**Chapter 15**

**Golf in Asia and the Middle East**

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**Objectives**

Upon completion of the chapter the reader should be able to:

* Outline the major golf bodies and their role in the Asian and Middle Eastern golf industry.
* Identify and examine the major strategic issues confronting golf in Asia and the Middle East.
* Identify the importance of golf tourism and manufacturing to the Asian golf industry

**Overview of the chapter**

The popularity of golf is heterogeneous in Asia and the Middle East. Golf is relatively new to the continent but its effects are immense. Asia accounts for most of the global industries growth in the last few decades and for most of the optimism when it comes to next few decades. Whilst golf was for so long a western pastime, golf is increasingly embedded within Asia. This chapter reviews the structure, organisation and governance of golf in Asia. The major governing organisations for amateur and professional golf are identified. This chapter also examines the major strategic issues confronting golf in Asia and the Middle East. The chapter concludes with a brief discussion of the importance of the golf tourism and manufacturing sectors to the Asian golf industry.

**Keywords**

Sport governance, national governing bodies, Asia, Middle East

**Introduction**

Asia is Earth's largest and most populous continent. Within Asia, there are 47 sovereign states, 6 states with limited international recognition, and 6 dependent territories and other territories. Unlike the continents of North America and Australasia, there is significant heterogeneity between and amongst Asian countries. Democracy in Asia varies considerably. Political systems range from long-standing democracies (e.g., Japan, South Korea, and the Philippines), newer democracies (e.g., Indonesia, Mongolia, and Timor-Leste) through to one-party states (e.g., China and Vietnam) and monarchies (e.g., Jordan, Saudi Arabia, Kuwait, Bahrain, Qatar, Oman and the UAE). There are approximately 50 different official languages amongst the Asian nations and considerable religious diversity Wealth (if measured by GDP per capita) is mostly concentrated in the East Asian territories of Brunei, Hong Kong, Japan, Macau, Singapore, South Korea and Taiwan, as well as in oil rich countries in West Asia such as Saudi Arabia, Qatar, United Arab Emirates, Bahrain, Iran, Kuwait, and Oman. Though certainly not without exceptions, the popularity of golf reflects the nation’s economic development. Asia is certainly heterogeneous. Consequently, Lawrence (2014, p. 1) advises, “It’s a mistake of huge proportions to view Asia as one market from a golf perspective”. Therefore, this chapter focuses on Pan-Asian organisations and issues.

**Governing organisations**

**Asia Pacific Golf Confederation (APGC).** The APGC is the representative body for 38 national golf associations throughout Asia-Pacific. The AGPC footprint is wider than Asia. Based in Melbourne, Australia, the APGC assists member organisations to develop golf in their respective countries, ensures adherence to the Rules of Golf as approved by the R&A, and partners with the International Golf Federation to promote golf.

The 39 members of the APGC are the national golf organisations for Australia, American Samoa, Bahrain, Bangladesh, Bhutan, Cambodia, China, Chinese Taipei, Cook Islands, Fiji, Guam, Hong Kong, India, Indonesia, Iran, Japan, Jordan, South Korea, Laos, Lebanon, Macau, Malaysia, Mongolia, Myanmar, Nepal, New Zealand, Oman, Pakistan, Papua New Guinea, Philippines, Qatar, Samoa, Saudi Arabia, Singapore, Solomon Islands, Sri Lanka, Thailand, United Arab Emirates and Vietnam. The organisations are classified to one of four tiers.

* Tier 1: Members with either more than 500 golf courses or over 300,000 male golfers, or with an annual income of more than US$5 million.
* Tier 2: Members with either more than 250 golf courses or over 150,000 male golfers, or with an annual income of more than US$2.5 million.
* Tier 3: Members with either more than 50 golf courses or over 50,000 golfers, or with an annual income of US$1.0 million.
* Tier 4: Members that do not belong to the above criteria.

