



DEVELOPMENT  
WEST COAST

Te Ohu Whakawhanake o Te Tai Poutini

WEST COAST  
NEW ZEALAND  
UNTAMED NATURAL WILDERNESS

Te Tai Poutini

DESTINATION

MANAGEMENT PLAN

LEARNING FROM THE PAST, EMBRACING THE FUTURE,  
MOVING FORWARD CONFIDENTLY

2022 - 2030

# HI MIHI

Kei aku nui, kei aku rahi,  
Kei aku whakatiketike ki te whenua  
Kei aku whakatamarahi ki te rangi  
Tēnā koutou katoa

Me mihi ka tika ki te hunga kua  
tāwhati atu rā

Ki te hunga kua kāwhakina e te  
ringa o Aitua

Haere i te ngaromanga nui, i te  
ngaromanga roa, i te ngaromanga  
e au ai tā koutou moe.

Ka hoki mai ki a tātou,  
ki te hunga ora

Tēnā tātou

Tēnā tātou i tā tātou hoe ngātahi  
nei i tō tātou waka, te waka e pae ai  
ō tātou wawata ki uta, arā, te waka  
whakawhanake i Te Tai Poutini.

E rere atu ana ngā puna o mihi o  
Poutini Ngāi Tahu ki ngā kaimahi o  
Te Ohu Whakawhanake o

Te Tai Poutini i tā rātou  
whakatangetange riaka e puta ai  
tēnei rautaki hōu ki te ao mārama.

E ai ki te kōrero, ko koe ki tēnā  
kīwai, ko au ki tēnei kīwai o tā tātou  
kete.

Nā reira e mihi atu ana mātou ki  
te tini ngerongero e pupuri ana  
i ā rātou kīwai e kore ai ā tātou  
kaupapa e hinga.

Ngā manaakitanga ki a tātou katoa

To my noble people,  
To my esteemed elders  
To our leaders  
I'd like to greet you all

We acknowledge those who have  
passed

Those who have been taken by the  
hand of Calamity

Go into the great beyond in order to  
rest in peace.

We return to us, the living  
Greetings

Greetings and acknowledgements  
to those of us who are paddling  
our canoe in unison, the canoe that  
brings our dreams to shore, the  
canoe that will carry us through the  
development of Te Tai Poutini.

The springs of acknowledgement  
of Poutini Ngāi Tahu are flowing to  
the team at DWC for their efforts  
to bring this strategy into reality.

It is said that you will hold your  
handle, and I will hold my handle  
of our kete.

And so we acknowledge the many  
hands who hold their kete handles  
so that our initiatives don't fail.

Best wishes to us all

# CONTENTS

Executive Summary	2
Introduction	3
Vision and guiding principles	4
What is destination management?	6
Key tourism stakeholders on Te Tai Poutini	7
Components of destination management	8
Components in detail	9
Te Tai Poutini DMP process	13
Implementing destination management	14
Leadership and Governance	15
Pounamu Pathway project	17
Destination marketing or storytelling	18
Visitor profiles	20
Visitor flows summary	21
Brand proposition and positioning	25
Te Tai Poutini narrative	26
Tiaki Promise	27
Situational analysis	28
Key international markets	29
From status quo via sustainability to regeneration	30
Regional challenges and opportunities	33
Strategic plan at a glance	38
<b>The action plan and priority projects</b>	<b>40</b>
Theme 1: Establish a destination management system	41
Theme 2: Support economic recovery and growth	44
Theme 3: Enhance community engagement and social benefits	46
Theme 4: Celebrate our cultural heritage	47
Theme 5: Protect our natural assets	48
Priority projects and activities 2023	49
<b>Appendix A: District perspectives</b>	
Buller	50
Westland	54
Grey	59

# EXECUTIVE SUMMARY

He whakarapopoto whānui

This Destination Management Plan (DMP) sets a clear direction for tourism on Te Tai Poutini. It is the result of an ongoing process of co-creation that started in 2020. The purpose of this document is to protect our rohe, enhance the reputation of our whenua and our tourism industry, and create a new regenerative tourism economy that benefits our communities now and into the future.

The DMP sits under and is guided by Te Whanaketanga 2050 and the subsequent Action Plan for 2022 – 2024 of which a key project for 'Enhancing the Regional Identity/Te Whakaniko i te Tuakiri o te Rohe', identified the development and implementation of the DMP as a priority project. The document aligns with the Destination Management Guidelines 2020 released by Ministry of Business, Innovation and Employment (MBIE).

Some areas of Te Tai Poutini benefit greatly from international and domestic visitation, whilst others are yet to realise any value from participation in the tourism economy. This plan sets out how to grow the visitation in a more holistic way across the region and considers local expectations and aspirations whilst seeking a balance across the four pillars of sustainable development; economic, cultural, social and environmental outcomes.

Through our consultation key themes were identified as game changers for tourism on Te Tai Poutini. As a result, this plan has a strong focus on developing more meaningful connections with our heritage, celebrating Māori culture, and sharing the unique stories of Te Tai Poutini as kaitiaki of this rohe. It also concentrates on investment in new technologies, capability building, placemaking and wayfinding.

## Key themes for the implementation of the DMP are:



### Establish a Destination Management system

*Te whakatūnga o tētahi pūnaha Whakahaere i te Tauranga*



### Support economic recovery and growth

*Te taumanu me te tipuranga ā-ōhanga*



### Enhance community engagement and social benefits

*Te whakakaha i te toronga a te hapori me ngā hua ā-pāpori*



### Celebrate our cultural heritage

*Te whakatairanga i ngā taonga tuku iho ā-ahurea*



### Protect our natural assets

*Te tiaki i ā tātou rawa o te ao tūroa*

The DMP is an essential first step toward a destination management approach in the region. As of mid-2022, the implementation work has begun and will continue to shape the way we manage tourism in the future. A vital next step is to establish the industry leadership group on Te Tai Poutini that includes all relevant stakeholders in the planning and decision-making on an ongoing basis.



Waiaototo River Safari, Haast

# INTRODUCTION

*He whakatafakīnga*

**This DMP sets a holistic direction for tourism on Te Tai Poutini, for both the recovery phase and ongoing development, bouncing back better and building more resilience for the future.**

The DMP outlines the values and principles that will guide destination management on Te Tai Poutini. Setting clear strategic themes that will help make the Te Tai Poutini vision a reality, with each theme having short to medium-term targets with specific projects to achieve them.

Tourism is an important sector for Te Tai Poutini’s economy, and a contributor to the regional identity and regenerative economy. It enables communities, especially those with a low population base, to improve the quality of amenities for both residents and visitors.

This plan adds to the intergenerational ambitions of Te Tai Poutini and supports the vision and mission set out in Te Whanaketanga – Te Tai Poutini Economic Development Strategy 2050. Although tourism makes up a share of the GDP on Te Tai Poutini, the tourism industry inspires a sense of pride and community spirit, reflects the values and culture of the communities, and is an integral part of attracting new residents.

Focussing on opportunities in tourism that will enhance the regional identity, the DMP supports the development of a resilient tourism system. The overarching goal is to provide economic and social benefits to our communities while regenerating the natural environment and strengthening the culture.

In showcasing the key challenges and opportunities for Tai Poutini tourism, the DMP is based on a detailed and thorough analysis of the current situation, where we stand and where our community wants to head. It considers the economic, social, cultural, and environmental elements of tourism and incorporates these into a vision for what tourism can contribute to the region.

