BEFORE THE COMMISSIONERS APPOINTED BY THE QUEENSTOWN LAKES DISTRICT COUNCIL

Submitter 31021

IN THE MATTER of Queenstown Lakes District Council Proposed Plan Stage 3

Corbridge Estate Limited Partnership

Submitter

BRIEF OF EVIDENCE OF RYAN JOHN BRANDEBURG

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BRIEF OF EVIDENCE OF RYAN JOHN BRANDEBURG

EXECUTIVE SUMMARY

1. Tourism New Zealand has been pursuing an international Golf Tourism Strategy since 2013. In that time there has been significant growth in golf tourism within New Zealand.

2. Golf Tourism is a highly desirable market sector as golfers are low volume / high spend visitors. They are also amenable to travelling regionally and during shoulder seasons.

3. Queenstown Lakes District has a mature golf tourism sector that is coming under increasing pressure. Development of Corbridge as proposed would add capacity to the golf tourism market, attract more visitors and be consistent with the Golf Tourism Strategy.

4. The proposed golf course and accommodation model is unique to New Zealand. However, it is not uncommon for construction of a Marquee Course to be supported by visitor accommodation/residential.

5. Covid-19 has obviously had a significant impact on the tourism market. However, the golf tourism market has qualities that mean it is likely to recover relatively quickly. Further to that the lead in time of a development such as Corbridge means that it would be likely to come on-stream to coincide with the recovery of the tourism market.

6. Development of a Marquee Course at Corbridge would contribute to the overall Golf Tourism offering within Queenstown Lakes and enable Wanaka to capture a sector of the market that it has traditionally missed out on.

INTRODUCTION

1. My full name is Ryan John Brandeburg, I am the Executive Director of Golf Tourism New Zealand.

2. I am a PGA Professional and a New Zealand based golf consultant. I hold a Bachelor of Science degree in marketing with a specialization in Professional Golf Management from Coastal Carolina University in South Carolina, USA, one of a select number of schools in the world that offer this program.

3. I currently serve as the Executive Director of Golf Tourism New Zealand and the Golf Specialist for the government's tourism board, Tourism New Zealand. I am also the golf advisor to the City of Auckland (ATEED - Auckland Tourism Events and Economic Development). In these roles, I am tasked with executing the government's Golf Tourism Strategy, providing expert advice on how New Zealand's golf courses can satisfy the needs of international visitors, how investment is best leveraged on golf facilities and events, and how to best market our golf product internationally.

4. In addition to these roles, I advise private clients both domestically and abroad, speak to conference and golf stakeholder groups, and am a monthly contributor to worldwide golf publications. Prior to my time as a consultant, I served in golf management roles in the USA with several high-profile facilities and one of the world's largest private equity firms, The Blackstone Group. From 2009 – 2014 I served as the director of golf for both Kauri Cliffs and Cape Kidnappers, two New Zealand courses owned by American Julian Robertson and ranked among the top 50 in the world. I sit on the board of the New Zealand Golf Industry Council, and have authored two books aimed at educating young PGA Professionals.

5. I have read the Expert Witness Code of Conduct set out in the Environment Court's Practice Note 2014 and agree to comply with it. I have complied with the Code of Conduct in preparing this evidence and I agree to comply with it while giving oral evidence before the

hearing committee. Except where I state that I am relying on the evidence of another person, this written evidence is within my area of expertise. I have not omitted to consider material facts known to me that might alter or detract from the opinions expressed in this evidence.

6. I have been engaged by Corbridge to provide advice and evidence on the Golf Tourism market in New Zealand.

BACKGROUND

7. Targeted development of New Zealand's golf tourism market began in 2012 when then Prime Minister and Minister of Tourism, John Key, commissioned a small group to write New Zealand's International Golf Tourism Strategy[1] (NZ Golf Tourism Strategy). The sector has been championed by Tourism New Zealand and several regional tourism organisations (RTOs) including:

    (a) Destination Queenstown;

    (b) Auckland Tourism Events and Economic Development (ATEED);

    (c) Wellington Regional Economic Development Agency (WREDA);

    (d) Destination Great Lake Taupo;

    (e) Hawke's Bay Tourism.