The AGPC is affiliated to the Olympic Council of Asia. The APGC’s programme of tournaments is providing elite junior and amateur players with a quality tournament playing opportunities. Key events managed by the AGPC include the Nomura Cup (the Asia-Pacific Teams Championship for men), Bonallack Trophy (Europe vs Asia/Pacific men's teams event), Patsy Hankin Trophy (Europe vs Asia/Pacific women's teams event) and the Queen Sirikit Cup (more formally known as the Asia Pacific Amateur Ladies Golf Teams Championship). The AGPC manages the Asian Pacific Amateur Championship. The tournament is a partnership between the APGF, Augusta National Golf Club and R&A. The winner of the event earns an invitation to play at the US Masters in August and in the British Open qualifiers.

**Asian Golf Industry Federation (AGIF).** The AGIF draws its membership from all corners of the Asian golf industry. Unlike the AGPC, the AGIF has an exclusive focus on Asia. Whereas the AGPC member is comprised of national golf organisations, the AGIF membership is more reflective of the wider golf industry. Member organisations include golf courses, club suppliers, professional support services, golf course architects, and golf real estate and development companies. Education continues to be the main focus of the AGIF with a growing number of events both for course superintendents and general managers. Other activities include research, sharing information and market intelligence, networking and lobbying.

**Arab Golf Federation (AGF)**. The mission of the AGF is to streamline the affairs of the game in the Arab world and enhance the overall development of golf by creating healthy playing opportunities for its members. The AGF is recognised by R&A and the Arab Olympic Committee. Whilst recognised by the R&A, the AGF is not an R&A affiliate. Members of the AGF are the national golf organisations for Algeria, Bahrain, UAE, Egypt, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Palestine, Qatar, Saudi Arabia and Tunisia.

**National Golf Organisations.** Each nation has its own national golf organisation. These organisations vary considerably in terms of their organisational capacity. Most of these organisations are recognised by and partner with their government’s sports agency or department. For example, the Indian Golf Union (IGU) describes itself on their website as "the apex body of golf in the country with primary objective of promotion and development of golf in India duly approved by the Ministry of Youth Affairs and Sports, Government of India".

**Professional Tours**

In this section, overviews of those Tours whose events qualify for Official World Golf Ranking (OWGR) events are discussed. There are other Tours in Asia, but none or only some of their affiliated events carry OWGR events. For example, the Indian Open is part of the Professional Golf Tour of India (PGTI), but is also co-sanctioned by the European Tour and Asian Tour.

**Asian Tour.** The International Federation of PGA Tours recognises the Asian Tour as the official regional sanctioning body for professional golf in Asia. The mission of the Asian Tour is to expand tournament golf so as to substantially enhance the careers of its members, thereby developing and growing golf in Asia while maintaining a commitment to the integrity of the game. The Asian Tour’s principal role is the sanctioning, management, marketing, technical administration, development and promotion of professional golf tournaments in the region. The Asian Tour’s core activity is to generate playing opportunities and increase prize money for its members through the sanctioning and, in some cases, ownership of Asian Tour events. Winners of an Asian Tour event receive a minimum of 14 OWGR points. The Asian Tour is overseen by a Board consisting of five non-playing members and four player members. The Board establishes goals and policies and directs the strategic development of the Asian Tour. The board is supported by a nine-person Tournament Players Committee. The Asian Tour’s objectives are to:

* Build a sound commercial platform to encourage commercial partners to build long-term relationships with the Asian Tour
* Re-invest surplus funds back into the Asian Tour to help build a stronger and more successful Tour that benefits its members and partners
* Increase the number of tournaments and prize money for members
* Develop and promote the sport of golf throughout Asia
* Establish mutually beneficial working relationships with its fellow members of the International Federation of PGA Tours and all other golf associations; at all times acting in the best interests of the development of the game.

