Destination Queenstown

GOLF DEVELOPMENT MARKETING PLAN /
November 2022

THE**CLUBHOUSE.**
SPORTS MARKETING

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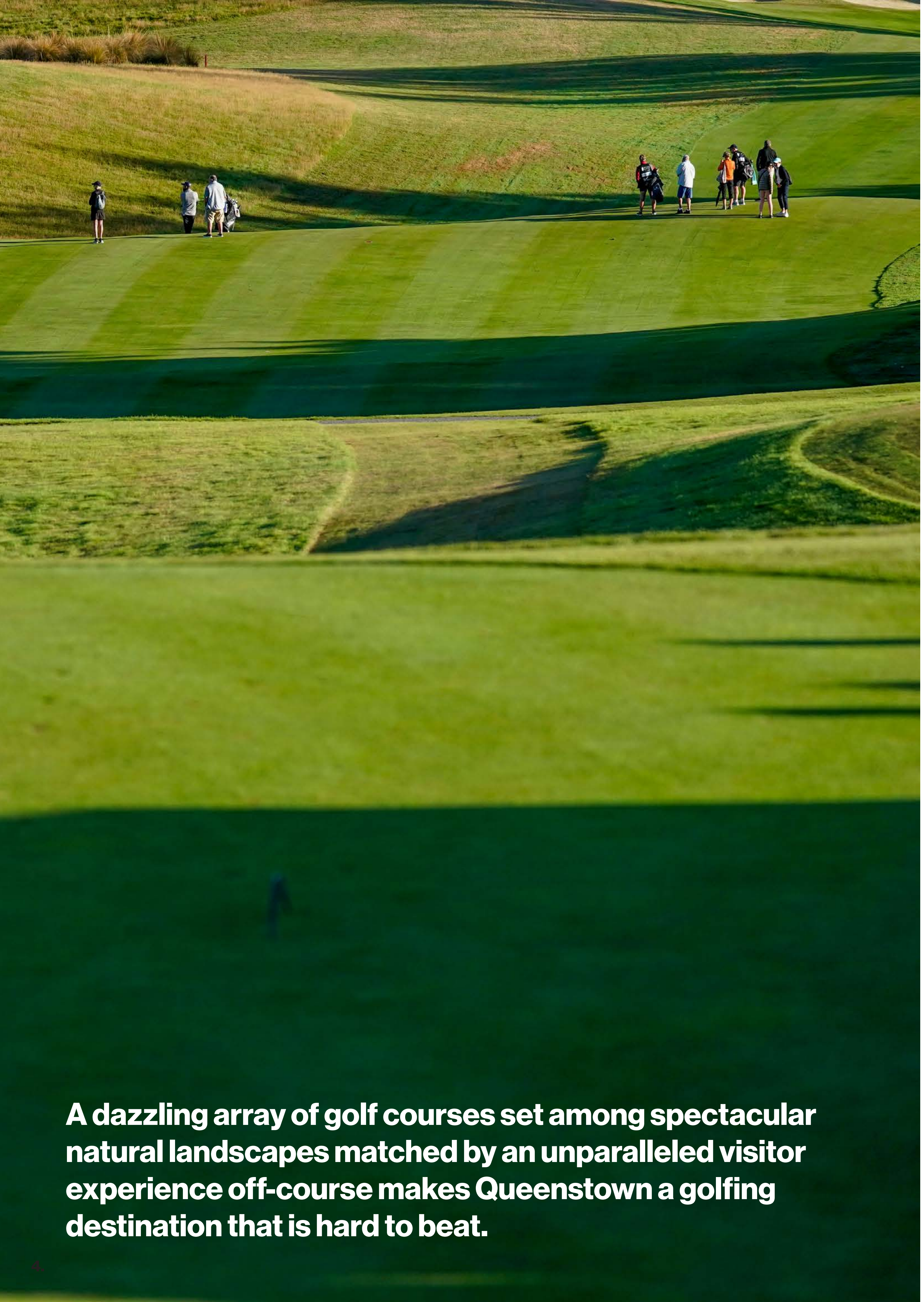
Contents



Executive Summary

Sustained by domestic demand during the Covid-19 pandemic, Queenstown golf facilities are reporting strong bookings for the 2022/23 summer as international borders re-open. Yet beyond the short-term pent-up demand from international visitors, the Queenstown golf tourism sector faces some uncertainty in the face of macro-economic conditions and from enhanced competition both domestically and overseas. Queenstown is, quite rightly, regarded as New Zealand's premier golfing destination with three marquee courses supported by good quality club courses.

This Market Development Plan (MDP) is an opportunity for the Queenstown golf tourism industry to consider the way forward and a future that optimises and enhances the benefits of golf to the region – both economically (through tourism), but also environmentally, socially and culturally. This Market Development Plan (MDP) is broken into four main sections:

Section 1 outlines **the opportunity** for the region to benefit from golf tourism. Macro trends that will shape the future of golf tourism are discussed, being the same as the trends being seen globally – an emphasis on sustainability, a focus on health and wellbeing, diversity and inclusion and reliance on technology

Section 2 identifies **the potential** benefits from economic, environmental, social and cultural perspectives. An estimation of the market size in New Zealand and Australia is undertaken with analysis of the existing and potential capacity for golf visitors in the region. Growth opportunities for Queenstown exist through the combinations of new product and better utilisation of available tee times.

Section 3 outlines the **current state** through a detialed SWOT analysis of Queenstown as a golf destination with insight taken from an industry stakeholder session
and individual stakeholder interviews. The New Zealand Open was identified as a major asset to the region, and its specific benefits were highlighted.

Section 4 provides recommendations into the **future state** for golf tourism in Queenstown with a vision: "For Queenstown to be positioned and experienced as a world-leading golf destination that drives economic benefits associated with tourism into the region and provides accessible, high-quality and environmentally leading golfing amenities to the local residents." Drawing upon the potential of golf tourism, potential capacity and industry collaboration to the SWOT analysis, recommendations were made in the following areas to progress towards the vision:

// Golf industry collaboration;
// Focus on high net worth markets;
// Be leaders in environmentally sustainable golf;
// Maximise yield from golf visitors;
// Protect and strengthen community golf assets;
// Capitalise on the New Zealand Open;
// Review DQ marketing of Queenstown as a golf destination.

This MDP is designed to act as a motivator and catalyst for the whole Queenstown golf industry to ensure that residents can continue to engage positively with the golf sector, while the visitor economy can experience Kiwi culture and connect with the local community and environment, supporting the local economy through golf tourism.

Introduction

Queenstown is New Zealand's premier golfing destination. It boasts a dazzling array of courses set among spectacular natural landscapes matched by an unparalleled visitor experience off-course. It is no surprise that Queenstown receives a high number of return golfing visitors and attracts investment from golfers that relocate or purchase second homes and become part of the local community.

Queenstown has been the leading golfing destination in New Zealand for many years since the development of Millbrook Resort in 1993 and the subsequent development of other tourism centric golf facilities notably The Hills and Jack's Point.

Golf facilities report that they have survived reasonably well throughout the Covid-19 pandemic and are seeing a strong appetite from visitors to return in the latter half of 2022. This buoyant outlook is echoed by tour operators.

Yet beyond the pent-up demand from the last two years of international golf travellers not being able to visit Queenstown, it is unclear what the future of golf in Queenstown, and New Zealand, will look like, with an increased focus on climate change and a strong competitor destination emerging north of Auckland.

Market research confirms that Queenstown faces increased competition in the domestic and international golf tourism market. Competitor markets are continually developing new golf product and committing resources to marketing them. Internationally, competitor destinations (supported by the research of industry bodies like IAGTO) recognise the high value nature of golf visitors and thus the economic opportunity from this special interest group within the visitor market.

Queenstown golf industry must be proactive in all areas of product and business development, customer service, marketing, research, skills training and innovation in order to maintain its leading position as a golf destination.

Destination Queenstown (DQ) is the Regional Tourism Organisation responsible for the marketing of Queenstown. Golf is a key strategic segment for Queenstown. DQ is looking to support the golf tourism industry from an overarching destination management perspective and in a manner that aligns with their strategy of regenerative tourism by 2030. It has asked The Clubhouse to develop a Market Development Plan (MDP) for Golf to guide the community in Queenstown towards an optimal positioning and offering for visitors and locals.

Objectives

By constructing a framework for understanding the Golf visitor and Queenstown as a golfing destination, this MDP aims to provide DQ and golf stakeholders with information to understand and inform effective marketing strategies, the value and opportunity that golf provides and can play in attracting future visitors. The MDP was written with an overarching holistic lens to achieve an alignment to benefit Queenstown and its residents socially, environmentally, economically and culturally.

The key objectives of this MDP are to:

// Validate DQ's focus on Golf as a strategic visitor segment;

// Deepen DQ's understanding of the golf market by understanding the potential economic opportunity; uncovering consumer motivations, behaviour, and decision drivers; and identifying future trends to enable mid to long-term planning;

// Engage community, industry and government stakeholders to collectively assess the current state of offering within the Queenstown area;

// Identify shared future aspirations of these stakeholders and the opportunities, barriers and recommended strategic actions required to achieving these;

// Provide recommendations on positioning to inform DQ's PR, marketing, media, storytelling and travel trade marketing with regards to the golf market.

Scope

This MDP is focused primarily on Golf within the Whakatipu Basin. There are unique courses within the wider Central Otago area that could, in the future, be aligned with this strategy to provide a connection to intrepid or local experiences that have appeal to international golfers.

For the purposes of this MDP:

// 'Golfers' are defined as a subset of travelers for whom golf is a significant motivating factor of their decision to travel to or within Queenstown. It is acknowledged there are significant differences between golf visitors based on their golfing frequency and knowledge;

// 'High value' visitors include visitors who stay longer or repeatedly visit the Queenstown region, who share the region's values and have an interest in the types of experiences Queenstown offers and who respect its environment and engage with the community.

The remainder of this report is structured as follows:

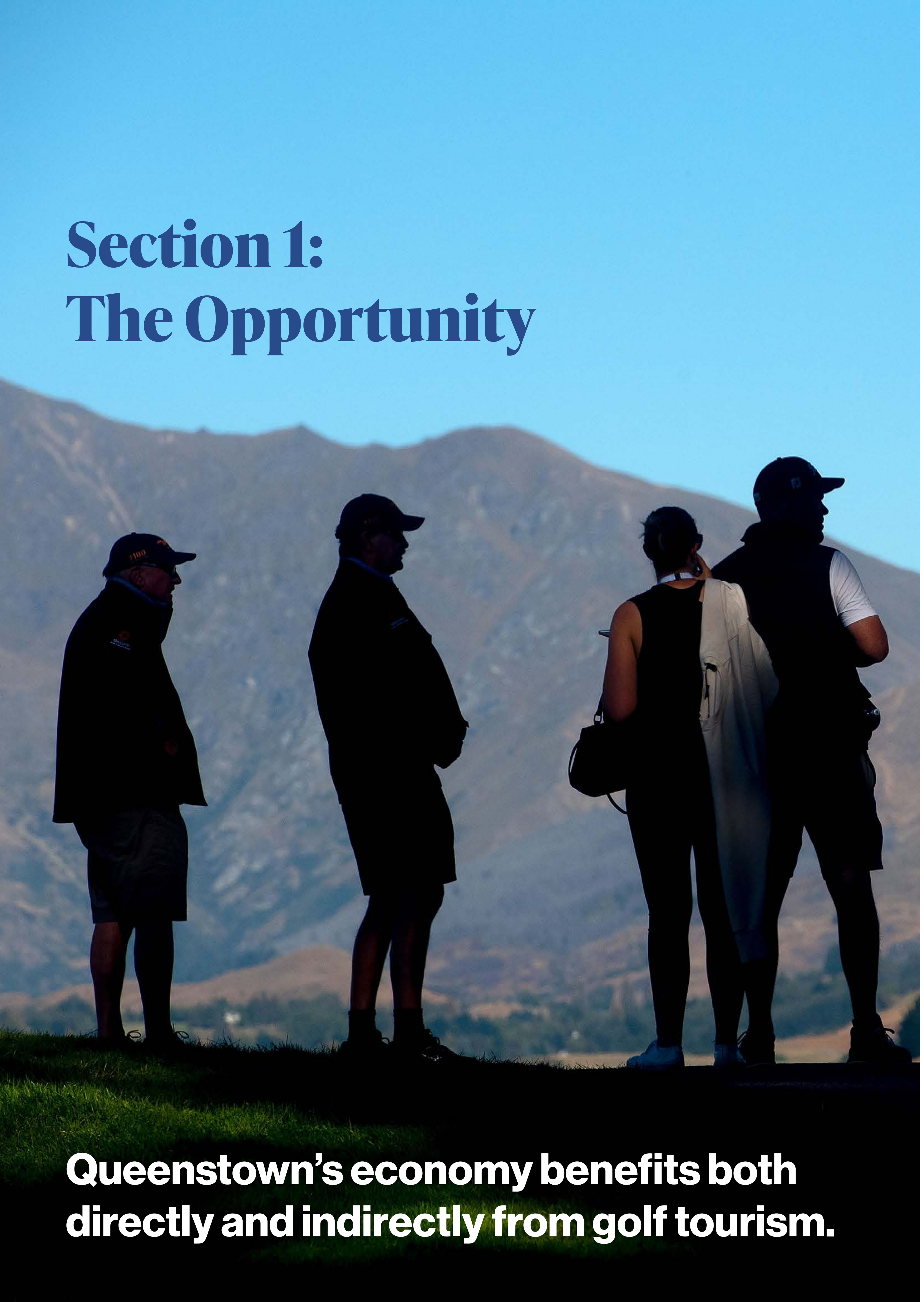
Section 1: Presents **the opportunity** for Queenstown to capitalise on golf tourism and explains the methodology used to quantify the potential opportunity.

