



DEVELOPMENT  
WEST COAST

*Te Ohu Whakawhanake o Te Tai Poutini*



WEST COAST  
NEW ZEALAND  
UNTAMED NATURAL WILDERNESS



*Te Tai Poutini*  
**VISITOR FLOW  
REPORT**

JUNE 2023



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Cover photo: Wilson Creek Canyon, Haast | RoadyNZ  
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# INTRODUCTION

*He whakatafakirua*

**Development West Coast (DWC) is coordinating the development and implementation of a Destination Management Plan (DMP) for the West Coast region according to the MBIE DMP guidelines<sup>1</sup>.**

The destination management guidelines create a shift from traditional destination marketing towards the stakeholders' joint responsibility for product development and capacity management. This requires engagement between stakeholders to manage experiences along the guests' journeys to, through, and onwards from the West Coast. This report outlines work performed for DWC to assess the visitor flows on the West Coast and develop suggestions for how these can support the overall strategy development.

The West Coast is a large region with three distinct districts that each feature diverse landscapes and unique tourism propositions and infrastructure. Each district offers different visitor experiences and will recover differently from the pandemic years. So before deciding what the destinations on the Coast are from the supply side, it is worth asking: How do visitors define their destination?

This visitor flow assessment provides a valuable 'market-based' view of a destination that complements other analyses. This is important because tourists are mostly unaware of destination boundaries – either between regions or districts – and see the destination differently depending on the purpose of their trip and their intentions. As tourists move through destinations, they are in charge of their itinerary, and they activate networks of providers to create their tourism experience. Likeminded tourists are on similar itineraries with predictable patterns and identifying these allows for better decision-making on the supply side.

An overview of the visitor flows provides new insights, identifies development opportunities across and between regions (north into the Top of the South, East towards Canterbury, and South towards Wanaka and Central Otago), and helps tourism operators collaborate better to meet tourist expectations. It also identifies risks and bottlenecks – within individual flows or across multiples – that stakeholders can jointly tackle or mediate.

1. <https://www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-projects/destination-management-guidelines/>



Roberts Point Track, Franz Josef | Photo Geoff Marks

## ACTIVITIES PERFORMED

The visitor flow assessment documented in this report is based on a series of workshops held with local tourism operators and stakeholders (see table below). They collectively identify flows and provide input into how specific visitor groupings travel on the West Coast (see Appendix A for an overview of the methodology). This work was intended to support the overall DMP process in all 16 areas of the plan (see Appendix B for a summary of the inputs) and was a key opportunity to

engage with stakeholders on the West Coast.

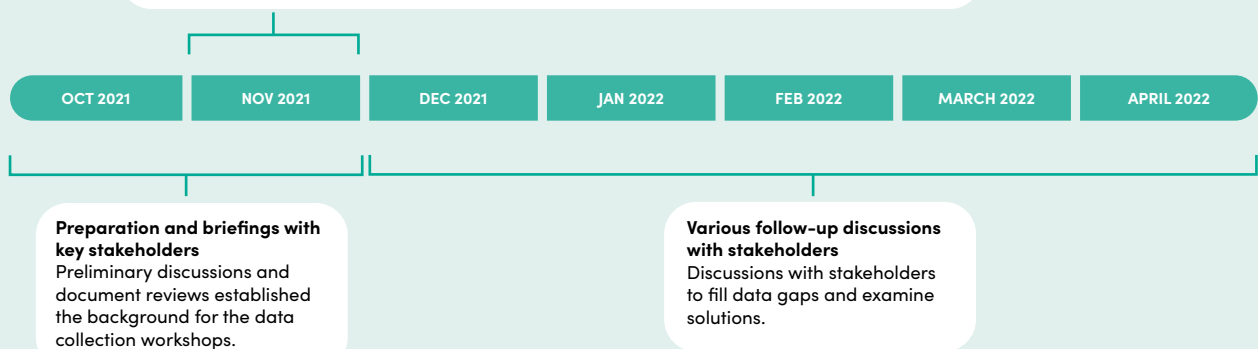
The workshop series and follow-up discussions with stakeholders provided sufficient data to make the recommendations and suggestions in this report. The next chapters introduce the findings from the assessment and make suggestions about how to incorporate these into the DMP and how stakeholders can implement changes.

## Workshop engagement activities

### Data collection workshop

15.11.21 Westport  
16.11.21 Greymouth  
17.11.21 Fox and Franz  
18.11.21 Hokitika

The workshops brought stakeholders together to map out key flows that they observe in their part of the destination – before COVID, during the pandemic, and potential flows after borders reopen. Discussions between stakeholders added context and details to the maps.



# FLOW Overview

In total, the workshops and subsequent discussions identified more than 60 individual flows (see Excel sheet provided). For each map drawn in the workshops, the following data was recorded:

- ✓ **Development stages**  
Future, new, developing, mature, declining, on hold due to COVID
- ✓ **Duration**  
Day or overnight
- ✓ **Successes**  
What went/goes well in this flow
- ✓ **Challenges**  
Before COVID or current
- ✓ **Solutions**  
Potential solutions for improving the flow
- ✓ **Research needed**  
What more do we want to know about this flow?
- ✓ **Key operators**  
Clearly defined or vague
- ✓ **Market influencers**  
Do we know how to encourage this market to visit?

The development stage gave insights into which flows are currently active and which are 'hibernating' due to COVID. With borders open again, some of these hibernating flows might be easy targets for reopening campaigns. Another important consideration was whether a flow was overnight or a day trip. Day trippers are often left out of traditional tourism management as the original definition of a tourist requires an overnight stay. However, day trips can provide economic opportunities and also take up capacity in a destination and, therefore should be managed accordingly.

Further analysis categorised the flows based on the type and main source market (domestic, international, or both), whether they are business or leisure travellers, and what their main draw card is on the coast (nature, culture, business, events, work).

