



Cape Kidnappers, Hawke's Bay

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GOLF TOURISM NEW ZEALAND

**PROGRESS REPORT
THIRD EDITION**
November 2016



To our golf industry stakeholders

As we head into summer I am pleased to provide you with this update about what has been a solid past year of achievement for the golf tourism industry. With your support we are continuing to deliver on our International Golf Tourism Strategy and grow New Zealand as a golf destination.

This report is our third industry update since the strategy was developed in 2014 and it provides a summary of the activity taken year-to-date by Tourism New Zealand (TNZ) and Golf Tourism New Zealand (GTNZ). It also includes information about recent and upcoming golf events and some great new tools to help you grow your business.

I am very happy to report that our most recent data shows international rounds across the 12 Marquee courses increased by 23% for year end April 2016. This is a great result and is just one of the many growth areas we have seen this year.

Other key highlights include:

- The total annual value of inbound golf tourism is \$329M as of August 2016.
- An 18% increase in the average golf visitor spend when compared to the same period last year.
- Rounds are up 31% over the same period last financial year and up 51% over the same period in 2013/14.
- Golf participation is at 2.6% of all international visitors.
- Two new courses opened in the greater Auckland area.

In addition, many of our other metrics continue to steadily improve. You can see more information about this in the key figures section of this report.

While it's fair to say our accomplishments this year have been significant it's important that we continue looking forward, growing our numbers even further, and setting goals for the future.

Securing the hosting of the 2017 Asia Pacific Amateur was a big step in this direction. The tournament will be broadcast live to more than 150 countries and attract a number of the world's golf media to New Zealand.

The event will provide us with a fantastic opportunity to showcase New Zealand as a top golfing and tourism destination. Our facilities, passion for the sport and our world class hosting abilities will provide a unique experience to our visitors and allow us to show the world what we have to offer.

As we now head into summer I wish you all a great season as we start to see more golfers arrive on our shores to enjoy our courses and our country.

Best Regards,

Ryan Brandeburg, PGA
Executive Director, Golf Tourism New Zealand
Golf Specialist, Tourism New Zealand

Have a question or want to know more? I would love to hear from you. Email me at ryan@gtnz.kiwi or give me a call on **09 215 7401**.