Section 2: Identifies **the potential** of golf tourism.

Section 3: Describes **the current state** of the golf facilities in Queenstown.

Section 4: the future state.

Section 1: The Opportunity



Queenstown's economy benefits both directly and indirectly from golf tourism.

DIRECT BENEFITS
Golf tourism supports the golf facilities in Queenstown. There are five primary golf facilities in Queenstown that are outlined in further detail in the Current state section of this report. These golf facilities support jobs and provide recreational amenities for the residents of Queenstown.

INDIRECT BENEFITS
Golf tourism strategies around the world are predicated on research that shows that golf tourists only commit a small percentage of their spend at golf facilities with the rest allocated to the accommodation, hospitality and wider tourism industry.[1] Accordingly, golfers are very valuable visitors for the wider tourism economy. Tourism New Zealand's report on golf tourism indicated that a golf tourist would spend around 20% of their total spend at golf facilities. Subsequent data collated by Golf Tourism New Zealand has shown that for golf visitors from Australia who stay in one destination spend approximately 20% of their total spend at golf courses. However, the data combined with feedback from golf specific travel sellers indicates that the percentage of spend at golf courses can range from 5% to 14% for high-end golf visitors (most likely from North America, China and the Rest of Asia). As a result, as much as 95% of a golf visitor's spend is dispersed throughout the wider visitor economy of a destination.

MACRO TRENDS ON GOLF TOURISM
Golf tourism is a multi-billion dollar segment of the tourism industry. In 2017 the International Association of Golf Tourism Operators (IAGTO) estimated that the industry was valued at NZD$32 billion per annum. Tourists who travel for the purpose of playing golf are high net worth visitors for the visitor economy.

The R&A, which is the governing body for golf across most of the world, released a report[2] this year stating that the number of golfers worldwide has increased from 61 million to 66.6 million over the past five years. The Covid-19 pandemic led to increased golf participation as people adapted to more flexible working conditions and sought outdoor activities where social distance could easily be achieved. Early insight is that golf has become "sticky" with these new players, meaning they are likely to remain engaged with golf regardless of easing Covid-19 restrictions.

The post pandemic recovery in international golf travel is anticipated to be both strong and sustainable because the pool of regular golfers, on which all golf tourism depends, has, outlined above by the R&A participation report, grown significantly over the past two years.

1. Tourism New Zealand, 2013 Golf Tourism Strategy.
2. R&A Golf Participation Report from 2021, view here (R&A Report).

Golf in Australia

Golf Australia have recently released a 2020/2021 golf participation report which shows[4]:

6.4%
Rise in the number of golfers with memberships to 409,970.

>1.2m
Australians who played a round of golf during the year.

60%
Of new members are under the age of 50.

34%
Of new members are aged between 15-34.

11.769m
Rounds of golf played, up 21% on the previous year.

Golf in New Zealand

Golf New Zealand's annual report for 2021 reported[5]:

9.3%
Rise in the number of golfers with memberships to 126,606.

157,021
Casual golfers registered, an increase of 15.8% from the previous year.

10.5%
Increase in the number of rounds of golf played.

Globally, the Covid-19 pandemic had a significant impact on the golf tourism industry. This Northern Hemisphere summer has seen markets recover strongly through marketing campaigns, major events and visitor numbers all rebounding.

The trends that will shape the future of golf tourism are the same as the trends being seen globally – there is an emphasis on sustainability, a focus on health and wellbeing, diversity and inclusion and reliance on technology. Some key macros trends for the golf industry are outlined overleaf:

4. Golf Australia, Golf Club participation report, February 2022, view here.
5. Golf New Zealand, Annual Report for the year ended 31 December 2021, view here (Golf NZ Report).

INCREASED PARTICIPATION IN GOLF:
Over the last two years there has been a significant increase globally in the number of people playing golf. The pandemic has highlighted the physical, social and environmental benefits of playing golf. Golf participation since the pandemic is up 9.3% in New Zealand[6] and 3-4% globally[7].

WIDENING APPEAL OF GOLF:
Traditionally perceived as an activity dominated by white middle-aged and older men, golf is seeing increased interest from women and the younger generation. The image of professional golfers has become younger and fitter and includes females. Within New Zealand, women's club membership has increased by 18% over the past 5 years and there has been a 71% increase in under 19 club membership with 99,133 rounds played by young people in the last 12 months[8]. The handicap system makes golf an equitable and inclusive sport for varying ages, skill levels, and all abilities to play and compete together.

ACTIVE HOLIDAYS:
Participation in sports while on holidays is a growing phenomenon. Golf is an active form of leisure - an 18-hole round of golf can involve walking for 4-5 hours covering distances of up to 8km. Golfers also experience the natural environment and surrounding landscapes. Wildlife and vegetation are a key feature for the visiting golfers experience.

IMPROVEMENT IN OFF-COURSE FACILITIES:
The modern golfer, led by a more diverse demographic of participant, expects higher quality and more variety of customer service at a golf course. This is particularly true for Americans who are used to a 'country club' style level of service and high net worth individuals who play at exclusive private member courses.

INCREASE IN SHORTER WALKABLE COURSES:
There is an increasing trend in new golf courses being built in the United States as walkable golf courses. Many golf destinations are also building short golf courses ('Par 3' courses) to complement their existing product offering. This ties into another macro trend that participants are increasingly seeing golf as a past time that has positive health and social outcomes.

CONSUMER DEMAND FOR ACTIVITIES THAT TAKE UP LESS TIME:
Golf is adaptable to those with limited time. In addition to the traditional (and favoured) 18-hole round of golf, there are various alternatives including short 18-hole courses (considered to be those less than 6,000 yards or 5.4km), 9-hole courses, Par 3 courses, driving range experiences, putting courses or virtual golf.

SUSTAINABLE TOURISM:
People are becoming more conscious of their carbon footprint and this is impacting their travel choices. Many are looking for destinations and experiences which value positive environmental outcomes.

INCREASED PRESSURE ON LAND:
Golf courses in urban centres are often faced with pressure around land use with the demands for housing.

SOCIAL MEDIA:
Golf media, like traditional media, has changed significantly and many of golf's most influential voices are now found on social media platforms. Additionally, word of mouth has a very strong impact through the niche and connected golf audience and tight golf club communities.

6. Golf New Zealand report.
7. R&A Report.
8. Golf New Zealand report.

Section 2: The Potential

// Economic

// Visitation from golfers.

// Visitation from high net worth visitors who tend to stay longer or repeatedly visit the region.

// Direct economic benefits to golf facilities: Visiting golfers may also spend money at golf facilities on hire clubs, carts, pro shop merchandise and food and drink in the clubhouse café or restaurant.

// Direct economic benefits throughout the visitor economy: Golfers tend to spend less than 20% of their total spend on golf products so the remaining 80% or more of their spend benefits a wide range of local businesses such as hotels, restaurants, retailers and other tourist activities.

// Job creation: The construction, development and operation of new courses will create more jobs as well as direct and indirect employment opportunities and career pathways for the young people of the region. Caddies, greenkeeping, maintenance, engineering and gardening are major areas of employment on a golf course. This is in addition to the customer-facing positions in the club house, pro shop, changing rooms and restaurant facilities. Clubhouse and restaurant facilities are excellent training grounds for the tourism and hospitality industry as a whole.

// Second homeowners: Queenstown has a high percentage of second home owners who are attracted by the lifestyle and liveability of the district, including the various golf options on offer. Many of these reside at golf resorts such as Millbrook and Jack's Point.

// Lifetime value of a golf visitor: Golfers tend to be strongly influenced by word of mouth referrals from family, friends and fellow golf club members. Age being no barrier to playing golf, these visitors have a higher value across their lifetime, and will disperse their spend among the visitor economy, even consuming products made in the region at home.

// Environmental

// Protection of green space and the creation of further green corridors. Golf courses act as natural buffers between natural landscapes and urban areas.

// Creation of predator free environments.

// Increased biodiversity and conservation of natural habitats.

// Environmentally certified tourism activities.

// Improved access to nature: Golf courses provide easier physical access points into the natural environment for recreation purposes.

// Greater opportunity for conservation outcomes, such as native plant regeneration.

// Social / Cultural

// Visitor economy supports community golf facilities: Golf membership fees in Queenstown are some of the cheapest in the world and this promotes golf as a more inclusive game in the Whakatipu region with price being less of a barrier.

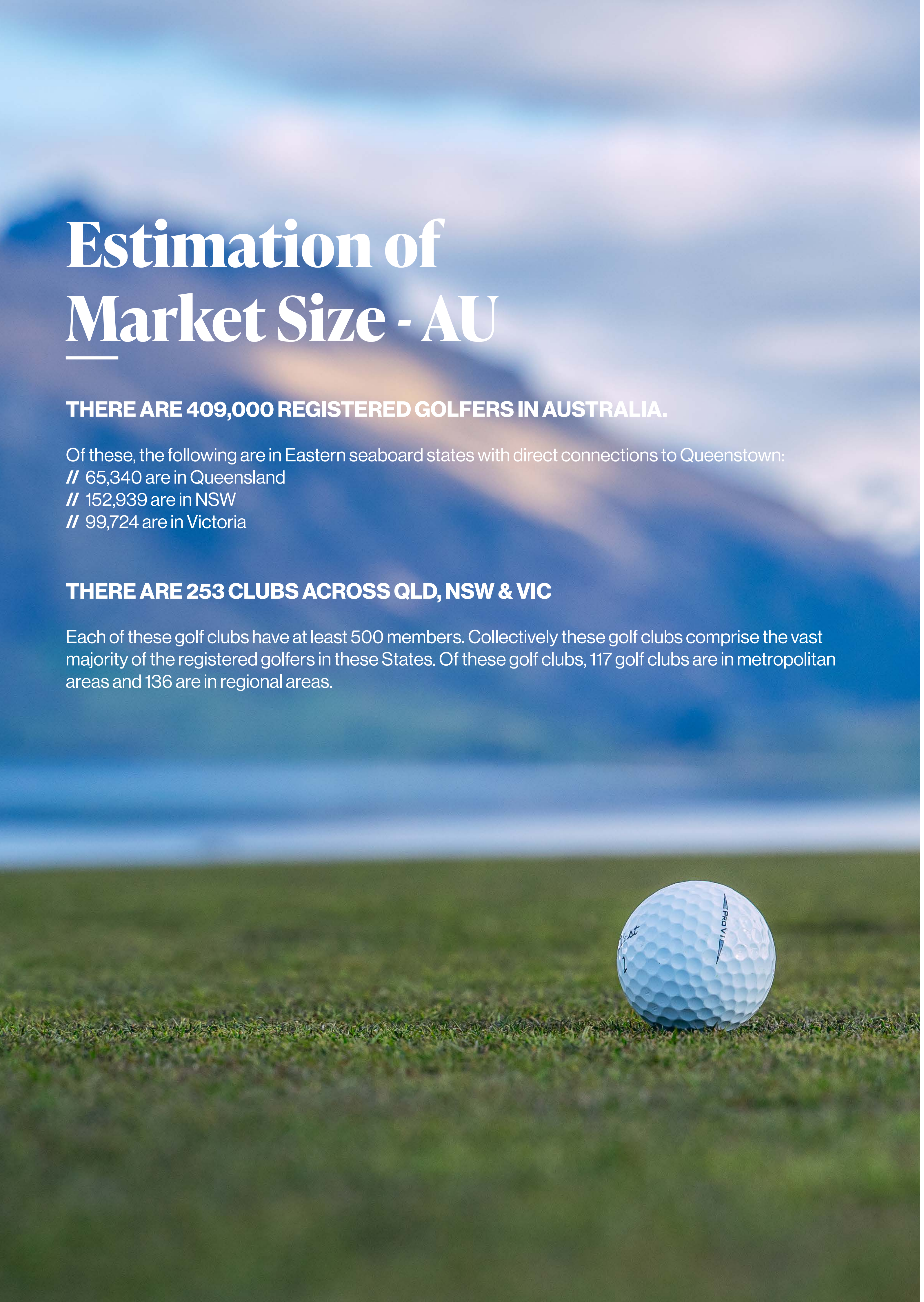
// Visitor economy supports junior golf accessibility: A progressive golf ecosystem has developed a world leading junior golf membership which is very low cost, accessible and promotes golf across the community. This model has been copied in other regions around New Zealand and is best in class.