8. Much of this work started in 2012. Since the NZ Golf Tourism Strategy was accepted in 2013, significant work has been undertaken to execute the strategy, with all funding provided by Central Government.

9. In short, golfers are high spending, high value visitors who travel in small numbers and have a strong desire to visit regional New Zealand in both summer, shoulder, and to a lesser extent, winter seasons. Pertinent information about golf tourism and its importance to both New Zealand's and Otago's economies is as follows:

    (a) At the time of writing the Strategy in 2013, international inbound golf tourism to New Zealand was valued at $145M NZD annually.

[1] The New Zealand International Golf Tourism Strategy is available at https://www.tourismnewzealand.com/media/1958/nz-international-golf-strategy.pdf.

The Minister of Tourism set a goal of achieving $223M NZD in annual revenues from golf tourism by the end of 2016. By mid-2016, annual revenues had exceeded $300M NZD, and at the end of 2018 these revenues exceeded $400M NZD. The 2019 figures have not been fully calculated as at the date of this evidence but all signs lead to further growth.

(b) A core component of the strategy currently relies on a trail of 14 “Marquee” courses nationwide. “Marquee” courses are defined as being high quality, aspirational courses with inherent international interest, due to their history and/or a particular identity. They also need to be accessible for visitor play. The current Marquee courses in New Zealand are:

(i) Kauri Cliffs

(ii) Gulf Harbour,

(iii) Titirangi,

(iv) Wainui

(v) Windross Farm

(vi) Kinloch,

(vii) Wairakei,

(viii) Cape Kidnappers,

(ix) Paraparaumu Beach,

(x) Royal Wellington Golf Club,

(xi) Clearwater,

(xii) The Hills,

(xiii) Millbrook Resort and

(xiv) Jack’s Point.

(c) Otago currently has three of these Marquee courses with Jack's Point, Millbrook, and The Hills – obviously all of these are located within the Wakatipu Basin.

(d) Additionally, the Marquee courses are insulated by 23 "New Zealand Experience" courses, which help create clusters encouraging a longer length of stay. Otago has two Experience courses with Queenstown Golf Club and Arrowtown Golf Club. Once again, both located within Wakatipu Basin.

(e) Whilst golfing attracts tourists, it is not the only benefactor. The data initially showed that only 22% of money spent during a golf holiday to New Zealand is spent on green fees. The remainder being spent on other activities, accommodation, food/wine, and transportation within New Zealand. More recent studies using data from MarketView, the International Visitor Survey (IVS), and direct feedback from the golf courses and travel trade have led to a revised understanding of the way golf spend is captured. The new insight suggests that approximately 5% of total spend from golfers occurs at the golf course. This significant change is a consequence of us having access to much better data.

(f) Our country's golf assets were overwhelmingly built with private funds, and in the past 20 years over $400M NZD has been invested into the development of these facilities. A course that garners international interest will typically cost at least $15M+ to construct, excluding the required amenities (clubhouse, cart storage, etc). It is important to note, however, that to support this investment and provide the requisite facilities expected by an international visitor, residential real estate and / or visitor accommodation has been a critical component of the vast majority of these projects. This type of model is evident in projects such as Kauri Cliffs, Cape Kidnappers, Millbrook, Jacks Point, Clearwater and so on. All have included a component of visitor accommodation and/or residential development to help support the investment made in visitor amenities (including the golf course). The components create a symbiotic relationship where the golf facilities create high quality amenity for visitors and residents whilst the visitors and residents help drive more volumes to the golf course, especially at off-peak times. While golf in the Otago region is strong, it is still not financially viable to build and operate a stand-alone golf course.