Key figures 2016

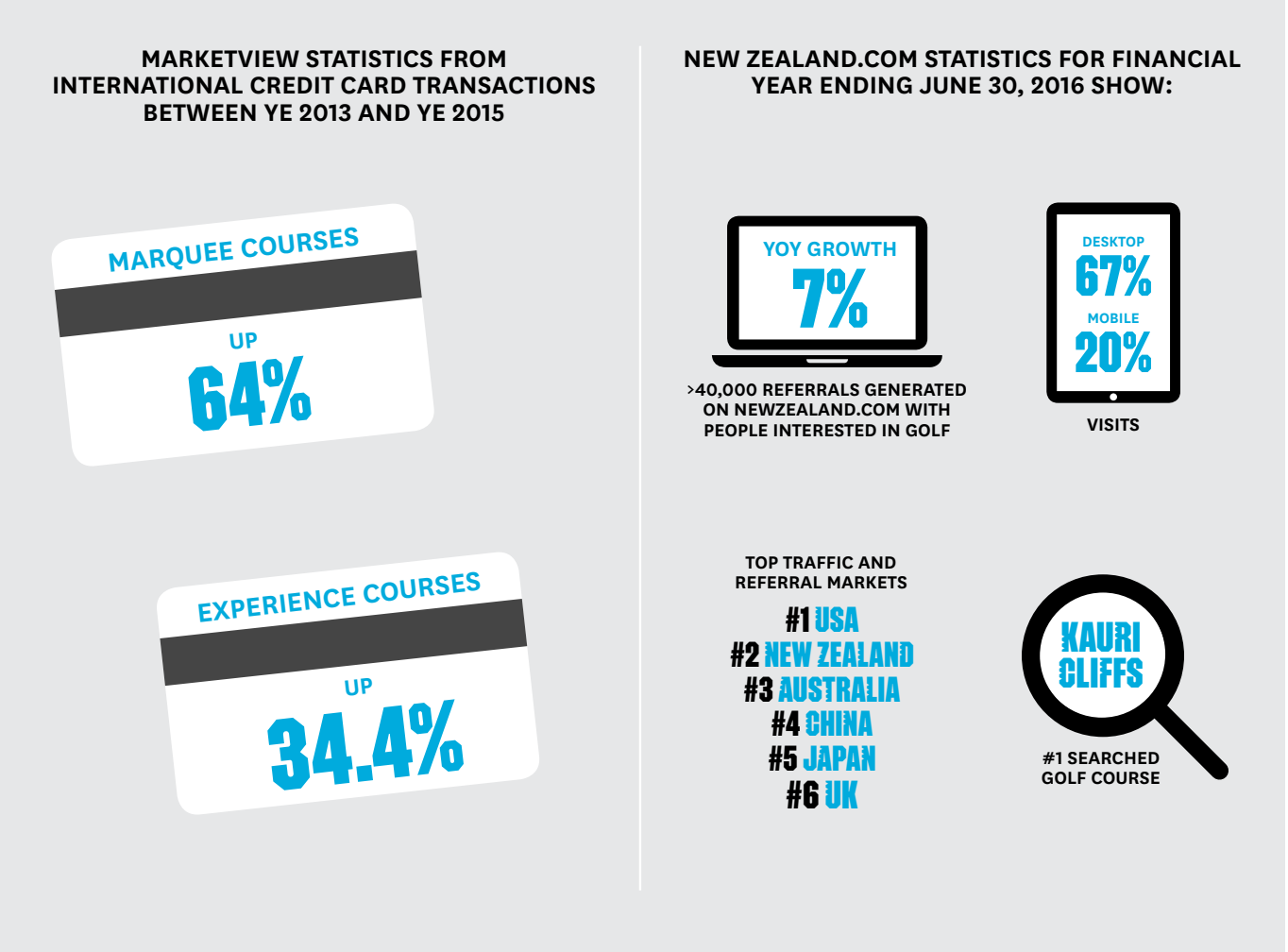
We are always looking at ways to understand more about our golf visitors. More information means we can work together to give our visitors what they are looking for out of their New Zealand experience.

We recently began utilising some clever technology that allows us to analyse credit card spend at courses across the country. We can now access international transaction data, such as the country of origin, amount, and the date/time it took place from EFTPOS terminals throughout the country.

The information can be filtered to show spend across the majority of New Zealand's courses, or it can be narrowed down to just a few in a specific region. Thanks to Wellington based company Marketview for providing the technology.

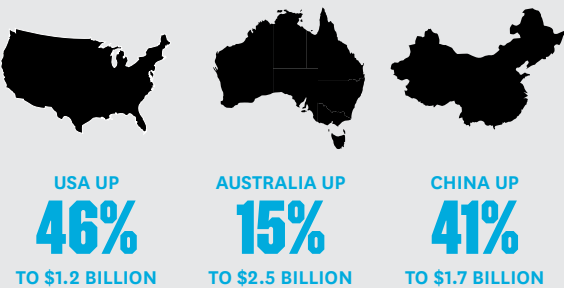
We will be using this new information and data from the quarterly International Visitor Survey and international visitor rounds collected at many of our golf courses in our work to help us to understand the volume of golfers visiting New Zealand.

Market Insight



INTERNATIONAL VISITOR SURVEY DATA FROM YEAR-END MARCH 2016 SHOWS:

INTERNATIONAL VISITOR SPEND PASSED \$10 BILLION FOR THE FIRST TIME - GROWTH CAME FROM ALL MARKETS:



AVERAGE INTERNATIONAL GOLF VISITOR SPEND

UP 18%

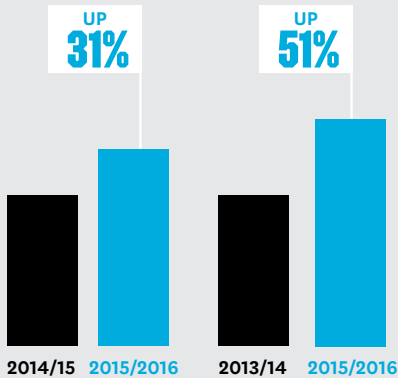


GOLF PARTICIPATION

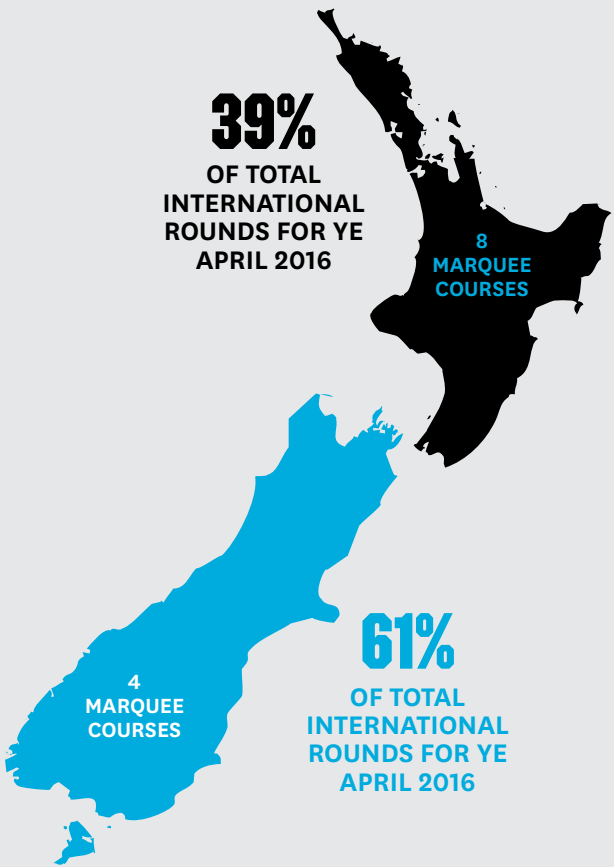
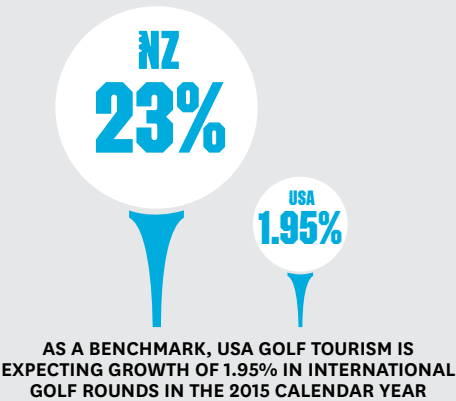


DATA COLLECTION FROM THE 12 MARQUEE COURSES THROUGH APRIL SHOWS:

INTERNATIONAL ROUNDS FOR THE MONTHS OF DECEMBER 2015 TO APRIL 2016



OUR YEAR-ON-YEAR GROWTH





Jack's Point, Queenstown

Two new courses have opened

Recently we have seen two new courses open in New Zealand.

Wainui Golf Club recently opened for limited play on its new site in Orewa and Windross Farm has also opened to limited play near Ardmore Airport.

This is a great achievement considering the worldwide market has seen a slowdown in new course construction over the past decade.

With impressive facilities and qualified staff the courses have gained international media and trade attention.

Both courses are expected to undergo a GTNZ assessment in the coming months.

Assessing new courses for GTNZ

When we set out on this golf tourism journey we assessed around 80 courses, and have since assessed additional courses as necessary. The assessment process is robust and was developed by industry experts in consultation with representatives from the industry to ensure that all courses are treated fairly. It includes each course being visited by two independent assessors.