The success of the DMP will result from a co-creation exercise with mana whenua and other key stakeholders to ensure both visitors and residents share a deeper sense of manaakitanga and katiakitanga towards Te Tai Poutini. **A key achievement of the DMP will be to establish a governance structure that will allow the tourism industry to set and pursue goals beyond the 2030 horizon of this DMP.**

# VISION

**By 2030, the visitor economy helps to enrich the lives of residents, supports our communities to thrive, connects, and protects our cultural heritage, and helps to regenerate our natural assets.**

**Achieving this vision will take effort from all stakeholders, with crucial decisions to achieve our goals based on solid values that will keep us aligned in our implementation.**

# Guiding principles

**Our guiding principles are drawn from tikanga Māori and will be at the heart of our decisions moving forward.**



## **Manaakitanga**

Welcoming, inclusiveness, connection, and support for each other.

*Te whakawhanaungatanga, te kauawhitanga, ngā hononga, te tautoko hoki a tētahi i tētahi.*



## **Kaitiakitanga**

Active guardianship of our taonga and giving back to nature.

*Kia takatū te tiakina o ā tātou taonga me te whakahoki atu ki te ao tūroa.*



## **Whanaungatanga**

Our sense of collective belonging and identity.

*Tā tātou rongō i tā tātou whai wāhitanga me te tuakiri.*



## **Rangatiratanga**

Courageous leadership and being in charge of our own destiny.

*Kia māia te hautū me te whakahaere i tō tātou ake ara whakamua.*



## **Pono**

We are honest and sincere in everything that we do.

*Kia pono, kia tika hoki i roto i ā tātou mahi katoa.*



## **Kotahitanga**

Unity and collective action.

*Te renarena o te taukaea me te mahi tahi.*

# WHAT IS DESTINATION MANAGEMENT?

Destination management:

“... brings together different stakeholders to achieve the common goal of developing a well-managed, sustainable visitor destination. It is an ongoing process that requires destinations to plan for the future and considers the economic, social, cultural and environmental risks and opportunities”.<sup>1</sup>



# Key tourism stakeholders on Te Tai Poutini

Destination management creates sustainable growth for the benefit of the local community.

Collaboration is critical – no one agency can manage a destination on its own and it requires coordination

of, and ownership by, all stakeholders. The key stakeholders will have a role in driving the destination development.

The diagram below shows tourism stakeholders on Te Tai Poutini.

Figure 1: Types of stakeholders

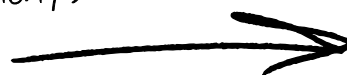


# Components of destination management

Destination management is a complex activity that includes a number of interrelated activities, as shown below. The work performed for this DMP has assessed and addressed each of the 16 components as suggested by the MBIE Destination Management Guidelines.

- 
- 1 Define the destination
  - 2 Define the vision
  - 3 Data, research and analysis
  - 4 Strategic fit
  - 5 Brand positioning
  - 6 Target markets
  - 7 Experience and product development (attractions)
  - 8 Access
  - 9 Attitudes
  - 10 Marketing and promotion (awareness)
  - 11 Amenities, services and infrastructure
  - 12 Environmental stewardship
  - 13 Capability and development
  - 14 Leadership and structures
  - 15 Risk and crisis management
  - 16 Measuring success

*Read more about the components  
on the following pages*





# Components in detail

## 1 Define the destination

Defining the destination in a region like Te Tai Poutini is key to understanding visitor movements and critical areas which the DMP can focus on. Clarifying geographical areas, townships, districts and the supply of visitor experiences and services, and where the community is actively engaged in developing visitor demand is critical since visitors do not necessarily understand geographical, locational or political boundaries.

While various perspectives are valuable, the approach needs to be 'visitor-centric', to inform discussions and decision making. It is therefore important to consider the current visitor movements and behaviour in and around the destination, as well as the destination's relationship and links to neighbouring destinations, highlighting opportunities for collaboration.

## 2 Define the vision

A shared long-term vision, which wider community stakeholders are committed to, is key. On Te Tai Poutini, this presents as a series of district clusters; Buller, Grey and Westland, with even more granular realities. The importance here is the alignment to regional ambitions and the greater collective vision. This will result in a higher understanding of what Tai Poutini values are and the values we seek from our visitors and how these will enrich Te Tai Poutini, in the economic, social, environmental, and cultural sectors.

**Canterbury region, Nelson and Otago regions are the destinations we are mostly competing with for the domestic travellers who also have Te Tai Poutini on their list.**

**Of the 35% who have ever considered Te Tai Poutini**

**They also considered...**

Canterbury region	77%
Nelson Region	76%
Otago Region	76%
Marlborough Region	73%
Southland Region	64%
Wellington Region	64%
Hawke's Bay Region	63%

**Of the 25% who have ever visited Te Tai Poutini.**

**They also visited...**

Canterbury region	81%
Otago Region	72%
Nelson Region	68%
Auckland Region	63%
Hawke's Bay Region	61%
Wellington Region	61%
Marlborough Region	60%

Source: TRACKING DOMESTIC TRAVELLERS' CONSIDERATION & VISITS OF THE WEST COAST NOVEMBER 2022

### 3 Data, research, and analysis

Destination management requires continuous commitment and investment into data, research, and insights to guide decision making, to track progress and measure success. Critical research into visitor motivations, understanding tourism flows and the impact of tourism on local communities are just a few indicators required to ensure the tourism industry maintains a social license to operate. The knowledge acquired from such investment provides a better understanding of visitors and their expectations whilst delivering on the capacity and desires of the community.

Investing into better understanding visitor perceptions and satisfaction as well as community tourism sentiment are the foundation for the DMP. This ensures we are not only delivering what we say we will but also doing so in a way that was agreed upon with the community.



### 4 Strategic fit

As we put together this DMP, effort has gone into considering what other national and regional frameworks have been developed. It has been important to understand where synergies lie and most importantly the role that Te Tai Poutini can play in the contribution to a national framework while also deriving a sense of identity for the region. Additionally, taking into consideration wider planning around energy strategies, conservation management and road use, remains pivotal in the DMP. A special consideration has also been given to Te Whanaketanga Te Tai Poutini West Coast Economic Development Strategy.

### 6 Target markets

Te Tai Poutini target markets are clearly identified however the spend can be a bit more nuanced. Whilst western markets make up for 75%+ of visitors, eastern markets are key drivers of spend for specific districts, notably the Chinese market for Glacier Country. Working with industry to diversify markets is key to increasing the attractiveness of the region and ensure year-round visitation and a more sustainable visitor sector.

### 5 Brand positioning

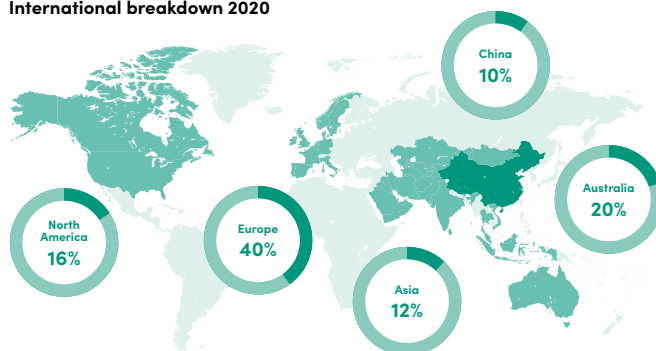
Te Tai Poutini enjoys a clear brand positioning that is anchored in a widely shared visual signature called **West Coast Untamed Natural Wilderness**. The brand was developed in consultation with industry and communities to reveal the essence of destination, the contract between the districts and to highlight the region's strengths and assets. It provides a pathway for visitors and locals to explore the region.

The Brand promise is supported by an icon strategy – aiming to connect locals, communities and visitors to anchor points that capture the essence of the destination across the districts. The flexibility of the icon strategy allows the supporting sub icons to adapt and change depending on the audience. The destination's brand story is detailed in the brand guidelines that make up the Untamed brand.

Te Tai Poutini Untamed brand is widely adopted by stakeholders across the region and is perceived as a regional identity. Due to wider distribution, controlling the context and use remains a challenge.