**Asian Development Tour (ADT)**. The ADT was launched in 2010 with the aim of creating a career pathway for professional golfers in Asia. Designed in the same structure as the Nationwide Tour in America and European Challenge Tour, the Asian Development Tour is a gateway to the premier Asian Tour and the exciting world of international golf. Sanctioned by the Asian Tour, the leading five players on the Asian Development Tour receive Asian Tour cards for the following season. Winners of an Asian Development Tour event receive a minimum of 6 OWGR points.

**OneAsia**. OneAsia is a men's professional golf tour based in the Asia-Pacific region. The tour was founded in 2009 as a joint venture between the PGA Tour of Australasia, the China Golf Association, the Korean Golf Association and the Korean PGA. OneAsia is a rival to the longer established Asian Tour, with which it has poor relations. Winners of a OneAsia Tour event receive a minimum of six Official World Golf Ranking (OWGR) Points.

**Middle East and North Africa Golf Tour (MENA).** The MENA Golf Tour is affiliated to the R&A and the Arab Golf Federation. The tour is open to professionals and amateurs. Beginning in 2016, the top five professionals on the Order of Merit receive Sunshine Tour cards for the following season, with those 6th to 15th earning entry into the final stage of the Sunshine Tour's Q School. The MENA Tour was included in the Official World Golf Ranking beginning in April 2016. In addition to the Sunshine Tour, those who place high on the MENA Tour's Order of Merit also receive exemptions into European Tour events. The MENA Tour also awards entry into the final stage of Asian Tour Q School for the top three players and full Asian Development Tour cards for the top two players. Winners of MENA 72-hole event receive a minimum of five OWGR points.

**National Tours**. Some of the most developed Asian golfing nations have their own national tours. Established in 2014 as part of the PGA Tour's global expansion, PGA Tour China is a China-based men's professional golf tour. A minimum of six OWGR points are available at their events. There are also the Japan Golf Tour and the Korean Golf Tours. In terms of prize money, the Japan Tour sits only behind the PGA Tour and the European Tour. The quality of the Japan Tour is also reflected in the OWGR points on offer. Winners of a Japan Tour event receive a minimum of 16 OWGR points, whereas they receive nine points for an equivalent Korean Tour event. The Japan Challenge Tour is a series of developmental golf tournaments run by the Japan Golf Tour Organization.

Similarly, the LPGAs of Japan and South Korea provide Tours for their members. The LPGA of Japan Tour is the second richest women's golf tour in the world. The Taiwanese LPGA Tour considers itself as the fifth most lucrative women’s golf tour. The Ladies Asian Golf Tour is effectively a tour for the rest of Asia.

**Major strategic issues**

There are a number of Pan-Asian strategic issues. The first is that the diffusion of golf is not even throughout Asia (R&A, 2015). Fifty-three of the 55 countries in Asia have golf facilities. However, eight countries account for 90% of the region’s supply. With 2,383 facilities, Japan alone accounts for 50% of the region’s golf facilities (R&A, 2015).

The diffusion of golf throughout Asia has largely been a top-down process. This reflects the traditional *modus operandi* of government in most Asian nations, which illustrates a top-down implementation approach and the prevalence of elitism. Lawrence (2014, p. 2) writes, “Where the game has spread, it has done so largely because wealthy elites have taken to it; where courses have been built in quantity, they have been created by developers as part of a scheme whose goal is to make profit (whether by associated housing, or as a resort project)”. In some cases, golf’s elite status has its origins in their colonial past. The British brought golf to Malaysia, Singapore, Philippines, India, Hong Kong and Myanmar. Barton and Furore (2012, p. 39) write, "The British took much from this land during the long years of colonial subjugation, but one crumb they left behind was golf". Golf in India is “a highly marginal, elitist activity”. In 2012, India had only one public golf course. All others are member-only facilities or on military bases (Barton & Furore, 2012). Golf in the Middle East can be traced back to expatriate Europeans employed to work in the oil fields. The golf development boom in the 1990s was linked to much larger economic development strategies. For example, the main approaches taken by the UAE to survive a post-oil world consist of diversifying the economy and global integration. UAE redirected its resources into education, healthcare, construction of new cities, real estate and tourism projects. Golf in the UAE is integrally linked to real estate and tourism projects, neither of which connects well to the local middle class.

