

ADVANTAGES OF ISTRIA REGARDING GOLF AS PART OF TOURIST PRODUCT

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ABSTRACT

A long-term tourism development in Istria has to be based on comparative and other advantages which stem from available resources. The integration of golf in tourism development has to be considered according to the comparative advantages, since travels triggered off by golf encompass a large part of the emissive tourism markets and are growing constantly. It is especially the case with wealthier consumers because Istria can not compete on the world tourist market without offering them golf courses as the part of the tourist product. For better understanding of tourism development in Istria and emphasizing golf as an important element in the improvement of the Istrian tourist product, a further analysis of golf development in the surrounding will be necessary. This research is referring to the golf development in Slovenia and Italian provinces in the vicinity, in order to compare them and use them for developing golf as Istrian tourism product.

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Key words: tourism, destination, advantages, tourist product

1. INTRODUCTION

Tourism represents a very dynamical and progressive activity with constant changes and new client demands. In order for a destination to be competitive in the world tourism market it is necessary to constantly adjust and fulfil its tourism product. In order to understand and define the tourist product better, it is necessary to state a destination's comparative advantages and its derived offer which role is very important in the tourist product creation. Golf and tourism travels motivated by

golf grow continually and represent one of the trends in world tourism. The most developed tourist countries have recognized these trends and possibilities – golf has become an integral and indispensable part of their tourism product. By introducing golf, the overall quality of the tourist product has been enhanced because a complete golf offer encompasses the best parts of other forms of the tourism offer. This kind of concept should be recognized in Istria, the most prominent and most developed tourist destination of Croatia. Istria has ideal conditions for golf development and its integration into the offer. It could become a prestigious golfer's destination. Special advantages are the mild climate which enables golf playing during the whole year as well as the proximity of the emissive markets. Another advantage is that there are no golfer destinations in the vicinity. This research is based on golf development in the competitive tourism countries in order to compare them and put them in context of the development of golf in Istrian tourism.

2. GOLF AS A PART OF A TOURIST PRODUCT OF THE DESTINATION

It is necessary to define elements of golf, in order to understand its importance and compatibility as a part of the tourist destination offer.

2.1. Elements of a destination's tourist offer

Tourist product is a set of available resources, services and convenience for tourists to use to meet their needs in a certain time and on a certain area (Kobašić&Senečić; 1989, 91). It is also the case with the destination tourist product which represents an integrated set of all the elements of a tourist destination offer. A tourist destination product represents a sociocultural, economical, natural and ecological unity in regard to tourist preferences (Magaš; 2003, 28). The core of a destination's tourist product is made out of a suitable combination of tourist resources. In accordance with the general resource definition, a definition of a tourist resource can be derived – all means that could be useful to the tourism of a certain area (Kušen; 2002, 16). Tourist resources are divided into tourist attractions and other direct and indirect resources. Basic tourists resources are represented by tourist attractions which are the main reasons tourists visit a destination. Other direct tourist resources are represented by the overall tourist infrastructure of a destination which ensures guests a pleasant stay and different activities. Other indirect resources represent actions of local population and state and are made out of the environment situation, geographical position and availability, communal infrastructure and political situation.

These resources represent an important part in creating the tourist offer. They are important also for the tourists' perception of a destination. These resources need to be arranged, equipped and marked since the users notice it and treat it as an integral part of the product (Križman, 2008, 153). In order to understand and define the tourist offer better, it is necessary to state a destination's comparative advantages and its derived offer which role is very important in the tourist product creation. Comparative advantages of natural values of a destination are: climate, landscape, beaches, ecological areas etc. while the derived offer is made out of various infrastructural and superstructural elements (Magaš; 2003,52). It is necessary to take into consideration the comparative advantages of a certain area and the possibility of developing various segments of a tourist product of the tourist destination. The long-term development has to be based on comparative advantages which stem from available resources (natural and acquired), on interdependence and functionality of relations between individual activities and on the need to ensure better life conditions to all residents in a tourist destination (Blažević; 2007.; 218).