International breakdown 2020



## 7 Experience and product development (attractions)

Diversifying markets and greater development of experiences and tourism products that are anchored in the community is essential to ensuring the continuity of the tourism industry on Te Tai Poutini. Climate change, international and domestic competition, new development, capacity, and staffing all have impacts on visitor tourism flows. As visitor needs change, and expectations evolve, working with industry to provide feedback, insights and guidance is key. It is important to understand how engaging and enriching experiences are being delivered at a global level while developing the region's unique proposition and ensuring that storytelling stays true to the regional narrative, anchored in our cultural and environmental assets. A foundational part of the DMP has been to diversify the offer in Glacier Country whilst building capacity and capability in the Grey and Buller Districts.

## 8 Access

Access in a region like Te Tai Poutini is an enabler for both visitors and communities. With the tyranny of distance, accessing an untouched natural environment like Te Tai Poutini can seem like a never-ending task. Supporting operators to increase connectivity physically and digitally is key to visitor growth. Supporting the development of infrastructure to allow greater connectivity with communities and assets (such as the Oparara Arches) is also vital to developing the visitor experience proposition and increasing the length of stay.

Wayfinding and placemaking play a key role in the Te Tai Poutini DMP as they create a focal point for visitors and locals to engage and for the visitor experience to develop. In turn this creates economic outcomes that will improve the quality of life of all members of the community. Access also plays a role in adapting to climate change.

## 9 Attitudes

Understanding West Coasters' values is necessary to ensuring a positive experience for our visitors. Whilst visitors make their way to Te Tai Poutini for the natural environment and the cultural heritage, it is vital for us to exhibit values that we hold dear.

As seen with the Tiaki Promise and the Marahau Pledge, a commitment that affirms the desire of manuhiri to experience Te Tai Poutini in harmony with the needs and wants of the hosting communities is a great social outcome. It ensures there is broad understanding and appreciation of the value of these visitors. It is also key to increasing the length of stay and the involvement of visitors in projects held dear by the communities. Forming and developing ambassadors alongside a regional narrative are key actions that are outlined in the DMP.



Lake Moeraki

## 10 Marketing and promotion (awareness)

Destination marketing is an important part of destination management to ensure the regional narrative stays true to the mandate from the tourism industry. The role of the DMP is to ensure all engaged parties understand the synergic role they each play and the broader outcomes from that collaboration. Visitor mapping helps us understand how the destination attracts the right visitors, at the right time and presents them with the right options, suited for them.

## 11 Amenities, services, and infrastructure

Since visitors become temporary residents of the place they stop at, understanding the impact they have on communities is important. Engaging with councils and communities to better adapt and future-proof our tourism industry is essential as is effectively planning the future cost of infrastructure which, on Te Tai Poutini, is greatly affected by long distances, climate change and a low population base. The right infrastructure planning underpins creating vibrant places for communities and visitor to engage.



Lake Brunner

## 12 Environmental stewardship

Whilst Te Tai Poutini represents only 8% of the total of Aotearoa's landmass, it makes up 25% of the country's conservation land. 86% of the entire region is protected in conservation land. Protecting and enhancing the environment is a value dear to West Coasters and it is also the very reason why visitors choose to travel to our region. Sustainability and environmental stewardship are key focuses of Te Tai Poutini DMP. The outcome needs to be a better understanding of the tourism sector's environmental footprint and how visitors and the community can embark on a regenerative tourism journey, not only protecting the estate but also improving it and setting the precedent for all industries on the coast. These actions ultimately enhance Aotearoa as visitors partake in the projects of our communities.

## 13 Capability and development

Lifting the productivity of the tourism sector is essential. Accessing technology, automating repetitive and low productivity tasks, investing in development to facilitate, deliver and ensure proper staff training that aligns to the destination narrative will facilitate this outcome. Building capability will mean working with wider industry to enhance the opportunities for people in tourism and the business community. Leveraging ambassador programs to enhance social pride and identity for the region as well as attracting and retaining talented individuals are opportunities to explore.

## 14 Leadership and structures

The vastness of Te Tai Poutini and the varying levels of tourism appetite has significant impact on the development of leadership structures in destination management. Whilst an overarching reference group is key to resourcing the destination management organisation, the development of task groups to address district realities and share knowledge has been retained as the major strategy. Task groups around product development, sustainability, wellness, food tourism and frontline customer service have been identified as critical needs. This will support the destination management organisation to table regional priorities while allowing the solutions to come from the community.

## 15 Risk and crisis management

The story of Te Tai Poutini is one of resilience, from natural disasters, climate change as well as global events. Climate events and their impact are well documented in the region and range from managing traveller disruptions, keeping communities safe, getting visitors back home safely and then rebuilding and welcoming new visitors. The basis of that resilience lies with ensuring access and strengthening communications – through technology, preparedness, and planning. Working with communities to address imminent and future hazards, anticipating the effects of climate change on communities, visitors and business continuity has and will still be important in the future. Alongside this, visitors also need to understand the reality and fragility of Te Tai Poutini, 'plan for the worst and hope for the best!'

## 16 Measuring success

Measuring outcomes is key to ensure we are driving change – modern destinations implement more complex KPIs and have outgrown isolating traditional indicators such as spend, length of stay, market share and other quantitative metrics.

New metrics include perception, motivation for travel, intent, alignment of values, social and environmental footprint, in addition to quantitative metrics. Success is measured on how aligned visitor and local values are and the synergy achieved. Metrics for success also include pride of place, intent to revisit, safety and actions that measure the benefit to the four well beings of social, economic, environmental, and cultural.

Successful destinations regularly revise and re-engineer their plans and structures according to the changing visitor needs and economic influences such as:

- Tourism sentiment index: the perception of tourism with local communities.
- Visitor sentiment index: the perception of visitors about the communities.
- Visitor consideration and saliency: the aspirational perception of potential visitors.

# TE TAI POUTINI DMP *process*

**Te Tai Poutini DMP was developed through consultation with stakeholders and in close alignment with planning initiatives undertaken nationally, regionally, and locally. This ensures that there will be opportunities for collaboration and shared developments.**

The process looks at tourism from different angles to gain a comprehensive picture of where we stand and where we want to go. It learns lessons from the past and it designs a path for the future. The following pieces of work make up the basis for the plan and consultation:

WORK PERFORMED	PLAN IMPLICATIONS
<b>EVENT STRATEGY DEVELOPMENT</b>	A strategy to promote and facilitate events on Te Tai Poutini.
<b>DOMESTIC PERCEPTION STUDY</b>	Identifies opportunities for operators targeting the domestic market using personas that provide insights into how to approach each of the visitor personas.
<b>GLACIER COUNTRY REPOSITIONING</b>	Approach on how to adapt the perception research to Glacier Country for targeting purposes. This work helps to set goals and targets for the region.
<b>SUSTAINABILITY FRAMEWORK CONSULTATION</b>	Analysis of economic, social, cultural, and environmental challenges/risks, opportunities/benefits. Providing an overview of the tourism stakeholders' challenges with opportunities in the past and going forward, which lays the groundwork for goal setting outside of traditional metrics.
<b>VISITOR FLOW ASSESSMENT</b>	An overview of how visitors move around Te Tai Poutini and for what reason, allowing for granular assessment of the types of flows and how to approach them.
<b>ECONOMIC ANALYSIS</b>	Economic trends give an indication of when and how tourism may return in the future.
<b>CONSULTATIONS WITH STAKEHOLDERS</b>	Understanding the desires of the different communities is essential to adapting the plan to local conditions.