(g) Data has been collected on international visitor rounds at Otago's three Marquee courses since January 2014. From the end of calendar year 2014 through calendar year 2018, these courses have seen more than a 25% lift in volume. During that same period, Otago's three Marquee courses accounted for 51% of all inbound rounds into New Zealand's Marquee courses. This speaks to the strength of the Queenstown cluster, both in terms of the golf offering, but also the quality of the complementary services available (such as inbound transport, quality accommodation and food and beverage, and alternative activities/attractions).

10. When analysing the different categories of visitors we receive in New Zealand, there is little debate that golfers are among the most coveted group due to their incredible metrics. They fit squarely within the government's overall tourism strategy of pursuing lower volume, higher spending and more environmentally sympathetic visitors.

11. Golfers are the highest spending of all visitor segments to New Zealand. They are also the most satisfied of all visitor segments, rating a New Zealand golf holiday a 9.3/10 with a net promoter score of 85%. This means that 85% of our golf visitors actively promote their trip to their family, friends, and social network. When compared to walking/hiking at 79%, cycling at 82%, and food/wine at 79%, golf falls second to only skiers who give New Zealand an 87% net promoter score.

12. Additionally, golfers stay longer, with an average length of stay at 27 nights versus a normal holiday visitor at 16 nights. Statistics show that the average spend from an American visitor on a golf holiday to New

Zealand is a staggering $19,000 NZD per person (excluding international airfare).

13. Golf Tourists also display a willingness to travel outside the peak summer season and into the shoulder months of March / April, and October / November. March and November are becoming two of the fastest growing months for international golfers visiting New Zealand. Golf in Otago is not just a summer sport, but can be enjoyed during the shoulder seasons (and even winter), thus spreading out golf tourism's benefit throughout the year.

14. Finally, one of the most appealing aspects of the golf tourism sector is our ability to reach the consumer. Statistically, golfers are much easier to reach than typical holiday visitors and other special interest visitors such as cyclists and wine drinkers. Cyclists can be found on cycleways, streets, sidewalks, and parks. Wine drinkers can purchase wine through several channels, from Four Squares to bottle shops and restaurants, and they can consume wine in several places including the comfort of their own home. This makes marketing to a cyclist or a wine drinker more expensive, less targeted, and harder to measure. In contrast, golfers congregate at golf courses, and marketing work can target the most affluent courses in key markets, forming relationships with them that allow us to speak directly to the end user. This targeted approach has allowed golf to realise significant gains in a relatively short time frame (refer paragraph 9(a) above), and on a reasonable marketing spend.

NEW ZEALAND GOLF STRATEGY

15. The government's strategy revolves around a campaign titled '*Courses of Nature*', which speaks to the incredible natural setting of our courses, shaped more by shovel than by bulldozer compared to other golf destinations around the world.

16. The campaign champions the Marquee and Experience courses, and is promoted at international events such as the New Zealand Open, worldwide travel-trade shows, consumer events, with familiarisation tours for travel-trade and media, through digital marketing campaigns,

and via photo and video shoots. Otago has been heavily showcased in all of these mediums. As discussed in paragraph 9(e) above the success of Golf marketing has significant upsides for other tourism offerings given that so much of the golf tourism spend actually goes to sectors other than golf.

17. From a strategy perspective, whether golfers come via direct bookings or travel trade is not of particular concern, so the work undertaken speaks to both channels.

18. New Zealand's inbound golf travel sellers prominently feature Otago as a "must visit" destination for not only golf, but the other exceptional activities the region offers. Among these inbound travel sellers are two based in Queenstown that especially champion the region - Remarkable Golf Tours and Peak Golf Queenstown.

19. While Wanaka does have a local club course, Wanaka Golf Club, this course has not met the threshold of the Marquee or New Zealand Experience portfolios of courses. The data clearly shows Queenstown's success, and it is my opinion that Wanaka is absolutely missing out on visitation from golfers currently.

WHO ARE OUR GOLF TOURISTS?

20. While the New Zealand Golf Tourism Strategy is about golf, a key component to its rapid success is actually due to non-golfers (or 'light golfers' - meaning those who play every other round or less).

