



FORWARD



- Activating The CHINA GOLD Market And Increasing Value Delivery To Visitors & The Sector

MAY 2015





ACTIVATING CHINESE GOLF
RESEARCH PURPOSE

FORWARD

CHINESE

ACTIVATING CHINESE GOLF TOURISM TO

A proposition & strategy for engagement

The unique and compelling Golf NZ Proposition

Pathways to activation + delivery



Based on:

Understanding needs of Chinese Golf Players

EXECUTIVE SUMMARY



- Golf tourism in New Zealand is in its infancy
 - Opportunity for future growth with very high value travellers
 - This is a golf plus tourism experience
- The two Chinese golfer segments with the most immediate potential for New Zealand are:
 - “Performance Golfers”, motivated by their love of golf
 - “Mastery Golfers”, motivated by the opportunities enabled by golf
- To activate Golf tourism:
 - Clearly define and communicate our competitive experience promise: Golf & travel
 - Strengthen alliances with clubs and travel specialists within clubs, and business associations
 - Identify and nurture consistent strategic relationships with key influencers
- Tell our New Zealand stories
 - Why famous quality, renowned
 - What makes our courses unique/different
 - What experiences can be had here
- Build the “drama” of New Zealand golf and travel experiences
 - Imagery is critical
 - Itineraries that suggest dramatic experiences
 - Suggest photogenic potential for sharing/recording experiences on social media
- Ensure social opportunities
 - Especially for business
 - Immediately after play
 - Private facilities to allow them to get noisy

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EXECUTIVE SUMMARY



- Develop Chinese language information
 - Digital platforms, QR codes and app access
 - Course play guidelines
 - Safety
 - NZ protocols
- Build & Use GPS & technology
 - Course map – play and direction
 - Apps, course tips and score recording
 - Enables play without a caddy (cheaper and more independent)
- Events and tournaments
 - Sponsor in China to build awareness and interest
 - Establish in NZ to provide a focus for play now
 - Build around existing NZ events
- Consider the needs of travel companions
 - Spouses/families
 - Fellow golfers

RESEARCH PROCESS



1. Concept development

2. In-market qualitative research
CHINA

1. Concept development

Ensure clear and differentiated propositions

- Desk based analysis of existing golf product
- **Discussion with key industry partners** to understand options for potential product
- **5 Key informant interviews** with NZ-based golf resorts and tour product providers, to further develop concepts, products and positioning propositions
 - Face-to-face and or phone (if outside Auckland)
- **10x Chinese famil participants**
- Design concepts to be included in research

2. In market qualitative research

Understand in-depth traveller needs, perceptions and decision making, the competitive proposition and targeting

Understand what proposition is most relevant and how this is best activated and enabled

- **5 key informant interviews** with golf trip influencers/ organizers in China
- **4x Group sessions** with golf club members
- **2x Consumer groups** – Active considerers; golf players
- All held in Guangzhou – April 2015

All were actively considering travel to New Zealand or have travelled in last 18 month to NZ.

All play golf, all travelled overseas at least twice in last 12 month.

Mix of ages – 30-50 years, 50 years and over.

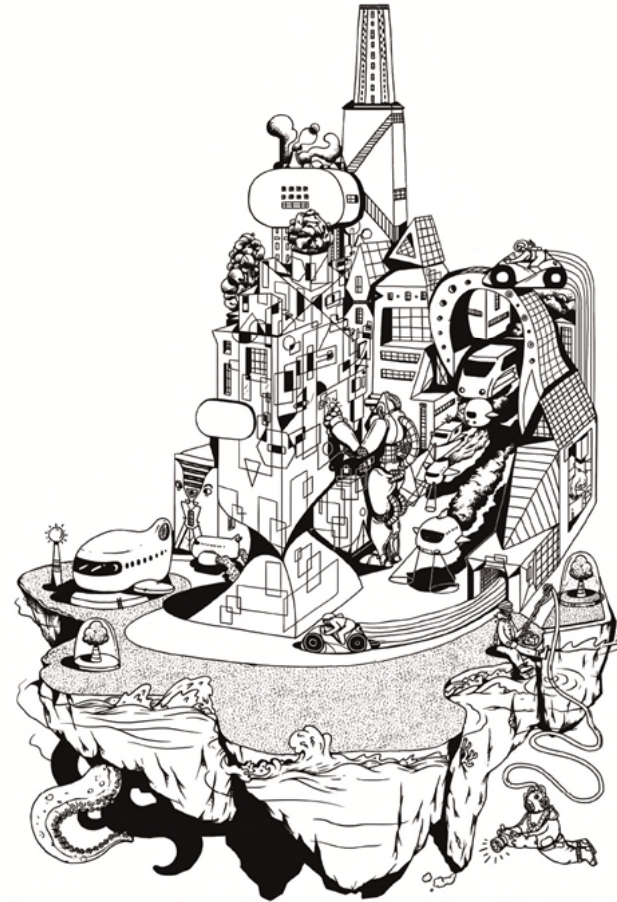
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CHINA GOLF

The context





Currently Golf is an elite and exclusive activity in China. It is a positively enriching experience; socially and experientially

ELITE
 精 英
 Jīng Yīng

EXCLUSIVE				
New Golf is a new sport in China < 12 years old	Expensive NZ\$100k + Membership \$120 per round	独 享 Dú Xiǎng	Foreign Etiquette & Protocol	Socially Aspirational
ABUNDANT				
Expansive Outdoors Open, not crowded	Beautiful Sanctuary Manicured, calm, cared for	丰 富 Fēng Fù	Personally Enriching Building skills and relationships	Non taxing sport Physical but achievable

“A life less ordinary”

- Golf tourism is an extension of this experience internationally. Chinese golfers are currently looking for an exclusive and expansive, abundant experience



New

Expensive

EXCLUSIVE

"A life less ordinary"

独 享

Dú

Xiǎng

Foreign
Etiquette &
Protocol

Socially
Aspirational



2 Key channels to play golf in China

Golf Course Clubs

- Elite
- Expensive to join & play
- Very close link to business clubs & associations
- Takes time to get there
- Closed – by invitation or membership only
- Composed but not dramatic courses
- Strong support – caddies, classes, coaching
- Extensive club facilities for socialising



Driving Range Clubs

- Relatively accessible – location & cost
- Role: to learn, practice, socialise
- Composed & professional atmosphere
- Some players have never played on a course – This is their golf
- Course club day once a month – A course based tournament for range members



➤ Access is limited and currently is the largely preserve of the rich and connected



ELITE

精 英

The Golfer

The T Shot

Stories to tell

Meeting new people and building connections

New bold experiences

Personal challenges and learning

DRAMA

戏 剧 化

Xì Jù Huà

“A life less ordinary”

The current Chinese golfer leads a privileged life. They are:

- Wealthy, time rich, well connected socially
- Very well travelled, sophisticated experienced travelers
- Travelling internationally many times a year – often having multiple golf trips abroad
- Their lives are interesting and they are constantly seeking stimulation and different and new experiences – because they can. They are looking for dramatic experiences – to extend themselves and provide enriching stories to share
- They are savvy and may, or may not require 5 star accommodation
- Building business relationships and networks is a key focus for many

GOLF + TRAVEL



Live like the Raj
"stay in a palace and visit the ancient temples"



Be a cold war Russian hero
"we are going to drive a tank and shoot rockets"

DRAMA

**Transformative
unique experiences**

Big
Bold
Unique
Experiential
*"3D involvement and
immersion"*



Discover the ancient civilisation of Egypt
*"stay in the desert and experience past
civilisations"*



Experience the history of Europe
"Live the way they did in the past"

➤ **New Zealand MUST deliver a sense of drama to be relevant to the elite Chinese golfer**

GOLF EXPERIENCES



NEW ZEALAND benefit

- **Natural dramatic intensity - UNIQUE**
- **Pleasant play year round**
- **Diversity of experience**
- **World class courses**
- **Accessible, less pressured**
- **Enormous variety in play**
- **NZ Golf heritage**
- **Range of course style & access**
- **Year round play**
- **New & different place to play**
- **Unique natural drama and zero distance Emerson – (get involved in play and unique nature experiences)**



- Can be terribly hot
- Not unique
- Mainly beach locations
- Can be rushed
- Can be rough and ready on cheap courses
- All similar course style – limited variation in experience
- Weather dependent
- Seasonal unpredictability
- Access can be difficult
- Variable course quality



- Proximity “like driving to a course in China”
- 1.5-2 hour flight
- Cheap
- Entertainment “Girls + Gambling”
- Manicured courses – including fairways
- Well serviced – carts, on course drinks, snacks
- Easy – don’t need to think, just play and socialise
- Variety and range of options
- Reputation PGA courses
- Works with business and building up business opportunities
- Heritage and history
- Seasonal, unique experiences
- Challenging golf experiences
- High quality courses
- Exotic experiences and stories
- Combining golf with other memorable and (safely) challenging social/travel activities
- Experiencing a different way of life

EASE & ACCESSABILITY

RANGE OF EXPERIENCES BUSINESS OPPORTUNITIES

HERITAGE & TRADITION

TRAVEL DRAMA

South East Asia

North America

Scotland / Europe

Russia /India

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GOLF EXPERIENCES



- Mostly coastal
- Aware through friends of accessibility of course play
- High end course offer, dinner prepared by chefs after play.



