and 10 golf centres respectively.

There are 6 golf facilities in the Volga Federal District (18%).

4 golf facilities locate in the Far Eastern Federal District (12%).

Only 5 golf facilities, or 15% of the total number of facilities situated in the Russian Federation, are located in the North-West, Ural, Southern and Siberian Federal districts.

No golf facilities are available in the North Caucasus Federal District.

From the above, in addition to Moscow and the Moscow Region, it will be probably reasonable in future to include the following regions in the list of territories designated by the Ministry of Sports of Russia as the base regions for the development of golf: Saint Petersburg, Leningrad, Sverdlovsk, Rostov, Kaluga, Nizhny Novgorod, Samara Regions, the Republic of Tatarstan, Buryatia, Krasnoyarsk, Krasnodar, Stavropol and Primorsky Territories. First of all, it is necessary to concentrate efforts for the development of golf infrastructure in these areas.

To make golf a mass sport, it is very important to create of a chain of affordable golf facilities in recreational areas.

First of all, it is necessary to construct golf courses, training facilities and related infrastructure in public recreational areas, parks, urban and suburban areas where most of people spend their weekends.

Secondly, it is necessary to construct golf facilities in traditional summer vacation areas, resorts and tourist areas. This will expand the list of services provided to travellers, improve the quality of service and increase the competitiveness of Russian resorts in relation to foreign resorts, which offer a significantly greater choice of outdoor activities and higher quality of service.

The construction of golf facilities in summer camps and kid’s resorts is another area of focus. The said measures will allow involving children in golf, foster interest in this sport.

The programme is financed from the consolidated funds, raised from the Russian Golf Association, the Federal budget, the budgets of the constituent entities of the Russian Federation, municipalities and other sources. The estimated total amount of financial support for the development of golf is 587 million rubles.

It is planned to use other raised funds to train the country’s leading athletes – the members of the national teams of the Russian Federation, to support the development of standard golf projects, to finance and co-finance the

construction of sports facilities, and to support centres for the development of golf, youth and mass sports.

The development of golf can improve the effectiveness of tourism development programmes in our country, increasing the appeal of local tourist destinations for Russian and foreign travellers.

The programme has been launched in 2014 and will be completed by 2020 in 3 stages:

The first stage (2014) was aimed at creating favourable conditions for the development of golf facilities, the construction of modern golf centres and facilities for mass golf development;

The second stage (2015–2016) was aimed at the creation of the federal, regional, municipal and private golf centres, as well as the development of mass and recreational golf in the country's regions;

The third stage (2017–2020) is aimed at optimizing the financial support system for golf development by enhancing the public-private partnership. Besides, it is planned to host major international sporting events in Russia and hold all-Russian, interregional and regional golf competitions and recreational events.

Some milestones of the golf development program have already been achieved, and some measures are currently implemented. For example, in 2015-2016 academic year, golf discipline was introduced in 11 schools of the Chelyabinsk Region within the initiative backed by the Russian Olympic Committee. The schools were provided with special equipment, the local teachers studied the basics of golf trainings, golf lessons were introduced in the physical education program [6].

Chelyabinsk teachers and schoolchildren joined the project together with the Russian Golf Association. Local schools showed their willingness to participate in this initiative. The training programs have been adjusted according to the project, and now these classes are very popular.

Thus, golf and golf tourism are one of the main priority development fields in sports and tourism industry. Golf development is implemented within the framework of the national programme, and in future it may become one of the most popular areas of domestic and inbound tourism.

To study further prospects for the development of golf tourism in Russia, it would be useful to consider current trends and experience in organizing golf tours in foreign countries.

In today's world, golf is gaining more popularity in many countries. Currently, the International Golf Federation (IGF) unites 118 countries. The popularity of this sport contributes much to the development of a new type of tourism, i.e. golf tourism, and the expansion of the market of tourist services. Many travel agencies and carriers, as well as hotel business, restaurants, companies, providing social and cultural services, are united in the International Association of Golf Tour Operators (IAGTO). According to experts, the annual volume of the global golf tourism market exceeds \$ 2 billion [5, 7].

Golf first appeared in the United Kingdom, and it is most popular in Scotland. This sport is considered national in Scotland [21, 23]. But golf tourism is less developed there. On the one hand, golf tourism suggests high prices, especially for Russians. On the other hand, many golf clubs

are private membership clubs [2]. Therefore, it is impossible to develop mass tourism in this field. According to national sources, the hotel occupancy rate in the golf industry centres does not exceed 50% [19, 22].