21. When the Golf Tourism Strategy was developed, we looked at other strategies already in place, and there are hundreds. Almost every country, region, and even some cities have well-developed golf strategies aimed at bringing in high spending visitors.

22. However, we noticed that they primarily spoke directly to golfers and only golfers. While golfers in general are premium visitors, groups of men or ladies traveling together to play golf didn't seem likely for New Zealand's long-haul destination status. Additionally, we had conducted several interviews with both male and female golfers and one thing was clear. When they went on a "girls" or "guys" trip it was all about

playing as much golf as possible as quickly as possible, and usually included basic accommodation and pub food. However, when couples travelled together, the length of stay increased, rounds of golf decreased with activities added in their place, nicer accommodation was utilised, and premium food & beverage experiences were enjoyed.

23. In light of that we decided to build our strategy around attracting couples with little concern whether one or both spouses were golfers. An unintended by-product of this approach was that golfers were instantly attracted to our destination, but the decision making to actually make the journey typically fell with the light or non-golfing spouse. Thankfully, New Zealand has built our reputation on spectacular activities, accommodation, food and wine, and our best courses are in close proximity to these attractions.

24. The result is a rapid rise in spend off a fairly low-volume due to an influx of high spending couples who have come with golf as a focus, but also choose to experience the best of what New Zealand has to offer. This is also borne out in the proportional spend data I discussed above in paragraph 9(a).

25. At the time the 2012 Golf Tourism Strategy was written, all oversight was provided by Tourism New Zealand, whose charter only allowed for international work to be performed. For this reason, the entire focus was on overseas visitors and little data exists on domestic golf tourism. While we are working to build this data set, it was not readily available by the time this evidence was prepared. The recent Covid-19 situation has seen Tourism New Zealand take the lead in the domestic tourism recovery, shifting its focus to managing both domestic and international visitors, at least for the short to mid-term. Given that I expect there to be more data being collected on the domestic market very soon.

FUTURE GOLF TOURISM MARKET

26. While the current tourism environment has been altered at least in the short-term due to Covid-19, the premium nature of golfers will likely result in this segment of the market being less affected than others. This will allow golf the chance to play a major role in the economic

recovery of the tourism sector. Golf is particularly well placed to do this given the high proportion of golf tourism spend that goes to services other than golf itself.

27. Pre-Covid, the government's tourism strategy was focused on a robust supply side (discussed further below), and attracting a high spend, low volume overseas visitor that was more likely to visit regional New Zealand throughout the year, but especially in the shoulder months, where there was the greatest opportunity for growth. The "Special Interest" sectors of golf, ski, food & wine, cycling, and hiking all played a role in delivering on this strategy, and are categories where spend is well above the average holiday visitor.

28. In the short term, there are significant domestic opportunities for golfers to travel within the country, experiencing the superb quality golf that exists here. Winter is the largest season for New Zealand golfers to travel outbound, exploring warmer destinations. With this opportunity on hold at the current time due to border closures and the uncertainty of overseas travel, the focus has already turned to exploring the golf courses that exist throughout the country. On another positive note, several golf courses are reporting a surge in member play and membership sales since Level 3 was announced in late April, leading industry leaders to believe that golf was less impacted than other sectors during the Covid-19 pandemic. Balmacewen Golf Club in Dunedin has reported 40 new membership sales in the first month, with Muriwai Golf Club in Auckland reporting close to 60.

29. The renewed focus on the domestic market has brought with it a recognition that our golf assets are of a high quality and more effort should be placed on keeping New Zealanders onshore for their golf holidays rather than immediately looking overseas. While it is too early to tell whether this strategy will work nationwide, there is evidence to suggest it has already been working in the greater Central Otago region for several years now. A study of available data from 19 golf courses in Central Otago analysed rounds played in 2014, 2015, and 2016. While these numbers are slightly out of date, I believe the trend they show to still be accurate. The study found that:

(a) In 2014, 133,069 total rounds were played, with 78,948 being member rounds. This resulted in 54,121 non-member rounds, or 41% of all rounds being from non-member sources (made up of international, national and local visitors). When removing international visitor data from the three Queenstown Marquee courses, the result is approximately 40,000 visitor rounds from domestic sources.