// Community Participation in Golf: Last year there were 10,530 club members, made up of 8,284 men and 2,246 women, in Otago last year. Golf provides a sense of social connection to the residents of Whakatipu Basin along with health and wellness benefits which have been well documented by Golf New Zealand.[9]

// Events: The Whakatipu Basin hosts New Zealand's leading professional golf tournament, the New Zealand Open, which is free for the public to attend and provides entertainment for residents along with aspiration for young golfers in the region. The volunteer contingent has a strong sense of community pride and local clubs proudly 'adopt holes' for the week.

// High social licence for golf tourism.

9. Golf New Zealand view here.



Estimation of Market Size - AU

THERE ARE 409,000 REGISTERED GOLFERS IN AUSTRALIA.

Of these, the following are in Eastern seaboard states with direct connections to Queenstown:
// 65,340 are in Queensland
// 152,939 are in NSW
// 99,724 are in Victoria

THERE ARE 253 CLUBS ACROSS QLD, NSW & VIC

Each of these golf clubs have at least 500 members. Collectively these golf clubs comprise the vast majority of the registered golfers in these States. Of these golf clubs, 117 golf clubs are in metropolitan areas and 136 are in regional areas.

Estimation of Market Size - NZ

THERE ARE 126,606 REGISTERED GOLFERS IN NEW ZEALAND.
Of these
// 36,486 are in Auckland, North Harbour and Northland;
// 15,424 are in Wellington;
// 39,990 are from the rest of the North Island;
// 12,800 are from Canterbury;
// 10,530 are from Otago;
// 11,286 are from the rest of the South Island.

157,021 NEW ZEALANDERS ARE REGISTERED AS CASUAL GOLFERS.
Of these:
// 52,471 are in Auckland, North Harbour and Northland;
// 12,275 are in Wellington;
// 36,900 are from the rest of the North Island;
// 8,499 are from Canterbury;
// 4,907 are from Otago;
// 8,427 are from the rest of the South Island.

THERE ARE 29 GOLF CLUBS IN THE GREATER AUCKLAND REGION.
These 29 clubs have more than 400 members and collectively they have 25,764 members.

Analysis:

Outlined here is an analysis of the existing capacity of Queenstown as a golf destination.

Assumptions:

// Golfers visiting Queenstown are predominantly from the New Zealand and the Eastern Seaboard of Australia markets. Golf Tourism New Zealand data indicates that these golfers play between 0.5 and 0.75 rounds per day that they are in Queenstown.

// Golfers visiting Queenstown from other markets play golf with less frequency.

// To be prudent we assessed the average rounds played per visitor per day at 0.75 which allows for rain outs and other 'events' which impact capacity.

// The audience of domestic and Australian Eastern Seaboard golfers play between 0.5 and 0.75 rounds per day when they are in Queenstown.

// At fully public courses on an average day there is capacity for 7.5 hours of tee times for 4 players at 10-minute intervals. This represents assumed peak capacity, being 180 players per day per course and assumed shoulder season capacity as being 120 players per day per course.

// At member courses capacity has been assumed as 40 players per day per course.

Peak Season Capacities from 1 Nov - 31 Mar (151 days). Existing capacity for visitors:		
Jack's Point // Fully public // 180 players per day	**Millbrook Resort** // 18 holes fully public // 18 holes private members only // 180 players per day	**The Hills** // Private // 16 visiting players daily // 16 players per day

Arrowtown GC
// Members club
// Capacity is variable and subject to member play
// Assume 40 players per day
	Queenstown GC
	// Members club
	// Capacity is variable and subject to member play
	// Assume 40 players per day
		Cromwell GC
		// Out of district, still used by golf sellers
		// Members club
		// Capacity unclear and subject to member play
		// Assume 40 players per day

TOTAL EXISTING CAPACITY: 496 players per day

*We note that Kingston Golf Club, Glenorchy Golf Club and Frankton Golf course have some capacity for the visitor market but their overwhelming purpose is to meet community need and/or provide an associated activity for a visitor that is not traveling for the purpose of playing golf.

POTENTIAL CAPACITY FOR VISITORS: Applying 0.75 rounds per day to 496 players per day means that (assuming 1 in 4 golfers visiting Queenstown are not playing golf on a given day) there is capacity for 661 golfers visitors in Queenstown each day of the peak season.

TOTAL BED NIGHT OPPORTUNITY IN PEAK SEASON :
661 golfers x 151 days = 99,811 bed nights from visiting golfers.

Shoulder Season Capacity from 1 Sep - 31 Oct and 1 Apr - 10 May (100 days). Existing capacity for visitors:		
Jack's Point // Fully public // 120 players per day	**Millbrook Resort** // 18 holes fully public // 18 holes private members only // 120 players per day	**The Hills** // Private // 16 visiting players daily // 16 players per day

Arrowtown GC
// Out of district but still used by golf sellers
//Members club
// Capacity is unclear and subject to member play
// Assume 40 players per day
	Queenstown GC
	// Out of district but still used by golf sellers
	//Members club
	// Capacity is unclear and subject to member play
	// Assume 40 players per day
		Cromwell GC
		// Out of district but still used by golf sellers
		//Members club
		// Capacity is unclear and subject to member play
		// Assume 40 players per day

TOTAL EXISTING CAPACITY: 376 players per day

POTENTIAL CAPACITY FOR VISITORS: Applying 0.75 rounds per day to 376 players per day means that (assuming 1 in 4 golfers visiting Queenstown is not playing golf on a given day) there is capacity for 501 golfers visitors in Queenstown each day of the shoulder season.

TOTAL BED NIGHT OPPORTUNITY IN SHOULDER SEASON :
501 golfers x 100 days = 50,100 bed nights from visiting golfers.

TOTAL BED NIGHT OPPORTUNITY ACROSS PEAK SEASON (99,811) AND SHOULDER SEASON (50,100):
149,911 bed nights.

Analysis:

The growth opportunities for Queenstown's capacity as a golf destination are as follows:

// 1 - Hogan's Gully is a consented golf course adjacent to The Hills and Arrowtown Golf Club. It is understood that Hogan's Gully, once completed, would allow visitor play. Whilst any added capacity resulting from the opening of Hogan's Gully will be subject to the ownership, if it was assumed there was capacity for 60 visiting players daily, then Hogan's Gully would add an additional 15,000 visitor rounds or, at 0.75 rounds per day, another 20,000 visitor nights to Queenstown's capacity for golf visitors.

// 2 - Discussions with golf facilities have shown that there is an opportunity to increase capacity at Arrowtown Golf Club and Queenstown Golf Club from working collaboratively and clearly defining to the industry the times allocated to member play and to visitor play. Should collaboration increase the capacity from 40 visitors per day to even 50 visitors per day at each of those facilities, this would increase the capacity for Queenstown by around 6,500 visitor nights across these two courses.

// 3 - Discussions with golf facilities have shown that there is an opportunity to increase capacity through offering twilight tee times into the evening. The main existing constraints to twilight tee-times being offered is lack of staffing resource and lack of return. Should a twilight offering be included even at two of the local golf clubs and extend the capacity by 20 visitors per day at each club through December, January, February and March, then this would increase the capacity by around 6,400 visitor nights.

Collectively the combinations of new product and better utilisation of available tee times, the estimated capacity for Queenstown could increase as follows:

149,000 ⇧ ⇧ ⇧ **182,800**

Visitor nights from golf visitors. Visitor nights.

Visitor Spend

Golf tourism strategies around the world are predicated on research that shows that golf visitors commit only a small percentage of their total spend at golf facilities with the rest allocated to the accommodation, hospitality and wider tourism industry, validating the premise that golf visitors are of high value to the visitor economy. The 2013 Tourism New Zealand Golf Tourism Strategy reported that a golf visitor would spend around 20% of their total spend at golf facilities.

In collecting and collating data from 2014 onwards, Golf Tourism New Zealand learned there are two contrasting golf visitors: During one trip Australian golf visitors are more likely to stay in one destination and their visitor spend comprises of approximately 20% spend at golf facilities with the remaining spend circulated around the wider visitor economy.

In contrast, golf visitors from North American and Asian spend a significantly lower percentage at golf facilities relative to their overall spend. Feedback from golf travel sellers and a deep dive from Tourism New Zealand's Insights Team found the percentage of spend at golf facilities can range from 5% to 14% for luxury golf visitors most likely from North America and Asia. Using these two subsets of golf visitors the following analysis and projections are largely adopted from the 2022 GTNZ paper, adjusted to the Queenstown context:

The Australian Visitor:
// Has an average length of stay is 5-7 nights, with 3-5 rounds of golf and an average spend of $3,750 (2019) or $4,250 (2023)
// This equates to approximately $700 per visitor night which corresponds with approximately 20% of spend being on green fees ($140)

The table below details visitor spend in Queenstown pre-Covid using GTNZ data and extrapolates this for the years 2023-2025. (2020-2022 not included due to international border closures).

	2018	2019	2023	2024	2025
AUSTRALIAN VISITORS	19,070	21,112			
FUTURE TARGETS			21,112	22,168	23,276
VISITOR SPEND	$3,300	$3,750	$4,250	$4,500	$4,750
TOTAL SPEND IN NEW ZEALAND	$62.9M	$79.2M	$89.7M	$99.8M	$110.6M
TOTAL SPEND IN QUEENSTOWN (65%)*	$40.9M	$51.5M	$58.3M	$64.8M	$71.9M

*Between [2014 - 2019] Australian golf visitors played 76% of the rounds measured at Marquee Golf Courses in Otago. We have taken this key measurement and applied a 65% market share for Queenstown. Clearly this market share is subject to ongoing preferences, competitor markets, macro-economic conditions and marketing activities.

Asia and north American markets attract a high-net-worth demographic of golfer with a very high visitor spend.

Golf travel sellers targeting this customer indicate that the average spend per person is anywhere from $7,000 up to $35,000. These visitors are likely to play between 3 – 6 rounds of golf in New Zealand but stay in luxury lodges and enjoy a range of tourism experiences outside of golf. GTNZ estimates that the average spend is between $14,000-$20,000 per person.

This group are more likely to play golf in regions around New Zealand. For example, Cape Kidnappers (Hawke's Bay) is the volume leader for rounds from North America and China. As such, they are likely to travel regionally around New Zealand to experience various destinations so Queenstown competes more domestically for these visitors.

The attributes of this market are outlined in Appendix 1 of this report.

Over the last five years we have also seen a number of high net worth travelers become members at premium golf clubs in New Zealand (for example The Hills, Millbrook Resort in Queenstown or Tara Iti in Northland). When they make a commitment to join a golf club in New Zealand they will come back on their own (without marketing to attract them back) and as repeat high net worth visitors they have an even higher value to our tourism economy than one-off visitors. These members are high-net-worth visitors/immigrants to New Zealand and are more likely to invest in New Zealand and make a broader impact to our economic and social wellbeing.

	2018	2019	2023	2024	2025
MARQUEE COURSES	10,320	12,175			
FUTURE TARGETS			12,175	12,601	13,042
VISITOR SPEND	$16,500	$17,000	$19,000	$19,500	$20,000
TOTAL SPEND IN NEW ZEALAND	$170.3M	$207M	$231.3M	$245.7M	$260.8M
TOTAL SPEND IN QUEENSTOWN	$47M	$58M	$65M	$69M	$73M

*Between 2014-2019 North American golf visitors played 27.8% of their rounds in Otago. Chinese golf visitors played 33.5% of their rounds in Otago. The "Total Spend in Queenstown" assumes a constant 28% market share for Queenstown from the long haul market. Clearly this is subject to ongoing preferences, competitor markets, macro-economic conditions and marketing activities.

Section 3: Current State

Undertaken in conjunction with an industry stakeholder session and individual stakeholder interviews, a SWOT analysis of Queenstown as a golf destination was completed.

Strengths

GOLF FACILITIES // Queenstown is home to six 18-hole courses and two 9-hole courses. Three of these have been recognised by Tourism New Zealand as Marquee Courses.

WORLD CLASS // Queenstown golf courses are blessed with world class scenery and provide a world class experience for visiting golfers.