Travel agencies in Malaysia and Thailand offer various packages with a specific set of golf services, depending on the amount of time spent on the course. The development of golf tourism there allows for generating an annual income of \$ 800 million. Moreover, the revenue increases by 10% annually.

Other countries offer flexible bonus systems that include golf games, flights, accommodation, educational and sightseeing programs, and other services. For example, in the United States, the revenue from the said services is about \$ 60 billion annually [24].

In recent years, golf tours to Romania have become increasingly popular, although this is an infant segment there. Romania can offer high-quality services, alongside with low prices, which allows attracting foreign tourists.

Sport tourism, in particular golf, is an emerging form of tourism in the Algarve region (Portugal). Experts say: «golf has significant economic, social and environmental impacts» [15].

Unlike foreign countries, the development of golf tourism in Russia faces a number of challenges:

Firstly, this sport is expensive and new for Russian citizens with still emerging demand, compared to that in the countries where golf has been developed for many decades.

Secondly, until recently, local travel agencies were mainly focused on mass tourism. However, the demand for mass tourism is slowing down due to the global political and economic events. This fact made it possible not only to open new tourist destinations in Russia, but also to promote the customized tours, which include golf tours as well.

Thirdly, the demand for golf tours in Russia is seasonal as an average golf season lasts only 180-190 days here [8].

One of the advantages of this tour product is the long-life cycle of golf infrastructure. It should be noted that even 20 years after construction, the golf course preserves its quality. Therefore, the term of its operation is not limited with due care.

Previously, the experts considered a possibility of using artificial grass for golf courses. According to manufacturers, artificial grass "... can be actively used in Russia as there is no adequate alternative to it in view of local climate. This coating does not require careful maintenance, like a natural lawn, and one can play on such a course immediately after the snow will melt" [12]. Later, the idea of replacing natural golf courses with artificial one turned out to be ineffective.

The number of equipped golf courses and facilities in Russia remains low, even compared to Iceland or Finland. There are only 13 golf courses with 18 holes in the Russian Federation. For reference, there are 68 same type courses in Iceland, where the climate also does not contribute to year-round golf, and 200 in Finland.

According to statistics from the Russian Golf Association, about 5.5 thousand people were permanent members of golf clubs in 2015. About 3.2 thousands of them took an active part in golf tournaments every season, representing our country around the world. Turkey, Spain, the UAE, etc. are the most popular countries among Russian golf players (table II).

TABLE II. POPULAR DESTINATIONS OF GOLF TOURISM FOR RUSSIANS

Countries	Volume of tourist flows (%)
Turkey	23
Spain	19
UAE	16
Great Britain (Scotland)	12
Thailand	9
Morocco	8
Czech	6
Bulgaria	4
Kenya	2
USA	1

The popularity of golf has contributed to the segment of golf tours that allow tourists to travel around the globe and try out the courses they like. Travel agencies are engaged in the development of customized products that will to meet the needs of tourists, so-called tourism product. The product features and the related services constitute the customer value of a tourist product. Those features determine the consumer's intention to purchase a specific tourist product.

Golf tourism product has its own specific features. According to world practice, the main customer traffic is formed by representatives of the business elite. A similar trend is observed in the Russian market [8]. Therefore, golf tourism can be classified as elite tourism, designed for wealthy customers. The respective customers do not bother about the prices, instead of demanding higher standards of the quality of services and goods offered. The development of the golf tourism industry in Russia would create a favourable impetus for attracting additional capital.

At the moment, there are 18 golf centres in Moscow and the Moscow Region. The centres offer facilities for visitors with different income levels, which is an advantage for the development of domestic tourism. Golf lovers and tourists from all over the world can enjoy a large selection of golf courses here, designed and built to world-class standards. Other regions can also offer the international-class golf and mini-golf courses, or golf simulators to be used to make players to keep fit and improve their skills all year round.

There are few travel agencies involved in organizing golf tourism in Russia. The most competent and popular are Alerse company, which has ten years of experience in promoting golf events in Russia, Aurora-Intour, Tour Bureau Renaissance, UTE Megapolis, UTS Travel and travel firms. PGA Tours, the International Federation, acts as an official partner of the annual All-Russian qualifying tournament, which provides an opportunity to participate in the World Golf Championship.