# Flow types

These included business flows, leisure flows, event flows, and those labelled as “temporary residents”. These types are described in more detail in the table below because they each have different decision-making processes that can be used to increase visitation.



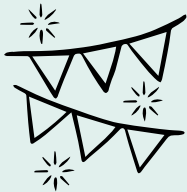
## BUSINESS TRAVEL

The business travellers’ primary purpose is professional and this influences their decision making. These flows tend to be less seasonal and are more likely to happen outside of the peak leisure travel and school holiday season over summer. The employer tends to make the decision on when and where to travel and local tourism operators don’t have much influence in affecting the decision. Some business travellers, for example sales people or maintenance engineers, were first to return after COVID lockdowns ended.



## LEISURE TRAVEL

These travellers might all have slightly different reasons for travel, from sport to relaxation and history through to shopping. They are free to choose where to travel and local tourism operators can entice them to choose the West Coast as their primary destination or part of their trip. For some, the West Coast will be the only destination on their trip, for example for a short-break weekend from Nelson. For others, the Coast will be one stop on a longer journey, for example international bus tours ‘looping’ the South Island.



## EVENTS

Event flows are driven by event organisers and are temporary reasons for travel, from one-day festivals, like the Hokitika Wild Foods festival, to multi-day sports competitions, like the Coast to Coast. Events can appeal to locals and visitors. For the visitors the event is the main reason for travel, and they might stay longer if they have the time and there are other activities or travel experiences they want to have. Events can draw both performers, for example music groups or professional sports teams, and spectators. The performers are there for work and their opportunities to extend may be limited. Spectators are more likely to have time for further experiences while in the region.



## TEMPORARY RESIDENTS

These are flows that come into the region and stay for an extended period, for example workers on large construction projects, seasonal workers, or international students. They become “temporary residents” to the region who are likely to want to explore the area while they are there and act more like locals.

The majority of visitors to the West Coast travel for leisure reasons. Events drive visitation, but many of these events were difficult to maintain under COVID restrictions. Large events will return when the restrictions ease, but they will be impacted by some of the key challenges – including low accommodation stock, access, and market unpredictability. Only a few business and temporary/potential resident flows were identified. There are likely to be more of these flows, and these will be identified as the West Coast continues to work on its destination management, including attracting talent and expanding the workforce. Looking at and overlapping the individual flows provides a more granular overview of the visitor activity in the region and allows planning for all types of flows, including those that locals also partake in.

Most flows come with a clear seasonality, for example, the Heaphy track mountain bikers will only be entering the region in winter when they have access to the great walk. Understanding the patterns of individual flows allows operators to focus on flows that do traditionally travel in the opposite season to increase annual business. The flows were distributed throughout the development phases, which means that the region has a good portfolio of flows from early developments to mature (late-stage) flows. Many of the flows before COVID focused on international visitors, and these have been on hold for the duration of the pandemic. With borders open these will start to become active again from 2022 onwards.

# Overview map

Maps were drawn on paper at the workshops and then transferred and edited in ArcGIS for 37 of these flows.

The overview map shows all the flows that were identified and mapped during the workshops. Some duplicate flows were summarised, because the same flow was identified in multiple workshops – for example Asian touring groups and weekend travellers from Christchurch or Nelson. The access points are clearly defined and there is only a limited number of roads that visitors can use, so the flows are all converging on the same hotspots around Greymouth and further south.

When we zoom in to South Westland, as an example, we can see the flows mostly crossing through into Wanaka and looping back to Christchurch or departing from Queenstown. These are mostly the international pre-COVID but the loop route was also taken by South Island bus tours for the domestic market during COVID, but not in the same numbers. The primary attractions are around the glaciers and other nature experiences in the area. This shows that many different flows follow the same patterns and visit the same attractions. However, their decision-making for the journey, the booking channels that they use, and the experience they are looking for is likely to be different. Therefore, it is important to take each flow individually for planning and targeting.

An example of an individual flow is shown below – The Nelson adventure junkies. These are leisure visitors from Nelson that come to Westport for one night to go mountain biking on the Old Ghost Road. This flow is in an early development stage and is active during COVID. Challenges with the flow are that they only spend one night, while there are opportunities for them to have more experiences while they are on the West Coast. Providing more information on other options and connecting them to other trails could potentially provide them with a reason to stay longer.

For more information on the other individual flows, see the interactive map and marketing processes sheet.