In our next Progress Report, we will announce a series of criteria for golf courses to “self test” to get a better idea if they are ready to apply for inclusion into GTNZ. While there are several areas of the full assessment, a successful golf course must be:

- “Of interest to an international visitor” - A golf course included in the GTNZ portfolio needs to justify the time spent, with an international visitor feeling that the course was unique and worth their time. The worst thing we can hear is a visitor telling us a golf course reminded them of something at home, as we are promoting unique experiences.
- “Exceptional design, rich history, scenic beauty” – Design is paramount, and is the heaviest weighted component of the GTNZ assessment. A course with a particular history or identity, or with dramatic scenery will also help us to provide an experience that is of interest to an international visitor.
- “Export Ready” – Export readiness is defined as the golf course’s ability to fulfill the needs of an international visitor. For a Marquee course, the bar is set very high. At an Experience course, we recognise that there will be varied levels of service, but minimum standards must be met in several categories.

The assessment process ensures that we are showcasing New Zealand’s golf experience in its best possible light so we are perceived as a world class golfing destination. In the long run the entire golf tourism industry will benefit from this approach as more international visitors wanting a wider range of golfing experiences will visit New Zealand.

Data collection underway

In addition to the Marquee course round data now being collected and reported by international auditors BDO, we are using the International Visitor Survey and Credit Card spend data to track the effectiveness of our performance. This means we now have a more robust basket of data that adds validity to our performance tracking and reporting.

Golf events summary

2016 New Zealand Open

The 2016 New Zealand Open was held in March with two spectacular courses in Queenstown, The Hills and Millbrook, co-hosting the event.

This event had the largest broadcast scope ever, with 25.8 million households receiving live coverage and 22.4 million households receiving nightly highlights. The coverage reached over 20 countries including Australia, France, China, Hong Kong, Indonesia, Malaysia, Singapore, Korea, Taiwan, and Japan.

TNZ worked with the Open and Sky Sports to produce a series of videos that showcased some of the country’s best courses and their accompanying regions. Due to footage restrictions that prohibited domestic use, these vignettes did not air during the domestic New Zealand broadcast but did air in all overseas markets.

We also took groups of international media from Australia, Japan, Hong Kong, China, France and the USA around the country on a tour of 14 different courses and to sample a range of New Zealand’s best activities, accommodation and cuisine.

Several stories from these tours have already been published, the most recent from American Tom Dunne will appear in this quarter’s publication of American Express’ Departures magazine, the official publication for their Platinum and Centurion (Black) card holders.

2017 Asia Pacific Amateur Championship

The Royal Wellington Golf Club has been selected to host the 2017 Asia Pacific Amateur Championship, one of the most significant amateur golf events in the world.

The Asia Pacific Amateur, a collaboration between the Asia Pacific Golf Confederation, the R and A, and Augusta National Golf Club, has grown in reputation since its inception in 2009. The 2017 event will be broadcast to over 160 countries and include three hours of live broadcast coverage on each of the four competition days plus a 30-minute highlight show. Attendance to the Amateur, which will be held from October 26-29 2017, will be free of charge.

Each country in the confederation is allocated two spots, and based on world rankings a country could have a maximum of six attendees. As the host country, New Zealand receives 10 entries into the event, with the winner of the Asia Pacific Amateur Championship receiving a spot in the final round qualifying for the 2018 Open Championship at Carnoustie, and a spot in the field for the 2018 Masters Tournament played at Augusta National.

Trade shows and hosting

TNZ once again joint-ventured with USA based Premier Golf, one of the largest golf travel specialists in the world and the official partner of the PGA of America, at the 2016 US PGA Show in Orlando, Florida.

Around 42,000 golf industry professionals from 91 countries around the world attended. Our core target was PGA Professionals, of which there were over 7,000 in attendance (up 3% from 2015). Premier Golf’s relationship with the PGA of America ensured we had premium booth placement which attracted significant traffic.

In April, we hosted a number of China and Hong Kong based golf travel specialists. We took them on a tour of five cities and eight golf courses over 10 days, and trained them on a number of additional courses, accommodation options, activities, and air/ground connectivity.

We have remained in contact with the agents as we help them to develop itineraries, obtain the proper resources (contacts, images, etc), and determine the best way for them to present their New Zealand product to their clients.