PROXIMITY // All courses are located within a 25-minute radius of one another. Visitors can stay in central accommodation in Queenstown and not be inconvenienced in traveling to the different golf courses.

DIVERSITY // A range of golf products and price points cater to different audiences. This ranges at one end of the spectrum from exclusive members courses (The Hills) and Over The Top Heli Golf on Cecil Peak through to local more accessible courses where visitors will regularly end up having a beer with locals after their round.

MORE THAN GOLF // Queenstown has a significant comparative advantage compared with other golf destinations as it provides a fantastic offering both on and off the golf course. Visiting golfers can enjoy Queenstown's offering of wineries, mountain biking, skiing, high quality food & beverage experiences, nightlife and other tourist attractions.

SEASONALITY & WEATHER // Queenstown benefits from long daylight hours in summer meaning there is more time to play golf into the early evening. It also benefits from very settled weather meaning there is very low risk of golf visitors having a diminished experience due to playing golf in inclement weather. Queenstown enjoys seasonality benefits for Northern hemisphere visitors but also increasingly for visitors from Australia during the January and February months.

WIDER TOURISM INFRASTRUCTURE // The golf industry is well supported by mature transport, accommodation and amenities infrastructure. The Queenstown International and Domestic Airport is centrally located. A range of transport options are provided by rental car companies and tour operators who incorporate transport solutions into their packages. A range of accommodation is available from luxury lodges to hotels, short term rental accommodation and backpackers.

GOLF SELLERS // There are established and knowledgeable inbound operators with a sharp understanding of the destination who invest in marketing Queenstown as a golf destination and drive repeat visitors.

MAJOR EVENT // Queenstown plays host to New Zealand's premier golf tournament each summer, the New Zealand Open. The benefits to Queenstown from this event are detailed in Appendix 5.

AMENITIES // Visiting golfers pay green fees which provide financial support for golf facilities and keep the costs low for local residents. This means that Queenstown residents enjoy some of the best value for money golf memberships in the world.

HIGH NET WORTH VISITORS // Through members clubs Queenstown attracts a segment of high net worth visitors who travel regularly to Queenstown for leisure and in doing so invest in golf memberships, property and other high value goods and services in the district. These high net worth repeat visitors have been developed over many years by the membership and residential property strategies of The Hills, Millbrook Resort and Jack's Point and create significant economic benefits for the region.

JUNIOR PROGRAMME // WJGC is arguably the most successful junior programme in New Zealand with 180 members. The region's golf courses have had the financial resources to support WJGC due to their economic success from tourism. Through the WJGC many parents have reconnected with the game and gone on to join local clubs. High-performance is not the focus of the programme, but it will undoubtedly become a by-product.

Weaknesses

WORKFORCE // The golf industry in Queenstown is facing a labour shortage. With the borders been closed for an extended period due to Covid-19 and the high cost of accommodation, the industry does not have the necessary number of workers. One consequence of this is that golf courses cannot utilise their capacity to stay open into the evening during the summer months. Staffing shortages also hamper the ability of golf courses to provide a premium experience for visitors. Courses with additional off-course facilities such as accommodation and premium food and beverage experience this shortage more acutely. Operators report considering whether they need to increase golf and accommodation rates to drive down demand to be able to service the visitors they receive, with the staffing capacity available.

LACK OF INVENTORY MANAGEMENT // A tee time is only sold once - if that is taken by a member who has already paid their annual fees, or if it is not used at all, there is lost yield to visitor economy. Due to the competing interest from members, a lack of capability and a lack of technology the golf inventory (tee times) across the region are not optimised.

LACK OF FOCUS ON YIELD // Few golf facilities use dynamic pricing of tee times or repeat offerings (as used by Jack's Point). The yield per player is not always optimised through providing quality food and beverage offerings (on and off course), golf carts and rental equipment.

MARKET FAILURE IN MARKETING TO INTERNATIONAL VISITORS // The golf facilities in Queenstown are not financially incentivised to promote their products to high net worth North American or Asian visitors as they yield the same amount as an Australian visitor yet are significantly harder to reach.

ACCESSIBILITY // Visitors may be discouraged from coming to Queenstown due to the difficulty in accessing all the courses. The Hills has limited tee times to 16 guests per day six days a week and of the 36 holes at Millbrook Resort, one of the 18-hole courses is reserved for members each day. Queenstown Golf Club and Arrowtown Golf Club both report they have very busy tee sheets with their existing members.

ADRENALINE ADVENTURE PERCEPTION // Some tour operators were concerned that Queenstown's adrenaline adventure perception does not help the golf section and a question as to whether more of an emphasis on leisure would more suitable. Golf, biking and enjoying food and wine are thought of as more soft adventure.

LIMITED INDUSTRY COLLABORATION // There is limited industry collaboration and no industry body coordinating the golf product in Queenstown.

LIMITED HIGH QUALITY ACCOMMODATION // Tour operators have reported the limited availability of suitable high-quality accommodation for the golf audience. Millbrook Resort is well suited to golf visitors but there is limited accommodation inventory available at a higher standard than this, other than the luxury lodges.

Opportunities

STRATEGICALLY INCREASE INVENTORY AND CAPACITY // Opportunity for golf clubs to work together to optimise and increase inventory. Examples include aligning the member only days so there is always visitor capacity at Arrowtown GC or Queenstown GC (or Cromwell GC), opening up twilight tee times, clearly communicating accessibility at member clubs (Millbrook and The Hills) and a centralised tee booking system.

IMPROVED PRODUCT // Opportunity to implement a quality assurance programme designed to certify golf courses in meeting and exceeding customer expectations. This might be initiated by a reformed Golf Tourism New Zealand.

INDUSTRY COLLABORATION // The leading golf tourism destinations are highly coordinated, often through one dominant operator for example St Andrews Links Trust, Pinehurst Resort or event Barnbougle Dunes. An industry group in Queenstown would provide cohesion in particular in aligning the economic and social opportunities associated with the three community golf courses (Arrowtown GC, Queenstown GC and Frankton GC).

FOCUS ON HIGH NET WORTH INTERNATIONAL VISITORS// High net worth international golf visitors will spend more in Queenstown including staying in premium accommodation, spending more on activities and food and beverage. The average spend by high net worth golf visitors is significantly higher than Australian and domestic visitors and a coordinated marketing campaign led by DQ could help to attract these visitors.

HIGHER YIELD FROM GOLF VISITORS // In addition, the revenue per golf visitor could be increased through selling other goods and services including food and beverage, merchandise and lessons.

COLLECTIVE MARKETING EFFORT // With additional capacity, DQ could work alongside the industry group to provide marketing resource to the golf destination. They could assist with generating premium collateral and content and investing in targeted marketing campaigns to the target audiences both short haul and long haul.

PROMOTE SHOULDER SEASONS // There is an opportunity to extend the tourism season. Examples could be using events or targeted campaigns to attract the Australian and domestic audience to visit Queenstown in the typically settled later Autumn season.

COMMUNITY FACILITIES // The community courses (Arrowtown GC, Queenstown GC and Frankton GC) all make significant social and cultural contributions to the residents of Queenstown. Should further investment be committed into these facilities (for example through high quality driving range facilities at Frankton GC) then even more benefits could accrue to both the visitor economy and the local community.

GOLF COURSE DEVELOPMENT // Queenstown has had a number of major capital investments in golf tourism facilities over the last decade. All of these investments create jobs and economic development for the region. Further private investment into new golf facilities is planned with Hogans Gully and Gibbston Valley consented and in various stages of the development process. These golf courses provide the opportunity to develop expertise in golf design and construction that can be exported outside of the district.

NEW PRODUCT // With Hogan's Gully and Gibbston Valley projects set to open in the coming years there is an opportunity for Queenstown to promote new golf experiences which drives new and renewed interest in the destination.

TO LEAD IN ENVIRONMENTAL SUSTAINABILITY // There is a growing awareness within the Queenstown community for the need to preserve greenspace while simultaneously protecting sensitive habitats and species. There is opportunity for the industry to agree on a joint environmental approach to golf facilities in the district. This could be through environmental certification for the entire district. There are two internationally recognised bodies exist for such certification including Golf Environment Organisation (GEO) which is a partner of Golf New Zealand. GEO Certification is internationally recognised as the gold standard for golf courses enhancing nature, conserving natural resources and having positive environmental impacts.

MAJOR EVENTS // The New Zealand Open tournament week would almost certainly yield the highest level of economic impact from golf tourism throughout the year. Simultaneously the tournament drives media and marketing outcomes for the region by broadcasting and promoting the region to an international audience whilst also leaving with hundreds of positive word of mouth influencers across a multitude of international markets. The New Zealand Open as a Pro-Am format should be fostered and leveraged by the local stakeholders in the region as it would be very difficult to replace its media and marketing outcomes.

WORKFORCE AND TRAINING // Leverage Queenstown's reputation as a world class golf destination in order to attract and retain golfing industry experts. Consider the opportunity to establish the region as world class training ground for the next generation of industry experts.

Threats

GOVERNANCE & MANAGEMENT // Many of the golf facilities are governed by member owned boards that may not always have the desired skills matrix or continuity to achieve both economic (tourism) and social outcomes. It is a difficult balancing act to appease members whilst also providing a tourism experience and this requires good governance and management who have expertise in the golf sector to meet expectations of both members and visitors.

COMPETITORS // There is a new cluster of premier golf courses on the Mangawhai coast, north of Auckland (identified above in the competitor destination section). Whilst Queenstown presents a different offering to these courses, it is likely that the Mangawhai destination will be highly competitive for the Auckland and Australian markets. In particular, the location of Mangawhai near Auckland is far more accessible for Auckland golfers along with the long-haul visitor flying into Auckland Airport. Additionally, there is potential that the Mangawhai Te Arai courses could introduce a major event that pulls revenue and stakeholders away from Queenstown and the New Zealand Open. Outside of New Zealand there is increased global competition from Victoria and Tasmania in Australia, along with ever improving product in Vietnam, Thailand and China in Asia, all destinations which are strongly supported by coordinated Government investment in golf tourism. A full analysis of New Zealand, Australian and international competitor destinations is set out in Appendix 1.

DEMAND FLUCTUATIONS // Pent-up demand from Australia has meant that stakeholders have reported very solid bookings until the end of 2022. It is unknown whether Queenstown will retain the levels of demand it is seeing in 2022 as tourists increase in confidence to travel to long haul destinations.

SOCIAL LICENCE // Golf courses take up a substantial amount of land and require significant amounts of water to operate. They are reliant on maintaining a social license to operate within the communities they exist in, particularly golf facilities that lease public land (Queenstown Golf Club). Golf facilities must stay connected to their local communities and demonstrate the ways in which they contribute to it. A current threat is the land use for Frankton Golf Club which is currently within a consultation process to lose part of the land to road development. This presents both a threat and an opportunity to enhance the facility.

WORKFORCE // While high house and rental prices continue to be an issue for Queenstown, this may continue to deter the quality workforce required for the golf facilities to provide a quality experience and operate at full capacity.

ENVIRONMENTAL IMPACT // There will be pressure from authorities and the local community on golf clubs to manage their properties in ways that minimises their environmental impact, and even to demonstrate the ways in which golf courses are of benefit.

Golf Courses

Major Events: New Zealand Open

Hosting major events is a key strategy for many golf tourism destinations due to the broadcast and marketing benefits they create. Essentially whilst golf viewership is not as high as other sports, those that watch and follow golf are a highly qualified audience who are most likely to travel for golf.

Queenstown has been the location of New Zealand's premier golfing event, the New Zealand (Men's) Open, 10 times since 2007 and Millbrook Resort has a long term commitment to host the tournament into the future. The event delivers various economic, social and cultural benefits to Queenstown that are detailed in Appendix 5.

Section 4: Future State

Vision

For Queenstown to be positioned and experienced as a world-leading golf destination that drives economic benefits associated with tourism into the region and provide accessible, high-quality and environmentally leading, golfing amenities to the local residents.

Aspirations

// Queenstown to offer a high-quality golf offering with uniquely Kiwi experiences that motivates increasing visitors to spend more, stay longer, return and generate positive word of mouth recommendations.

// A supported industry with a capable workforce that works together.

// Queenstown to be recognised as a world leading environmentally sustainable golf destination.

// Golf to retain a strong social license in Queenstown where the local community enjoy the amenity provided by the golf facilities and value the economic, social, cultural benefits attributable to the golf industry.

// Queenstown to have a strong and established market position as a golf destination within the key markets of New Zealand, Australia, USA and selected Asian markets.

Positioning

Queenstown is well positioned as a high quality, export-ready, golf destination. Supported by mature tourism infrastructure, Queenstown's strong supply side of golf products supported by a wide range of attractions and facilities outside of golf, significantly broaden the potential catchment of tourists and lengthen the duration of visitor's stay.