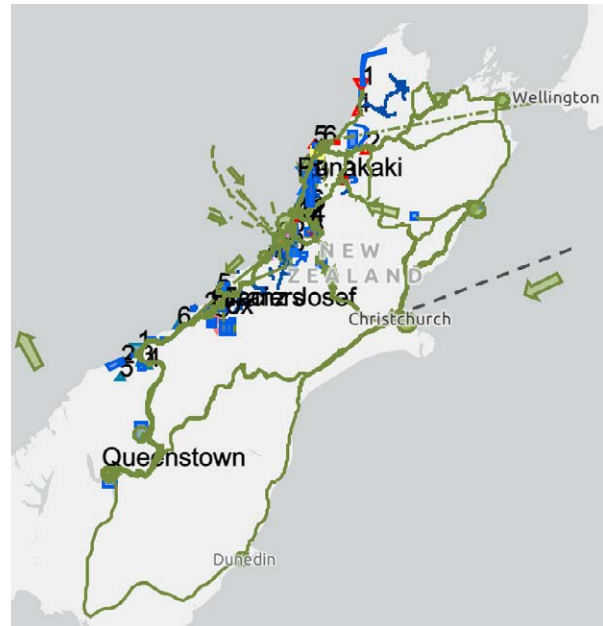


Figure 1: Overview of all mapped flows

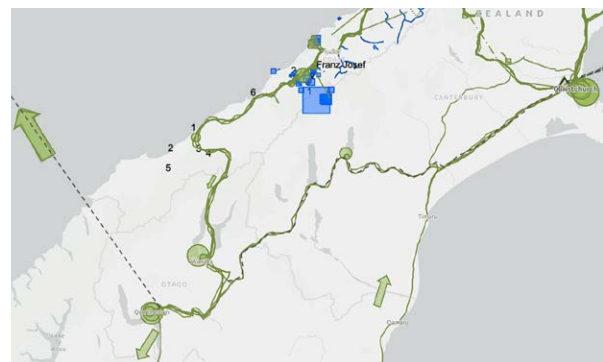
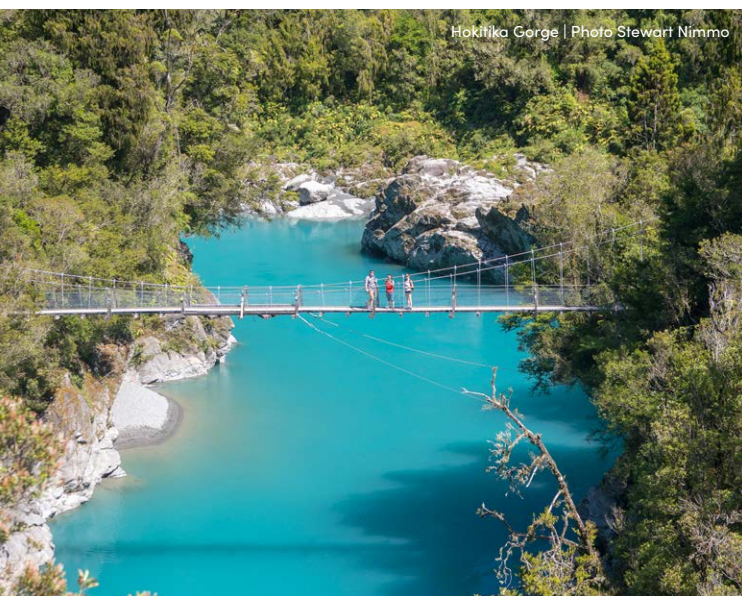


Figure 2: South Westland Flow summary



Figure 3: Nelson adventure junkies flow map





# KEY FINDINGS

## ACROSS FLOWS

This chapter discusses the main findings from the data collected during and after the workshops. These challenges impacted numerous flows and must be addressed to improve the overall functioning of the visitor economy on the West Coast.



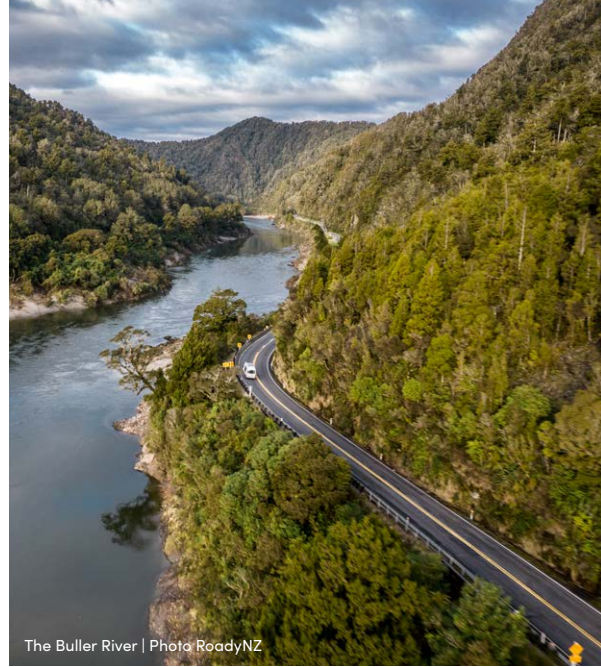
Figure 4: Key transport infrastructure and access on Te Tai Poutini

## ACCESS (ROAD, AIR, RAIL)

Access is one of the challenges across most flows, even some within the region. The workshops confirmed that getting to and around the West Coast was not always easy.

As Figure 1 shows, the West Coast has a limited number of access points, which is a challenge especially when weather, natural events, or COVID restrictions closed roads or cancelled flights, trains, and buses. This is difficult to address because big infrastructure investments are needed to build more resilient roading infrastructure, for example. For flights, rail and buses, the tourism operators on the West Coast must work in partnerships, for example with Waka Kotahi or Kiwirail, to ensure continuity of service. Unfortunately, sometimes transport providers wait for bookings before increasing or maintaining capacity, while operators are waiting to secure capacity or routes to book. This is a risk that the industry must manage going forward and close relationships with transport partners are essential. Anticipating potential road closures for planned work, like at the Oparara Arches, can help to mitigate negative effects and plan for alternatives.

In addition, flight schedules were limited throughout the pandemic, which made the West Coast more difficult to reach for travelers from further afield. The few flights that were coming on a weekly basis were often booked for business travelers who were less price-sensitive than leisure visitors. The reduced or cancelled schedule for the Tranz Alpine trains and some bus services added to the transport woes and further limited access to the West Coast. As travel resumes, some of these schedules will ramp up again, but it will be a matter of reconnecting regional operators and their logistics to these new patterns.