- Very difficult to get access to play on the best courses
- Can be hot
- Less diversity than NZ
- Can be windy
- Distances between different experiences and courses



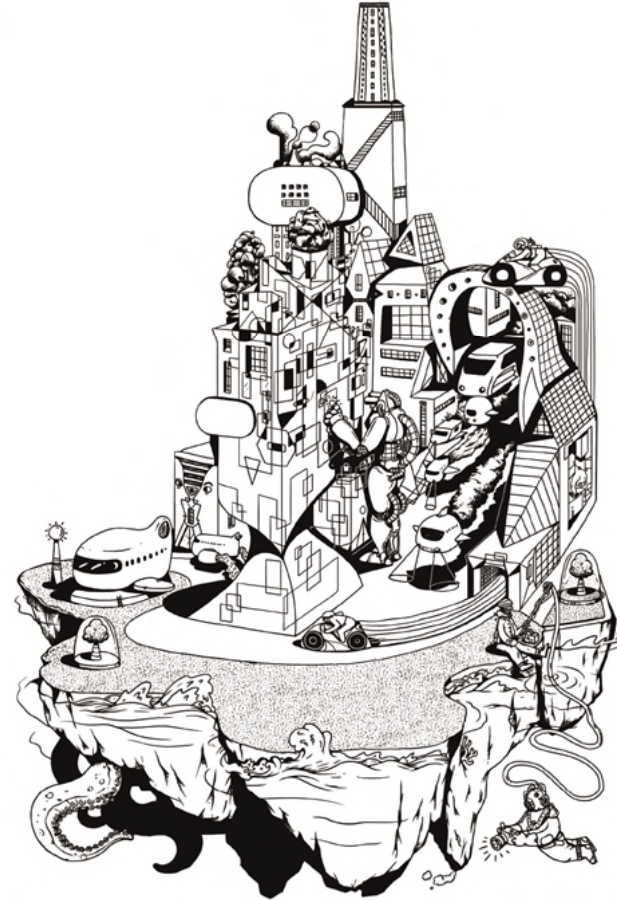
- ***NZ is world class and accessible to play***
- ***Pleasant play year round***
- ***Diversity of experience – within a short distance***
- ***Accessible: public experiences and exclusive experiences***

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THE NEW ZEALAND GOLF PROPOSITION



Auckland
Tourism, Events and
Economic Development
An Auckland Council Organisation



Ministry of Business,
Innovation & Employment

A Auckland
Airport

DESTINATION NEW ZEALAND: HOW ARE WE BUILDING INTEREST TO ACTIVATION CURRENTLY?



New Zealand 100% Pure

**New Zealand
is associated
with beautiful
environments**

BUT

Risks being too passive to generate a passionate desire to come for the elite traveller who wants dramatic & memorable golf & travel experiences

**Will it be boring?
What else is there to experience?**

**New Zealand
has some
association
with golf
(Lydia Ko)**

BUT

It is not 'top of mind'

**Why – what is available & special
about the Golf experience in NZ**

AND THE NEW ZEALAND GOLF IS SPECTACULAR



New Zealand

**DRAMATIC
INTENSITY**

**Experience and
indulge in the
intensity of the
untouched**

**ZERO DISTANCE
immersion**

DIVERSITY

Variety

Many
Different
Contrasting
Choices

Options
multi
layered

EASE

*Inclusive
Accessible
Serendipity*

*Welcoming
Open
Safe
Friendly
Responsive
flexible*

Feel it, see it, touch it, do it, play it, share it

The drama of the world's best in the world's most dramatic natural landscapes

Multi layered- unique, new and different experiences

Involving – the ease in which to experience many different things

Stories & experiences – the more stories they have the more sharing they do

NZ GOLF DEVELOPMENT: PROPOSITION



PROPOSITION

- Build an aligned NZ Golf story around **dramatic intensity: Experience and indulge in the intensity of the untouched.**
 - Contrast & diversity: Mountain courses with the contrasting snow background, geothermal, coastal, contextualising the course within the environment and local experience
- Continue to **build reputation**
 - Tell stories and continue to build relevance of NZ golf : Courses within the world top 100, Course designers & architects, Building architects and designers, Unique challenges & unusual experiences, PGA tournaments, players, coaches
- **Build imagery**, photographs and experiences that reflect this proposition delivering overall more drama and intensity:
 - Focus on high intensity tee shots and close up action play shots
 - Utilise dramatic lighting
 - Build natural contrast, close up and distance elements
 - Include unique experiences – animals, geothermal, mountains
 - Photogenic potential for sharing/recording on social media
- Include **references to premium and elite experiences**
 - Indulgence and premium where possible: Helicopters, Art/Sculpture
 - PGA and World Class Golf, coaches, players, manicured greens.
- **Clarify accessibility & Ease**
 - Clarify accessibility of courses – Public availability & how to access premium courses
 - Very easy to get to all the courses in New Zealand and can be in a tropical northland course in the morning and a southern mountain course in the afternoon
 - Very easy to get from accommodation to a number of local courses – within minutes and domestic flights very quick and not waiting
 - World class and accessible
- Build a sense of **zero distance emersion.**
 - People, friends in the shots enjoying the experience together
 - Close up of the shots, challenges.
- Include a sense of **socialisation.**
 - People together playing and sharing after golf.

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DRAMATIC INTENSITY: A GOLF PLUS TRAVEL HOLIDAY

Experience and indulge in the intensity of the untouched

Raw – but refined

Built on naturally contoured land
– with shovels not bulldozers

New – one of the first

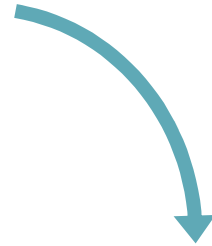
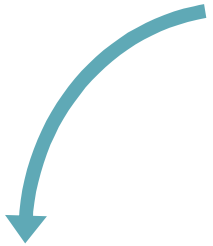
Accessible

Dramatic

Among the best in the world



Attend a golf tournament
PGA instruction



Learning to fly

Raise a Sail - Sailing

Sky diving (self/tandem)

Hunting

Helicopter

Day- hike

Ski

Premium wine

Island hop on a yacht

*Walk on ice –
Glacier walk/ Ice cave*

Indulge in a thermal spa

Glacier milk lakes

Drive a campervan

Sleep under the stars



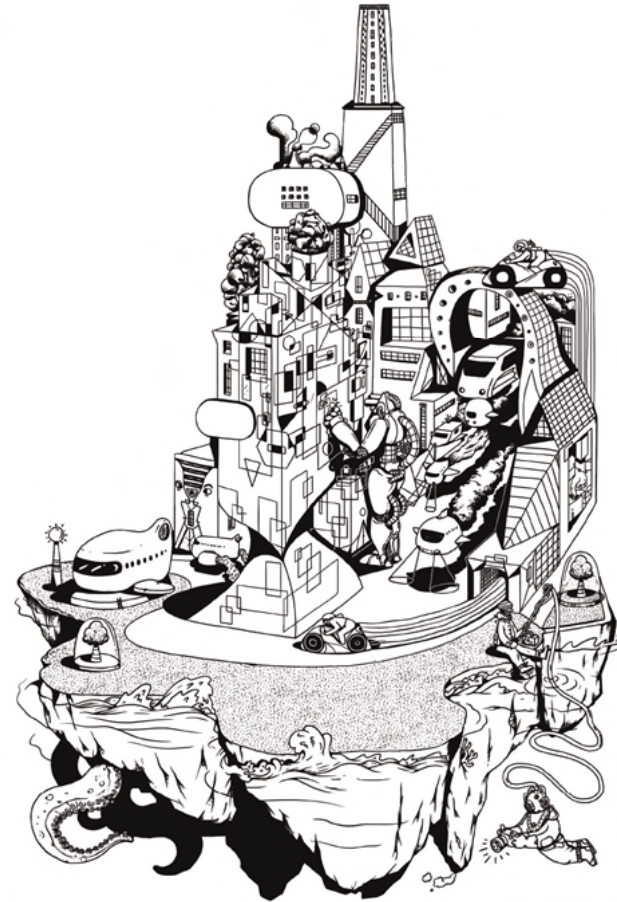
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CHINA GOLF

The segments



GOLF IN CHINA: TARGET GROUPS NOW



→ Current golf travelers from China fall into two broad segments. Both are elite, heavily involved with Golf in china and travelling and playing Golf internationally frequently.