# Implementing destination management

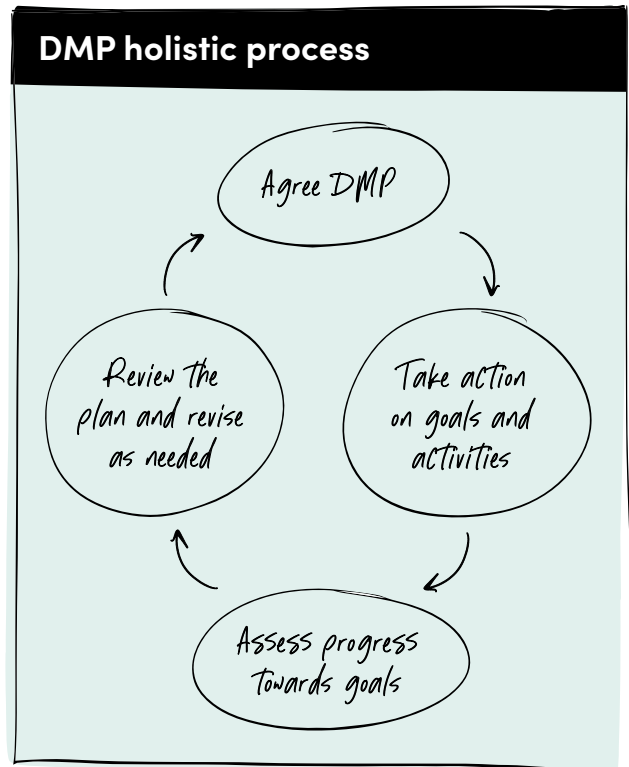
The DMP takes a continuous improvement approach that will allow our industry to thrive and create maximum positive impacts over time.

Once the DMP and its objectives are agreed upon, activities and projects outlined can be implemented. Progress towards the goals will be assessed regularly and the plan will be revised if needed. This will ensure that we learn over time and continuously improve our activity to achieve our longer-term vision.

At the same time, Te Tai Poutini tourism community needs to achieve a greater understanding of infrastructure needs, the operating landscape, and the impact of the tourism industry on the region in a more holistic way than in the past. This will be achieved by working with a destination reference group that encompasses stakeholders for both the engaged communities and the wider group that affects our region's tourism development.

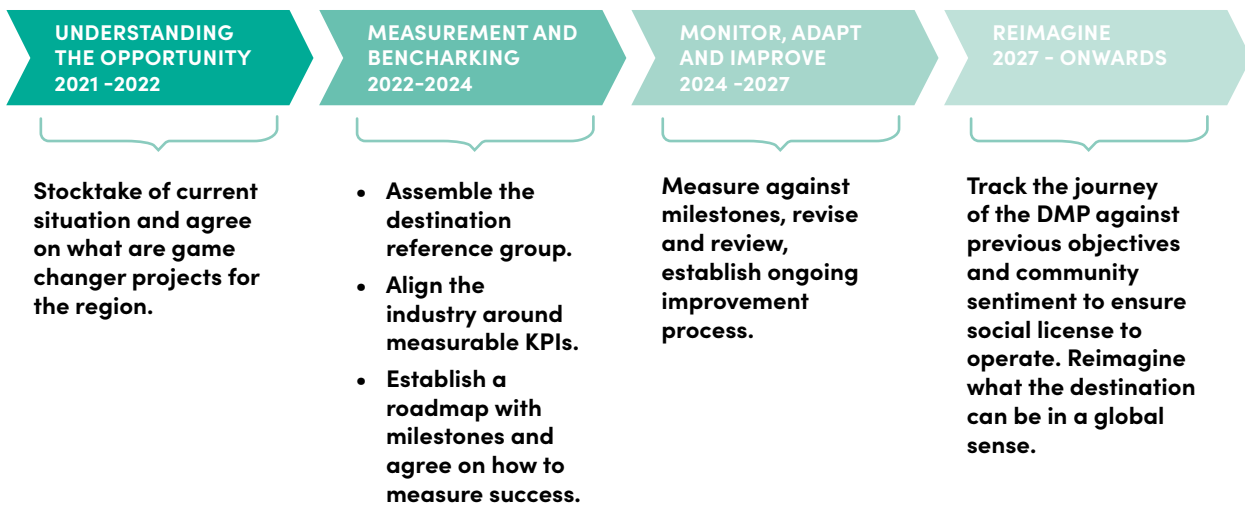
**Benchmarking, monitoring and evaluation activity will include:**

- Measuring and managing capacity, including understanding demand and supply factors, and tracking visitation patterns;
- Developing tourism forecasts to understand the future picture and enable suitable planning



- Exploring new and more holistic ways of measuring the impact of tourism that include social, environmental and cultural impacts, and;
- Monitoring community perception and sentiment towards tourism and documenting the benefits of tourism for local communities.

## Destination management approach timeline





# LEADERSHIP + GOVERNANCE

## Partnerships and collaboration

**Destination management is the result of collaborative work between multiple organisations that want to ensure tourism improves the quality of life of residents and visitors.**

This collaborative governance model requires a clear vision and purpose from each organisation, and an understanding how to bring about a collective change through actions within each organisation. It is the delicate balance between Manaakitanga and Kaitiakitanga that gives a voice to everyone within the community and ensures collective decision making for long-term benefits.

Creating a destination management reference group, of industry leaders and stakeholders across multiple sectors is the foundation of this plan. The role of the group will be to implement the changes outlined and agreed upon in the DMP through advocacy, lobbying, influence and feedback.



## Community engagement

The DMP relies on support from communities, residents, and stakeholders directly and indirectly involved in tourism. Getting the local community to understand and appreciate the value of tourism but also adhere to the goals and fully endorse the ambitions of the sector. The table to the right shows what we envision high community engagement looks like in 2030.

## Mana whenua co-governance

Understanding culture and heritage is a key aspect to defining the region and legitimately developing a sustainable destination management model. Co-designing that future with mana whenua is vital to developing a sustainable tourism industry. It is also the foundation for opportunities with indigenous tourism, developing a sense of pride and positioning Te Tai Poutini as a taonga.

Ongoing development of new Māori cultural tourism products is key to maintaining the competitiveness of the region and increase the regional dispersal and ultimately the length of stay from international and eventually domestic tourists. DWC will support mana whenua, local government, industry and the Department of Conservation in the development of cultural products and services, reflecting Te Tai Poutini's unique cultural proposition, and the importance it has within in Aotearoa.

## Increasing community engagement

LOW COMMUNITY ENGAGEMENT 2021	STRONG COMMUNITY ENGAGEMENT 2030
LACK OF DMP	Long term destination management strategies are in place
LACK OF DIALOGUE AND SUPPORT FROM WIDER COMMUNITY	Local residents understand and appreciate visitors as temporary residents
APATHY FROM COMMUNITY	High participation in visitor economy
LACK OF CONNECTIONS WITH COMMUNITY	Businesses and communities engaged with tourism industry
PERCEPTION OF POOR QUALITY OF SERVICE AND LACK OF MEASUREMENT TOOLS	Excellence in front line customer service
INDUSTRY FOCUSED ON INTERNAL ISSUES	Industry understands wider implications
LACK OF ACCESS TO CAPITAL FOR INFRASTRUCTURE AND ACCESS TO MARKET	Industry leverages co-funding to access capital
LACK OF FUNDING FOR DMP ENABLEMENT	Funding strategies and planning for key initiatives
LACK OF UNDERSTANDING OF IWI VALUES AND MANA WHENUA	Māori and non-Māori businesses engaged with mana whenua



# Pounamu Pathway

The Pounamu Pathway consists of four world class tourism attractions where visitors embark on a journey of discovery across Te Tai Poutini of the South Island, Aotearoa (New Zealand).

Four tourism hubs will be located along Te Tai Poutini at Māwhera (Greymouth), Kawatiri (Westport), Awarua (Haast) and Hokitika. Each hub will create a captivating, immersive visitor experience, revealing local pūrākau (stories) and showcasing the breathtaking natural scenery.