Bitz (2014) provides a cogent summary of the divide between professional golf and grassroots golf in many Asian countries:

The game draws in sponsors such as companies selling cars, watches and other luxury goods, as well as financial services. Not many are particularly interested in the development of the game at grassroots level. Their sole targets are wealthy individuals. That is golf’s paradox when it comes to finding new markets.

So whilst golf’s perception of an elite sport is problematic on the one hand, it is also a source of opportunity on the other. Key to understanding the emergence of golf throughout Asia in the 20th century is its appeal to aspirational members of the fast-growing middle classes. Even though Asian economies are at very different stages of middle class emergence, the emergence of the Asian middle class is globally significant. China exemplifies this opportunity better than most. There is a positive relationship between the popularity of golf and the level of consumption in China. A study indicates that 72% of the total golf clubs were located in the areas of which local GDP per capita ranks amongst the highest in the country (Lin & Shu, 2009). Between 2010 and 2020, Asia is expected to double its share of global middle class consumption to 42%. By 2015, 98 million Chinese households were predicted to be middle-class, compared with 52 million in 2010. India’s middle class was predicted to grow from 32 million households in 2010 to more than 50 million by 2015 (HSBC, 2012). Other recent high-growth nations in Asia include Israel, Malaysia, Indonesia, Bangladesh, Pakistan, Thailand, Vietnam, Mongolia, Uzbekistan, Cyprus and the Philippines, and mineral-rich nations such as Kazakhstan, Turkmenistan, Iran, Brunei, United Arab Emirates, Qatar, Kuwait, Saudi Arabia, Bahrain and Oman.

The increased economic prosperity in many Asian countries created a new middle class who are more exposed to information, especially advertising, and have more resources and ability to know the rest of the world (Lange & Meier, 2009). With economic prosperity comes changes to culture and consumption patterns. Key to understanding middle-class aspirations is the concept of conspicuous consumption. Conspicuous consumption occurs when individuals consume more expensive goods to signal their wealth and exhibit their social status (Nanda & Yeh, 2016). There are two motivations to consume conspicuously. First, “invidious comparison” indicates that a member from an upper class background will consume luxury goods to display their status to those with a working class background. Second, “pecuniary emulation” motivates a member from the working class to consume conspicuously so that they are perceived as belonging to the upper class (Nanda & Yeh, 2016). Golf clubs in Asia cater for this conspicuous consumption. Each club is aimed at the top end of the market. Hyperbole is common. Phrases and words such as “International Standard”, “Championship Golf”, “Signature Design” “Exclusive” and “Private” are common. Clubhouses are often somewhere between extravagant and opulent, and membership fees prohibitive for the vast majority of the population.

The R&A (2015) report that in 2015, there were 207 courses under development in Asia. Of Asia’s 53 golfing countries, 27 have at least one new project in development. Japan, had no new courses in development, mostly due to the lack of suitable land. The majority of the growth is in China, with 56 courses in development and 46 projects on hold with their fate unknown. India ranks second with 32 courses under development, followed by Vietnam with 18. Golf projects are also underway in the Middle East, more specifically Israel, Jordan, Oman, Iran and Lebanon.

The development of golf courses is not without its own set of challenges. One challenge for golf, certainly in Asia, is that new courses, will be further from the city and more difficult to reach, (HSBC, 2012). In many Asian cities and countries, land is scarce and population density is high. The continual expansion of golf courses runs counter to the broad ideal of urban sustainability (Neo, 2001). China actually banned the development of courses in 2004 to protect China’s shrinking agricultural and forestry lands. In addition to using water and land that could be used for food production, the concern in India is that golf “raises the price of existing real estate and creates inequality in access to common property resources”(Sharma, 2005, p. 73). Writing about the challenges of finding space for golf courses in Singapore, Neo (2010) writes “Golf is thus viewed rightly as a space hungry sport. Coupled this with the belief that Singapore is land scarce, the objection to further golf development, for many, is plain and direct”.