GOLF IN CHINA: TARGET GROUPS **FUTURE**



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GOLF IN CHINA: TARGET GROUPS **FUTURE**



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DELIVERING TO THE SEGMENTS

1. Mastery Golfer

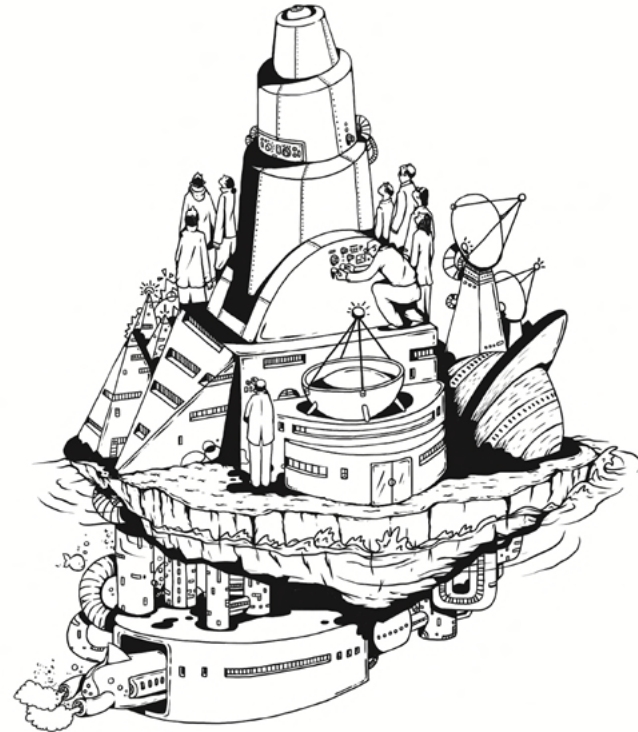
For the love of golf
Personal challenges

2. Performance Golfer

For what golf enables
Prestige and status

3. Development Golfer

For entertainment
Curiosity



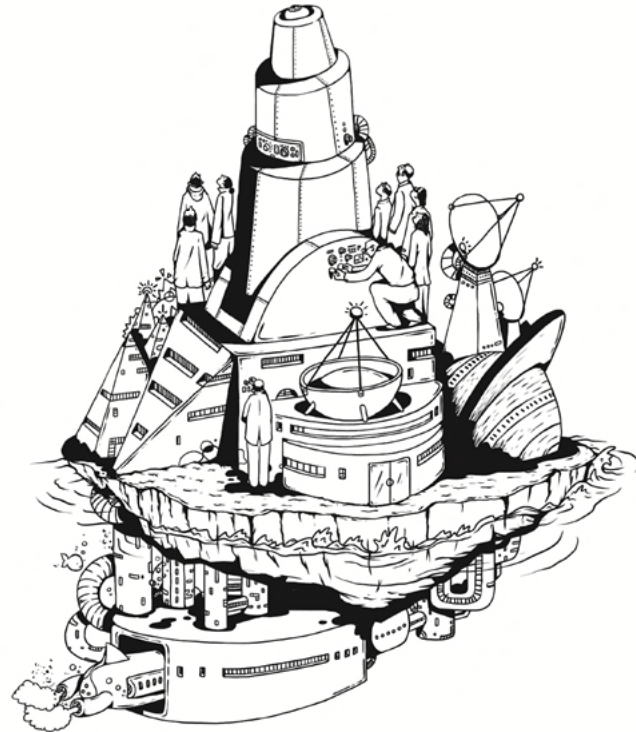


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DELIVERING TO THE SEGMENTS

1. Mastery Golfer

For the love of golf
Personal challenges





MASTERY PERSONAL CHALLENGES IN A SOCIAL CONTEXT





MASTERY EXPERIENCE GOLF SEGMENT: NEEDS



WHO THEY ARE

Successful wealthy and connected
 Committed golf players – time rich
 A sophisticated worldly confident traveller.
 Seek premium experiences
 Travel in groups 2-12 people –
 Travelling with: Close colleagues/family/friends
 Medium trip duration – 7-14 days
 Age: 40+

THE ROLE OF GOLF

Love golf for the golf play experience. It is positively challenging, mentally and physically. Improvement and honing skills is important. Socialising and food are important but secondary

APPROACH TO TRAVEL GOLF PLAY

To build golf skills and have new and (safely)challenging/ dramatic, unique life experiences

Want to improve, challenge themselves, participate in tournaments, enjoy the focus and physicality of Golf

They want to play full rounds and maximize time on the course, especially on holiday. They will play 18 holes

Protocol and rules are important. They want to understand them and follow the social expectations on the course

They do not want to take time out during the day for long lunches and food. They are happy to eat on the go or have a quick break/ snacks during play. A big lunch would be a distraction from golf

Challenges are important – to test yourself. Participating and potentially winning tournaments is attractive

NZ GOLF

A choice of diverse spectacular inspiring challenging uniquely New Zealand golf courses that are easily accessible

NZ TRAVEL

Personal abundant and enriching travel experiences that indulge the senses with a dramatic way and expands their horizons

SATISFYING INTERNATIONAL GOLF

Challenging

Golf focused

Full rounds

Variety of courses – from premium elite to local experience

Tournaments – for the golf



MASTERY EXPERIENCE GOLF SEGMENT

NEW ZEALAND GOLF PERCEPTION & ACTIVATION



NZ Golf perceptions currently

Overall

- Limited real knowledge of golf in NZ – especially about the quality of the New Zealand golf experience and courses
- Some awareness of top New Zealand golf players eg Lydia Ko
- Most favorable are those with contacts and friends who have been or have a link with new Zealand – of if there is a personal direct connection – someone who can outline the experience and potential itinerary, and why this is unique, different, exciting and will be fun.

Barriers

- Uncertainty about the golf and travel experience – nice but perhaps a bit boring
- Not top of mind

Latent drivers

- **Highlight real diversity** – with ease; including top 100 courses and where famous golfers have played, course and building architecture, sculpture. Stories to build experience promise and unique experiences
- **Deliver clear experience promises** – Golf and travel itineraries with compelling reasons why (world class, unique, diverse, challenging) **Knowledge**
- **Playing in dramatic natural environments**, being immersed and experiencing the unexpected and unique (animals, geothermal, mountain, lake)
- **Personalised travel experiences** with challenge and (safe, easy)drama
- **Opportunity to improve your game** – experience on many different styles of course easily



MASTERY OVERALL PROPOSITION SUMMARY



Opportunity

A core current segment in market

Potentially very strong growth potential

Willing to play across course style, seasons and regions

- Core to utilising NZ golf facilities and resources throughout New Zealand, building seasonal and regional visitation

New Zealand

Experience and indulge in the intensity of the untouched
Zero distance immersion

Mastery Golfer
For the love of golf

NZ Golf

Spectacular inspiring golf
Top and Unique and unusual courses & challenges with variety
Immersed in the unique natural drama of New Zealand

NZ Travel

ENRICHMENT

Personal abundant and enriching travel experiences that indulge the senses in a dramatic way and expands their horizons.

Focus

Golf holiday with broader range of personalised travel experiences
Great golf and travel experiences with associates, friends & family is key



MASTERY EXPERIENCE GOLF SEGMENT DEVELOPMENT



NZ promotion opportunity

- 'Friendly' Golf in NZ tournaments/ events - to act as a trigger to activate a trip
- Linking golf and experiences; New Zealand premium wine, seafood, showcase as a china club tournament promotion
- Develop concepts around seasonal experiences. NZ is good any time – autumn, spring, summer and regional themed experiences (Southern mountain and lake, Northern food bowl & Volcanic plateau.
- Build a story around the diversity of courses and access to unique regional challenges – all within a short distance
- Building social media sharing – photo imagery

Promotional channels

What

- **China golf range and driving clubs primarily** – Through strong consistent in club NZ presence over time
 - Relationships with key influencers/ travel organisers within the clubs
 - Provide promotional material, Proposition statements, imagery, itineraries and experiences, events, gold experiences (watch NZ open and play)
 - Develop sponsorships and associated promotion of wine and food
 - Work with the club social media programme
- **Specialist golf tourism operators**
 - Developing product/ itineraries to offer the clubs and players independently

Why

- They are heavily involved here and receptive to messaging – personal relationship selling is relevant and builds confidence
- Specific offers including potential experiences will engage more than a general destination concept – there are many options

Products/courses most relevant

A range – from top 100 to unique regional
Play and compete

Development opportunity

- Skills and experience building golf tours



MASTERY EXPERIENCE GOLF SEGMENT



ACTIVATION in market

Utilise Chinese Golf club social media channels – run competitions, product give-aways etc associated with golf events.