Cultural storytelling will deliver a 21st century representation of the traditional Māori network used for centuries for trade and migration. This modern representation will enable visitors to retrace the footsteps of the 'Pounamu Pathway' on Te Tai Poutini and connect with iconic cultural tūpuna, sites, battles and wars and the rich untold stories in the rohe (region).

Intertwined with these cultural pūrākau (stories), the Pounamu Pathway will bring to life the European Tai Poutini heritage stories such as gold mining, coal and pounamu, and the impact these resources have had on the region, and the people we know today.

The Pounamu Pathway tourism venture is led by Te Ara Poumanu Limited and is a collaboration between Tai Poutini hapū, Te Rūnanga o Ngāti Waewae and Te Rūnanga O Makaawhio and supported by Development West Coast.

The inspiration for the Pounamu Pathway was

## MĀWHERA, GREYMOOUTH

The Pounamu Pathway in Māwhera will be the first hub to open in Q4 2023 and be purpose built and designed, closely followed by the Kawatiri and Awarua hubs.

Not to be outdone by the storytelling internally, Te Wai Pounamu Architecture firm RM Designs sought inspiration for design of the external canopy from Te Tai Poutini rainfall and the Māori word pōkeka meaning 'rain cape'.

The use of textures and timber layers in its design replicates harakeke or flax which is woven throughout the canopy's rooftop. Traditionally, a rain cape was made from layers of flax which was used to keep water off the wearer. The canopy's philosophy is the same, it envelopes and protects visitors who enter the building.

**POUNAMU  
PATHWAY**  
UNTAMED NATURAL WILDERNESS

always to tell the rich local pūrākau to international and domestic visitors. The project has always been aspirational and aims to deliver a world class, innovative, immersive experience. These lofty aspirations have been brought to life with creative partners Wētā Workshop and Cerebral Fix.

# DESTINATION MARKETING OR

*storytelling*

## Destination marketing as we know it is dead - *there, we said it!*

**Define with absolute clarity the values our community holds dear and attract visitors that share the same values.**

Where previously most of a destination's efforts were spent on building compelling messages, slick brands and media plans to attract the attention and reach a wider audience, modern destinations must now focus on understanding consumer motivations, wants and needs and how they align with local values. All of this must be done within a strategic framework: a customer journey map.

Storytelling is one way of gaining an understanding of a destination which implies telling the stories of protagonists that make the destination, whether they are local or visitors.

Storytelling aims to inspire people through showcasing values, and people, as well as experiences, landmarks and culture. It ultimately takes consumers on a journey from the first point of awareness through inspiration, desire, decision making, experience and feedback. This achieves greater regional dispersal within the districts and a longer length of stay.

Attracting visitors which emulate the values that locals hold dear – will result in less effort on managing experiences and promoting specific places and landmarks but allowing for multiple layers – which in turn will align to the right market at the right time. A destination management organisation's role has evolved into maturity, it is less about talking and more about listening and enhancing.



# Te Tai Poutini a destination within a destination

**Our region must not only be a destination in itself that is characterised by cultural, and social, landmarks as well as tourism assets, it also needs to be a destination within a destination.**

Te Tai Poutini must tell the story of New Zealand's largest carbon sink, harbouring a quarter of our conservation land and most importantly, how this is connected, through our nature, our culture and our pounamu to the rest of Aotearoa. This will define our region as a taonga, outlining our uniqueness and compelling explorers and seekers to visit our region.

It will define how Te Tai Poutini complements other regions, and how we ultimately benefit from synergies rather than being in a competitive landscape. This will instil a sense of pride within all New Zealanders and visitors that such a place exists, understanding the limitations and practicalities of living in such an environment but most importantly, ensuring that

development is made Te Tai Poutini a destination within a destination from both resident and visitor perspectives.

Our first work was to better understand domestic consumer perceptions and ongoing consumer perception through research. We need to understand what visitors seek when travelling and what makes Te Tai Poutini a special place. We can then start thinking about what is missing – such as the role of our culture and pounamu – and how we can develop the regions' tourism offering. From here we can truly build a region that resonates with visitors, adds value to the NZ proposition and is supported by local communities and mana whenua.

Eventually, the DMP can better support existing products to engage with locals, domestic and international visitors but also move quickly on market opportunities or failures that align with resident values, tikanga māori and the aspirations of mana whenua. If done well this will create a dynamic and regenerative year-round tourism industry that is world-class.

# Visitor profiles

DWC commissioned research identified four personas that give a good indication of the types of domestic visitors that are likely to choose Te Tai Poutini for a vacation.

**Intrepid explorers** are a more natural fit and the current offering already meets their needs.

**Unwind weekenders** are a "stretch target" and issues around accessibility will need to be

managed. You'll have more buy in with accessibility than convenience. **Families** and **round trippers** are also interesting targets and work is needed to convert more of these for Te Tai Poutini.

As we diversify, the visitor industry on Te Tai Poutini will have to contend with varying levels of sophistication from travellers. In turn products will have to be developed to engage stretch-target visitors while also aligning with the vision of tourism on Te Tai Poutini.

Figure 2: Visitor profiles

**Bringing it all together, the personas that will be the easiest to engage are already aligned with our natural assets and how we do things.**



<b>INTREPID EXPLORER</b>	<b>ROUND TRIPPER</b>	<b>FAMILY GETAWAY</b>	<b>UNWIND WEEKEND</b>
Lead emotional need	Lead emotional need	Lead emotional need	Lead emotional need
<b>EXHILARATION</b>	<b>PLAY/ EXHILARATION</b>	<b>PLAY</b>	<b>REFRESH</b>
Lead functional need	Lead functional need	Lead functional need	Lead functional need
<b>INTERESTING</b>	<b>ASPIRATIONAL</b>	<b>WITHIN MY MEANS</b>	<b>PHYSICALLY AVAILABLE</b>



**Capturing our stretch targets will require us to message around their core emotional needs and develop strategies to tackle their more challenging lead function drivers.**

# VISITOR FLOW Summary

The Buller River | Photo RoadyNZ

**Five visitor flow workshops were conducted and identified close to one hundred individual flows across Te Tai Poutini. These were based on qualitative insights from industry stakeholders and later entered into a GIS system.**

Fifty nine flows were mapped for the period during COVID-19 and 47 pre COVID-19. Discussions about the future focused on returning visitors and getting the pre COVID-19 flows re-established.

Comparing the flows pre COVID-19 with during COVID-19 (Figure 3) is a comparison of international versus domestic travel patterns. Most noticeable is that there are big similarities between the routes taken (due to limited transport options and pathways) and the attraction points they visit. However, the domestic visitors seem to spend more time in the northern part of Te Tai Poutini, and the international visitors continue on South more often and loop back through Queenstown. This observation is supported by tourism spending data that shows that the northern part of Te Tai Poutini has fared much better through the pandemic than Glacier Country. As international visitation resumes these flows will likely displace each other again as they did before the pandemic. This is worrying because the domestic market saved many tourism operators over the pandemic years and it would be smart for operators to continue to attract domestic visitors, even if their needs are different.

**Figure 3: Pre COVID-19 visitor flows**



**Figure 4: During COVID-19 visitor**



# Key findings across visitor flows

## ACCESS (ROAD, AIR, RAIL)

Access is one of the key challenges across the region. The workshops confirmed that getting to and around Te Tai Poutini was not always easy. As Figure 5 shows, Te Tai Poutini has a limited number of access points, which is a challenge especially when weather, natural events, or COVID-19 restrictions closed roads or cancelled flights, trains, and busses. Tourism operators on Te Tai Poutini must work in partnerships; for example with Waka Kotahi or Kiwirail, to ensure continuity of service. The top three regions that visitors enter from and leave to are Christchurch, Nelson Tasman, and Wanaka, in that order (Triptech 2021).