Marketing efforts must embrace the comparative advantage that Queenstown has as a golf destination which are some of New Zealand's best golf courses, the incredible landscapes and the array of associated tourism activities and world class food and drink offerings in the region.

RECOMMENDATION	GOLF INDUSTRY COLLABORATION	FOCUS ON HIGH NET WORTH MARKETS	BE LEADERS IN ENVIRONMENTALLY SUSTAINABLE GOLF	MAXIMISE YIELD FROM GOLF VISITORS	PROTECT AND STRENGTHEN COMMUNITY GOLF ASSETS	CAPITALISE ON THE NZ OPEN	REVIEW DQ MARKETING OF QUEENSTOWN AS A GOLF DESTINATION
WORKSTREAM	Establish industry group	North America	Achieve environmental certification for the region	Optimise inventory management	Protect community assets	Market Queenstown as a premium golfing destination	Target markets
	Capture visitor data	Asia	Create joint biodiversity approach	Structure green fees/ dynamic pricing	Develop social license and improve community sentiment towards golf tourism	Host international golf travel trade and golf media	Content
	Collaborate with tourism industry	Attract golf media	Predator-free areas	Centralised online booking system		Community engagement	Promote shoulder season and twilight
		Leverage DQ travel trade		Additional services			Golf-specific media

RECOMMENDATION:

Golf Industry Collaboration

ESTABLISH INDUSTRY GROUP
A golf industry group should be established to increase cohesion between the golf facilities. Fostering industry collaboration is going to be necessary to ensure an integrated network of golf providers to best service golf visitors. As a further step linking golf and tourism experiences will increase visitor satisfaction and length of stay.

There is currently short comings with respect to under-utilisation of the capacity of golf courses and a lack of clear information for visiting golfers about the accessibility of some golf facilities at certain times and days.

This industry group should consider the availability of tee times for visitors and ensure that there is a consistent offering to FIT visitors and trade. In addition, this group should focus on managing inventory across member clubs to ensure the capacity (unused by members) is being optimised for the visitor economy. This group should also receive feedback from tour operators about the visitor experience.

CAPTURE VISITOR DATA
It is crucial to understand and monitor visitors' golf experiences in Queenstown and to ensure that Queenstown continues to meet and exceed their expectations. Since Golf Tourism New Zealand ceased operating the data contained for Queenstown is weak. With a changed environment since the pandemic it is critical that all golf facilities in Queenstown have a collective approach to gathering data.

We recommend that the golf industry group collectively agree to capture consistent data. This may involve working alongside GTNZ. Data should be considered alongside GTNZ but we would recommend data is captured relating to visitor numbers, visitor origin, length of stay, spend, whether they engaged travel trade, quality of experience both on & off course, net promoter score.

COLLABORATE WITH TOURISM INDUSTRY
At the time of writing this MDP there is a paper before the Minister for Tourism which advocates re-establishing Golf Tourism New Zealand. This body would have the mandate to oversee a consistent product (for example through a quality assurance scheme), improve industry knowledge, capture data and work alongside Tourism New Zealand to promote New Zealand on an international level as a golf destination.

Should Golf Tourism New Zealand be re-established then Destination Queenstown and the golf facilities need to work alongside it. One clear opportunity is for Destination Queenstown to align with GTNZ to promote the region to the high net worth audience.

RECOMMENDATION:

Focus on high net worth markets

NORTH AMERICA & ASIA
Data has shown that there is a subset of golf tourists (generally from North America and Asia) that spend significantly more, use less tee times and contribute much more to the wider economy. These golf visitors fit within the premium segment of the market and are more likely to stay in luxury lodges, fly to the Over The Top hole in the sky and spend more on non-golfing tourism activities.

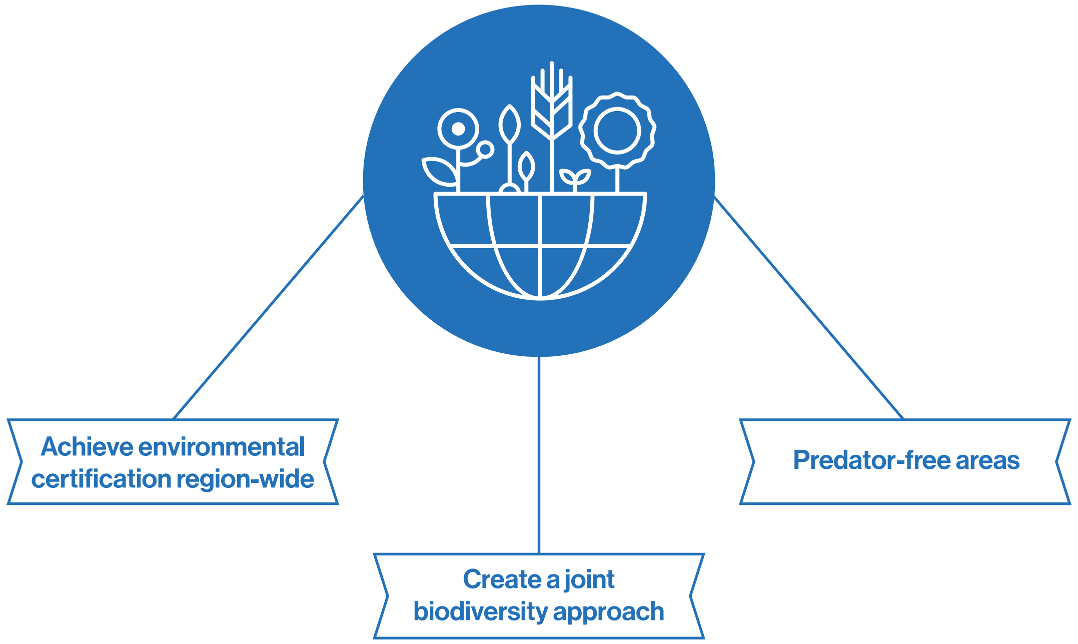
Individual golf facilities, operating at relatively high capacity, are not financially motivated to invest the time and resources in upskilling golf travel trade, sending their own staff to trade shows or investing in marketing initiatives to attract the premium visitor. This is the primary area where Destination Queenstown, working with golf and luxury stakeholders, could increase the value of golf visitation to Queenstown through attracting more high value visitors.

It is recommended that Destination Queenstown and golf providers work together to promote Queenstown as a luxury golfing destination with an aim to increase the number of high value golfers from long haul markets. The GTNZ data indicates that these high net worth visitors are most likely to be attracted through the travel trade industry. DQ should work with Tourism New Zealand (and, if reformed, GTNZ) to ensure that Queenstown is represented at international golf trade shows and has a consistent presence as a destination to international golf sellers.

ATTRACT GOLF MEDIA
It is recommended that DQ attract golf media and key influencers to promote the region. These media and influencers should be invited to Queenstown during peak season where they can see the destination at its best. The New Zealand Open is a good platform for this where a number of influencers from Korea, Japan, USA and Australia are already in attendance.

LEVERAGE DQ TRAVEL TRADE
DQ has dedicated resource, expect in connecting with trade travel. This should be leveraged for DQ to attract golf media and key influencers to promote the region. Visits by media and influencers should be made to Queenstown during peak season where they can see the destination at its best. The New Zealand Open provides an excellent hosting opportunity for this. Schedule in the summer months, a number of influences from Korea, Japan, USA and Australia already regularly attend the event.

Leaders in environmentally sustainable golf



Queenstown should consider positioning itself as the environmentally leading golf destination in Australasia. This positioning could extend beyond the golf facilities to include progressive environmental actions from golf sellers, transportation and accommodation providers.

Some golf facilities are already providing leading environmental programs in relation to pest control, native planting and use of inputs. The industry group could be used to advance a joint environmental approach to predators, biodiversity, planting and to the region becoming certified as world leading.

The industry group could also consider advocating for all Queenstown golf facilities to become GEO Certified. The OnCourse New Zealand programme provides a streamlined pathway to gain the most credible international recognition for sustainable golf – GEO Certified. Golf's national governing body, Golf New Zealand Korowha Aotearoa, subsidies the cost of completing the OnCourse New Zealand programme for clubs.

Maximise yield from golf visitors

This recommendation is aimed at supporting golf courses to increase revenue and optimise inventory.

OPTIMISE INVENTORY MANAGEMENT

Through the recommendation that there is golf industry collaboration, golf facilities have the opportunity to optimise their inventory management. This increased accessibility will open up more tee times to sell.

STRUCTURE GREEN FEES

Golf facilities should consider more dynamic pricing of green fees. Stakeholder discussions indicated that there is a high demand for tee times from approximately 10am until 1pm and pricing could reflect this. Many stakeholders indicated that a twilight rate could also extend the length of stay and provide more capacity, noting that twilight is some of the best time of the day to play golf during peak season. Further, the 'replay rate' used at Jack's Point is another way of structuring green fees to extend the length of stay by golf visitors in the region.

CENTRALISED ONLINE BOOKING SYSTEM

Industry feedback has shown that the tee time booking process at golf facilities is cumbersome. With a number of members clubs there has not been investment in user friendly tee time booking system. This impacts both FIT visitors and travel trade. Feedback also indicated there are difficulties in securing group tee bookings which impacts the ability for larger golf groups to visit the region.

A centralised online booking system should be developed, including a data portal whereby golf facilities can provide real time information to the dedicated website about tee bookings, pricing and other relevant information.

ADDITIONAL SERVICES

There is opportunity to increase the yield from each golf visitor through provision of food and beverage, merchandise, golf carts, rental clubs and lessons. A quality assurance scheme could be implemented to ensure that golf facilities are meeting visitor expectations (whether this is at the premium level or club level).

RECOMMENDATION:

Protect and strengthen community golf assets

PROTECT COMMUNITY ASSETS

Community golfing assets have the ability to improve and further contribute to the golf visitor offering. A positive example is the continual enhancement of Arrowtown as a golf product. Particular opportunity here relates to the Queenstown Golf Club and Frankton Golf Club which could provide a variety of offerings to the golf visitor economy.

The voice of the golf industry is important at this moment when the Frankton Golf Centre is being considered for repurposing and this could be done in a way that enhances the golf visitor experience (for example through a high quality golf driving range, putting experience or associated food and beverage offering).

DEVELOP SOCIAL LICENCE AND IMPROVE COMMUNITY SENTIMENT TOWARDS GOLF TOURISM

Golf's social licence in Queenstown must continue to be cultivated and nurtured, particularly to residents. Good news stories and the positive impacts of golf tourism needs to be communicated to residents, particularly non-golfing residents. Improving community sentiment towards golf tourism reflects positively on the golf visitor experience.

GTNZ could play a role in promoting the community experience in the region to the high net worth long haul audience.

Capitalise on the New Zealand Open

MARKET QUEENSTOWN AS A PREMIUM GOLFING DESTINATION

Golf tournaments are a proven way to reach a highly qualified audience of golfers. DQ has the opportunity to leverage the New Zealand Open to show the world that Queenstown is one of the best golfing destinations in the world and capitalize on that reputation.

As golfers can be targeted through specific media, the tournament broadcast is a prime marketing opportunity for Queenstown's golf tourism.

The tournament broadcast is a ready-made platform to introduce Queenstown's new products and promote it as a premium golfing destination to the domestic, short-haul and long-haul markets.

HOST INTERNATIONAL GOLF TRAVEL TRADE AND GOLF MEDIA

The New Zealand Open can be leveraged as a hosting opportunity for international golf travel trade and media. A wide variety of events occur throughout the week including a Japanese welcome, Champions Dinner, Tournament Part-tee and NZTE networking breakfast. Media opportunities are regularly hosted as iconic Queenstown tourist destinations such as the Over The Top golf hole at Cecil Peak, on the Earnslaw and the Shotover Jet.

COMMUNITY ENGAGEMENT

With junior coaching clinic, caddy workshops and volunteer opportunities, the tournament provides many ways for the community to be involved with the event. Residents can watch the tournament for free and socialise in the public food and beverage areas.

Review DQ marketing of Queenstown

TARGET MARKETS
It is essential to ensure that there is constant demand from New Zealand and Australia, in particular from the Eastern Seaboard, to visit Queenstown amidst an increasingly competitive landscape. This target market is highly defined (as outlined in Appendix 1: Market Insights) and most easily reached through golf specific channels including via golf clubs, existing databases, golf media and event broadcast.

Another market to leverage is the high net worth market primarily from North America and Asia. DQ could look to actively deploy resources to attract the premium visitor that spends considerably more.