2.2. Golf compatibility with the destination's tourist product

Golf represents one of the most developed and mass commercial sports of today. All golf market analyses show that golf has become an indispensable and necessary part of a destination's tourist product, not only in Europe but all over the world. Tourism development practice in the world shows that countries which do not have golf courses in their offer can not seriously compete on the world tourist market in the segment of richer consumers (Bartoluci&Čavlek; 2007,154). The tourist product of a destination has to be seen, developed and created in this view, if its goal is to compete on the demanding world tourist market. In order to view the situation on the world golfer market better, several characteristic markers are used. Their purpose is to view the dimensions of the spatial and population location of golfer markets. The markers are: golf availability, i.e. the number of inhabitants of a country per one golf course, the extent of the golfer population, i.e. the share of golfers in a country's population, the number of golfers on a golf course. From the view of economical science and analysis, the most important information is the size and structure of the world golfer market shown in US \$. It is shown in the following table:

Table 1: Size and structure of the world tourist market

INDICATOR	WORLD	USA	EUROPE
Number of golf courses	31.500	15.990 (51%)	6.546 (21%)
Number of golf players	70 mil.	29 mil (41%)	8 mil (11%)
Number of inhabitants per a golf course	-	19.000	74.850
Golfer share in the total number of inhabitants (%)	-	9,6%	1,6%
Number of golfers per a golf course	2.222	1.813	1.222
Market value	\$90 billion	\$55 billion	\$10 billion

Source: www.nfg.org, www.ega-golf.ch, (11.04.2008.)

The table shows there are 31.500 golf courses in the world and that around 70 million people practice golf. These figures represent a great potential in the tourist sense. The most important information is that market value for a year amounts to 90 billion dollars. The most developed part of the world for golf are the US (51% of the world golf courses, 41% of the players and market value 55 billion \$). From the point of view of this research, the situation in Europe is particularly interesting. It is considered that Istria will be visited by European golfers. Europe owns around 6.500 golf courses – 21% of the total golf courses in the world. It is also important to state that a large number of these golf courses are found in the north where they are closed, due to the climate, during cold winter months. A large number of the total of 8 million (11% of the world golfer population) is forced to travel during winter in order to play golf. Annual golf income in Europe amounts to 10 billion dollars which represents important information for golf development as a part of the tourist product.

3. ISTRIAN ADVANTAGES FOR GOLF DEVELOPMENT

For better analysis and comparison, it is necessary to show the current situation in relation to golf courses in the competitive Mediterranean countries. All important tourist countries on the Mediterranean as well as Italian regions in the vicinity of Istria have been taken into consideration. Comparative and other advantages of Istria for golf development have been pointed out.

3.1. Situation on a wider area – Mediterranean

As we already stated, basic tourist resources are tourist attractions which attract tourists to visit a certain destination. In this case, the attractions are the golf courses which represent the main reasons why people visit a destination. The main strength of a destination are attraction complexes which have two functions – attract guests and fulfil their expectations (Senečić&Grgona; 2006; 141). Many Mediterranean countries recognized their development chance in golf as a part of the tourist product. The development of golf in Spain began in the 1960s, and the most popular golfer region is Costa del Sol with 51 golf courses.¹ France has several golfer regions (Normandy, Biarritz, Paris) but the region around Cannes where the best golf courses are found is far more known. In Portugal the Algarve region has 38 of the total 89 courses². During the 1980s the Portugal government systematically helped in creating the Algarve golf region in order to improve the usage of accommodation outside the main season, prolong the main season and bring richer guests. Turkey has built 17 golf courses on the same principle. They are concentrated mostly in the tourist region Belek in the province Antalya.³ In this way, with the help of the government a new European golf destination was consciously formed which managed to profile itself on the European market of tourist golf travels. Italy with its 258 golf courses⁴ represents a significant European destination for golf vacation. The following table shows the number of golf courses in the Mediterranean countries:

Table 2: Number of golf courses in the Mediterranean countries.

COUNTRY	NUMBER OF THE GOLF COURSES 2009
France	559
Spain	332
Italy	258
Austria	149
Portugal	89
Turkey	17

¹ Source of data: http://www.bookyourgolf.net/Spain_Golf_Courses/Costa%20del%20Sol.htm (20.02.1010.)

² Source of dana: <http://www.algarvegolf.net/index2.htm> (15.02.2010.)

³ Source of dana: http://www.golfturkey.com/golf_courses (01.02.2010.)

⁴ Source of dana: <http://www.ega-golf.ch> (11.01.2010)

Egypt	13
Slovenia	11
Tunis	10
Cyprus	9
Greece	6
Croatia	4

Source: www.ega-golf.ch (01.01.2009.)

On the basis of this information, the conclusion is that all important Mediterranean countries where tourism represents a significant economic branch have or are building their own golf courses. Their purpose is the modernization of the tourist product offer as well as improving the quality of the tourists coming there on their vacation. Besides, it is widely known golfers travel in pairs or groups so the extent and importance of this segment is additionally emphasized. It can be concluded that tourism and golf as world trends are in constant growth and compatible. Both golf and tourism have mutual interest fields. In that view, both Croatia and Istria have a lot to do.