Sponsor local Golf tournaments with integrated promotions of New Zealand products and experiences

Send NZ PGA coaches to China for visiting training exchange

Promote Golf tournaments in NZ – NZ open spectator and play Golf packages, weekend stay and play tournaments

Link Golf TV channel to key golf websites in NZ to activate planning process

Provide NZ Golf content to Golf TV channels



DEVELOPMENT in New Zealand

Develop and bundle cluster trails/ itineraries with golf app for NZ – North & South Islands

Educate pre trip on biosecurity requirements at the boarder re clubs ad shoes

Develop Chinese language QR code: Itineraries regionally, course information – safety, protocol, availability, booking, guidance on course, distance in feet, availability of carts

Clear communication of the NZ golf opportunity – top 100, challenges, variety, unique environments

Golf course and golfing websites – up to date and information with online booking system – available in Chinese language

Emphasis of Golf quality and diversity with ease of access and unique challenges

Options for local off-site activities and tailored experiences – that are dramatic and special

Develop regional local course network with information on access and unique experiences. Manage expectations – low level facilities but unique golf experiences and challenges



MASTERY EXPERIENCE GOLF SEGMENT: SPECIFIC GOLF EXPERIENCE DELIVERY



NZ GOLF

A choice of diverse spectacular inspiring challenging uniquely New Zealand golf courses that are easily accessible

NZ TRAVEL

Personal abundant and enriching travel experiences that indulge the senses with a dramatic way and expands their horizons

GOLF NEEDS

Welcome – good directional signage; welcome pack highlighting golf play & points of interest on course

Equipment – tends to bring own clubs, availability of shoes and clubs for hire, towels, flasks (hot water)

Course – unique diversity of topography, spectacular surroundings, location of scenic photo opportunity clearly marked

Amenities – clubhouse with hot and cold food, bathroom facilities, snacks to purchase – hot and cold, healthy options – glass of milk. Does not need to be high end club facility

Times – clear open/close times, times not open to visitors/non-members, seasonal or all year round

Assistance – good signage, wayfinding & enablement to quickly familiarise and orient themselves to the course; if unattended – short video, signage pamphlets in Chinese is ideal. Will use digital information if available. A concierge to explain the course and challenges, play tips and highlights a bonus

Language – option on website for Chinese language; map of golf play, health and safety & hazards in Chinese, special stories of golf course

SOCIAL NEEDS

To play golf with friends and enjoy the challenge together

May travel with friends and family who are not playing – so activities and itinerary for them is attractive

Do want to socialise and share after play – but not so important to have facilities on course

COURSE STYLE NEEDS

Range – from Marquee to community – delivering experiences, challenges and variety. Willing to mix it up but needs a story and reason

Manage expectations so they know what to expect



MASTERY EXPERIENCE GOLF SEGMENT: TRAVEL NEEDS



NZ GOLF

A choice of diverse spectacular inspiring challenging uniquely New Zealand golf courses that are easily accessible

NZ TRAVEL

Personal abundant and enriching travel experiences that indulge the senses with a dramatic way and expands their horizons

TRAVEL STYLE

Travel focus: Golf is the main experience focus - with other travel experiences to supplement the experience.

Other options for non playing friends and family if they are a part of the group

Will design the trip around courses and golf experiences – nationally & regionally

They are looking for a variety of experience and course levels and may be happy to achieve this within one or two regions if the diversity of opportunity is made clear and the ease of this apparent

Are open to multi seasonal golf play – especially if it is a good golf experience and delivers something different

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Will pay for premium and tailored experiences – but do not require 5 star accommodation for all the trip

Golf and experiences are the focus – with good food

TRAVEL NEEDS IN NZ

Experience: Unique self determining travel, more adventuresome personally engaging, NZ iconic experiences, will go off beaten track for that rewarding exclusive experience

Transport: Self drive – car, campervan

Typical Activities: Personalised and exclusive – Heli-Skiing, Sky-diving, Yachting, fishing

General – Farmers Markets, Glacial walks, Jet boating, Ice-Cave

Accommodation: will use a variety, seek NZ unique accommodation – prefers to stay away from 5 Star, and very interested in architecturally designed boutique hotels/lodges in unique locations with scenic outlooks, family accommodation – 3 star motels, self-catering, campervan outdoor experience

Food: Greater mix of New Zealand and Asian fusion outside of accommodation

Seafood high appeal

Self-catering – DIY food box in motels with easy recipe

Fruits stalls, farmers markets, supermarkets



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DELIVERING TO THE SEGMENTS

2. Performance Golfer

For what golf enables
Prestige and status



PERFORMANCE PRESTIGE & STATUS



'A Life Less Ordinary'



Wall of Fame – highly visual, personally signed by the Golfing Greats



Informal leisure

Serendipity on a wine tour



Formalities

FORWARD



PERFORMANCE UNIQUE EXPERIENCE





PERFORMANCE NETWORKING GOLF SEGMENT NEEDS



WHO THEY ARE

Highly successful in business or aspiring to be, Substantial discretionary time. Place huge emphasis on building business networks and friends in this way. Socialising is central.

Extremely influential

Males typically 40 years+

Travelling with: Business colleagues/friends – but may also travel with family (Partners) due to long haul travel

- Non player activities important, so need assurance of engaging activity options

Strong active links to business clubs and organisations e.g. Commerce Associations, Lions, Rotary, Car Clubs- BMW, Regional Golf Associations – Guangzhou

A sophisticated worldly confident traveller. Wealthy/ extremely wealthy

Seek premium experiences that are unique, dramatic, engaging, note-worthy, often characterised as being on their 'bucket list'

May extend stay switching to FIT mode of travel

Travel in groups Group travel (6-30 people) Adult friends & colleagues

Short to Medium trip duration 5 – 7- days then may extend

THE ROLE OF GOLF

Context for socialising and building connections and business friendships. Want to build Chinese connections and potentially NZ connections. Prestigious activity and lifestyle. Attracted to the noteworthy and famous. Competence and performance success important – being able to share, tell stories, celebrate. Want value but will pay for premium experiences.

They like personal challenges

NZ GOLF

A choice of diverse spectacular inspiring challenging uniquely New Zealand golf courses that are easily accessible

NZ TRAVEL

Personal abundant and enriching travel experiences that indulge the senses with a dramatic way and expands their horizons

APPROACH TO GOLF PLAY

Want to play – and need to feel they are having a personal challenge. May not finish a full round if the weather is not good or it is too tiring.

Want to have the stories – the challenging hole, a good photo spot, where a famous person played.....

Want to play on the best courses – but not always on courses that are too hard

Friendly tournaments and creating challenges with awards to celebrate at the end of play

After golf socializing is important – Ideally on the golf course facility or close by. They do not want the mood to diminish with a gap between play and socializing. Socialising will often getting loud and with alcohol. Private space to do this without impacting other is ideal

SATISFYING INTERNATIONAL GOLF

Famous and renowned

Personally challenging

Opportunities for socializing and networking

Not necessarily full rounds

Premium top world quality courses (not too difficult)

Friendly tournaments – with awards and prizes – bragging rights



PERFORMANCE NETWORKING GOLF SEGMENT

NEW ZEALAND GOLF PERCEPTIONS & ACTIVATION



Overall

- Limited real knowledge – especially about the quality of the New Zealand golf experience and what travel experiences would be attractive.
- Most favorable are those with contacts and friends who have been or have a link with new Zealand – of if there is a personal direct connection – someone who can outline the experience and potential itinerary, and why this is unique, different, exciting and will be fun.

Barriers

- Uncertainty about the golf and travel experience – nice but perhaps a bit boring
- Not top of mind

Latent drivers

- **The exclusive quality of the New Zealand golf experience**, courses, facilities, accommodation
- **Playing in dramatic natural environments**, being immersed and experiencing the unexpected and unique (animals, geothermal, mountain, lake)
- **Personalised exclusive opportunities** to experience an original landscape and environment & experiences with challenge and (safe, easy)drama
- **Business, social networking opportunities**



PERFORMANCE NETWORKING GOLF SEGMENT



Opportunity

A core current segment in market
Only interested in the best – courses, experiences, service

- Limited number of New Zealand courses will meet their need for reputation and 'red carpet' treatment
- Very valuable as they will spend for great and exclusive experiences – in golf, travel and goods like wine
- Future golf resort style development tailored to this segment

New Zealand

Experience and indulge in the intensity of the untouched
Zero distance immersion

Performance Golfer
For what golf enables

NZ Golf

Premium hospitality in world class & renown New Zealand Golf courses & their spectacular environments

NZ Travel

EXCLUSIVITY

Premium hospitality everyone enjoys to build and extend business friendships, cultural exchange and unity

Focus

Golf holiday and some premium leisure travel experiences

Social (business) networking and group enjoyment is key

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PERFORMANCE NETWORKING GOLF SEGMENT DEVELOPMENT OPPORTUNITY



NZ promotion opportunity

- 'Friendly' Golf in NZ tournaments - to act as a trigger to activate a trip
- Highlight world class - top 100 & PGA
- Linking golf and experiences; New Zealand premium wine, seafood, showcase as a china club tournament promotion
- Develop concepts around the drama of the environment and accompanying experiences
- Link to local Chinese businesses and business clubs

Promotional channels

- Business associations linked to golf clubs
- China golf range and driving clubs primarily – Through strong consistent in club NZ presence over time

Products/courses most relevant

- **Premium** experiences with socialising opportunities, friendly tournaments, after game functions, private facilities, New Zealand premium food – seafood especially

Development opportunity

- On course facilities that are more resort orientated, dining, private areas, orientated around socialising
- Private space for socialising in premium lodges
- Famous architecture in facility development – contemporary – not 'American farmhouse' style like many of the current premium lodges in NZ



ACTIVATION – in market

Build relationships and presence with premium golf clubs in China and their associated business organisations

Sponsor golf tournaments in China, sponsor Golf events showcasing NZ food, wine hospitality

Promote NZ Golf open and international players attending

Co-promote with complementary NZ tourism events e.g. NZ regional wine weeks – like Otago wines,

Engage with targeted Golf Club social media platforms, share their achievements, promote golf + travel itineraries, run competitions



DEVELOPMENT

Present golf courses entrances and club facilities to international standards - refined excellence

Provide premium resort style on course experiences as a future development opportunity – Accommodation, restaurants

Foster and develop sector relationships with NZ trade and government sectors for international event and tournament opportunities

Reception areas with hall of fame, international links and highlighting the stature of the course

Bring NZ culture onto Golf courses – architecture, sculptures, cultural shows

Chinese speaking concierge staff available

Premium High status Activities & NZ Golf travel

Provide itineraries for non players and examples of experiences

Café – Relaxing areas to eat and drink

Walking trails

Free WIFI in clubhouse



PERFORMANCE NETWORKING GOLF SEGMENT

GOLF EXPERIENCE DELIVERY



NZ GOLF

World class courses in spectacular diverse and naturally unique locations

NZ TRAVEL

Premium hospitality everyone will enjoy to build and extend business friendships, cultural exchange and foster unity and harmony

GOLF NEEDS

Welcome – Golf concierge introduces and welcomes to golf club; special event glass, signage, tournament hoardings visible. Even if small group acknowledgement in some way is appreciated. Flags if an event or special occasion

Equipment – quality branded clubs, golf shoes, lockers, hot water flasks, carts with GPS, GPS watches; suggested clothing for weather conditions on website.