CONTENT
It is recommended that DQ, together with the golf facilities, create a mix of imagery and video content to showcase golf in Queenstown. Powerful imagery and video should be shared that captures the viewer's imagination and shifts them from "dreaming" to "planning" to "booking" stages. Aspirational content is important. Imagery of The Hills should be used even though their capacity is limited. Other golf destinations (i.e., Pinehurst) promote one course even though it represents a small fraction of their capacity. This content should be golf specific and ideally provided by the golf facilities.

PROMOTE SHOULDER SEASONS AND TWILIGHT
It is recommended that DQ promote the shoulder season particularly to lengthen the golf season into April and early May where the conditions are very suitable for golf.

Industry stakeholders also reflected on certain low periods throughout the peak season (i.e., December and parts of January) and these could be filled through proactively working with stakeholders to create amateur events (i.e., the Millbrook Masters) and conference business into these low periods.

It is recommended that DQ look at promoting the twilight offering to extend capacity. Twilight in the region has had some resonance amongst golf influencers and there is some quality content that could be used. The twilight target market would be more focused on the Australasian golf visitor and could also specifically refer to 9 hole options.

GOLF SPECIFIC MEDIA
Golfers watch golf on TV, check their handicaps on a website, follow the game on social media and read about it in print and digital journalism. Whilst the audience numbers of the New Zealand Open may seem small these outlets should be considered particularly in relation to the Australasian audience. Marketing to golf trade trade should also be considered as part of this approach, as they provide a direct link to golfers.

Conclusion

Queenstown has a cluster of quality 18-hole golf courses, easily accessible from accommodation centres, in stunning natural environments that are appealing to domestic and international golf visitors. There is a variety of courses that are designed by well-known golf architects, are well maintained and deliver an incredible experience. Off-course golfers savour Central Otago wines, enjoy our brilliant restaurants and can get amongst nature in the various outdoor activities Queenstown has to offer.

With the borders now open Queenstown golf tourism bookings are looking very strong through the summer of 2022/23. Beyond this there is uncertainty both at a macro-economic level and with enhanced competition domestically and overseas.

This MDP is an opportunity for the golf tourism industry to consider the way forward and a future that optimises the whole benefit of golf - both economically, environmentally, socially and culturally.

The introduction of this MDP is designed to act as a motivator and catalyst for the whole Queenstown golf industry to ensure that residents can continue to enjoy their golf and around this the visitor economy can experience Kiwi culture, connect with the local community and support the local economy through golf tourism.

Next Steps

This MDP has been created with collaboration across the golf sector including courses and operators and with Destination Queenstown. The optimal way to execute this MDP would be to continue to work collaboratively.

It has been suggested that an industry group be established, which we would recommend as the first priority to seek industry buy-in. Initially DQ would facilitate establishing the group and moving forward it would become a collaborative arrangement.

The first action point would be to identify which workstreams would be led by DQ and which would be led by the wider industry.

Next, a prioritisation process would identify the importance of key priorities within the recommendations, as well as targeted timelines.

Following this, the allocation of funding and resource to the recommendations will need to occur.

To ensure this MDP remains relevant and fit for purpose it should be reviewed and revised as required at appropriate intervals.

Market Insights

Prior to the Covid-19 pandemic, international visitors who travelled to New Zealand for the main purpose of playing golf spent more than $400 million annually. Golf Tourism New Zealand (GTNZ) reported that the value of the golf visitor economy in New Zealand had increased from $143m in 2012 to more than $400m in 2018[11].

The following stats were released by Tourism New Zealand in their last deep dive into golf tourism:
// Golfers are the most satisfied of all tracked visitor categories into New Zealand, ranking their golf holiday a 9.3/10.
// Golf results in a staggering 85% net promoter score, essentially meaning that 85% of our visiting golfers actively recommend a New Zealand holiday to others when returning home.

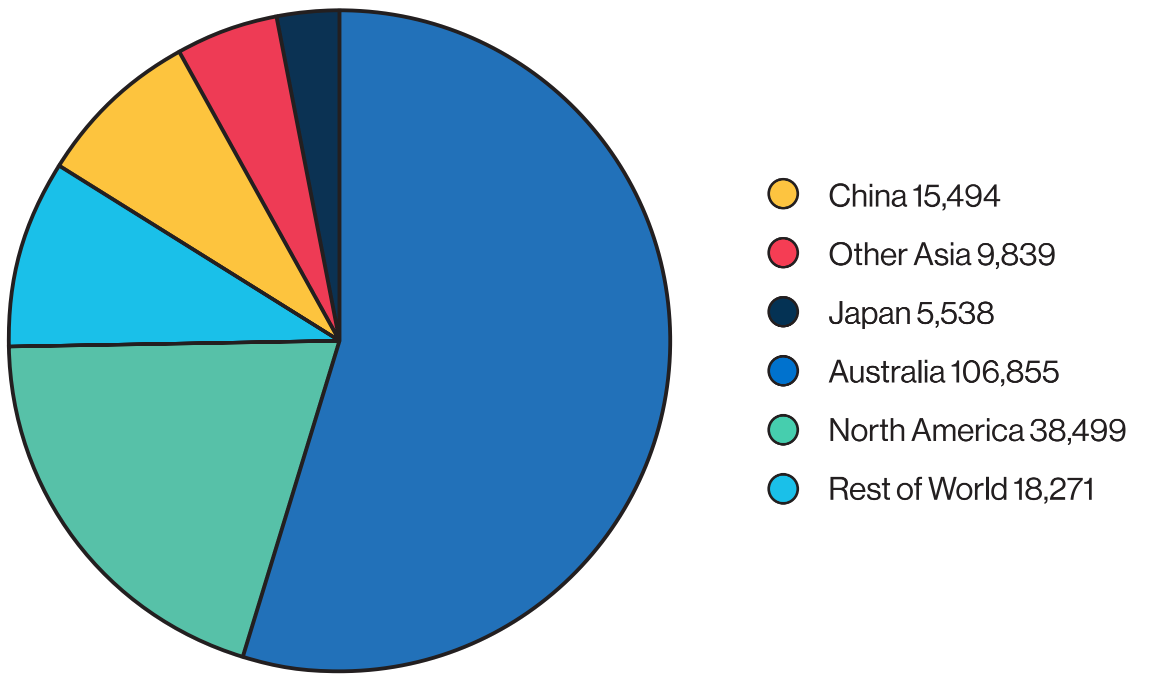
GTNZ collected data from 2013 to 2018 on the number of rounds played at its fourteen designated 'Marquee courses', of which three of these were in Queenstown, Jack's Point, Millbrook Resort and The Hills (Queenstown Marquee Courses).

In every year that data was collected, Jack's Point and Millbrook Resort were the top two courses by volume. A breakdown by country showed Jack's Point was the most popular golf course for Australian golfers and Millbrook Resort the most popular for Japanese golfers. Jack's Point, steadily rose every year in international visitor rounds from 7,560 in 2014 to 12,074 in 2019: an increase of 59.7% over the period.

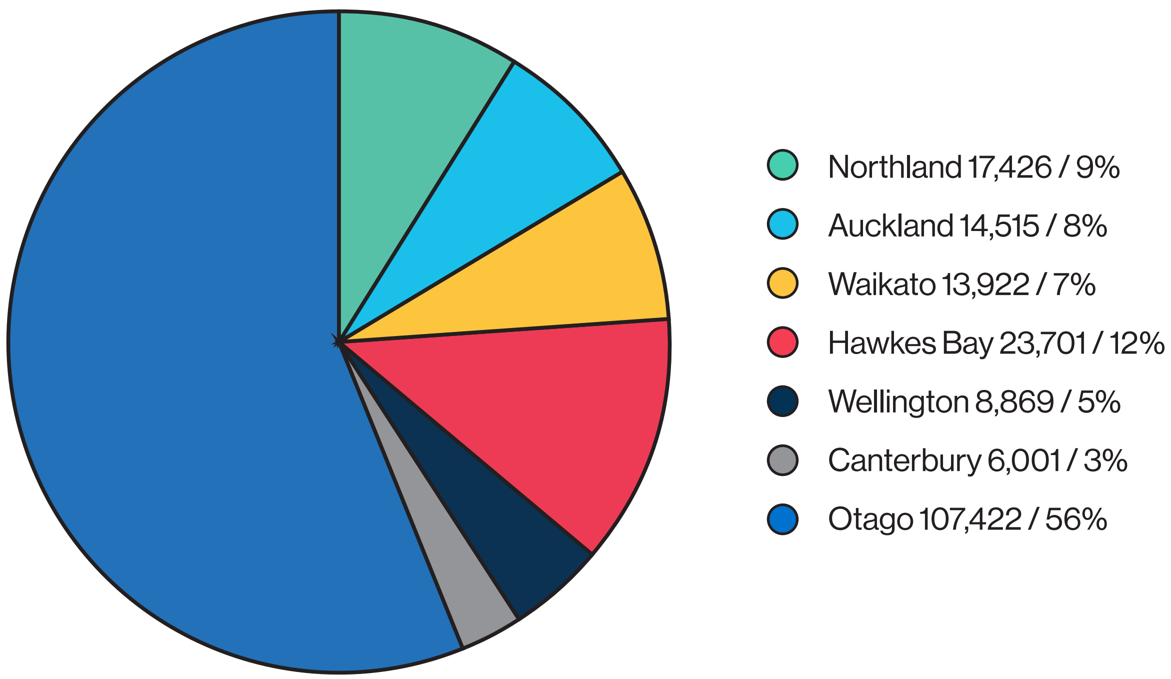
DEFICIENCIES IN THE DATA
There are a number of deficiencies in the data which should be acknowledged:
// The data does not include rounds played by members of Queenstown golf clubs who live outside of the region. There is a meaningful number of members who live out of the region but travel frequently to Queenstown. These members are high value visitors to the Queenstown region who invest in property, memberships and other goods and services in the district.
// The data does not include rounds played by members guests who travel from outside the region. Whilst the members guests may not be paying the same green fees as ordinary visitors, they still spend money in the wider visitor economy.
// The data above is international and does not consider the domestic New Zealand visitor. As we have seen through the pandemic and the resilience from the golf facilities, Queenstown is a very popular destination for domestic visitors.

[11] Final GTNZ Repo

Rounds Played by Country / 2014 - 2019
MARQUEE COURSES



Regional Dispersion 2014 - 2019
MARQUEE COURSES



Golf Visitor Insights

Drawing upon the GTNZ data and industry insights collected through this MDP, Queenstown as a golf region and Destination Queenstown would benefit from focussing on three target markets:

1. **Domestic Golfers**
2. **Australian Eastern Seaboard Golfers**
3. **North American High Net Worth Golfers**
4. **Asian High Net Worth Visitors**

Domestic Golfers

Research from Golf New Zealand: DotGolf (online portal) currently researching: How many rounds played at Millbrook Resort, Jack's Point, Queenstown, Arrowtown, The Hills by people whose home club is in:

A // Auckland region
B // North Island
C // Canterbury

CHARACTERISTICS OF A DOMESTIC VISITOR

// They are often repeat visitors influenced by word of mouth through their golf clubs or social golf circles.

// They may not be a member of a golf club.

// They have most likely arranged their own golf and transport requirements, often hiring a car and driving themselves.

// They are less seasonal and willing to travel to play golf throughout the year. They will play at all times of the year, including in winter and during the Christmas period.

// They may visit annually or even more frequently.

// Most will bring their own clubs, as opposed to hiring equipment.

// They may travel to watch or volunteer at the NZ Open.

// The younger generation will look to play golf differently to the standard morning tee time of 18 holes.

// Some are price sensitive and will consider value for money. May only play one round at the more premium courses like Millbrook Resort, Jack's Point or The Hills.

// Some may have local friends and be playing as guests of a member, for example at The Hills or Millbrook outside of the visitor capacity times.

// If they travel with other golfers, they have a shorter length of stay with more focus on golf and less on other activities.

Domestic Golfers

CHARACTERISTICS OF A 'SECOND HOME' VISITOR

There is another domestic visitor which should be separately considered, those who live part time in the Queenstown region. This includes those with houses at Millbrook Resort, Jack's Point and could include future homeowners at Gibbston Valley, Hogan's Gully or other golf lifestyle developments. Golf is one of the contributing factors attracting these second home visitors to the district. These visitors would have the following characteristics:

// They make significant contributions to the local economy through regular visitation.

// They contribute socially and culturally to the local community.

// They are often members of golf clubs in the region and accordingly are integrated into the community.

// They bring guests and friends to the region.

// They invest in the region and support jobs and the wider economy.

Australian Visitors

Australians are the highest volume golf visitors to New Zealand who spend most of their time in the Queenstown region.

56%
Of international rounds between 2014 - 2019 were played by Australian golfers.

76%
Of rounds played by Australian golf visitors were at Jack's Point, Millbrook Resort and The Hills.