(b) In 2015, 134,951 total rounds were played, with 81,104 being member rounds. This resulted in 53,847 non-member rounds, or 40% of all rounds being from non-member sources (made up of international, national and local visitors). When removing international visitor data from the three Queenstown Marquee courses, the result is approximately 37,600 visitor rounds from domestic sources.

(c) In 2016, 143,163 total rounds were played, with 84,121 being member rounds. This resulted in 59,042 non-member rounds, or 41% of all rounds being from non-member sources (made up of international, national and local visitors). When removing international visitor data from the three Queenstown Marquee courses, the result is approximately 40,300 visitor rounds from domestic sources.

30. Given the vision being pursued by Corbridge it is expected they will have significant appeal to the domestic market, which based on the data above, appear willing to travel to the region for golf. Additionally, I believe the addition of Corbridge to the Queenstown Lakes District golf offering will absolutely increase both international and domestic visitation and/or length of stay.

31. As our ‘bubble’ is envisioned to expand to Australia this will bring further opportunity. Australia is the largest source of golfers by volume into New Zealand. Furthermore, golf presents an opportunity for the long-haul international recovery for small numbers of highly valuable tourists to return to our shores. This is because golf is low volume, enables easy contact tracing and the clientele are willing and able to

abide by government directions (it is noted that Golf was an approved activity during both Level 3 and Level 2 Covid-19 Alert levels).

SUPPLY SIDE FACTORS

32. As mentioned above, a robust supply side that delivers on the expectations of visitors was, and still is, a key to the strategy's success. In essence if we don't provide an exceptional product the tourists won't come and our net promoter score would drop significantly.

33. In the early days of the strategy's launch, a significant amount of time was spent on identifying what the supply side should look like, and what actions needed to be undertaken to ensure we were an export ready golf destination.

34. An early task was identifying our offering. This is now based around our Marquee Courses that were already receiving international acclaim and drawing overseas visitors. These courses were then 'insulated' with additional courses that could add value, increase length of stay, and provide a better connection to New Zealand through interacting with locals. These two groups of courses were named the Marquee Courses and New Zealand Experience courses.

35. A robust set of criteria were established to assess which of New Zealand's 400 courses would qualify for either of the two categories. The assessment process looks at two areas[2]:

    (a) First, The course:

        The course criteria look at the quality of the course itself, which is paramount to attracting visitors. Only when the course criterion of Marquee or Experience status was met could the assessment move on.

    (b) Secondly, the facilities:

[2] Copy of the Golf Tourism New Zealand Assessment System is attached at Appendix 1.

Being the quality of the facilities such as the club house, food and beverage offering and service standards (forms of payment, hours of operation, languages spoken, etc).

36. The reason for this two-step process was simple. A great facility (clubhouse, food and beverage, and service) is somewhat easier to build, however a great golf course, worthy of a long-haul visitor's time, is much rarer. Upon assessing the facility, the total score is tallied up and placed against a scale which identifies the course at Marquee or Experience level, or not to the requisite standard.

37. In total, over 100 courses were assessed with 38 originally being included across the two lists. This assessment process is now on going to ensure complacency doesn't creep in at the facilities that have made it on to the list and to encourage other courses to aspire to the necessary standards or new courses to be established. As a result, the list of courses has grown and shrunk based on ongoing assessments.

38. As previously mentioned, New Zealand has 14 Marquee courses, with 10 in the North Island and four in the South (one in Christchurch and three in Queenstown). Some would say that is a sufficient amount.However, premium visitors are drawn to new product, and our competitor destinations are building golf at a rapid pace. DaNang in Vietnam, for example, has over 20 courses under construction at this time, and the country as a whole has several more projects underway. We need to continue to add quality product to New Zealand's offering that allow us to stay competitive with other destinations around the world.