Course – world class standards; variety of iconic NZ Golf courses – spectacular scenery; famous challenging holes; location of scenic photo opportunities marked out **Introduction** to the unique challenges on the course and commentary of points of interest – trickiest hole, Top 3 specific scenic photo opportunities, history, famous players, protocol and safety etc. is ideal. Can be personal, video and/or Chinese translated pamphlet.

Amenities – integrated sport and recreation resort facilities ideally– more of an outward international focus; accommodation, food & beverage, pro-shop, meeting, spa & wellness and leisure activities on-site and in close proximity off-site.

Times – available to fit with travel schedule of group, early morning or late afternoon.

Access – open access, no time limits on players, no pressure, online bookings.

Assistance – Golf concierge, caddies on hand or at least on request, Chinese concierge may assist during Golf play, transfer to Golf course options.

Language – Chinese website translation, Chinese speaking concierge, Chinese Golf course map and play description in Chinese.

SOCIAL NEEDS

A key focus – Time place and flexibility to socialise – talk, challenge each other, have and celebrate success (small awards)

Evening entertainment can get loud Need the freedom to do this

COURSE STYLE

The best, top quality, well maintained, courses of excellence. International quality - The elite courses only



PERFORMANCE NETWORKING GOLF SEGMENT TRAVEL



NZ GOLF

World class courses in spectacular diverse and naturally unique locations

NZ TRAVEL

Premium hospitality everyone will enjoy to build and extend business friendships, cultural exchange and foster unity and harmony

TRAVEL STYLE

Travel needs: To socialise and have dramatic and note worthy travel experiences around golf play and a golf focused travel. That the group is happy is important – If one person does not like it then the group will change their plans and cut an activity short. Premium transport and accommodation is preferred.

Travel focus: Golf is the focus for planning the itinerary - with other travel experiences around this.

Other options for non playing partners if they are a part of the group

Will design the trip around noteworthy courses experiences—nationally & regionally

They are looking for reputation

Are open to multi seasonal golf play – If it is pleasant and easy. They do not like wind and extreme weather. They are not in any way restricted to the Chinese holiday season

Will pay for premium and tailored experiences *Golf, socialising and experiences are the focus – with good food*

TRAVEL NEEDS

Experience: exclusive well planned & co-ordinated iconic NZ experiences; evening entertainment, cultural shows, casino, special award ceremony at dinner or on course; focus on socialising, not sightseeing

Transport: bus, private, domestic flights, helicopter

Typical Activities: Wine tasting, yachting, fishing, hunting, lake excursion, eating, casino, ice-cave

Accommodation: international brand hotel; both twin double beds "king size options"; NZ iconic luxury lodge experiences

Some of the current luxury lodges are not perceived as premium architecture and interior design. The overall design is seen as too American and not unique

Food: Chinese/Asian mainly, banquets, private room dining

Showcase freshest NZ cuisine – seafood, e.g. Local Blue cod, Crayfish, Oysters, Mussels, soft shell crab, Scallops, Abalone, Salmon; premium lean cuts lamb and venison, pheasant



PERFORMANCE NETWORKING GOLF SEGMENT VALUE



Price value and deals

This segment will pay for quality experiences. They would rather pay more for a better, more convenient and time efficient experience, given the choice.

They hate doubling up – e.g. a bus ride two ways when they could bus one way and boat return – or boat and helicopter.

They talk deals and price – and do like to feel that they are winning and get a good deal – or acknowledgement for their patronage.

They are very aware of the international Golf experience market and costs and want to feel they are getting value – sometimes this means paying a lot. They can compare the cost of Augusta (with it's famous reputation and history) and Kauri Cliffs.

- You need to provide the evidence to charge a premium – stories, exclusivity, rarity.
- No surprises with hidden or added costs – e.g. Wifi. These must be built in.

They will go to a vineyard, buy 10 cases of the most special and expensive wine. They need to be able to try it, have a story to tell about it and get a discount for buying the volume.

Often they currently encounter sales people saying it is not on the tasting menu.

If they go to 6 regional courses – there is a discount card.



PERFORMANCE DEVELOPMENT NEEDS PREMIUM EXPERIENCE



→ Add indulgence, eliteness and participation to imagery and experience

- Helicopters to a Golf Course
- Ceremony & Anticipation – Personal welcome, flags for events
- Unexpected natural experiences highlighted – e.g. deer on the course, Wekas, sheep, boil your own eggs on a golf course.
- Unique stories and special challenges ahead for the golfer on specific golf courses. E.g. *“You’ll be excused if you forget your golf when you get to the top of Robb’s Knob and admire the view - it’s stunning. “*





FORWARD

DELIVERING TO THE SEGMENTS

3. Development Golfer

For entertainment

Curiosity





THE CHINESE DEVELOPMENT GOLF SEGMENT



CHINA FUTURE DEVELOPMENT



Travel plus golf

- Golf in China is such a young sport that this is currently an emergent opportunity – to be monitored for the future
- Golf is aspirational for many Chinese travelers, but they do not currently have a connection with golf, do not understand how to play, protocol involved and see it as a sport that is largely closed to those who do not belong to a club
- This may change in the future

Barriers

Don't understand that New Zealand has public access courses.

Don't understand 'how to' - protocol, rules and procedures, where to go, what to do.

Limited English language – to understand how to navigate the opportunity.

Opportunity

- Develop a strategy to communicate clearly in China and in New Zealand public course availability (without member invitation)
 - Consider an open to all symbol. Consider a Learn to Play Golf sign. Use outside courses, in promotional material.
- Develop Chinese language protocol information, ensure visually clear wayfinding signage (symbols not just words).
- Consider developing online/digital Chinese language information and course descriptions.
- Promote as a tourism activity to build local course usage regionally through a regional network

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THE CHINESE DEVELOPMENT GOLF SEGMENT



CHINA FUTURE DEVELOPMENT

Travel plus golf



Have a go



A tourism activity – that is Golf focused. Have a chance to experience Golf in New Zealand.

- Easily accessible (relatively), fun and building a skill with low pressure
- Less social risk and cost than playing in China as a beginner
- Incidental opportunity to have a go at golf or have a casual round once in New Zealand

learn and build skills

Learn to play



Looking for an opportunity to complete a short **Golf learn-to-play course** in an academy setting – Golf focused course with other supplementary experiences

- Pre planned Golf tuition and academy style programme
- With some travel experiences
- Famous/ recognised golfing credentials



THE CHINESE DEVELOPMENT GOLF SEGMENT



→ Consider developing **Golf tourism and Golf experience opportunities** – casual have a go and learning based

→ Communicate the **public access to play** – not just by invitation

→ Build awareness of open access on course through tourism channels: brochure, web, i-site

→ Build **regional and national course networks** + referral “play NZ” opportunities with stories about courses, learn to play packages and clear access and protocol information

→ Consider an alternative game rule option/ ‘*Onto the green!*’; Short positive social experience, photo opportunities, certificates, prizes

→ Pitch the walk and play, see, do opportunity

→ Deliver stories around the course, animals, landscape, interest and photo spots

→ Organise times and access to utilise club and facility down time

→ Provide equipment for play (top of the range not necessary)

→ Provide Chinese language translation – brochure, QR Code with safety protocol and guidelines

New Zealand

Experience and indulge in the intensity of the untouched
Zero distance immersion

Development Golfer

Learn to play

Have a go

A chance to learn in a place where other great (NZ) players have learnt without pressure

NZ Golf

An easy memorable experience of Golf that captures the spirit of New Zealand travel

Freedom to experience & be immersed in the dramatic natural beauty

NZ Travel

Freedom to experience and try new things – Zero distance emersion

Learning with some travel

Focus

Travel holiday with Golf play



THE CHINESE DEVELOPMENT GOLF SEGMENT



WHO THEY ARE

Younger active less experienced golfer
 Less premium oriented
 Smaller groups – 4-6 people
 Travel duration 7 days - 3 weeks
 Golf play is more incidental and casual or pre organised if a learn to play programme

COURSE STYLE

Public access course – without pressure and feeling welcome. 9 hole play (For a learn to play programme).
 Or where a 'famous' person has learnt and played, or a special geographical feature – e.g. geothermal.