In April, TNZ attended the International Association of Golf Tour Operators (IAGTO) Asia Golf Tourism Convention (AGTC) in Chiang Mai, Thailand. AGTC pairs suppliers (like TNZ) with buyers from around the world, with a significant amount of buyers coming from Asia. The event resulted in us meeting with over 50 buyers and offered us numerous networking opportunities.

It was great to see other New Zealand suppliers in attendance including Terrace Downs Resort, Remarkable Golf Tours, and New Zealand Golf and Travel.

In June, TNZ attended IAGTO’s North American Conference (NAC) in Pinehurst, North Carolina. Like AGTC, the NAC conference pairs suppliers and buyers together, with a significant amount of buyers coming from North America. We attended the event as a sponsor and this allowed us opportunities to talk to the event attendees and really promote New Zealand to key stakeholders. A special thank you to the Marquee courses, who all made a financial contribution to enable attendance.

The process of familiarisations

A familiarisation (famil) aims to showcase what we have on offer to relevant industry so they consider us as a destination.

We typically focus on travel agents who actively sell golf or media who produce content about golf. We do also occasionally look to host influencers such as club captains, golf professionals, and/or general managers from regions we target.

Bringing a famil to New Zealand includes significant collaboration and cost from airlines, the regional tourism organisations (RTOs), and TNZ.

The journey starts at one of TNZ’s 14 overseas offices who will work with our Auckland and Wellington based teams to determine the need for a famil. The global team will then begin identifying participants and developing the itinerary.

Once these are approved, the RTOs will assist to make recommendations and bookings specific to their region.

During the famil, TNZ staff from a worldwide office will accompany the participants to New Zealand and interact with our tourism providers and RTOs along the way.

Upon completion of the famil, TNZ staff continuously work with the agents or media involved in the famil. If it was a media famil, the results will be published and shared with the relevant tourism industry businesses that participated. If it was a trade famil, TNZ staff will work with the trade partner on creating content and distributing it to their clients.

In many cases, the trade famil attendees will use a New Zealand based inbound operator to assist with itineraries and local expertise. These inbound operators will also make bookings on behalf of the foreign travel agency. This means it is very likely that a famil you have hosted will generate results but you may not hear from the attendees personally.



The Kinloch Club, Lake Taupō



Cape Kidnappers, Hawke's Bay



Rotorua Golf Club



Chisholm Links Golf Club, Dunedin

Industry embraces technology to showcase courses

Sometimes the magnificence of a course can't be captured by words alone so we have been encouraging courses to invest in professional photography and even video or virtual reality to promote their point of difference. Kauri Cliffs and Cape Kidnappers new videos are superb examples of using a short video to deliver a powerful message about their product.

See the videos for yourself:
Cape Kidnappers | Kauri Cliffs

And taking it to the next level, Over The Top Helicopters and Rapturous Media have created an amazing virtual reality immersive experience shot at 4,500 ft on their clifftop par three in Queenstown. The experience can be viewed from a desktop, tablet, or phone, but works best when paired with Google Glass, an optical head-mounted display designed in the shape of a pair of eyeglasses. This cutting edge tool has been incredibly useful at overseas trade shows to allow a member of the media or travel trade to experience the clifftop par three for themselves.

You can view the desktop version of the virtual reality experience **here**
** If you are having trouble with the links, hold down the Control key while clicking on the video link.*

AA Traveller Golf Guide



The Great New Zealand Golf Guide, a collaboration between TNZ and AA Traveller, went to print in July 2016. The guide is packed with information on the Marquee and Experience courses, plus surrounding activities and accommodation. The guide is available throughout New Zealand at airports, i-sites, rental car desks, and other areas heavily populated by visitors. The Guide was also distributed to key overseas travel and golf partners, and reciprocal AA clubs. This will allow the Guide to be used in pre-planning a trip to New Zealand. Due to high interest a second print run of the guide is being arranged.

Tourism New Zealand's golf promotional video

TNZ has a promo video highlighting some of the country's top courses. The video is a great tool to showcase what we have to offer. The video is especially useful at trade shows, and when overseas golf travel specialists are educating their clients about our destination. You can view the video **here**.