Figure 5: Key transport infrastructure and access on Te Tai Poutini





Dining in Greymouth | Photo Stew Nimmo

## ACCOMMODATION

Limited accommodation – in different areas and for different types – was a consistent challenge across Te Tai Poutini. With the closure of YHA hostels as well as other operators due to COVID-19 and some provides offering emergency housing after the floods, this pressure is likely to have increased and presents a real risk.

## EXPERIENCES

Some experiences were not what visitors expected, both before and during COVID-19, and there was room for improvement in the service quality. These are challenges for activity operators since they will need to adjust their product offering and staffing to cater to both domestic and international demands.

## MAIN TOURING ROUTEST SIGNAGE / INFORMATION

The feedback from some operators was that the visitors often did not know what was on offer on Te Tai Poutini and did not plan in enough time to do more than a few things. This was both for the group and the 'free and independent traveler' (FIT) markets. Wayfinding is a key flow topic because it allows stakeholders to steer flows, then by understanding where the different travellers get

their information, we can ensure that they get the information they need when they need it.

## 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 have shown that the pandemic has also affected how and when people plan to travel in the future. 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 and balance this as international visitors return.

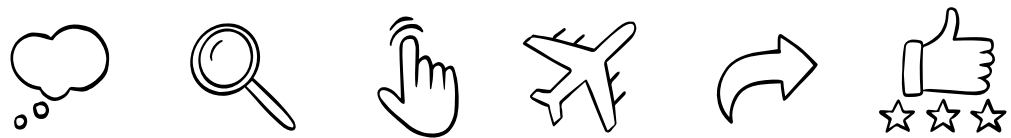
## UNPREDICTABILITY IN MARKETS

This challenge related to border closures, travel restrictions, and the new needs of visitors. Unfortunately, this is likely to remain for the foreseeable future as there will be new crises and challenges to address. It is vital that our destination management approach creates a system where we can monitor the current state of tourism on Te Tai Poutini in order to make adjustments and provide the needed support to operators.



Photo Franz Josef Wilderness Tours

## Customer journey map



*Dream > Research > Book > Pre-trip > Tai Poutini > Post-trip*

Visitors	SEARCH FOR INSPIRATION	EVALUATE OPTIONS	SELECT AND PAY	TRAVEL/ RESEARCH	EXPERIENCE AND SHARE	TRAVEL AND REVIEW
LOCAL OPERATORS	Share stories	Provide information	Booking systems	Travel service/info	Provide service	Gather guest feedback
INBOUND AGENTS	Promote destinations	Provide packages	One stop shop	Provide itinerary info	Problem solver/guide	Gather guest feedback
I-SITE		Provide information	Provide bookings	Provide information	Info and bookings	
DEVELOPMENT WEST COAST	Raise overall awareness	Provide links to providers			Information in destination	Market research
DEPARTMENT OF CONSERVATION		Information on activities	Hut/camp bookings		Manage sites and provide information	

## Everyone plays a role

The type of information sought from each of our key personas will be different and an important step will be to create guest journeys for each of them to ensure stakeholders can play their part in hosting them.

This is where in-destination management plays a key role in the destination management approach. With much focus on storytelling and bringing communities together and granting a voice to wider stakeholders, it ensures visitors feel connected to the region and its people. It provides continuous feedback to stakeholders and enriches the destination's engagement during the customer experience

phase. The visitor journey map highlights which stakeholders can play an active part and must be represented in the destination management reference group to ensure the aspirations are materialised in the real world. For example, modern visitor centres are no longer limited to physical buildings, rather they represent an assortment of touchpoints, from visitor ambassadors to tourism staff, mobile information centres, websites, social media and temporary sites for festivals. Ensuring there is consistency and continuity of the destination management vision on the frontline is essential.

# BRAND PROPOSITION + POSITIONING

**The identity of Te Tai Poutini is anchored in its stories and people, which are forged by the natural elements omnipresent in the region.**

The link between the physical characteristics, the people and culture ultimately define Te Tai Poutini's promise which is vehicled through our Untamed brand. The brand is expressed by values which need to be weaved into our storytelling and anchored in products, experiences, and narrative; thus bringing

the brand to life through real-life tourism products and services.

The positioning of the region is based in the alignment of those values with experiences, geography, culture, history and climate which make up the fibre of the destination. The positioning should reflect the identity of locals and a sense of pride. Much like its people, it should be unique and play a part in the wider NZ narrative. Having a special place like Te Tai Poutini, the untamed natural wilderness, makes Aotearoa's overall message stronger and more relevant.



Background photo: Maruia Hot Springs | Stewart Nimmo

# Te Tai Poutini narrative

The natural assets of Te Tai Poutini are a main drawcard.

'Rugged and wild' was one of the most recurring themes when consumers thought about Te Tai Poutini. They saw it as greener than any other region. People expected to find "exotic flora and fauna, untouched, beautiful scenery, great native forests and bird life

and awesome beaches". Te Tai Poutini was seen as "untamed, unspoiled, green, alive."<sup>2</sup> There was a sense that it is how it's always been, before people and development changed the landscape. This sentiment is already reflected in Te Tai Poutini's current branding.

Overall, Te Tai Poutini is synonymous with being one of the most beautiful and natural regions of New Zealand.