So whilst many Asians look at golf favourably, because it is aspirational and a symbol of financial status, this is the same reason that some governments are reluctant to embrace the sport. As Blitz (2014, p. 2) remarks, “Ploughing resources into a game played ostensibly by the wealthy does not sit comfortably with them”. When the Communist Party came to power in China in1949, Mao Zedong condemned the game as a "sport for millionaires", and courses that had been built for foreigners were turned into public parks, zoos and communal farms. Another reason for the slowing down of golf development in China was the governments large-scale nationwide anti-corruption campaign. Golf is not only a symbol of success and status in China. Golf is also considered a platform for corruption, bribery and the establishment and consolidation of political-economic ties and interest groups.

**Golf tourism**

Asian companies account for more than 15% of the International Association of Golf Tour Operator (IATGO) members, and more than half of IAGTO's tour operator members sell Asia golf destinations. Asian golf tourism is dominated by South-Eastern Asian nations, most notably Thailand. With an estimated 800,000 tourists visiting Thailand to play golf, Thailand is the number one golf tourism destination in Asia and number seven globally. Malaysia and Indonesia are the next largest destinations while Vietnam and Cambodia are fast-emerging markets. Vietnam constructed six luxury courses along what is known as the Ho Chi Minh Golf trail. Approximately 75% of the Asian golf tourists are travellers from East Asia with those from Japan, South Korea and China the most prevalent. Australians and Europeans make up the majority of western golf travellers coming to Asia. A proxy for the size of the inbound and outbound golf tourism markets in Asia is provided by the number of IATGO members in each country. The following is a list Asian countries affiliated with the AGPC that have at least one IATGO member: Cambodia (7), China (91), Chinese Taipei (1), Hong Kong (10), India (14), Indonesia (51), Japan (24), South Korea (38), Malaysia (46), Oman (4), Philippines (10), Saudi Arabia (1), Singapore (25), Thailand (93), United Arab Emirates (40) and Vietnam (28).

Most new golf courses in the Middle East are embedded within resorts and residential communities. Dubai has applied a diverse strategic approach in developing a strong brand image and events (including golf events) have significantly contributed to this as a brand extension, a key brand element, and as a co-branding partner (Sutton, 2016). A problem for Middle Eastern countries is the significant "distance" between a tourist's home culture and a destination's culture (Zaidan, 2016).

**Golf equipment manufacturing**

No discussion of golf in Asia would be complete with an acknowledgment of the regions manufacturing sector. Stachura (2007, p. 215) write that three quarters of the world’s golf clubs sold each year “have Asian fingerprints on them”. Asian golf club manufacturers include Srixon, Mizuno, Honma and Miura. Other leading companies assemble Asian manufactured components (i.e. grips, shafts and heads) in the United States. These components are usually made by independent Asian manufacturers, but some companies (e.g., Ping) own their plants in Japan and Vietnam. Acushnet Company's primary brands are Titleist, FootJoy, Scotty Cameron, and Pinnacle. Whilst Acushnet is an American company, it is also a subsidiary of Fila Korea. Whilst the preceding discussion is about golf clubs, identical patterns are also evident for balls and apparel.

Asian countries, in particular where the Chinese culture is dominant, are less accepting of the notion of protection of proprietary creative work (Chiu & Leng, 2016). Asian consumers are less supportive of copyright laws and more inclined to purchase counterfeits compared to westerners. Consequently, in some Asian countries, there is considerable supply and demand for counterfeit products. Counterfeit golf equipment is no exception to this phenomenon (http://keepgolfreal.com).