WHERE DOES CORBRIDGE FIT?

39. I have reviewed the preliminary plans for Corbridge and based on these I would expect if they are executed well it will meet the Marquee criteria. The proposed location is consistent with the NZ Golf Tourism Strategy 'Courses of Nature' given the stunning location surrounded by the mountains and adjacent to the Clutha River/Mata Au. The golf

designers engaged are renowned for producing high quality courses internationally.

40. In order to deliver on the tourism potential, Corbridge must develop a golf course of significant architectural standing, maintain it to a world class standard, build facilities that match, and populate it with a staff who can meet and exceed the expectations of the international visitor.

41. The model proposed by Corbridge is an excellent choice for several reasons.

   (a) Firstly, it removes barriers to visiting by incorporating accommodation, food & beverage, and activities into one destination, especially when accommodation in the area has been in under-supply.

   (b) Secondly, the resort and associated amenities help to justify the significant capital investment in the golf course.

   (c) Thirdly, it helps reduce and remove burdens on both the golf operation and the accommodation operation by allowing services such as laundry, housekeeping, reception, security, and food & beverage to be shared.

42. It is difficult to forecast the Wanaka tourism space post-Covid, but it is certainly envisioned that the area will still be a desirable place to live, work, and play. By the time Corbridge is fully functional, I expect the tourism economy to have returned and accommodation for visitors and workers to be once again in short supply with fairly heavy demand. Recent insight into golfer travel trends has revealed that they prefer to stay on-site, and in a type of visitor accommodation that allows them to travel with other couples or as a multi-generational family sharing a villa, house, or short-stay product.

43. Corbridge's plans to build a mix of short stay accommodation made up of hotel rooms and apartment / villas, plus residential style visitor accommodation and worker accommodation is unique in the industry.

If delivered to a high standard I expect Corbridge will be well received by both the domestic and international golfer.

44. Pre-Covid, Corbridge would have absolutely been building “into demand”, meaning there was an under-supply of superb golf in the region (Wanaka and Queenstown) to meet the needs of a growing number of visitors. The three Marquee courses in Otago have shifted significantly over the past several years as a result of the surge in golf tourism. Rates have all increased significantly, but this has not dampened growth in volumes. As a result there is pressure on all three to continue trying to service a growing number of visitor players. This is a fine balance as the destination risks losing appeal if access to courses is restricted because they are busy. For example, the Hills have responded to this by limiting the number of visitor rounds to no more than 12 per day during the summer. The effect of this is to push players to the other courses which also face capacity constraints. Overall, this indicates that there is certainly space within the market for a new offering.

45. Post-Covid, especially during the time when it is envisioned Corbridge would be entering the market, I expect demand to have returned to the extent that further golf courses will be required to be able to meet the needs of the visitor market.

Ryan Brandeburg

Executive Director

Golf Tourism New Zealand

Date: 26 May 2020

APPENDIX 1 – GTNZ ASSESSMENT SYSTEM

GTNZ ASSESSMENT SYSTEM

The GTNZ Assessment system comprises two parts – the Course Assessment and the Facility Assesment and is not intended to rank golf courses, but rather to quantify their characteristics and market readiness.

1. Complete the Course Assessment and enter the number in the **"COURSE ASSESSMENT POINTS"** section at the bottom of this page.
2. Divide by 1.5 and enter the number on the **"TOTAL COURSE SCORE (A):"** line.
3. Complete the Facility Assessment and enter the number on the **"TOTAL FACILITY SCORE (B):"** line.
4. Add the total of the two lines **(A)** plus **(B)**.
5. Enter the total on the **"TOTAL SCORE"** line in blue box on Page 2.

To qualify for **MARQUEE STATUS**, a course must score a minimum of 50 points on the Course Assessment, and no less than a total of 90 points for the combined score.

To qualify for **NEW ZEALAND EXPERIENCE STATUS**, the course must score a minimum of 40 points on the Course Assessment and no less than a total of 60 points for the combined score.