GOLF NEEDS

Welcome – good way- finding signage; Open to public, Visitors Welcome, Learn to Play signage/Give it a Go.
Equipment – complete hire package, instruction and practice packages.
Course – not too challenging, unique and scenic.
Amenities – Clubhouse, food & drink – snacks if possible (not essential).
Times – clear communication of times available; will work around club availability.
Access – off-peak discounts, communicated all year round, access options from accommodation to golf course – if possible.
Assistance – minimal if they just want to play unhindered and not under the watchful eyes of others, or may want option of a PGA instructor or equivalent, and may lead to enquiries about, long stay instruction option (Chinese language not necessary always).
Language – Chinese pamphlet outlining map + play plan + protocol + safety; Chinese language for specialist learn to play programme.

NZ GOLF

A fun casual golf experience that is easy, memorable and great value

NZ TRAVEL

Freedom to experience and try new things

TRAVEL NEEDS

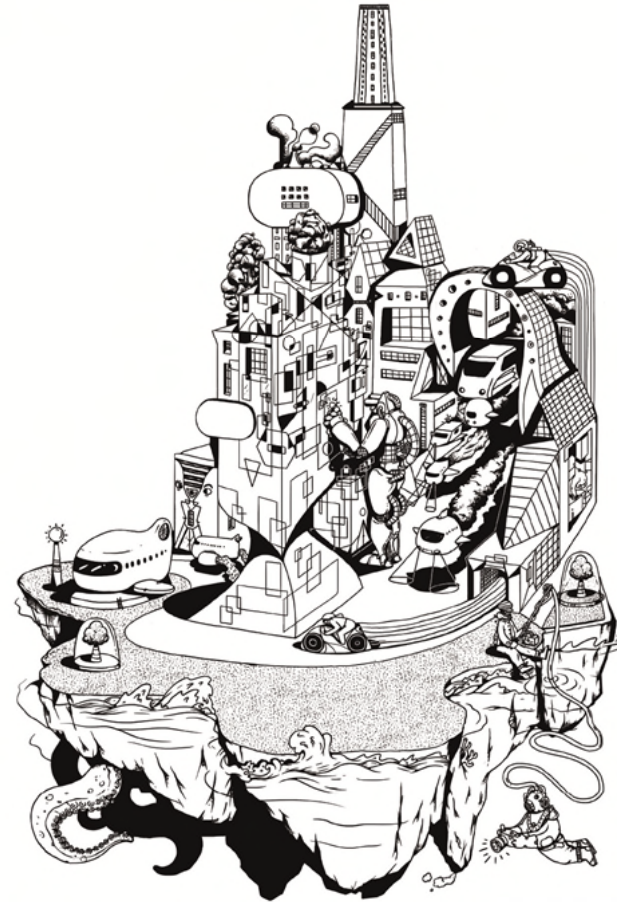
Experience: quality, fun, uniquely NZ, immersion
 Experiences with no pressure just relaxation. The more serendipitous, the better.
Transport: Self Drive – Car/Campervan
Typical Activities: Helicopter, Sky-diving, wine tasting, thermal pools.
Accommodation: less premium, family and friends, amenities, self catering motels, local hotels 3 star upwards, playground.
Food: European NZ/Asian; casual dining outlets, self catering.



FORWARD

NEW ZEALAND READINESS

by level of interest in
the china market



DIFFERENT LEVELS OF INDUSTRY ENGAGEMENT



Different clubs and organisations will have a different level of interest in developing for the China market, and the timing of their development. There are opportunities at all levels.



Opportunity	China Ready	China Activate	China Focus
Focus summary	<ul style="list-style-type: none"> • To utilise resources and maximize revenue in low demand periods during the day, week and season • Build awareness that the courses are open to all 'public' and Chinese/ tourists are welcome • Language – basic course instruction and protocol/safety in Mandarin • Safety - any issues are in Mandarin print out • Minimise disruption to other players – by timing access after or away from busy times depending on player skill • Assess player skill to schedule to minimise disruption 	<ul style="list-style-type: none"> • To activate real value from passionate Chinese golfers who will pay for great experiences on a range of our courses • Enable: Build Chinese language across all touch points - mainly on digital platforms (Golf sector and course focus) • Welcome: Build our welcome to Chinese players • Enable the easy integration of travel and golfing experiences – with ease, drama and memorability • Develop our stories – why, what, where is special, famous, unique • Enable social experiences, and challenges, tournaments, mini competitions • Build relationships with courses and clubs and business associations in China • Activate social media sharing personally and presence in clubs <p>Provide relevant food, hot water and flasks</p>	<ul style="list-style-type: none"> • To activate real value from passionate Chinese Golfers and social networkers who will pay for great experiences on our premium courses • Build resort style facilities including accommodation & food • Invest in architects, sculpture, premium course design and location

DEVELOPMENT ACTIONS



China Ready



China Activate



China Focus



Experience focus	FIT travel Holliday – with golf experience	Golf holiday with opportunity for personalised travel experiences	Premium golf experience and leisure travel enabling socializing
Awareness and connection	Presence on NZ travel sites Tourism information centers In accommodation Personal social media travel sharing	Strong network of golf clubs NZ website presence Golf travel agents Social media – build sharing. Personal and club	Well maintained relationships with a broad range of golfing and business sector groups & clubs specialist golf experience planners, Golf travel agents (golf courses use them to organise the trip) Social media – sharing. Personal and club
Signage and Information	Road front welcome(public access symbol) Image based signage and wayfinding	Visual icons indicating location of key amenities & services. Identification of hazards and safety considerations (no Chinese language signage) Pamphlets in Chinese if appropriate	
Hospitality	Clear indication open to visitors and times	Have people present to welcome guests. Video introduction in Chinese or English with Chinese subtitles about the course (on line link) Pamphlets Welcome pack(soap, towel, flask for hot water, golf course plan and and play guide)	The personal approach and welcome. Club president, status. Specific hole by hole course information(how to play the hole, stories, photo opportunities, famous player stories Flags, welcome signage for tournaments

DEVELOPMENT ACTIONS



China Ready



China Activate



China Focus



Wayfinding	Visual symbols and icons Golf plan and play – course introduction in Mandarin	More DIY – self directed but informed Golf plan and play – video with fly over	Assisted. Personal golf concierge (mandarin speaker) available on site
Chinese Language	Course play and protocol in mandarin	Chinese language– web based course information, QR code link to language about the course, protocol, times, services. Online Written course pamphlet	Chinese language available at all levels – personalised if required. Especially at the peak holiday season QR code digital translating
Food + Beverage	Hot water Glass of fresh milk Instant noodles Fresh Fruit – with a knife and plate available Fruit smoothies(optional)	Addition of hot dish rice or noodles preferred	Extensive multi level offering. Café, a la carte, restaurant Snack cart on the course – cold water, fruit, steamed buns, sticky rice pack for tournament days
Equipment	Rental clubs, shoes, bag, flasks Balls & tees	Latest brands to buy or hire Golf carts for hire(preferred) – will walk Branded pro shop gear(apparel, soap, sun visor, gloves, trophies, towels, balls & tees) Sun lotion, sand fly repel	Also More technology: golf carts, GPS watches to geo locate on course, ability to customize equipment to NZ conditions (change golf heads) Stylish sophisticated apparel

DEVELOPMENT ACTIONS



China Ready



China Activate



China Focus



Coaching and development	Package deal short and simple in English Have a go at the basic shots, the clubs, the swing, protocol PGA or local level coaching	Customise coaching to individual needs Mandarin option Book in advance	On demand PGA coaching Chinese language option
Caddying	Not required	Pre book option	Available in Mandarin or GPS watch or enabled golf carts with instruction Call back to reception if problems
Pricing and packages deals	Package deal – e.g. equipment & coaching Transport and golf play	Give something free (small) e.g. 10% off at club house F&B or pro shop discount Buy in the pro shop and a free tea Discount for multiple rounds	Will pay a premium if the service and experience is there
Building serendipity	Public availability clearly marked Local wildlife – visual signage Geothermal, wildlife information	Plus: Challenge of getting under par at the most challenging hole Joining a local event or competition	Business and commercial exchanges with NZ / china Cultural exchange with locals
Story telling - note worthy – architecture players - Unique experience	Local stories, local history	Architectural significance, buildings and course and geographical/ play challenges	Famous, significant moments, architects, special holes