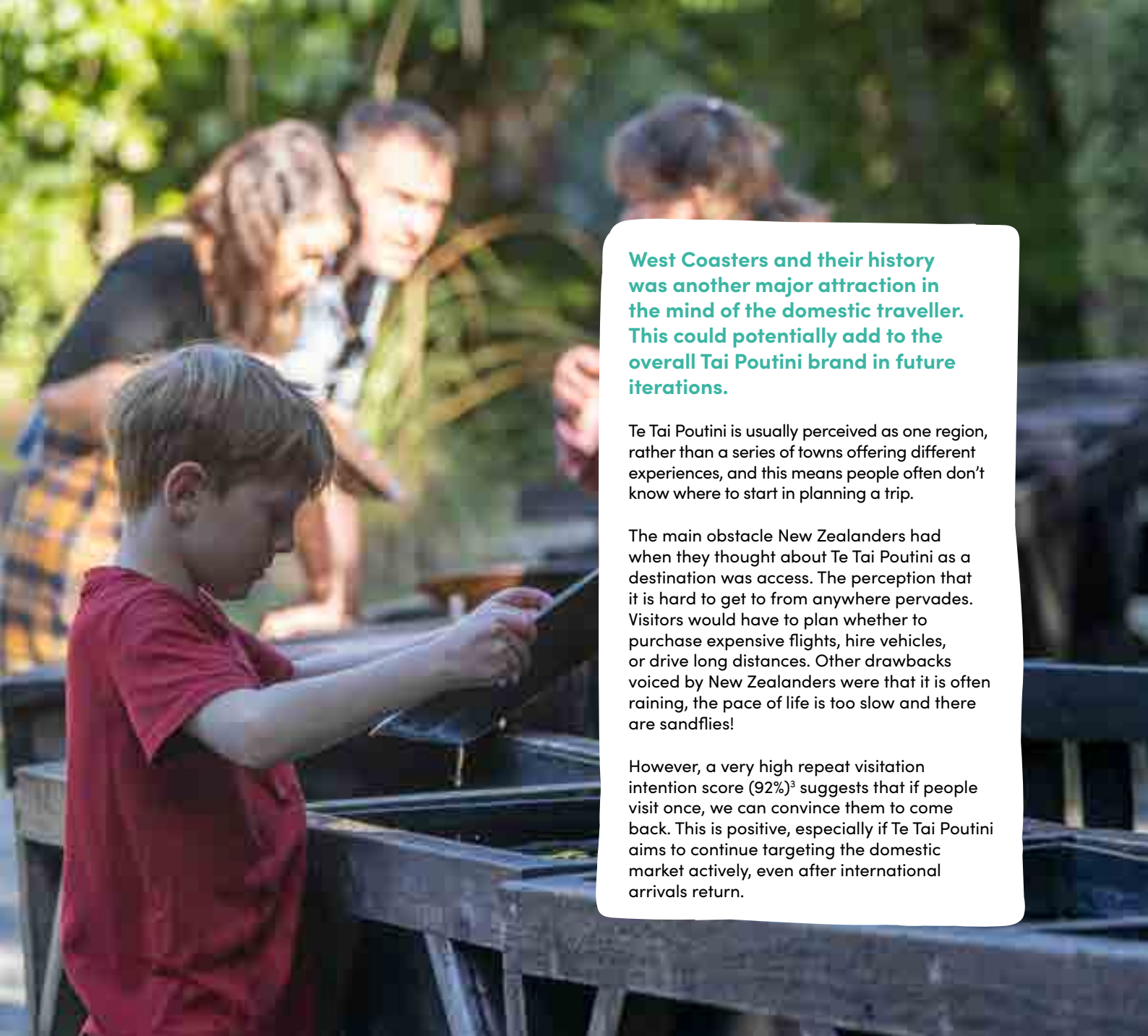
**WEST COAST**  
NEW ZEALAND  
UNTAMED NATURAL WILDERNESS

## Perceptions

- > *Rugged coasts*  
Rugged and wild, a place that had been moulded by the (sometimes) extreme conditions.
- > *Lush greens*  
That everywhere you look, it's greener than any other region, whether this be lush farmland or deep bush.
- > *Untouched vistas*  
A sense that it is how it's always been. That there is no other place where you can see as much of 'old New Zealand'... before people and development.

## Key Attractions

- > *Coasters are super friendly and helpful*  
Our people, Coasters, are seen as a unique bunch who are friendly, open, and interesting. Different perspectives and a different way of life, but open to 'outsiders'. Always happy to help.
- > *Pioneer history*  
We are seen as being one of the few places that have maintained a sense of pioneer character, through the likes of Shantytown and Reefton. Our history of exploration and pioneering spirit is unique.
- > *Interesting Coasters*  
Time and time again, what made us extra special was the interesting stories of the region that start at the pub and end up somewhere they'd never believe.



**West Coasters and their history was another major attraction in the mind of the domestic traveller. This could potentially add to the overall Tai Poutini brand in future iterations.**

Te Tai Poutini is usually perceived as one region, rather than a series of towns offering different experiences, and this means people often don't know where to start in planning a trip.

The main obstacle New Zealanders had when they thought about Te Tai Poutini as a destination was access. The perception that it is hard to get to from anywhere pervades. Visitors would have to plan whether to purchase expensive flights, hire vehicles, or drive long distances. Other drawbacks voiced by New Zealanders were that it is often raining, the pace of life is too slow and there are sandflies!

However, a very high repeat visitation intention score (92%)<sup>3</sup> suggests that if people visit once, we can convince them to come back. This is positive, especially if Te Tai Poutini aims to continue targeting the domestic market actively, even after international arrivals return.



## Tiaki Promise

The Tiaki Promise is a commitment to care for New Zealand, for now and for future generations. The DMP incorporates regenerative tourism principles at the heart of its mission. Our region will embrace the Tiaki Promise as part of New Zealand's commitment to taking care of our environment, our communities, and our culture.

The DMP will endeavour for Tai Poutini communities to come together and develop their own engagement towards our environment, culture, community, whilst actively contributing to the diversity of our economy. By developing a localised promise, not only will Te Tai Poutini adopt the principles of Tiaki but further expand these principles to protect the taonga that is Te Wai Pounamu.

# Situational analysis

There are significant differences between the three districts on Te Tai Poutini, which means that a differentiated approach is needed for each district (see Appendix A for details).

Having a solid base of domestic visitors contributes to a more resilient tourism sector. Te Tai Poutini will aim to encourage them to travel to Te Tai Poutini for some of their domestic trips, especially from our surrounding regions.

The South Island makes up 60% of total visitation to Te Tai Poutini – combined with Auckland, this means that it is 76% of the visitor industry covered.