The table below is from the Tourism New Zealand Golf Tourism review of 2022:

	2014	2015	2016	2017	2018	2019	2023	2024	2025
AUSTRALIAN GOLF TOURISM VISITORS	13,644	15,851	18,552	18,876	19,070	21,112			
FUTURE TARGETS							21,112	22,168	23,276
VISITOR SPEND PP	$2,500	$2,700	$2,900	$3,100	$3,300	$3,750	$4,250	$4,500	$4,750
TOTAL VALUE FOR NZ	$34.1M	$42.1M	$53.8M	$58.5M	$62.9M	$79.2M	$89.7M	$99.8M	$110.6M

If 76% of the Australian golf visitor rounds are in Queenstown then one could apply 76% of the figures above to anticipate values for Queenstown. Given that some golf destinations in New Zealand are at the luxury price point it could be more appropriate to apply 65% of the value of the table above to the Queenstown region as overleaf...

1.

Australian Visitors

	2014	2015	2016	2017	2018	2019	2023	2024	2025
AUSTRALIAN GOLF TOURISM VISITORS	13,644	15,851	18,552	18,876	19,070	21,112			
FUTURE TARGETS							21,112	22,168	23,276
VISITOR SPEND PP	$2,500	$2,700	$2,900	$3,100	$3,300	$3,750	$4,250	$4,500	$4,750
TOTAL VALUE	$34.1M	$42.1M	$53.8M	$58.5M	$62.9M	$79.2M	$89.7M	$99.8M	$110.6M
TOTAL VALUE FOR QUEENSTOWN	$22.1M	$27.4M	$34.9M	$38.0M	$40.9M	$51.5M	$58.3M	$64.8M	$71.9M

The data aligns with the total capacity outlined in Section 2. It also reinforces the premise understood by stakeholders in the industry that Australian visitors are a core market for golf tourism in Queenstown. Australian visitors deliver volume to golf facilities which supports the viability of these courses.

KEY ATTRIBUTES OF AN AUSTRALIAN VISITOR

// They are often repeat visitors influenced by word of mouth through their golf clubs in Australia's main cities.

// Their primary motivation is golf and they have less focus on other activities.

// On average they stay 7 nights, with 5 rounds of golf and an average spend of $3,750 (as of 2019).

// They may travel with a spouse or family but many will be on group trips. They may also be in Queenstown for conferences or other business purposes and golf is seen as a networking opportunity.

// They care about the quality of the courses and related accommodation facilities, but still require value for money.

// They are more influenced by time, cost and location.

// They may have self-booked although a good number book with volume based inbound tour operators in Queenstown specifically Remarkable Golf Travel and Peak Golf.

// They have a shorter lead-in time to book travel.

// Given their trips are shorter and more focussed, they tend to stay in Queenstown rather than visiting multiple locations like a typical long-haul visitor would.

APPENDIX

1.

North American High Net Worth Visitors

Between 2014 and 2019 North American golfers accounted for 20% of all international rounds played in New Zealand. Regionally, 27.8% of their rounds were played across Queenstown's Marquee courses.

20%
Of international rounds between 2014 - 2019 were played by North American golfers.

27.8%
Of rounds played by North American golfers were played across Queenstown's marquee courses.

CHARACTERISTICS OF THIS MARKET (feedback from golf travel sellers and inbound operators)

// They stay longer, approximately 10-12 nights within New Zealand.

// They are members of a golf club (or several golf clubs) and have taken a golf holiday before.

// They are a luxury consumer.

// They generally travel with a spouse or family (golfing and non-golfing).

// They are less influenced by time, cost or location.

// They have thoroughly researched their golf holiday and have likely engaged travel trade.

// Golf travel sellers targeting this customer indicate that the average spend per person is anywhere from $7,000 up to $35,000. GTNZ estimated that the average spend is between $14,000-$20,000 per person.

// These visitors are likely to play between three and six rounds of golf in New Zealand.

// General travel trend data for New Zealand shows the destination as a "once in a lifetime" trip for many of our long-haul visitors. This is due to several reasons including geography, time commitment and cost. With the rise of international memberships (i.e. Tara Iti and The Hills) this creates a segment of visitors who will make regular trips and consistently bring guests to their golf club in New Zealand.

1.

North America cont...

// This group are more likely to play golf in the regions. For example, Cape Kidnappers (Hawke's Bay) is the volume leader for rounds from North America. As such, they are likely to travel regionally around New Zealand to experience various destinations.

// They are likely to enjoy a range of other tourism experiences in the country. This could include food and wine tourism and cycle trails.

// They may become members at a premium golf club in New Zealand which will result in repeat visits without any additional marketing.

Asian High Net Worth Visitor

8%

Of international rounds between 2014 - 2019 were played by Chinese golfers.

33.5%

Of rounds played by Chinese golfers were played across Queenstown's marquee courses.

The Chinese golfer has similar travel characteristics to the North American visitors, however feedback from the market, travel sellers and inbound operators is that the Chinese market is conservatively 10% higher in spend versus the US market, primarily due to frequenting more premium golf courses, accommodation and activities.

Rest of Asia (including Japan) accounted for 7% of all international rounds played 2014-2019. The most frequently played course for all Japanese visitors is Millbrook Resort which reflects it's ownership. In raw numbers, in the years from 2014 to 2019 there have been 1,500 and 2,000 visitor rounds played annually by long haul visitors from Asia.

Competitor Destinations: Domestic

	NORTHLAND / NORTH AUCKLAND	TAUPO

COURSES	// Kauri Cliffs
	// Tara Iti
	// Te Arai North* opening 2023
	// Te Arai South* opening October 2022
		// The Kinloch Club
		// Wairakei Resort
		// Taupo Golf Club

EVENTS	No major events.	No Major Events.

STRENGTHS	// Year-round playability without the seasonality of Queenstown, particularly for the domestic and Australian Eastern Seaboard visitor.
	// Tara Iti has a very high world ranking at 25th in the world by Golf Magazine and 2nd outside of the USA by Golf Digest.
	// Kauri Cliffs has been ranked in the world top 100 until 2015 and Golf Digest currently rates it 26th outside of the USA.
	// Te Arai South is the first design in New Zealand by reputable course architect Bill Coore and likely to be highly regarded at a global level.
	// Te Arai North is the third design in New Zealand by reputable course architect Tom Doak and likely to be highly regarded at a global level.
	// Proximate to Auckland and the Auckland Airport.
	// First class clubhouse and hospitality facilities
	// Caddy programme that meets market expectations for the USA and Asian visitor.
	// High quality practice facilities.
	// Onsite luxury accommodation tailored to the golf visitor.
	// Proximate/adjacent to beautiful beaches.
	// Material part of the community, Tara Iti is the second largest employer in Kaipara.
	// Both Te Arai North and Te Arai South are likely to join Kauri Cliffs as Marquee Courses promoted by Tourism New Zealand. Tara Iti not promoted as it is private to members.
		// Kinloch is the only design by Jack Nicklaus which has some international appeal.
		// Kinloch is rated 66 outside of USA by Golf Digest.
		// Wairakei is a sanctuary for native birds and wildlife and is the leading environmental golf experiences in New Zealand.
		// Luxury accommodation onsite at Kinloch.
		// Strong supporting tourism infrastructure for a range of accommodation, food and beverage options.
		// Visitor destination has other offerings at Lake Taupo including cultural experiences, mountain biking and other water activities.
		// Supporting capacity from Taupo Golf Club which has 36 holes at a lower price point and extensive capacity.
		// High quality practice facilities at Kinloch and Wairakei.
		// Domestic airport.
		// Kinloch and Wairakei both established as Marquee Courses promoted by Tourism New Zealand.

WEAKNESSES	// Currently very limited tourism infrastructure in the local area in terms of hotels, food and beverage offerings and experiences.
	// Tara Iti is exclusive and not entirely open to visitor play. Members may bring guests and overseas vsitors may apply for a one-time round during their visit with a letter of support from their home golf club.
	// Price point significantly higher than Queenstown and other Australasian golf destinations.
	// Capacity will be limited to one golf course across the Mangawhai courses daily (approx. 150 players).
	// Kauri Cliffs is a long drive from the other golf courses.
	// 1.5 – 2 hour drive from international airport.
		// Only two marquee courses and they are not as highly rated compared with other golf destinations in Australasia.
		// No international connections.
		// No caddy programme.
		// Requires driving to access

Competitor Destinations: Australia

	TASMANIA	MELBOURNE

COURSES	// Cape Wickham Links
	// Barnbougle Dunes
	// Barnbougle Lost Farm
	// Ocean Dunes
	// King Island Golf Club
	// 7 Mile Beach* expected to open Q4 2023
		// Royal Melbourne
		// Kingston Health Golf Club
		// Victoria Golf Club
		// Peninsula Kingswood
		// Metropolitan Golf Club
		// Commonwealth
		// Yarra Yarra
		// The National
		// Dozens of other quality options

EVENTS	// Taylormade Bass Strait Masters
	// King Island Pro-Am
		// Presidents Cup 2011, 2019, 2028, 2040
		// Australian Open (various years)
		// Australian PGA (various years)
		// World Cup of Golf (various years)

STRENGTHS	// Domestic and international airport
	// Highly rated golf courses with Golf Magazine currently rating Barnbougle Dunes 38th and Cape Wickham 70th in world top 100 with Barnbougle Lost Farm rated 89th in the 2019 ratings.
	// Fully accessible public golf courses.
	// Priced between NZD$150-250 per round or NZD$200-300 for day rates.
	// Private airstrip
		// Global reputation as a golfing destination
		// Highly rated golf courses with Golf Magazine currently rating Royal Melbourne West 7th, Kingston Heath 22nd, Royal Melbourne East 92nd in the world top 100 and Golf Digest rating Victoria GC 57th outside of USA and Metropolitan 58th outside of USA.
		// Diverse range of high-quality golf experiences across wider Melbourne region.
		// Very accessible for Australian domestic visitors and with international connections at Melbourne airport.
		// Extensive tourism infrastructure and other activities in Melbourne

WEAKNESSES	// Very limited tourism infrastructure in the local area in terms of hotels, food and beverage offerings and experiences.
	// Remote, King Island requires a flight on a small plane.
	// The destination requires travel and logistics – it is not a one-stop shop.
	// Unsettled weather associated with island geography.
		// Many Melbourne Golf Clubs are private and not entirely accessible to visitor play.
		// Accessibility is limited to certain times.
		// Melbourne is a seasonal climate which can be less than ideal for golf in both Summer and Winter.
		// Price points can be high at certain golf facilities.

Comparable International Destinations

	PINEHURST	ST ANDREWS, SCOTLAND

COURSES	// Pinehurst Resort which features 9 full golf courses plus Thistle Dhu (putting course) and the Cradle (short par three course)
	// Mid Pines & Pine Needles
	// Various adjacent golf facilities across the spectrum of offerings (both private members course and public course) including Dormie Club, Country Club of North Carolina, Tobacco Road and many others.
		// St Andrews Links Trust which includes seven golf courses including the Old Course, New Course, Jubilee, Castle, Eden, Strathtyrum, Balgove (short course) and Himalayas (putting course).
		// Kingsbarns
		// Various adjacent golf facilities across the spectrum of offerings (both private members course and public course) including Fairmont St Andrews, Dukes Course, Elie, Crail, Leven, Lundin and many others.

EVENTS	// US Open (various years)
	// Women's US Open (various years, in 2014 and 2029 in weeks adjacent to the Men's US Open creating a double week of golf)
		// The Open Championship (various years)
		// International junior and senior events
		// Dunhill Links (pro-am)
		// Women's British Open (various years)

STRENGTHS	// Reputation as being the home of American Golf, strengthened by the USGA (governing body) currently building a headquarters there.
	// Population of around 15,000 that services a golf tourism industry offering around 25 different golf courses all within one small region.
	// Lots of capacity and accessibility for visitor golfer.
	// Excellent booking system and high standard of tourism infrastructure.
	// Progressive and constantly updating product.
	// Pinehurst #2 rated at number 17 in the world top 100 by Golf Magazine. Other golf courses in the town have been highly rated although not at world top 100 level.
	// Highly proximate golf offering alongside accommodation options at different price points.
	// Golf history and golf legacy celebrated throughout the town.
	// Pinehurst Resort has a lot of capacity and so is one entity leading the tourism offering.
		// Reputation as being the 'Home of Golf'
		// Highly rated golf courses with Golf Magazine currently rating St Andrews Old (3) and Kingsbarns (81) in the world top 100.
		// Golf has a high social licence – golf tourism generates majority of the tourism related income to the town; the golf courses in St Andrews belongs to the residents and to the town – the Links Trust courses, and membership fees remain very low for residents; residents are given priority of tee slots; the Old Course is closed on Sundays for the public to walk on.
		// Residents are very welcoming of visitors
		// Golf is very accessible to all technical abilities
		// The Himalayas is a very popular mini putt course and is 2 pounds to play.
		// Whilst St Andrews itself doesn't have too many world leading courses, the destination is accessible by car to other top-rated courses in Scotland.
		// Highly established tourism infrastructure including golf sellers, transportation, accommodation, caddies.
		// Range of different accommodation options including luxury at The Old Course Hotel and Fairmont.