**Conclusion**

The governance of golf throughout Asia is necessarily fragmented, given the number of organisations and the number of countries. A single strategic plan is impractical. Golf is developing at a considerable rate in some parts of Asia, reflecting a growing middle class. When combined with golf tourism and golf manufacturing, the Asian and Middle Eastern countries will continue to be a cornerstone of the global golf industry. Relatively low wages, environmental concerns (especially land and water use), and the need for sustained government support will constrain golf’s development in Asia and the Middle East.

**Case study – Mission Hills Group**

Since the group began its golf operations in 1994, it has evolved into a conglomerate of hotels and resorts, golf and country clubs, residential communities, sports academies and pro shops. The Hong Kong-based Mission Hills Group does not just develop golf courses. They develop golfing mega-complexes. When southern China opened for economic reforms in the early 1990s, Ken Chu was among the first Hong Kong investors to buy land in the special economic zone of Shenzhen. Despite no background in golf, the Chu family could see the potential to link *guanxi* and golf in China’s a new, upwardly mobile economy. Having good *guanxi* - a wide network of mutually beneficial relationships developed outside the formal work setting - is often key to business relationships.

Mission Hills at Shenzhen is the world's largest golf club according to the Guinness World Records. The complex features twelve 18-hole resort and championship courses designed by golf's greatest names and architects - Jack Nicklaus, Pete Dye, Greg Norman, Nick Faldo, Annika Sorenstam, Jose Maria Olazabal, Ernie Els, Vijay Singh, Justin Rose, Ian Poulter, David Leadbetter, Jumbo Ozaki and Zhang Lianwei. Mission Hills at Haikou (the provincial capital of Hainan Province) is central to a government-led initiative to make tropical Hainan the sports and leisure capital of Asia. This is in keeping with Hainan government’s ambitions to put the island on the international tourism radar as the “Hawaii of China”. Mission Hills at Dongguan features seven 18-hole resort and championship courses.

Mission Hills facilities have hosted over 100 major international tournaments. The Omega Mission Hills World Cup, the celebrity Pro-am Mission Hills Star Trophy, the World Golf Championship and The Match in 2013 featuring Tiger Woods and Rory McIlroy.

The Company is well connected to government. The 1995 World Cup event was a tremendous boost to Mission Hills' relationship with local governments. This is because China was desperate to prove its ability to host major international events after losing its bid for the 2000 Summer Olympic Games. Ken Chu is the Missions Hills Group Chairman and CEO. He is a National Committee Member of the Chinese People’s Political Consultative Conference (CPPCC) and led the special advisory council for the Beijing 2008 Olympic Bidding Committee.

**Case discussion questions**

1. What is the strategy of the Mission Hills Group?
2. How does the company ensure an appropriate balance of east and west?
3. Mission Hills is a family company. Would you invest in it if it was to become a public company? Why or why not?

**Chapter discussion questions**

1. What are the major drivers of demand (i.e. participation) and supply (i.e. golf courses) in Asia?
2. What factors underpin the ongoing development of golf-related tourism and manufacturing in Asia?
3. If a male Asian golfer was to dominate elite golf, what impact would that have on golf in Asia?

**Guided reading**

A number of articles in International Journal of Sport Policy and Politics provide detailed overviews of sport policy in a number of Asian countries. These include Hong Kong (Zheng, 2015), Iran (Dousti, Goodarzi, Asadi, & Khabiri, 2013), Lebanon (Nassif & Mahfoud, 2015) and Japan (Yamamoto, 2012). Washburn (2014) provides a detailed examination of golf in China within a wider context of public corruption, battles between Beijing and local governments, ambitious developments, land seizures and environmental degradation. Neo (2010) provides tremendous insight into the political control that governments, in this case Singapore, can exercise golf course development. Lim and Patterson (2008) bring together the themes of golf tourism and major sport events in their examination a PGA event held on Jeju Island, South Korea.

**Recommended websites**

* Asian Tour: <http://www.asiantour.com>
* Asian Golf Industry Federation: <http://www.agif.asia>
* Arab Golf Federation: <http://arabgolffederation.org>
* Asia Pacific Golf Federation: http://asiapacificgolf.org

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