From July 1, 2016 any course wishing be assessed must have completed the **TOURISM NEW ZEALAND GOLF EDUCATION MODULE.**

COURSE ASSESSMENT POINTS

Course as a whole:	/60
Individual holes (par is 0)	/36
Course conditioning	/28
Total course assessment points:	**/124**

Divide by 1.5 for total course score

TOTAL COURSE SCORE: **(A)**

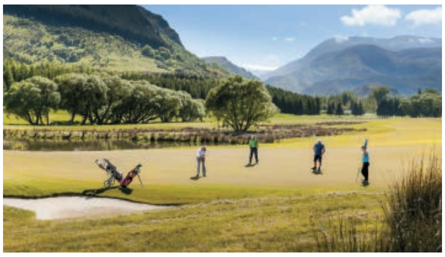
FACILITY ASSESSMENT POINTS

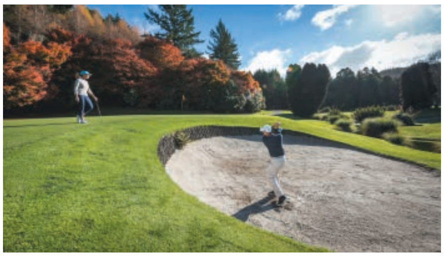
TOTAL FACILITY SCORE: **(B)**

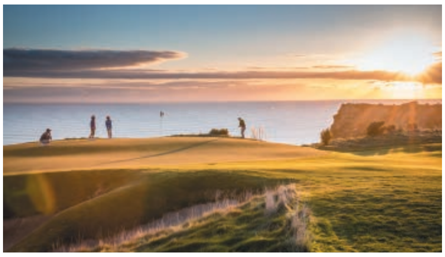
0-20 Total Points = Poor
21-29 Total Points = Good
30-36 Total Points = Very Good
36+ Total Points = Excellent

TOTAL SCORE

*Combination of total course score **(A)** and total facility score **(B)***







COURSE AS A WHOLE: /60

VARIETY
Does the course provide a diversity of golfing challenge, design features and breadth of challenge (across skill sets)? **Score:** /10

STYLISTIC INTEGRITY
Does the course integrate with its environment and are its features consistent with its location (i.e. does it "hang together")? **Score:** /10

ROUTING
Does the course travel around the property in a coherent manner with appropriate changes of direction, hole lengths, etc? **Score:** /10

HISTORY
Does the course have a reputation that adds to the experience? **Score:** /10

AESTHETICS
Do the surroundings add markedly to the overall experience? **Score:** /10

STRATEGIC INTEREST
Do holes offer options for differing approaches (risk/reward)? **Score:** /10

INDIVIDUAL HOLES *(Par is 0)* /36

(Very Poor: -2, Poor: -1, Okay: 0, Good: 1, Very good: 2)

Consider the following and score the course as a total of 36 (18 holes at a maxiumum score of 2 each):

TECHNICAL CHALLENGE
Does the hole test skill as well as power?

MENTAL CHALLENGE
Does the hole offer strategic alternatives?

USE OF LAND
Are features well utilised?

AESTHETICS
What is the quality of the visual and sensual experience of the hole?

GREEN COMPLEX
Is the green well sited and are there interesting features in and around it?

NEGATIVES
Is the hole unbalanced either strategically or aesthetically?

Score each hole between -2 and 2	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	Total
																			/36

COURSE CONDITIONING /28

(Poor: 0, Okay: 2, Very good: 4)

Total score of 28 consisting of five categories below. Max of 4 points for each category, with greens counting triple.
**In most cases, the lack of fairway irrigation will prohibit scoring a "Very Good" score for fairways*

Is the course generally of international maintenance standards in the following categories?