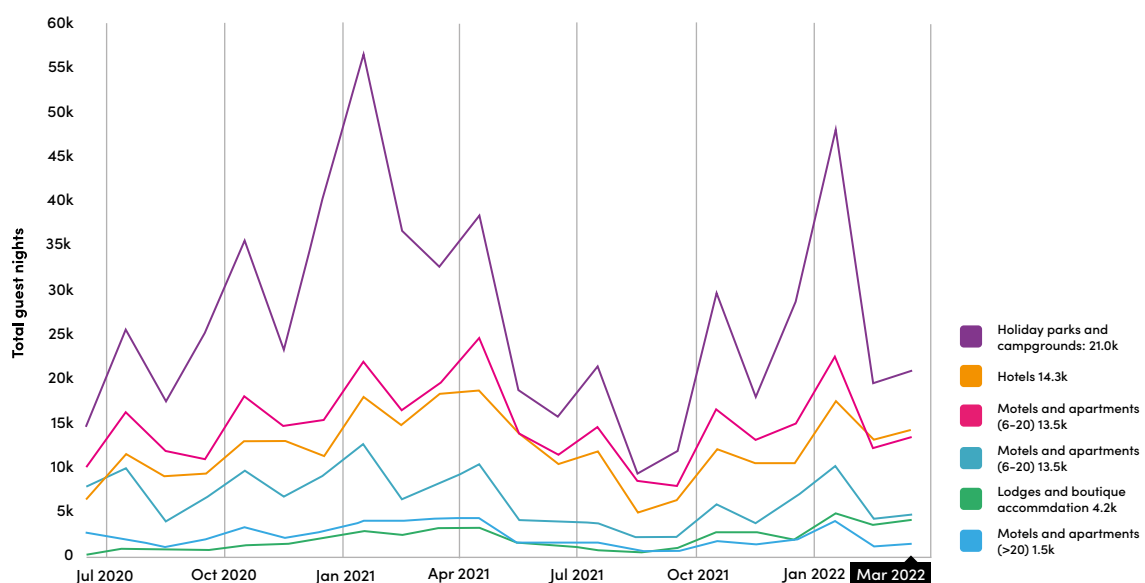


## ACCOMMODATION

Limited accommodation – in different areas and for different types – was a consistent challenge across the West Coast. With the closure of YHA hostels as well as other operators due to COVID and some provides offering emergency housing after the floods, this pressure is likely to have increased and presents a real risk. A detailed room inventory in the various categories would be useful to identify where the shortfalls are and at what times of year, they are likely to occur. Then a clear decision can be made on the type of operator and investment required to fill the gaps. As visitor numbers return the business case for more accommodation will become stronger again. The graph below shows the number of guest nights in different types of accommodation on the West Coast since July 2020 from MBIE's new accommodation monitor. It shows clear seasonality for the domestic market and the highest visitation in Holiday Parks.

**Figure 5: Guest nights on the West Coast by property type<sup>2</sup>**

Total guest nights for Development West Coast by property type (monthly)



<sup>2</sup> <https://teic.mbie.govt.nz/dataRelease/adp/>



Welcome Flat Hut, Copland Track | Photo: RoodyNZ

DOC accommodation is not included in these numbers, but the seasonality is likely to be similar. One interesting accommodation development is that overall nights on the DOC Great Walk Huts have increased year on year throughout the pandemic (see Table). The reason for this is the opening of the Paparoa Trail and the associated huts.

This is a great sign, showing that these new assets are a draw card for visitors that will likely attract domestic and international visitors in the future. This provides an opportunity to use the Paparoa trail as the attraction point and bundle the experience with other service offerings on the West Coast. This is especially relevant for cycling since the Paparoa trail is also open for mountain bikers and has already attracted great reviews<sup>3</sup>.

DOC Facility	2019 Total	2020 Total	2021 Total
Aorere Campsite	193	150	189
Brown Campsite	200	145	83
Brown Hut	837	851	851
Ces Clark Hut	164	1,546	3,174
Goulard Downs Campsite	211	208	167
Goulard Downs Hut	756	846	798
Heaphy Campsite	930	862	766
Heaphy Hut	5,705	5,910	6,332
James Mackay Campsite	598	726	636
James Mackay Hut	4,988	5,072	5,734
Katipo Creek Shelter Campsite	208	105	123
Lewis Hut	1,172	1,221	667
Moonlight Tops Hut	310	2,611	5,281
Perry Saddle Campsite	718	658	568
Perry Saddle Hut	5,181	5,064	5,447
Pororari Hut	141	2,648	4,839
Saxon Campsite	416	258	240
Saxon Hut	2,090	2,197	2,311
Scotts Beach Campsite	218	125	112
<b>Grand Total</b>	<b>25,036</b>	<b>31,203</b>	<b>38,324</b>

3. [https://www.tripadvisor.co.nz/Attraction\\_Review-g660716-d17562726-Reviews-Paparoa\\_Track-Punakaiki\\_West\\_Coast\\_Region\\_South\\_Island.html](https://www.tripadvisor.co.nz/Attraction_Review-g660716-d17562726-Reviews-Paparoa_Track-Punakaiki_West_Coast_Region_South_Island.html)

## EXPERIENCES

Some experiences were not what visitors expected – both before and during COVID – and there was room for improvement in the service quality. Since even one bad experience on a trip can taint a whole journey, it is important to deliver this consistency along the guest journey. For the inbound operators consulted, some mentioned a lack of interesting experiences for some of their groups, which was influencing their travel choices. For example, the West Coast offers a lot of outdoor experiences and natural beauty but for travellers who like to shop between experiences, there might be more offerings in surrounding regions. The map below shows the natural (blue) and cultural icon (yellow – red triangle) attractions on the West Coast. These are spread along the West Coast and can be part of many different itineraries. Specialised flows, like thrill-seeking mountain bikers, will be aware of where their attractions are and how to get there. In fact, a trail like the Pararua track might be the primary reason for travel. For other visitors, like the Grey Nomads cruising around the south island, more local information might be needed to direct them to sites of interest. I-sites are an important distributor for undecided visitors that might not know exactly what is on offer locally.

## SIGNAGE / INFORMATION

The feedback from some operators was that the visitors often did not know what was on offer on the West Coast and did not plan in enough time to do more than a few things. This was both for the group and the FIT markets. Wayfinding is a key flow topic because it allows stakeholders to steer flows to increase visitation in an area. By understanding where the different travellers get their information, we can ensure that they get the information they need when they need it. For group tours, this is in the planning stage with the agent. For event attendees, they need to know before they book their flights what other experiences are on offer. And for FIT travellers it might be physical road signage or i-Site information. Understanding the needs of the travellers on each itinerary allows for more accurate information sharing – through physical or digital signposting.