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DEVELOPMENT ACTIONS



China Ready



China Activate



China Focus



Enhancing unique experiences	Opportunity to socialise with locals in club rooms – after the game you are welcome to share a beer	PLUS Well stocked pro shop with service and technology Logo goods Coordinated itinerary with web cam recordings or real time http://www.magicmemories.com/	PLUS Enabling private room functions for exclusive social events, hospitality and entertainment Places where you can get loud or be discrete
Building networks – regional, national	Linked in to RTO websites Linked to other similar courses as a network or cluster regionally	Links to other golf courses in NZ, wineries, luxury lodges, Wi fi enabled booking Regional and international links to other courses	
Considerations – the needs of the group	Awareness of public course access Basic language information in Chinese – course and protocol	Golf is the focus – they do not want to be distracted by long lunches, breaks in play	Social interactions and opportunity for this is central. E.g. mini competition, dining areas close to end of play. Premium ancillary services – golf linked Banquets, spaces for private socialization, prize giving ceremonies Special transport offers – exclusive helicopters, jeeps, luxury cars Resort feel including leisure and wellbeing services in a private setting



FORWARD

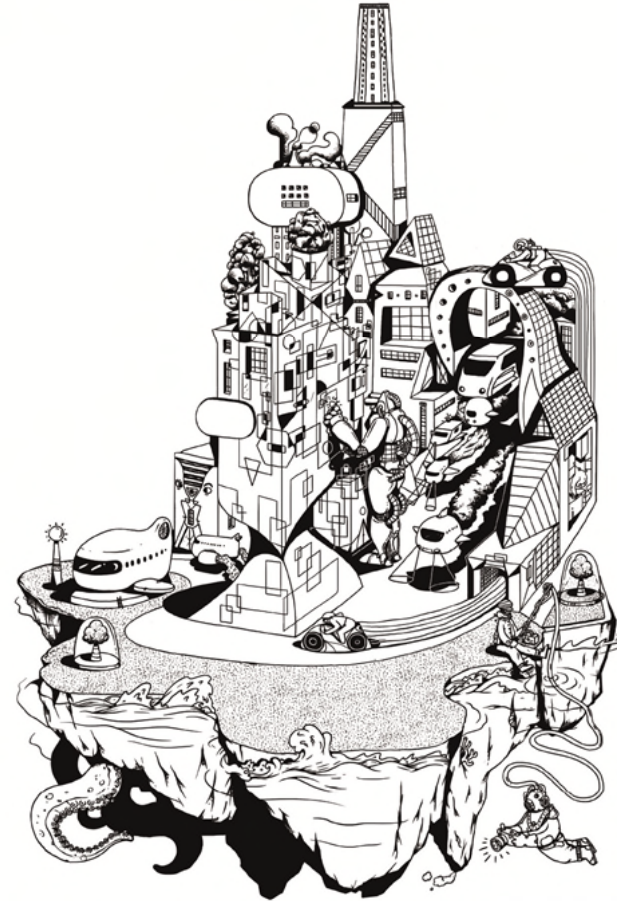
APPENDIX





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APPENDIX: OPPORTUNITY FOR DEVELOPMENT



ACTIVATION AND TARGETING THE INFLUENCERS



- Identify and chose the top clubs in China to build and develop personal relationships with
- Establish how many relationships can be supported – and do those well and maintain links closely over time – developing an integrated and continuous approach
- Provide:
 - Video content – NZ courses, activities, experiences
 - Info on Golf courses, coaches, reputation and the drama of the New Zealand experience, building the social, emotional, and experiential promise
 - NZ products to be given as prizes e.g. logoed water bottles, thermos, (no green caps = your partner will have an affair)
 - Take away information on New Zealand – paper pamphlet based course information/region, cluster information, itinerates and experiences, activities
 - Sound bite of the New Zealand proposition: ***Experience and indulge in the intensity of the untouched***
- Develop
 - Sponsored tournaments – there as promotion, here as activation
- Build conduit specialists (more than a travel agent)– who are able to build experiences tailored to specific NZ Golf tourism and targeted needs (resolve payment remuneration which is currently not equitable)
- Build travel agent (sellers) who are informed and will advocate for New Zealand

SOCIAL MEDIA AND SHARING



Sharing great experiences is a part of the whole experience for the Chinese golfer and an opportunity for the New Zealand golf sector to build connection and reputation

Linked to this is a strong interest in photography and taking great images to share

WeChat is the primary sharing and messaging app used by the Chines

- Encourage sharing – photos, itinerates, experiences
- Provide great photo opportunities(on the course, prize giving) – and make suggestions

Develop a social media plan

- Link into Chinese social media site of the key China targeted golf courses. Provide information, updates, news
- Build followers onto local sites/ Club, region, cluster
- Provide something to the club to support the social media – e.g. NZ meat pack with recipes, case of NZ wine – wither hills Queenstown or locally linked course – taste the summer of Otago....
- Give something to give away

<p>DIGITAL</p> <ul style="list-style-type: none"> - Social media - Travel sites 	<p>WeChat MaFengWu → Self C-Trip Golf courses websites NZ Tourism sites/ RTO sites NZ golf</p>	<p>Golf options & itinerates/ reviews</p> <p>Appealing activities and options for golf nearby</p> <p>Book air ticket and accommodation with travel agent</p> <p>Sponsored material</p> <ul style="list-style-type: none"> - Specialist Golf sites - Golf tours and packages - Links to more information
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INDIVIDUAL GOLF CLUB WEBSITES

AN EXAMPLE OF IDEAL CONTENT

Build Basic Tourism features into website

- Location Map – Clearly show region – North Island/South Island → Getting There directions for self drivers/ Airport transfers
- Option of Chinese or English language
- Open to Public – No need to have a member escort them
- Tee Bookings - Ability to book directly online – ask questions

Golf Play - Visualise The Experience

- Photos and option of video course tour is ideal
- Spectacular large photos highlighting the dramatic intensity/uniqueness of course, using aerial views, fairways, clubrooms, wildlife & fauna
- Clubrooms/facilities showing outlook as well as superb hospitality offering - social and dining occasions

Tell your unique Golf Course Story

Course designer, brief description of type of course, distinguishing characteristics, challenging moments, International Ranking/ Famous Golf Professionals played /Land mark events, Big name tournaments hosted

Give Info at a Glance

- Easy to read banner

Designer	Type of course	When established	# of holes	PAR	m/yardage	Distance to town
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On-Site Services

- Licensed - wine and dining type – café, bistro, restaurant
- Opening times, menus with photos

Activities

- for non-players special features of the site e.g. nature walk, fruit trees, croquet, photographers trail, **WIFI** lounge, trampoline etc.

Instruction & Practice facilities

e.g. Putting, Chipping greens with bunkers/Driving range; ability to book a lesson online with PGA instructor /other

Special Packages

- Stay & Play, - On-site
- Off- Site/ Local area – links to different style of accommodation and distance from Golf course
 - Luxury Lodge
 - 4 Star
 - Self Cater – 3 bedroom /2 bedroom
 - Special Times – week-day play, early bird/twilight,

Destination

Popular must do Local activities/sights with travel distances, including family activities

FORWARD

LANGUAGE



Many Chinese do not have strong English – especially older travellers.
Those that speak may not read/write English.

The use of translations online/digitally will be extremely helpful.

- Regional/destination golf information online
- Course information and play guides
- Play protocol and considerations
- Food options and visual menus
- Safety and health information

www.straker.co.nz is a simple effective translation service.

QR code that links to a translated Mandarin version is easy and helpful, e.g. menu link.
Chinese language signage is not necessary.

→ Developing technology based translations is important at all levels to ease the way.

QR code
language menu
link



ARCHITECTURE AND SCULPTURE



Architectural reputation can be enough to draw Chinese visitors to an NZ Golf experience. Notable architecture is elite, cultured, able to be a part of the experience and discovery. It delivers to the mind body spirit – which is a part of the overall Golf experience.

There is interest in building architecture:

The designer, reputation, achievement, points of interest.

The story behind design, uniqueness.

New course building:

Any new building project should strongly consider the architectural design reputation and story as a draw card in itself.

Interior architecture and design:

The Chinese are appreciative of sophisticated contemporary design or design that reflects and references the unique nature of New Zealand. They do not value “American” or traditional American style design which is not unique or seen as ‘premium’ (Cape Kidnappers is an example of this).

Course design:

The reputation of the course designer, the special challenges and points of interest are interesting to the Chinese Golfer and increase their sense of involvement and stories they can tell.

Sculpture:

Adds to the experience on course and involvement. It is intriguing and provides great photo opportunities.

VISUALLY DEPICT THE GOLF HOLIDAY EXPERIENCE



A digitally interactive map – with search options

North and South Island Golf Trails

Sell the experience – this is tourism!
Needs to highlight the diversity – new challenges

Choose the golf experience you want?

- Thermal
- Snow capped
- Glacial
- Seaside
- Cliff-top
- World Top 100

Championship Courses

- Marquee
- Community

And where these are located on the two islands.

Experience

Level

Map locations: Kauri Cliffs, Gulf Harbour, Golf Club International Airport, Rotorua International Airport, Wairakei Golf & Sanctuary, The Kinloch Club, Cape Kidnappers, Beach Golf Club, n Golf Club, ion International Airport.

FORWARD

CHINESE WANT STORIES TO TELL ...



“Play your best golf, the scenery is complimentary”

And some intrigue to the golf experience.