Russia holds the following largest golf tournaments: The Russian Open Golf Championship among the professionals, which is the PGA tour stage, the Cup of the President of the Republic of Tatarstan, which is being held for 9 consecutive years, the Business People Golf Cup, a charity event.

"Moscow", "Russian Golf Association", "Tatarstan Golf Association", "Club Med", "Nizhny Novgorod", "Bashkortostan", "Mari El", "Tatarstan", "Kazan", "Zenit Bank", "Golf Kazan Club", and "Moscow Country Club" are

the most active golf teams participating in the tournament in the Republic of Tatarstan.

The team of Tatarstan is headed by Mr. Rustam Minnikhanov, the President of the Republic. The tournament organizers plan to hold competitions in Kazan on an annual basis, thus creating a local golf tradition.

The tournament is held in two days, which are preceded by a training day. The teams, consisting of four amateur players each, are competing for the Cup of the President of Tatarstan, which is the main prize. And the individual competition takes place on the second day. Besides the tournament, the guests and the participants are offered to take tours to Kazan, to watch the performances of the local on-stage performance groups, to participate in the award ceremony a gala dinner.

Golf events are held at Kazan Golf & Country Club, located at the territory of the Sviyaga Hills ski and sports resort. For 9 years, Sviyaga Hills ski and sports resort offers its guests an 18-hole championship golf course, poolside relaxation, a beach equipped with comfortable sun loungers and rental equipment [9].

Tatarstan, having the necessary infrastructure, can become a professional golf training centre.

The Business People Golf Cup was established in 2001 by the Moskovsky Komsomolets Publishing House. The event is held annually in June in the suburbs in the Moscow Region.

According to statistics from the World Tourism Organization, on average, golf players contribute additional \$ 500 to the national budget per day, which is seven times greater than that generated by an ordinary traveller. Golf tourism is ranked the first in terms of cash turnover generated by specific types of tourism. It is important to note that in recent years, the citizens of our country are showing an increased interest in golf.

Thus, golf is still an infant industry in Russian, which has started to develop only when it was included in the Olympic Games program. Golf championships and tournaments are being held in Russian cities and regions since 2014. These events are prestigious and often attract local wealthy and famous people. However, the domestic market for Russian golf tourism is not structured yet. It is necessary not only to create more facilities, but also to promote golf among the population and especially young people, to develop golf traditions and the culture of outdoor activities. According to researchers, this type of recreation and entertainment can suggest great prospects for the Russian tourism industry in future [14, 20].

IV. RESULTS

The analysis of the research on the perspectives of the development of golf tourism in Russian regions allows for the following conclusions:

1. Currently, golf tourism is evolving at a low pace in the Russian regions. This is due to the poor promotion of golf as a sport and leisure activity among the Russian population. Initially, golf clubs were arranged for professional sportsmen, and only by the beginning of the XXI century, they became available for everyone.

Russians believe that golf is a sport and leisure activity for very reach people. Poor awareness of the culture and the types of golf games, as well as of the health benefits

delivered by golf limit the attention of the broader Russian audience to golf tourism.

2. The long-term programme on the development of golf adopted by the Government of the Russian Federation is one of the first important steps towards the goal, which is the efficient and rapid development of golf inside the country causing the increase in golf tourism popularity.

The bottlenecks, first of all, are caused by the current legal regulations. The problems with the allocation of the land plots and golf courses maintenance techniques affect the number of courses available in the country. According to the specialists, a course should be in the range of 20-40 minutes' drive from a city. Poor accessibility, low traffic, and rather high construction costs may result in low return on investment.

3. Golf is an infant industry in Russia. To promote golf tourism, it is necessary to arrange interesting tours, reflecting its affordability and attractiveness for people of all ages.

Having analysed the golf tourism market, the authors have concluded that this is a highly profitable segment because of the infrastructure that will improve the ecological situation, social and economic growth of cities and villages.

The examples of the countries, which have successfully developed this tourism sector, evidence the effectiveness and profitability of the construction of golf facilities. The high quality of services and the availability of championship golf courses that comply with the global quality standards allow hosting international championships and tournaments in Russian golf clubs, which, in turn, will attract foreign and local tourists.

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