WEAKNESSES	// Tourism infrastructure is very golf centric, there are few alternative activities and culture for the visiting guest.
	// Capacity for the most reputable golf course is limited. golf course
	// Not close to an international airport.
		// Nearest international airport is Edinburgh, so requires train and driving to access.
		// Very popular in summer and difficult to get onto the most popular courses.
		// Town reaches capacity when major events are on.
		// Small playing window of 1 April – 30 October due to weather.

(NB: neither are competitor destinations to Queenstown but provide some interest from a case study)

Industry Consultation

The industry was consulted on the MDP through a stakeholder session facilitated by The Clubhouse and individual engagement sessions.

STAKEHOLDER SESSION Held on 2 June attended by the following:

ORGANISATION	POSITION	NAME
Millbrook	General Manager	Brian Howie
Kiss My Putt	Owner/Operator	Janie Rees
Gibbston Valley, Hogans Gully	Golf course design architect	Greg Turner
Queenstown Golf Club (Kelvin Heights)	General Manager	Andrew Bell
Jacks Point	Head Pro and Marketing Manager	Luke Leesberg
Remarkable Golf Tours	Owner/Operator	Tim Kershaw
Over The Top Helicopters and Golf	Guest Relations O˜cer	Victoria Jenner
Arrowtown Golf Club	Assistant Manager	Jono Jackson
Destination Queenstown	Marketing & Communications Director Data & Insights Analyst	Sarah O'Donnell Eilidh Blanchard

Although it was a smaller turnout than anticipated, this enabled more input from each stakeholder and more constructive and collaborative discussion overall.

INDIVIDUAL ENGAGEMENT SESSIONS

ORGANISATION	POSITION	NAME
Millbrook	General Manager	Brian Howie
The Hills	Acting General Manager	Craig Palmer Sian Chilton
Hogans Gully Formerly Golf Tourism New Zealand	Consultant	Ryan Brandenburg
Wakatipu Junior Golf Club Golf New Zealand	Golf Development Manager	Simon Boland
Golf New Zealand	CEO GM Partnerships	Dean Murphy Hana-Rae Seifret
New Zealand Open PGA of New Zealand Coronet Tours	Tournament Director Board Member General Manager	Michael Glading
Remarkable Golf Tours	Owner/Operator	Tim Kershaw
Peak Golf Queenstown	Owner/Operator	Stephen Jensen

3.
APPENDIX

History of Tourism NZ's National Golf Strategy

In 2013, a golf tourism strategy (the 2013 Golf Tourism Strategy) was written by industry experts and accepted by TNZ. This strategy had the support of the golf industry and was prepared after extensive engagement with stakeholders across the sector. The key recommendations from the 2013 Golf Tourism Strategy were:

// That a body called Golf Tourism New Zealand (GTNZ) was established to support the marketing and promotion of New Zealand as a golf tourism destination;

// That GTNZ supported the supply side of the golf industry to enhance the offering of golf facilities and ensure that the visitor experience met expectations;

// That GTNZ worked alongside golf facilities and TNZ to capture accurate data on visiting golfers;

// That GTNZ worked alongside TNZ to guide marketing spend in order to increase demand for New Zealand as a golf destination.

Since 2014, GTNZ captured data from Marquee courses throughout New Zealand and, along with TNZ, measured the value of the golf tourism industry. The 2019 report from GTNZ showed that the value of the golf tourism market in New Zealand had increased from $143m in 2012 to more than $400m in 2018.

In 2019, GTNZ lost the support of TNZ as it moved away from marketing special interest groups. As a result, there are gaps in the data from 2019 – 2021.

GTNZ evaluated and selected 42 courses to be promoted as part of New Zealand's golf offering, arranged into three portfolios - the Marquee courses, the New Zealand Experience and the Hidden Gems.

The Marquee courses portfolio included 14 premium courses. To achieve Marquee status, courses must be of high quality and aspirational with inherent international interest, have a history or reputation and/or a particular identity and be accessible for visitor play. Queenstown has three Marquee courses – The Hills, Millbrook and Jack's Point.

The New Zealand Experience Portfolio was the second tier of courses promoted to support the Marquee courses and provide additional links in the golf trail. For inclusion in this portfolio, courses must demonstrate their ability to showcase crucial elements of the New Zealand golf brand such as:value for money, local culture, community spirit, country charm, uniqueness of design, unique connection to nature, location proximate to golf trails and history. The courses in this portfolio had varying quality of facilities that may or may not meet the expectations of all international visitors, and they were accurately represented to ensure realistic expectations were met. Arrowtown Golf Club and Queenstown Golf Club were included in this portfolio.

There are no Queenstown courses in the Hidden Gems portfolio.

4.

Inventory: Golf Courses

	MILLBROOK RESORT	JACK'S POINT	THE HILLS	QUEENSTOWN GOLF CLUB	ARROWTOWN GOLF CLUB	FRANKTON GOLF CENTRE	KINGSTON & GLENORCHY GOLF CLUBS
GOLF OFFERING	// Remarkables Course (18 Holes) // Coronet Course (18 Holes)	// 18	// The Hills Championship Course (18 holes) The Farm (9 hole par three course)	// 18	// 18	// 9 hole short course // Driving range with 10 bays	// 9 hole
INVENTORY AVAILABLE	// One course daily to visitor // Driving range with 5 bays, increasing to 17 bays	// Fully public golf course	// 16 players daily for visitors. // In addition members can bring guests.			// Fully public golf course	// Fully public golf course
OWNERSHIP MODEL	// Private	// Private	// Private	// Members, leased from QLDC	// Members	// Council owned	
MEMBERSHIP NUMBERS	// 625 family members // 50% resident // 50% non-resident		// 200 Families				
DRIVING RANGE	✓	✓	✓		✓	✓	
PRACTICE FACILITIES	✓	✓	✓				
EQUIPMENT HIRE	✓	✓	✓	✓	✓	✓	
FOOD &BEV FACILITIES	Clubhouse restaurant, Hole in One café, Millhouse and Kobi restaurants	Clubhouse restaurant	Clubhouse restaurant	Clubhouse café and bar	Clubhouse café and bar	Clubhouse café and bar	
ONSITE ACCOMM	✓	✗	✗ New consent to build up to 66 residential and 84 visitor accommodation units.	✗	✗	✗	✗

4.

Inventory: Golf Courses

	MILLBROOK RESORT	JACK'S POINT	THE HILLS	QUEENSTOWN GOLF CLUB	ARROWTOWN GOLF CLUB	FRANKTON	KINGSTON & GLENORCHY GOLF CLUBS

FEES FOR NZ AFFIILIATED GOLFERS	// Mid Oct – Apr: $195 (Remarkables); $275 (Coronet)
	// June – Aug: $100 (both courses)
	// Sept – mid Oct: $175 (both courses)
	*Discount on fees for in-house guests
		// May – Oct: $155
		// Nov – Apr: $195
			// 16 visitors 6 days a week
			// $660 (18 holes and the Farm)
				// 1 May – Sept: $50
				// Oct – Apr: $64
					// May – Oct: $55
					// Nov – Apr: $65
						// Adult $20
						// Junior $5
							// $10

FEES FOR DOMESTIC VISITORS	As above	As above	As above	// May – Sept: $75
				// Oct – Apr: $100
				*Offer free club hire during the ski season on presentation of a valid ski pass
					// May – Oct: $110
					// Nov – Apr: $140
						As above	As above

FEES FOR INTERNATIONAL VISITORS	As above	As above	As above	As above	As above	As above	As above

EVENTS /COMMUNITY INVOLVEMENT	// New Zealand Open
	// Southern Gem
	// The Queenstown Classic
	// Queenstown cycle and walking trail around the resort
		// New Zealand Open Pro-Am Day 3
		// Southern Gem
		// The Queenstown Classic
			// Previous host of the New Zealand Open
			// Southern Gem
			// The Queenstown Classic
				// Hosts Wakatipu Junior Golf Club	// Hosts Wakatipu Junior Golf Club	// Hosts Wakatipu Junior Golf Club	

RANKING	// Tourism NZ Marquee Course	// Tourism NZ Marquee Course // Ranked 62nd in the world by Golfer's Digest in 2022	// Tourism NZ Marquee Course				
OTHER	// Spa facilities and gym	// Winner Of The 2019 IAGTO Sustainability Award For Nature Protection	// Sculptures				

4.

Alternative Golf Products

OVER THE TOP A unique par 3 golf experience nestled 4,500 feet in the Southern Alps on Cecil Peak. Heli pick up / drop off options available from The Hills, Jacks Point and Millbrook Resort.
PUTT 'N GLOW A glow in the dark mini putt golf, 9 holes lit up by UV-light and colourful artworks.
OUTDOOR MINI GOLF An 18 hole outdoor mini golf in central Queenstown.

TOUR OPERATORS - DOMESTIC

// Remarkable Golf Tours – Queenstown based operator offering a full range of golf travel services, transport and golf packages.
// Peak Golf Queenstown – Queenstown based operator offering a full range of golf travel services, transport and golf packages. Also runs the Southern Gem (5 night, 4 course event).
// Par NZ – leading golf holiday and golf event company that runs a number of mass participation golf events in Queenstown including the Central Otago Autumn Classic (5 day event) and the Millbrook Masters (5 night, 4 course event).
// Experience Golf – Official travel partner of Golf New Zealand, Auckland based operator offering a full range of golf travel services and driving significant business to Queenstown.
// Kiss My Putt – specialises in luxury golf retreats for small groups of women.
// Coronet Tours - guests stay and dine at Millbrook while enjoying a tournament style golf tour, hosted by Michael Glading, tournament director of the New Zealand Open.
// Pacific Destinations (NZ Golf and Travel).
// Playing around New Zealand.
// Greenfernz.

TOUR OPERATORS - INTERNATIONAL

The following international golf tour operators frequently send golf business to Queenstown:

// Kalos Golf – Ultra high-end USA group that brings.
// Perry Golf – Leading golf travel business arranging tours to golf destinations around the world.
// Golf Select – Australian based golf travel business.

5.

The New Zealand Open

The New Zealand Open has been developed as a Pro-Am style tournament where "ordinary" golfers can play inside the ropes alongside the professionals. The tournament features 150 professionals and 150 amateurs. The New Zealand Open attracts an interesting array of business leaders, celebrities and influencers from around the world to play in the event. The entry fee for an amateur to play in the event is around $17,000 and accordingly the event attracts a high net worth visitation.

The event is held in late February or early March each year. This displaces some business for FIT and the inbound operators but the ultimate economic impact for Queenstown is very strong. Other destinations sometimes host events outside of the peak season but one of the strengths of the New Zealand Open is that the settled weather and exceptional experience means that the destination is promoted at it's very best to the influential visitors as well as through the broadcast.

ECONOMIC BENEFITS More than 3,200 people visit Queenstown to attend the New Zealand Open, resulting in 17,330 bed nights and a total spend of over $3.7 million.

MEDIA & MARKETING BENEFITS The live broadcast for the New Zealand Open generates more than 833 hours of live broadcast coverage into 31 countries / territories around the world. A further 121 hours of highlights was distributed to 21 Markets. The key markets for the live broadcast are New Zealand, Australia and Japan. Domestic coverage of the tournament is comprehensive with all major media agencies including Sky, NZME, TVNZ, Mediaworks, Stuff and TV3 covering the tournament along with the golf specific media.

CULTURE In 2020 Ngāi Tahu, as mana whenua, held a powhiri to officially welcome all manuhiri to their rohe and the Tournament. Through official protocol Ngāi Tahu blessed the whenua of the event and all those involved with the tournament. A korowai has been gifted by New Zealand Māori Golf Association to Golf New Zealand to be worn each year by the winner of the NZ Open at the presentation ceremony.

INCLUSIVITY New Zealand's best all abilities golfers had an opportunity to contest for the inaugural New Zealand All Abilities Open in 2020, run in conjunction with the New Zealand Open. It was held as a 54-hole stroke play event, with 18 holes played at Jack's Point and The Hills on the second and third days of the NZ Open. A junior event is also held annual in partnership with the Wakatipu Junior Golf Club.

COMMUNITY INVOLVEMENT The tournament is supported by a contingent of 533 event volunteers and 102 volunteer caddies. The majority come from local golf clubs, and most are returnees. As a way of thanking volunteers, they are each gifted a complementary round at Millbrook to be used within a 12-month period.

6.

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Thank you.

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