3.2. Golf situation in the vicinity of Istria

For analysis of the golf offer situation, we have taken the situation in Slovenia and Italian regions Friuli and Veneto.

Golf in Slovenia

As in many other countries, Slovenia has realized possibilities and opportunities golf development offers. Slovenia has always been an interesting tourist country with built tourist accommodation, but tourism has always been of a seasonal character – oriented on the winter season. During 1990s investments in golf have started “sponsored” by local and state government. Along with the existing golf courses in Mokrice, Bled and Lipice, other golf courses have been built. Slovenia now has 11 golf courses.⁵ Two golf courses have been partially financed by the European Union foundation and there are golf courses Otočec and Dinars Golf Club near Ljubljana. There are also some other additional golf practice courses and a base for further golf development – around 9.000 golfers. It has to be stated that these golf courses have been built mainly for local inhabitants, not to attract foreign tourists.

⁵ Source of data: <http://golfportal.info/gzs/zveza> (01.03.2010.)

The cold climate does not allow playing golf during the whole year and it is one of the flaws of Slovenian golf.

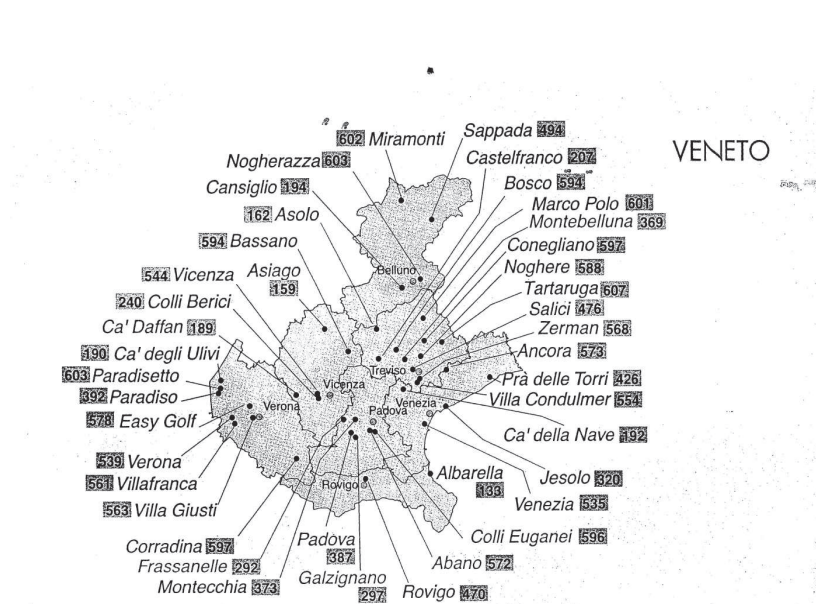
This fact can be used to develop golf in Istria since the Slovenian emissive market is very interesting to us due to the number of golfers and proximity. So, many golfers from Slovenia would come and visit the courses in Istria.

Golf in northern Italian regions Friuli and Veneto

There are more than 250 golf courses in Italy which primary purpose was to meet the needs of local inhabitants, not the attraction of foreign tourists and development of golf regions.

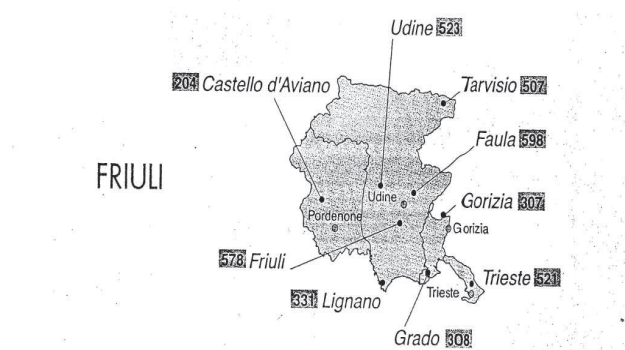
During 1990s situation gradually changed to the benefit of golf tourists, but there are no regions like for example Costa del Sol, Algarve or Antalya in Italy. Similar situation is found in the northern Italian regions Friuli and Veneto. The number and location of golf courses is shown in the following pictures:

Picture 1: Number and location of golf courses in the Veneto region



Source: Montanaro, N. (2009). Golf in Italia 2009, Federazione Italiana Golf, Rim, str.22

Picture 2: Number and location of golf courses in the Friuli region



Source: Montanaro, N. (2009). *Golf in Italia 2009*, Federazione Italiana Golf, Rim, str.22