Tools to grow your business

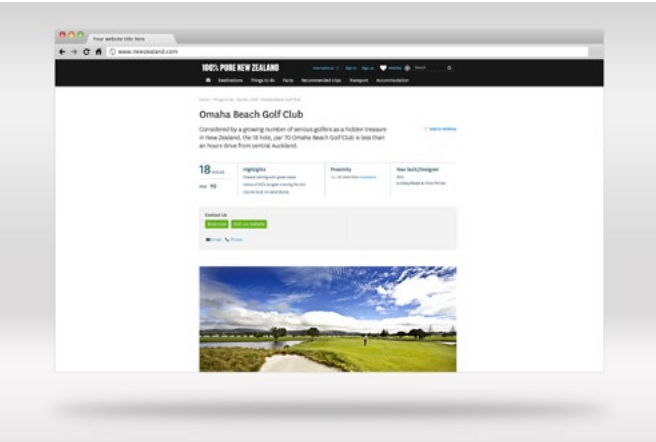
TNZ has engaged a market leader in digital e-learning to help us produce a series of educational modules for the Marquee and Experience courses. The five minute modules will be released soon and have been developed to help golf courses develop international capability and grow their international business. The topics covered are:

1. Golf as an international tourism opportunity - understanding the value and impact of tourism on golf courses
2. Understanding roles – meet the key players in the tourism industry
3. Service delivery – how to ensure your course meets international service standards
4. Digital and online booking – the evolution of digital and how it impacts your business
5. Understanding the Chinese golfer – who they are and what are they expecting
6. Qualmark – the value that Qualmark brings into your business

The modules will be released to the courses in the coming weeks.

Create a listing on newzealand.com

Listings for golf courses and golf travel specialists on newzealand.com are free to create and easy to maintain. A listing is a great way to promote your facility or service to the millions of people who visit the site each year. As a golf course or travel specialist, you own the listing and the content, and therefore you are required to maintain the listing. The contact person listed on the account needs to log back into the database regularly to ensure all information is up to date, or the listing will disappear due to inactivity. Marquee and Experience golf courses have a special “enhanced listing” template on newzealand.com that provides more information than a standard listing. If you have any questions on your listing or need help setting one up, please contact mary.dai@tnz.govt.nz.



Wellington courses feature on Fox Sports

The Golf Show on Fox Sports Australia visited Wellington in December spending time at Royal Wellington and Paraparaumu. While in the city the crew took the opportunity to check out what else Wellington had to offer experiencing the newly renovated Intercontinental, Greenmantle Estate Lodge, Te Papa, Boomrock Station, a Waka tour in Wellington Harbour, and superb food and wine. You can check out the Golf Show video **here**.



Royal Wellington Golf Course

Understanding the Chinese golfer

There is a comprehensive research report now available. It's packed with information aimed at helping you understand the Chinese golfer, what motivates them, how you can attract them, and what it takes to satisfy their requirements. The study, titled “Activating The China Golf Market And Increasing Value Delivery To Visitors & The Sector” was co-funded by Auckland Tourism, Events, and Economic Development (ATEED), the Ministry of Business, Innovation, and Employment (MBIE), and Auckland International Airport. Download as a small PDF [here](#), or as a larger PowerPoint [here](#). Note: PowerPoint is the preferred method for viewing the research.

Reap the rewards of Qualmark

Qualmark is New Zealand Tourism's official quality assurance organisation, providing a trusted guide to quality travel experiences. Qualmark makes it easy for travelers to select high quality places to stay, things to do, and ways to get around. Having Qualmark status means a business has met stringent quality standards and environmental criteria. There are several benefits to joining Qualmark such as:

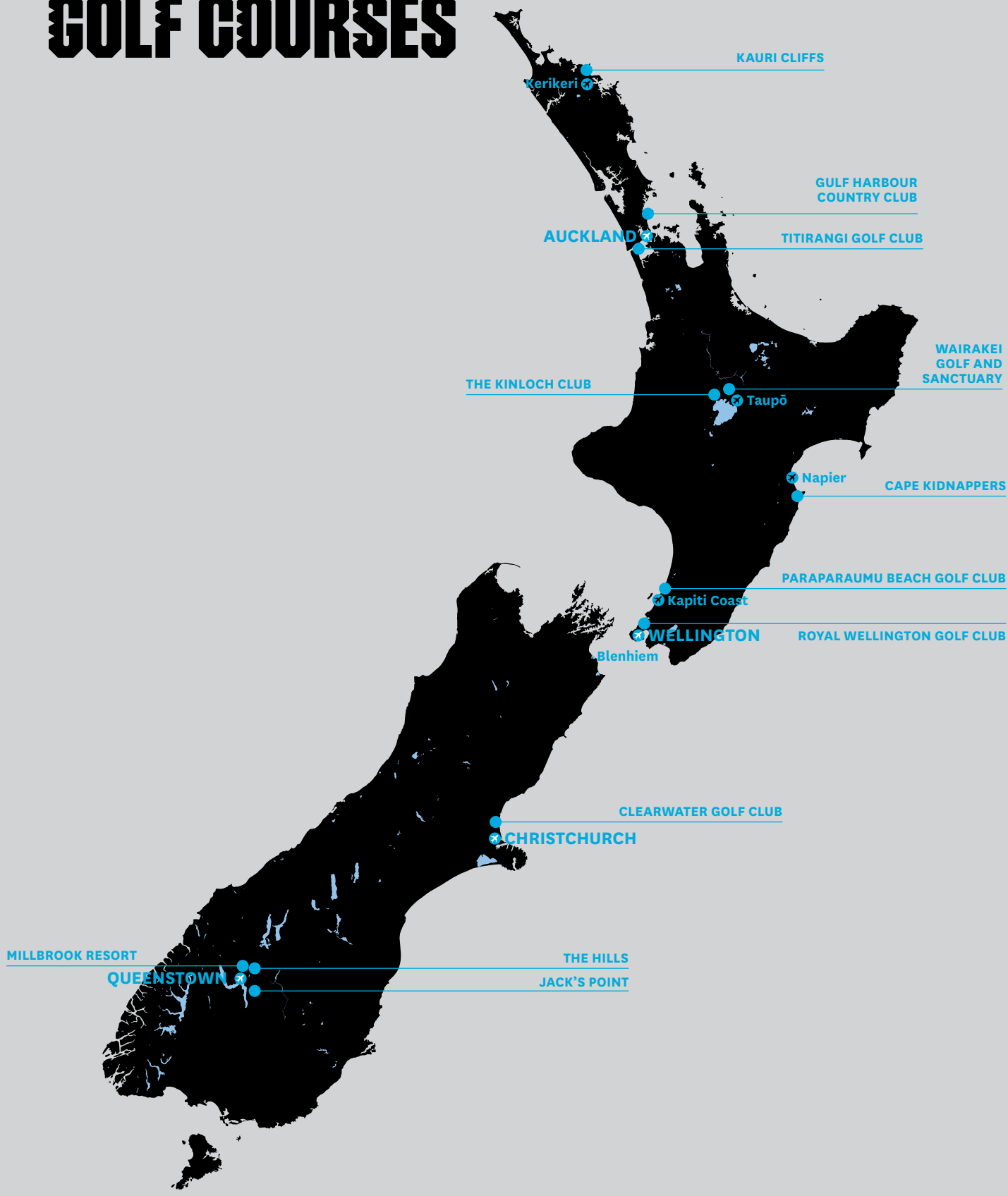
1. Priority listing on newzealand.com
2. Inclusion with international trade operator training
3. Greater access to inbound tour operators
4. Support from a business advisor and golf advisor
5. Health and safety assessment included as part of the Qualmark business assessment
6. Your business is assessed in line with best practice within a tourism context and wider business principles
7. An independent view/outside perspective of your business
8. Recognition and trust

Did you know? Around 15% of businesses listed with Tourism New Zealand are Qualmark endorsed. Those businesses generated 62% of newzealand.com referrals of the last six months with an average of 198 referrals per business.