Greens (*Triple this score*) **Score:** /12
Fairways **Score:** /4
Tees **Score:** /4
Hazards **Score:** /4
Rough **Score:** /4

FACILITY ASSESSMENT /44

(Poor: 0, Okay: 1, Very good: 2)

ARRIVAL / GOLF EXPERIENCE / DEPARTURE
From a visitor perspective, is the total facility arrival, golf experience, and departure poor (0),okay (1), or very good (2 points) **Score:** /2

CLUBHOUSE
Lack of clubhouse is 0 points, limited hours is 1 point, normal operating hours is 2 points **Score:** /2

CLUBHOUSE AMENITIES
No visitor amenities 0 points, limited visitor amenities 1 point, robust visitor amenities 2 points. Very few courses will have robust visitor amenities **Score:** /2

ACCEPTED FORMS OF PAYMENT
Cash only 0 points, basic forms of payment 1 point, enhanced options such as American Express, Union Pay, etc are 2 points **Score:** /2

PROSHOP / RETAIL
Existence of a proshop 1 point, stocked proshop with logoed retail items 2 points **Score:** /2

F&B AVAILABLE
No F&B 0 points, limited hours F&B 1 point, normal operating hours including breakfast and dinner 2 points **Score:** /2

LOCKER ROOMS AVAILABLE
No locker rooms 0 points, visitor access to locker rooms 1 point, showers with towels 2 points **Score:** /2

PRACTICE AREA
Practice fairway only 0 points, driving range with balls available 1 point, if sufficient short game areas are also present 2 points **Score:** /2

SCORECARDS / MAPS / COURSE GUIDES / GPS
Scorecards only 0 points, maps or course guides 1 point, GPS 2 points **Score:** /2

CARTS / TRUNDLERS / CADDIES
Trundlers available for hire and/or limited carts (5 or less) 1 points, sufficient cart fleet 2 points, caddies or the ability to arrange caddies 2 points **Score:** /2

HIRE CLUBS
Lack of hire clubs 0 points, basic / limited hire clubs 1 point, premium clubs available or a large inventory of clubs available 2 points **Score:** /2

EXPECTED LEVEL OF SERVICE
Limited service is 0 points, basic service with meet/greet 1 point, international standard service 2 points **Score:** /2

PGA PROFESSIONAL
No full time golf staff 0 points, staff in proshop or shared PGA Professional is 1 point, full time PGA Professional is 2 points **Score:** /2

INSTRUCTION AVAILABLE
No instruction offered 0 points, limited instruction offered 1 point, full instruction program 2 points **Score:** /2

TEE BOOKING
Phone or email booking 0 points, online enquiry form or limited online booking for visitors 1 point, Online tee booking for guests with sufficient booking window for long haul travelers (30 days in advance or more) 2 points **Score:** /2

Note Tee Time Interval

Note Standard Pace of Play

ACCESSIBILITY
High volume with very limited visitor play 0 points, good mix of member and visitor play 1 point, high availability for visitor play 2 points **Score:** /2

DO ESTABLISHED GOLF RATES EXIST?
No established rates 0 points, basic rate card 1 point, full rate card with visitor categories 2 points **Score:** /2

DO ESTABLISHED NET RATES EXIST?

No net or commissionable rates rates 0 points, net or commissionable rates exist 1 point, these rates exist in digital form (PDF, etc) 2 points **Score:** /2

DOES THE STAFF SPEAK ANY FOREIGN LANGUAGE(S)?

Foreign language defined as anything outside of English and Maori. No foreign language skills 0 points, foreign language(s) spoken 1 point, collateral or website in foreign language(s) 2 points. **Score:** /2

PRINTED / DIGITAL COLLATERAL?

No collateral 0 points, printed collateral 1 point, printed and digital collateral 2 points **Score:** /2

IS SIGNAGE PRESENT AT ENTRY AND ON-COURSE?

Lack of road signage and course signage 0 points, minimal road and course signage 1 point, robust road and course signage 2 points **Score:** /2

LOCATION

0 - 2 points based on the assessor's review of the following questions: Is the course located appropriately to be part of a logical trail, or to anchor a trail (this question carries significant weight)? Additionally, are there complementary activities and/or attractions nearby for premium consumers? **Score:** /2

NOTES