ACCOMMODATION



While the elite Chinese golfer appreciates premium accommodation – they do not always require five star or boutique lodges.

They may be happy to have a mix of accommodation styles and quality.

They like to share and be together. This is part of the social experience. Friends may happily share a room. If it is premium accommodation, they will expect 2 “double” beds – not single beds.

Shared units with a central living space and a number of bedrooms is appealing

All rooms must be of equal quality/size with none better than the others

Space to socialise, be together, enjoy food and drink and get noisy without disturbing others is valued. Sometimes boutique lodges can feel too constrained and thus “boring”.

A golf concierge service linked to premium hotels and lodges is valued – introducing the courses, experiences and play guidance.

Chinese language translations (digital, written) is helpful.

FORWARD

ACCOMMODATION NEEDS



When booking a Twin Room no matter if it's a 3 or 5 Star – they expect DOUBLE size twin beds.



FORWARD

FOOD



Food is extremely important to the Chinese

- It is a source of pleasure and enjoyment, but also an opportunity for socialization and sharing. This is particularly important for the Performance Golfer.

Ideally food will be available on course and off course

- If off course then not too far from the course – so they are able to eat soon after have played Golf – especially when the food on course is not what they enjoy.
- If they are waiting the social flow is interrupted.

New Zealand options

- Quality fresh NZ seafood is preferred with lamb and steak as options.

The Mastery Golfer is less concerned about food and do not want the game play to be interrupted by long breaks for food. They are happy with a sandwich if that is the only thing available.



CAFÉ FOOD ON SITE NEED NOT BE COMPLICATED



Relevant easy options for breakfast and lunch can make a world of difference to their experience. Easily satisfy with the availability of a boiled or poached egg, a glass of milk.



FORWARD

MODERN PRO RETAIL



Pro shop retail is important for the Chinese.

They are looking for:

- Quality golf equipment at the premium courses – latest branded
- Stylish and contemporary apparel
- Logoed merchandising material
- Trophies and prizes for informal competitions between friends



A **vacuum flask** with hot water for drinking on the course is a standard piece of golf equipment. Ideally these will be available to purchase – or loan on the course



FORWARD



BUILDING AN EVENT:

Organised tournaments with experience of banquet/celeb chef

- An EXAMPLE OF the level of hospitality that would be appealing– (This would be written in Chinese for them to appreciate they are welcome)

Focused around a friendly Stableford competition over two days and 36 holes of exciting golf (Saturday + Sunday), plus an optional and relaxing practice round (Friday) for those who arrive early.

This promotion is excellent

For chinese golf lovers, playing three days of golf in early Spring at the renowned Kauri Cliffs course may have been enough enticement, but to add to this fabulous package, Group Executive Chef Dale Gartland and his team will cook the ultimate finale dinner as a highlight of the weekend on Saturday 24 October. Our sommelier will be suggesting an optional New Zealand wine pairing matched to Dale's Menu. Don't miss what promises to be a spectacular and fun-filled event!

When: Friday, 23 October 2015 - Sunday, 25 October 2015

Event Tariff is NZ\$800.00 + GST per person per night for double occupancy*

The two night package includes luxury suite accommodation, entry in the

Kauri Cliffs Spring Tournament and attendance at the five course dinner by Dale Gartland and the Kauri Cliffs chefs on Saturday evening. Also included in the package is daily pre dinner drinks and canapés, gourmet dinner, full breakfast and the complimentary practice round on Friday for interested guests.

* Minimum two night stay required for tournament entry.

FORWARD



Extensive manicured courses – with extensive 'resort' facilities



Mission Hills – World's Largest Golf course
– China's most prestigious

But

Often need to drive 1.5 hours one way.
Expensive memberships 100K+
While they play outdoors, air is polluted
Crowded

The China Offer

MANICURED COURSES + LUXURY
FACILITIES



FORWARD

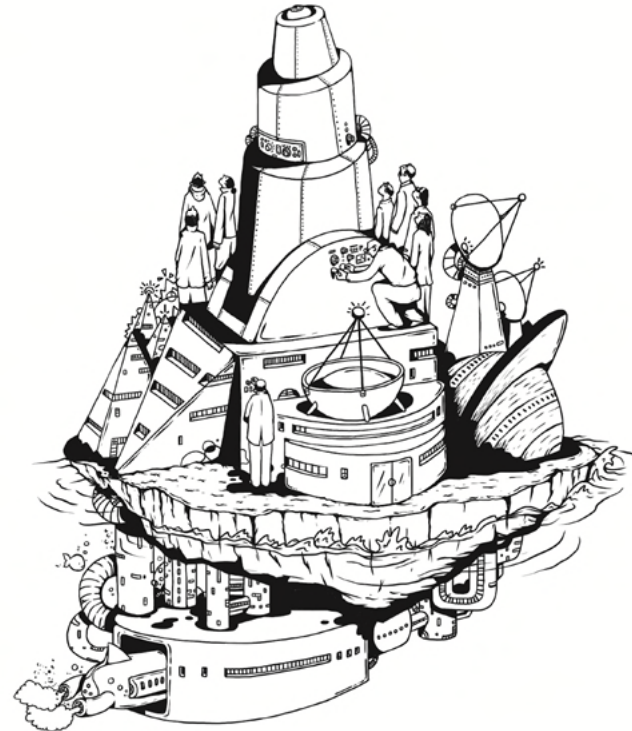
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APPENDIX

Research design



CHINA CONCEPTS



全球百佳高尔夫球场

- 1 位于全球最天然的环境

来全球百佳高尔夫球场挑战自我

- 2 球场位于雪山、湖水、地热区、海岸与悬崖等多样自然环境中

新西兰的高尔夫球文化

- 3 在新西兰，平均每1万人就有超过一个球场可享受
到处都有多种选择和机会
来到新西兰自行探索高尔夫球

来参与百分百纯净的独特新西兰高尔夫体验

- 4 从原始的山峰球场到海岸球场皆能
享受新西兰高尔夫球场的多样化
零距离溶入大自然的怀抱中

来新西兰独自享受轻松高尔夫

- 5 轻松享受人生
无需球童，甩开包袱，不赶时间，每个人都能来打球

新西兰的四季高尔夫

- 6 享受四季不同景色
这里的温带气候让您能随时畅打高球
体验北岛至南岛的不同风光

来新西兰尝试高尔夫

- 7 新西兰的高尔夫文化让水平不同的玩家都有球场可发挥
从全球百佳球场，到初学者球场
来找出球的最佳甜蜜点吧

FORWARD

RESEARCH OBJECTIVES



The context

- Understanding golfing needs, aspirations, attitudes and perceptions
 - Why are they playing golf? What emotional, social and experiential benefits do they derive from this in the Chinese context?
 - Who do they play with? What are the relationships between players? What benefits do they gain from the social side of this activity?

Different needs and value drivers

- Explore range of golfing segments types (e.g. competitive golfer, luxury golfer, golf buddies, escapist golfer)
 - What are the key implications of these for golf destinations? Which are the optimal segments for NZ given its inherent strengths/weaknesses? What will move the target segments from 'NZ-is-desirable' to activation/booking

Golf tourism

- Why do they choose golf focused travel experiences
- What experiences have they had of golf tourism? What are the emotional and experiential benefits of this tourism experience – compared with playing golf at home and versus non-golf trips abroad?
- How are golf tourism experiences different to golf experiences at home?
- What is an ideal golfing experience? (e.g. social image, formality, course reputation, social experience) - at home and abroad?
- What makes a golf course/destination desirable (e.g. challenge, beauty, reputation, celebrity associations, freedom, flexibility) - at home and abroad – role of course attributes themselves and nearby attractions/activities (e.g. near large cities, near high-interest activities like fishing)
- Understand the consideration and decision making process, how does a destination get “on the list”
- What and who influences this and what drives commitment
- Identify important decision influences e.g. friends, colleagues, bosses, golf experts, club personnel, social media, celebrities.
- What is the impact of Lydia Ko's rise and how could this benefit perceptions of New Zealand as a golf destination?
- Identify complimentary products that are attractive to golfing visitors e.g. style of accommodation, travel mode, food and wine, fishing, family time, business/investment projects.

RESEARCH OBJECTIVES CONTINUED



Understand how New Zealand is perceived as a golfing destination?

- What image and expectations are associated with New Zealand as a golfing vacation destination
- How do New Zealand's golf destination perceptions fit within wider perceptions of New Zealand ?
- What are the perceived strengths and weaknesses of NZ for golf?
- How do the range of possible experiences available in New Zealand fit with golfing expectations and aspirations?
- How does New Zealand compare to other golfing destinations? What is the optimal position for NZ given its inherent strengths in golf experience?

Concepts – potential NZ golfing product/ propositions

- Develop and test golf-product concepts
- Understand response to different potential experiences and products
- Understand what propositions or “stories” resonate with Chinese golfers
- Identify current opportunity and how to further activate this immediately
- Elicit direction on what would be required to develop or extend New Zealand's golf product for Chinese market.

Activation

- Understand who to target – match with traveller needs and destination offer awareness
- Understand how to best build knowledge and reputation; how to engage and build commitment to travel and play golf in New Zealand