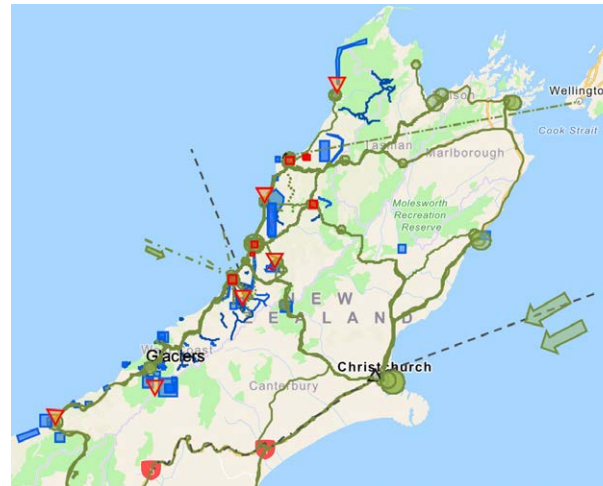


Figure 7: Experience overview for natural and cultural experiences on the West Coast with the main touring routest

## CHANGING CONSUMER PREFERENCES

COVID-19 has changed the way people travel and what they expect in relation to health and safety. Experiences from other markets opening up have shown that the pandemic has also affected how and when people plan to travel in the future.

All the while with domestic visitors, operators are dealing with guests that have different preferences to the international visitors and who also travel differently. At the same time, new domestic flows developed because some New Zealanders moved their international travel plans to visit New Zealand instead. An example of this are the Grey Nomads traversing the country in motorhomes with. The question is whether these flows will continue for another winter when the borders open and Kiwis can once again travel overseas.

Specific points discussed during the assessment were the shorter booking horizon of New Zealand visitors, the unwillingness to pay for guides, and the general “DIY” nature of most New Zealand visitors. These are challenges for activity operators because they will need to adjust their staffing to fit the new demand patterns. Understanding the dynamics in this new situation will help operators to plan more securely and, if needed, adjust their business model to the new realities.

## UNPREDICTABILITY IN MARKETS

This challenge related to border closures, travel restrictions – also domestically – and the new needs of visitors. Unfortunately, this is likely to remain for the foreseeable future. Even when the pandemic slows further, there will be new crises or challenges to address. Therefore, it is vital that our destination management approach creates a system where we can monitor the current state of tourism on the West Coast – if not in real time, then with little lag – so that we can make adjustments and provide the needed support to operators.

The Greymouth i-Site | Photo Stewart Nimmo



# Key opportunities across flows

The table below shows some key opportunities for development in the region – in the longer term. The potential activities could kick-start the development of these opportunities.

Horizon	Opportunities	Potential activities
Longer-term	Connect different cycle paths and offerings	All types of biking have increased in popularity and the West Coast has a great variety of offerings already. Some of these are far apart and not easy to connect, so there are opportunities for entrepreneurs to create offerings to make the experience seamless.
	Continue communication to domestic market	The domestic market has helped the industry through COVID and it is important that this is maintained, even when borders are open.
	Attracting workers and residents to region	As the borders open, demand will rebound and operators need to prepare for this in advance.
	Increase cultural offering	Some visitors are looking for additional experiences away from nature. Developing more cultural offerings will improve the portfolio on the West Coast.

## WHAT DOES THIS MEAN FOR DESTINATION MANAGEMENT?

The findings from this assessment will allow the stakeholders on key flows to work together and create better service packages for the individual visitor groups. This allows for more accurate targeting and decision-making. Each identified flow makes up a part of the overall visitor economy. Even if it is not noticeable at first, it can grow into a strong contributor. Therefore, one of the key tasks for developing the visitor economy will be to find those operators that want to drive a certain flow and provide them with the tools and resources to make it happen.

One way in which this can be achieved in the

destination management approach is through specific task forces to drive key strategic flows or clusters of flows, like the organised group tours from Asia, for example. This allows for more coordinated management and allows the assessment of the flow's sustainability as well in terms of its economic, social, cultural, and environmental contribution. The resilience framework – developed separately – can support stakeholders in making decisions on which flows to drive in the future.

This assessment is a starting point for viewing the visitor economy as a set of flows that pass through a territory. The process requires accountability and responsibility assignment, which is described in more detail in the projects section.





# RECOMMENDATIONS

The following recommendations are aimed at helping DWC and the West Coast tourism stakeholders to take this visitor flow lens into the DMP and its implementation.

Each recommendation includes the purpose, the activities to undertake, and the suggested stakeholders to involve in the process. The chapter closes with a section on the next steps for visitor flow management, especially around assigning responsibilities and continuing the process long-term.

## 1 > Consultation and task forces

Consultation with key stakeholders is vital to gather input from operators and stakeholders on the current visitor flow assessment and to share the information. This assessment provides an overview of the flows in and through the region and the base information collected during the workshops. This is the first step, and the important thing is to create momentum by engaging with select operators to manage a flow.

Their buy-in is required in order to prioritise actions and move activities on this flow forward. Topic-specific task forces are one way to gather these operators. For example, a group could work on the bus tour groups because these all have similar itineraries and involve similar operators in the delivery. This provides opportunities to create packages along the visitor journey and ensure consistent quality.

With the variety of cycle experience on the West Coast, a cycling task force could also help to connect the various trails and provide a continuous service offering to the various visitors on cycle flows.

## 2 > Connect with surrounding regions

The flows move between regions and visitors do not see the borders. So to improve the overall service quality of the visitors' trips, a joint approach would help. This would mean leading discussions with surrounding RTOS not only on marketing collaborations but also in joint management. This could include exchanging information on capacity constraints on transport, creating packages across borders, and actively encouraging destinations up or down the flow to provide information on experiences available on the next stop. This way similar operators, like accommodation providers, can work together to serve the same flow since the guests will stay with both of them in consecutive nights and they are not in competition on the same night.