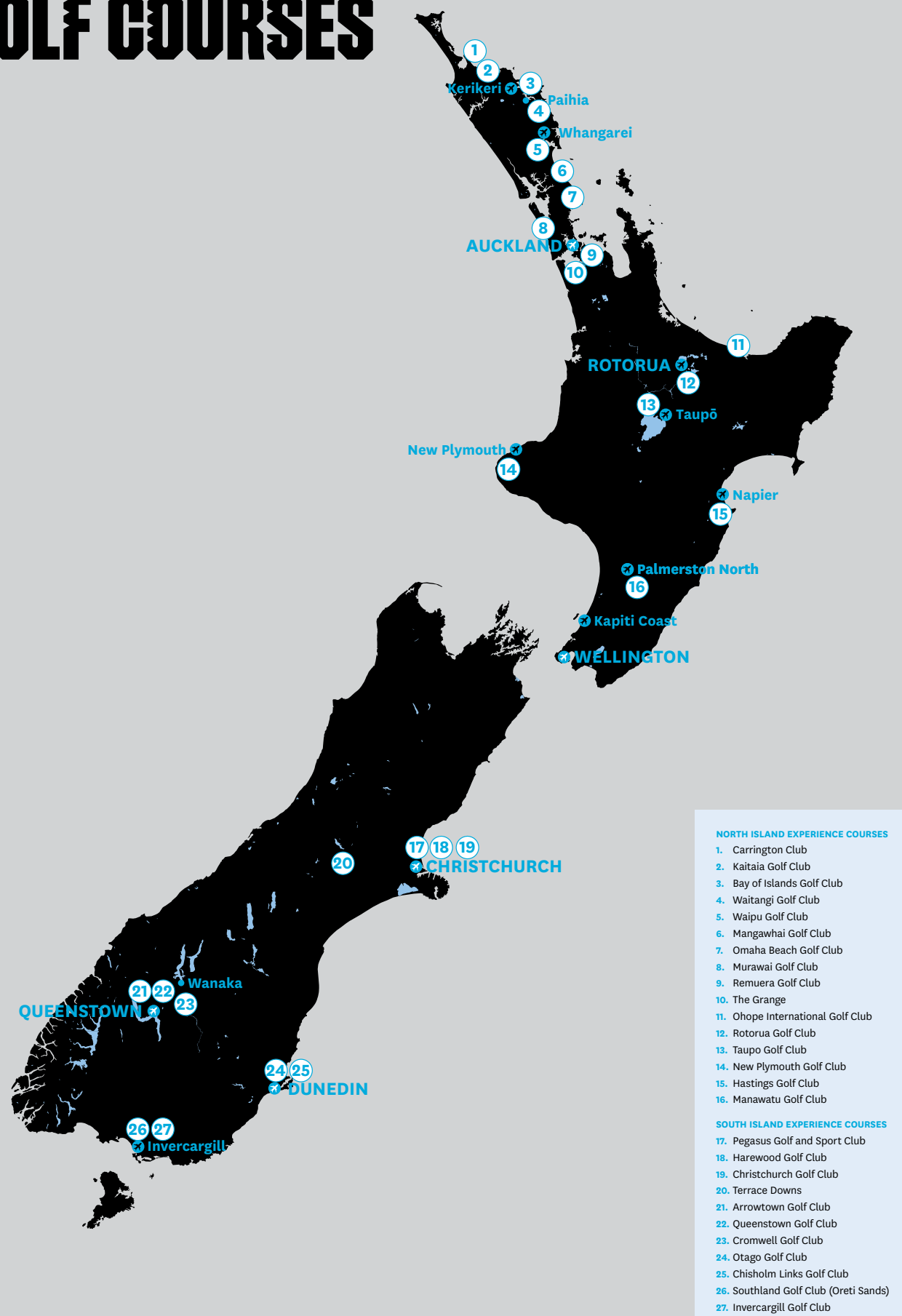


Paraparaumu Golf Course

MARQUEE GOLF COURSES



EXPERIENCE GOLF COURSES



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