Pictures show that both regions dispose in a sufficient number of golf contents. There are not just Championship courses here but also courses for practising found as parts of agritourisms. Since golf courses were built for the needs of local inhabitants, the greatest number of golf courses can be found in the vicinity of larger towns, such as: Trieste, Udine, Venice etc. These courses function as classical city courses – based on club membership. In recent times, golf courses for tourist purposes have been built – in Lignano, Jesolo, Caorle – mostly financed by tourist visits. Both regions are relatively well developed golf regions with rather long golfer and tourist tradition and a solid local golfer base. However, they are not formed into a unique destination product and none of these regions managed to become a golfer region in the European frame. This is the advantage of Istria – we can create it to become a well known golfer region.

3.3. Comparative and other advantages of Istria for development of golf as a part of the tourist product

Istria has all predispositions for golf development and forming itself as a well known golfer region (Jeremić, 2008, 551). The mild climate enables golf playing throughout the whole year, it has ecologically healthy nature and sea and the relief that suits modelling and golf course design. Golf course design is becoming a difficult and demanding work (Wiren, 1990, 7). A great advantage is the vicinity of large emissive markets and the fact that there are no golfer destinations in the region. The following table shows the relation between the number of guests and

overnight stay and the number of golfers according to emissive countries in the vicinity:

Table 3: Relation between the number of guests and overnight stay and the number of golfers according to visiting countries (Istria, 2009)

COUNTRY	NUMBER OF THE VISITORS	NUMBER OF THE OVERNIGHTS	% OF THE TOTAL FULL ADDITION OF THE VISITORS	NUMBER OF THE GOLFERS
GERMANY	603.093	5.371.594	28,19	552.388
SLOVENIA	412.762	2.470.583	12,97	9.000
ITALY	474.775	2.305.636	12,1	95.430
AUSTRIA	350.968	2.057.315	10,8	104.072
NETHERLAND	150.964	1.665.352	8,74	330.000
CZECH	98.560	639.827	3,36	35.369
RUSSIA	53.928	554.670	2,91	5.150
DENMARK	40.209	350.564	1,84	145.310
GREAT BRITAIN	43.024	307.616	1,61	1.218.288
FRANCE	56.036	265.758	1,39	378 275
SWITZERLAND	35.116	217.824	1,14	72.626
SWEDEN	32.667	214.349	1,12	532.944
BELGIUM	25.356	199.151	1,05	47.134
IRELAND	2.316	12.778	0,07	289.120

Source : European Golf Association, Eurostat, 2009. godine i TZ IŽ statistic, 07.01.2010.

The table shows that the most important emissive markets for Istria own a large golfer potential. It can also be concluded that this kind of tourist market would come to Istria too if it were a golfer destination. It has to be considered that Istria represents a typical car-destination – it is well connected with Europe so that golfers can reach this destination quite easily, even outside the main season. Besides, a large number of golf courses in the emissive countries are closed during winter months. Istria has ideal conditions for golf playing throughout the whole year and this represents an additional argument for the importance of golf in the Istrian tourist product development.

CONCLUSION:

All important Mediterranean countries where tourism represents a significant part of the economy already have or are building their own golfer regions. Their purpose is to modernize the tourist offer and the uplift of the quality of tourists. On the tourist market, the best known golf regions are Costa del Sol in Spain, Algarve in Portugal and in recent times Antalya in Turkey. In our vicinity, in Slovenia, golf courses were mostly built to meet the needs of local inhabitants, not to attract tourist. Besides, the cold climate does not suit playing golf throughout the whole year. This fact could be very useful in golf development in Istria. Northern Italian regions Friuli and Veneto are developed regions in terms of golf with a long golfer and tourist tradition and a solid local golfer basis. But none of these regions managed to become a widely known golfer region. This is seen as a great advantage of Istria – it could become a golfer destination known on the entire European continent. The long-term tourism development in Istria has to be based on comparative advantages which stem from available resources. It especially refers to the mild climate which enables golf playing throughout the whole year, the vicinity of emissive markets and the fact that there are no widely known golfer regions in the vicinity. It can also be concluded that this kind of tourist market would come to Istria too if it were a golfer destination. It has to be considered that Istria represents a typical car-destination – it is well connected with Europe so that golfers can reach this destination quite easily, even outside the main season. Istria has all predispositions to develop golf and turn itself into a widely known golf region. This is why it is necessary to insert golf as an integral part into the process of restructuring and repositioning of the Istrian tourist product.

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