3

### Developing new products to fill gaps

The flows overview shows what was happening in the destination – and might return – and what is happening currently, under COVID. Surprisingly, very few future flows were identified as operators were just looking for borders to open so that previous flows could return. At the same time, they voiced some clear issues with the pre-COVID flows and these will need to be addressed going forward. Creating new product offerings is a great way to fill gaps, for example with more sustainable product offerings or developments in areas that are currently not covered. The DMP can address both of these by creating opportunities for new product development in areas where there are currently few flows while ensuring that these are in line with the sustainability framework.

4

### Next Steps on visitor flow management

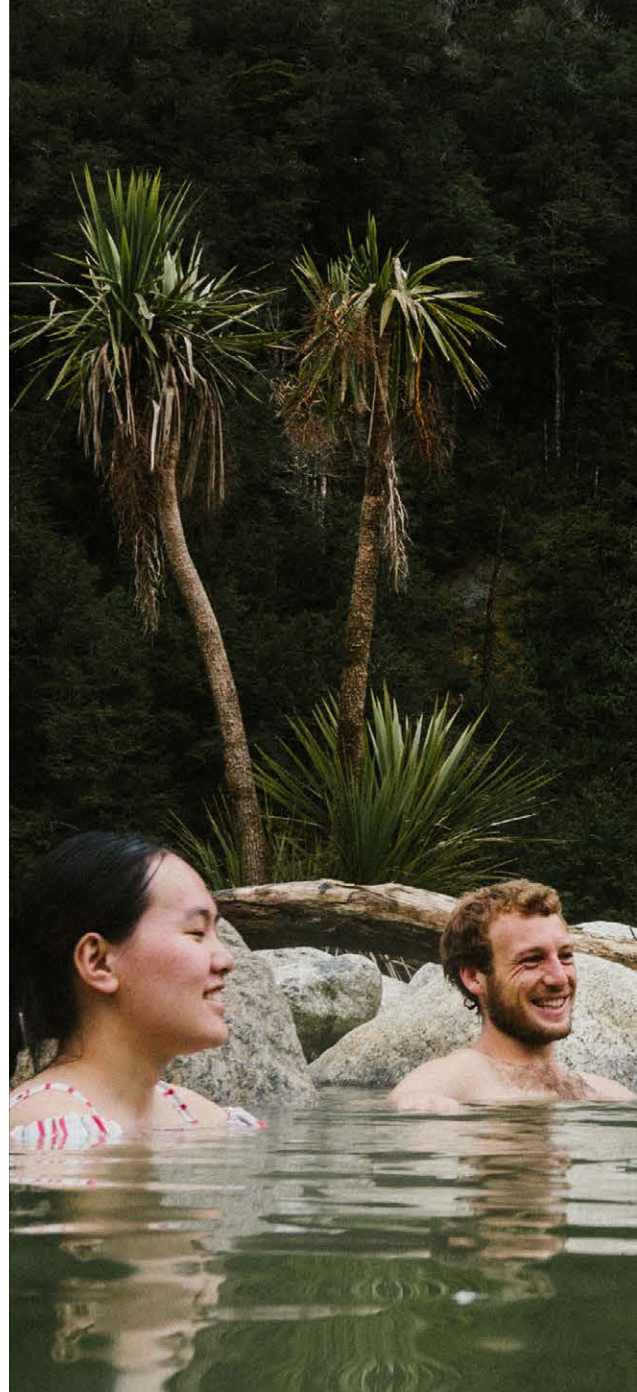
This visitor flow assessment is the basis for ongoing management of visitor flows in and through the destination. As described in Appendix 1, this assessment provides the basis for the last two steps in the model – “Arranging resources and assigning accountability” and “Install for ongoing update and facilitate the process”. Specific recommendations for each are described here.

5

### Arranging resources and assigning accountability

Now that you have the list of flows and maps with the marketing processes, it is important to find the key players for each of the flows or sets of flows you want to develop further and to give them the resources they need.

<b>Purpose</b>	Identify one operator per flow that is essential to the flow and could lead the flow development. The goal will be to turn several operators into ‘flow champions’ to have them share the approach and encourage others to support them. With a strong champion it will be easier for DWC to take a support role and assist several flows at once. Once all the operators in one flow are identified, DWC could help coordinate an experience exchange group for those operators to work together to further develop business within the flow.
<b>Activities</b>	<ul style="list-style-type: none"> <li>• Select champion per priority flow</li> <li>• Provide training and guidance</li> <li>• Hold regular meetings to keep up with progress</li> <li>• Share success stories with other operators to encourage collaboration</li> <li>• Facilitate mastermind groups to encourage information exchange within flows</li> </ul>
<b>Stakeholders</b>	DWC, key operators



## Install for ongoing update and facilitate the process

<b>Purpose</b>	The final step is to turn the maps and marketing processes into a living management plan. It is important to have a coordinator that can keep an overview of what is going on in the different flows and can coordinate with the flow champions on a regular basis. Regular events can help to gather ongoing input. The maps and processes can also be installed in a public space or online to allow input at all times. The key goal is to not have the assessment disappear in a draw. It should be out in public so that we can crowd source new details and developments regularly. This does take some staff time and coordination from the lead organisation but will provide ongoing updates.
<b>Activities</b>	<ul style="list-style-type: none"> <li>• Employ/train a visitor flow champion at DWC</li> <li>• Revise flow maps and Excel regularly as new information becomes available</li> <li>• Hold an update event every 12 months where operators can share what has changed on their flows, what are new challenges, and what are possible solutions.</li> <li>• Hang key maps on an accessible wall at DWC so that visitors can provide input on an ongoing basis with Post-its OR make digital maps available and ask for feedback</li> <li>• Give regular updates to operators if research shows there might be changes coming</li> </ul>
<b>Stakeholders</b>	DWC, operators

Basically, these last two steps are about starting implementation and getting operators involved in this.

## Limitations

There are three notable limitations to the data and scope of the assessment.

### 1. COVID impact on flows

The situation in 2021/22 meant that borders were closed, and operators were not looking at business as usual. This meant that many traditional flows were on hold and temporarily replaced with more domestic flows. The assessment shows a point in time and should be updated when borders are open again, and new insights on visitor behaviour are available.

### 2. COVID impact on the assessment process

Unfortunately, COVID also affected the follow-up to the workshops. Some events that were planned to discuss earlier results and gain further stakeholder input were postponed indefinitely.

### 3. Some key stakeholders not involved in the workshops

Even though all efforts were made, a few key stakeholders were not able to send a representative to the workshops for the assessment. This means that their views were not represented at the workshops and this could mean that some opportunities or challenges from their perspective are not documented here.



# APPENDIX 1

## – Methodology and Approach

Old Ghost Road | Richard Rossiter

The methodology is based on the **St. Gallen Model for Destination Management<sup>4</sup>**, which has been applied internationally to assess and manage destinations.

The overall methodology can be integrated into a comprehensive workshop series and generally includes a six-step process (see below). The results presented in this report are based on the first four steps of the methodology, and the recommendations would support the final two steps.

### Step 1

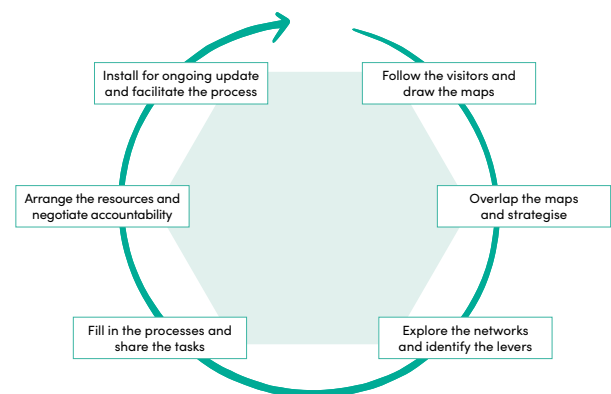
#### Draw the maps

Maps of the tourism regions are shown to stakeholders and they are asked to draw the current visitor flows, under guidance from a trained moderator.

Each flow is given a separate map and analysed individually. For each flow map, we want to know:

- Who is travelling? Where are they from? What is their profile?
- What do they do on their trip (activities, accommodation, mode of transport, etc.)? How much do they spend?
- When do they travel? (allows for seasonal analysis) How many of them are there?
- How developed is this flow? (based on a lifecycle model – growing, stable, declining, on hold due to COVID)

This provides a solid qualitative basis for further quantitative modelling.



### Step 2

#### Overlay and strategise

The maps are digitally overlaid in a GIS system to create an overview of all identified flows through the area, helping to identify additional hotspots, potential for future developments, and strategic topics, like seasonality and infrastructure requirements. See flows overview chapter.

### Step 3

#### Explore the networks

The networks of companies that provide the tourism services and bring tourists to the destination are mapped to identify collaboration opportunities along the flows. This includes an analysis of their roles in influencing purchase decisions and servicing tourists on-site.

4. <https://www.advances-destinationmanagement.com/sgdm>

## Step 4

### Explore processes

For each flow, the marketing processes, directly connecting the suppliers with the source markets, are mapped to identify the most cost-efficient and direct distribution methods. This helps to identify bottlenecks and find solutions.

The marketing processes for each flow analyse:

- **Key players**  
Who is the key player involved in this flow? These are usually operators or attraction providers. For many natural areas, like a national park or conservation area, DOC will be the key player as they have influence over who can operate in these areas.
- **Market mavens (Influencers)**  
Who influences visitor opinion on this flow? These are sometimes difficult to assess at first but can yield very direct rewards if they are identified. For example, the influencer for tour groups would be the inbound operator who plans and arranges the tour.
- **What is/was going well in this flow?**  
This can relate to progress, job creation, awards, customer satisfaction, etc.
- **What are/were/will be challenges?**  
These can relate to sustainability dimensions
- **What are possible solutions?**  
The workshops are a great opportunity to get stakeholder input on innovative solutions



Old Ghost Road | Hage Photo

- **What else do we need to know?**  
This creates suggestions for further market research and analysis
- **Finally, who is responsible for this flow?**  
This puts the responsibility with one person (not an organization) to manage this flow. This may need further work after the workshops in steps 5 and 6.

## Step 5

### Arrange resources

Once the tasks and stakeholders known, resource requirements are defined and secured to ensure the implementation can move forward. Project based funding can then be tied to clear outcomes that benefit the stakeholders at a national, regional, and a local level.

## Step 6

### Update and facilitate

Ongoing updates keep the maps current and the stakeholders engaged. Local champions in the destination can facilitate this process even during the implementation of the destination management plan. The maps become a living part of the destination management plan.



# APPENDIX 2

## A flows-based approach and MBIE DMP Guidelines

Visitor flow analysis provides a highly complementary perspective of tourism destination management and can provide an alternative view of the competitive unit in tourism. The table below provides commentary of how the St Gallen visitor flow methodology maps to the 16 topic areas of the MBIE Destination Management Guidelines and how the flows can assist the overall DMP process.

DMP COMPONENTS	RELEVANCE OF VISITOR FLOW PERSPECTIVE
<b>DEFINE THE DESTINATION</b>	<p>Each visitor defines their own destination based on their reason for travel on a particular journey. Asian coach tours to the Glacier country, for example, provided a predictable and stable flow before COVID – with predictable challenges.</p> <p>For that same flow, Hokitika was a gateway to the West Coast. For other visitors, Hokitika may be the hub that they use to experience other parts of the West Coast. In the case of an event, like the Wild Foods, Hokitika becomes the primary destination for a short period of time.</p> <p>Hence, the flows perspective allows us to see a destination from a variety of lenses and adapt our management to provide enjoyable experiences for all of these different visitor groups.</p> <p>Understanding that the West Coast is made up of different districts and communities, helped us ensure that from a supply side perspective, different 'destination' areas were included in the plan.</p>
<b>DEFINE THE VISION</b>	<p>A clear vision for what the West Coast wants to stand for is important. In fact, each district or sub-region may have a different view of where they want to be in the future.</p> <p>Through workshops and engagements, we landed on an overall vision for what tourism will do and then we broke it down into the districts and sub-regions. Work was done to define localised visions and validate these with stakeholders.</p> <p>For all levels, it is important to consider the economic, social, cultural, and environmental goals for the area.</p>

DMP COMPONENTS	RELEVANCE OF VISITOR FLOW PERSPECTIVE
<b>DATA, RESEARCH AND ANALYSIS</b>	Individual tourism statistics do not capture the complex and dynamic nature of tourism behavior and the visitor's interactions with the destination at a granular level. That is why it was important to look at a variety of sources, including visitor flows, Waka Kotahi, Triptech, DOC, and other data sources to validate assumptions and provide depth.
<b>STRATEGIC FIT</b>	Since the West Coast has distinct sub-regions with historically different tourism markets, it was important to identify the strategic fit at a more granular level. Flows can move between these areas and each flow can be mapped to a part of the overall strategy, both at local and national level. Operators can collaborate to drive flows independently of regional development if it fits with their strategy. Some key flows may need development assistance, leadership, or management from DWC or other key stakeholders, like DOC.
<b>BRAND POSITIONING</b>	<p>A strong brand provides visibility to the region and sub-regions. The West Coast's current "Untamed wilderness" seems to still fit well and the sub-regions can build on this to position themselves.</p> <p>Aspects of the sustainability pillars can help to define the brand for sub-regions and aid the communities in positioning themselves.</p>
<b>TARGET MARKETS</b>	<p>Each flow has a profile which can be defined further over time. This goes beyond traditional "target markets" because visitors may join several flows throughout their journey, including some that are outside of their usual profile. For example, a backpacker may decide to go on a luxury helicopter ride for a day or a high-spending visitor may choose to attend a free cultural event.</p> <p>Therefore, the flows provide a more granular assessment of current and potential visitor groups.</p>
<b>EXPERIENCE AND PRODUCT DEVELOPMENT</b>	<p>Flow analysis provides an overview of the hotspots on a map and the empty areas. This provides opportunities develop new products and services along existing flows or create new attractions to divert flows to new areas.</p> <p>The sustainability framework provides a set of community ambitions to sense check new experiences against.</p>
<b>ACCESS</b>	Access was identified as one of the key issues in terms of sustainability and risk on the West Coast. Partnerships with stakeholders can work towards solutions in this area.
<b>ATTITUDES</b>	During the workshops resident operators were involved in mapping the flows and noting their attitudes on the maps. The further community consultations on sustainability helped to identify resident attitudes to tourism in general – both positives and negatives, both pre-COVID and during. This showed up more granular attitudes towards particular types of tourism and helps to manage the social license of each flow.
<b>MARKETING AND PROMOTION</b>	During the workshops, participants identify the influencers in the market for each flow. For example, for coach tours to the glaciers the inbound tour operators are the key contacts. It is then possible to create a list of the key inbound operators and market to them in a more targeted and direct way.
<b>AMENITIES, SERVICES AND INFRASTRUCTURE</b>	<p>Maps and stakeholder engagement can help to identify where infrastructure development is needed and what amenities are required where. For example, this could include mapping EV charging stations in the region and filling gaps to ensure that EV owners (and those who rent EVs) can traverse the region.</p> <p>Sustainability considerations may impact which infrastructure projects are given priority, if they support multiple flows or have an overall positive impact on residents and visitors alike.</p>

DMP COMPONENTS	RELEVANCE OF VISITOR FLOW PERSPECTIVE
<b>ENVIRONMENTAL STEWARDSHIP</b>	Stakeholder across the West Coast have shared the pre-COVID and current challenges and identified potential solutions. Just like the infrastructure developments, environmental concerns can be identified on maps to see where there are hotspots. Then partnerships can be sought with stakeholders, like DOC or the NEXT Foundation, to address these.
<b>CAPABILITY AND DEVELOPMENT</b>	<p>The challenges identified in the work for the DMP can inform training needs analyses conducted together with training providers or specialised skills recruitment drives. Perhaps sustainability training for operators can move them further along their journey.</p> <p>Ongoing tracking of visitor satisfaction can help to identify future skills gaps.</p>
<b>LEADERSHIP AND STRUCTURES</b>	<p>DWC can potentially move more into a coaching role and provide guidance for operators on how to lead and manage their flows and target markets.</p> <p>Setting up the governance structures, through a regional or district level advisory group, can help to gather momentum amongst the operators and stakeholders.</p>
<b>RISK AND CRISIS MANAGEMENT</b>	<p>The sustainability framework shows risks that were present in the system before COVID and currently. This helps to address these in planning for the future.</p> <p>Risks and crises can also be mapped per flow (impact/likelihood assessments). This can inform overall regional response plans, for example “Which flows will be impacts by a road closure at point X?”</p> <p>A risk / likelihood matrix can help the region to prepare for future market fluctuations.</p>
<b>MEASURING SUCCESS</b>	<p>The operators that are actively servicing a flow usually have a good grasp of how well that flow is doing (numbers, spend, etc.) and whether there have been changes over time. This can be overlaid with economic and visitor data.</p> <p>Annual reviews of flows based on operator attitudes and satisfaction can provide base data for decision making.</p> <p>Annual reviews of stakeholders’ perception of challenges and opportunities in the four sustainability pillars can guide longer-term plan updating and implementation.</p>



**DEVELOPMENT**  
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