## OUR TOP 5 DOMESTIC MARKETS 2021

**CANTERBURY 29%**

**AUCKLAND 16%**

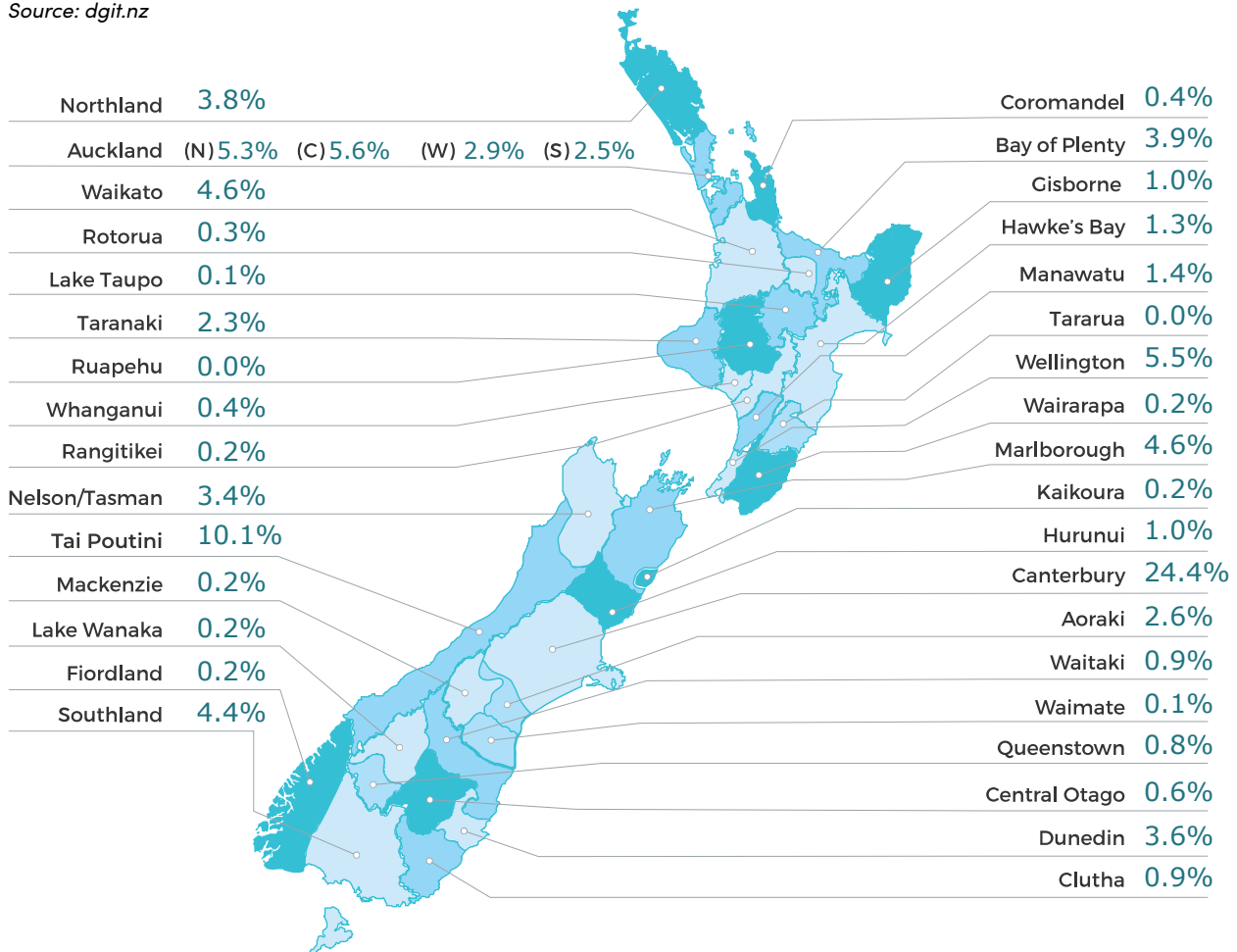
**TAI POUTINI 10%**

**WAIKATO & BAY OF PLENTY 9.3%**

**MARLBOROUGH & NELSON 8%**

**Figure 6: Where do they come from?**

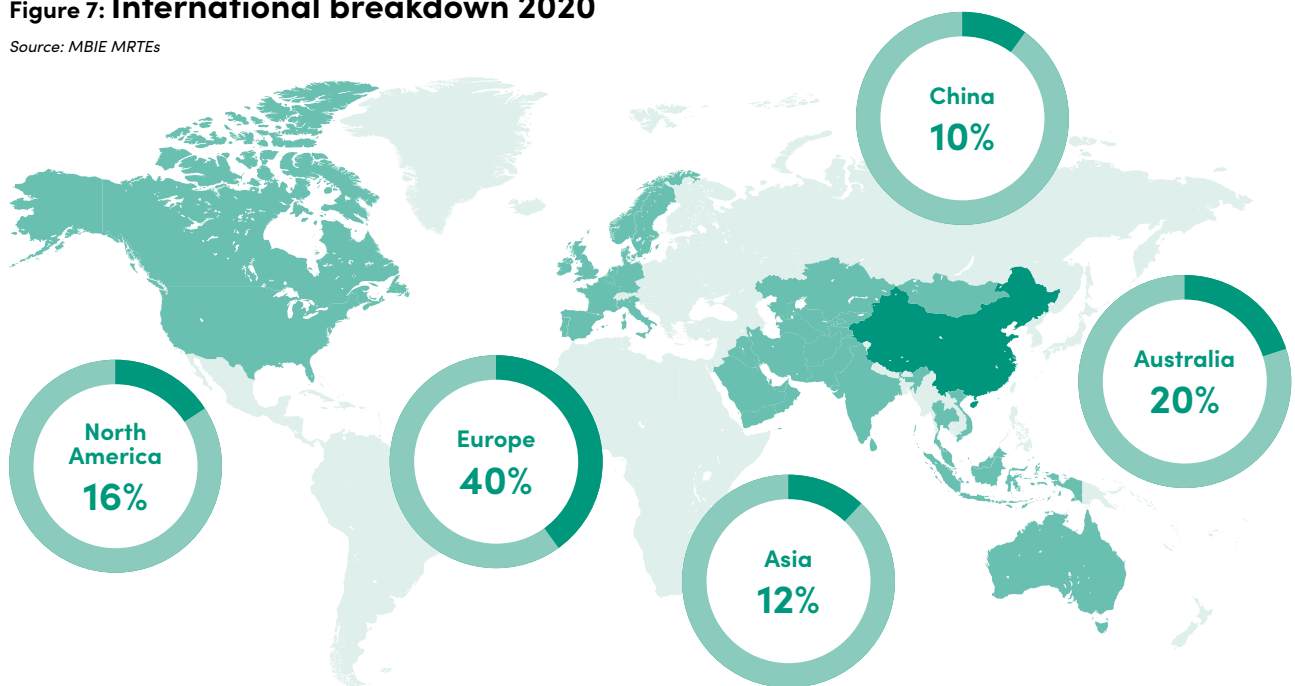
Source: *dgit.nz*



# Key international markets

Figure 7: International breakdown 2020

Source: MBIE MRTES



The spend analysis per country of origin does not vary per district. With most visitors to Te Tai Poutini hailing from western markets, this meant that Europe, Australia and North America made up 75% of visitor spend.

The key feeder markets are mature markets, with a strong predisposition to FIT rather than group touring and they are likely to make travel decisions independently.

Ironically, western markets have not been a focus in destination marketing over the last years. It was focussed on Asia, especially China and South-East Asia, however these markets only represent 21% of total spend on Te Tai Poutini.

4. Tourism Industry Aotearoa: Tourism Summit Aotearoa Scorecard 2018

5. Global Data "Trip.com Group Case Study including Trends, Motivations, Marketing Strategies, Opportunities and Challenges"

6. More Media World Travel Council : TRAVEL & TOURISM: ECONOMIC IMPACT 2021

## THE GLOBAL LANDSCAPE<sup>4</sup>

International departures will reach

**68%**

of the pre COVID-19 levels globally in 2022 and expected to improve to 2019 level

**82%** in 2023

**97%** in 2024

**101%** of 2019 levels by 2025

with a projected 1.5 billion international departures<sup>5</sup>

Tourism employs

**289 M**

people globally, accounting for 9% of global employment in 2021<sup>6</sup>

Oceania accounts for

**5.5%**

market share of all global travel

Tourism contributed

**6.1%**

to global GDP in 2021

# From status quo via sustainability to regeneration

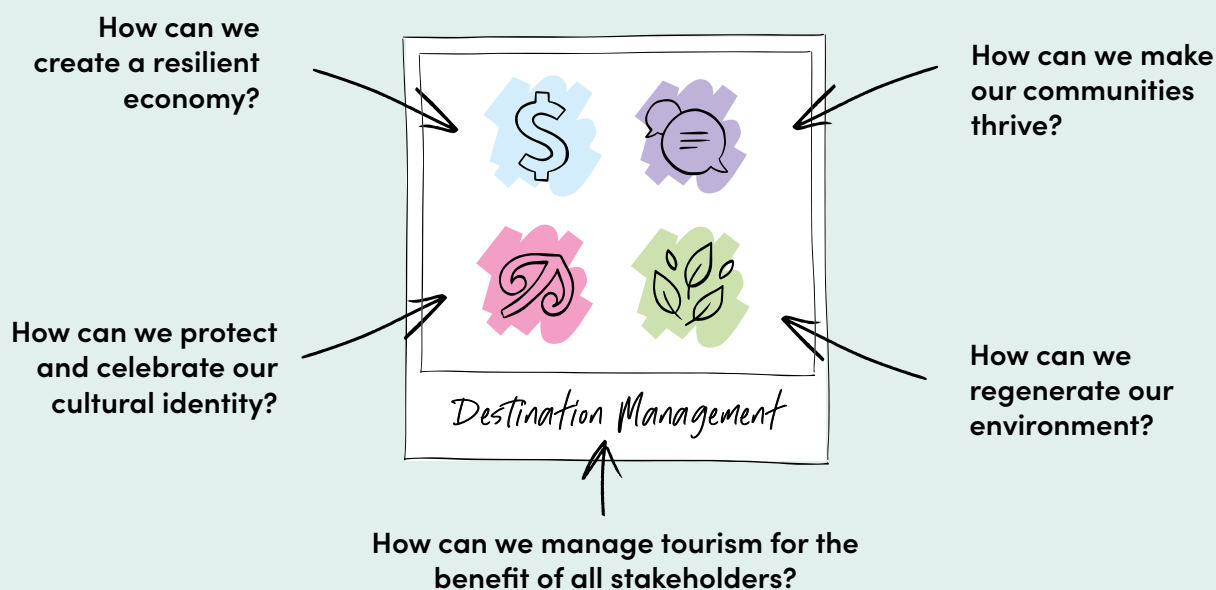
As part of the DMP process, we developed a sustainability framework for Te Tai Poutini that outlines the areas where we will set goals and take action – economic, social, cultural, environmental, as well as destination management.

The Destination management pillar is all about establishing our process for managing the destination

From status quo via sustainability to regeneration long-term and achieving goals in the other pillars. Figure 8 shows the pillars of this framework and the questions we are asking.

We consulted a variety of stakeholders on what the most important challenges and opportunities were in each of the four pillars. These responses provide a baseline for some of the goals in the action plan.

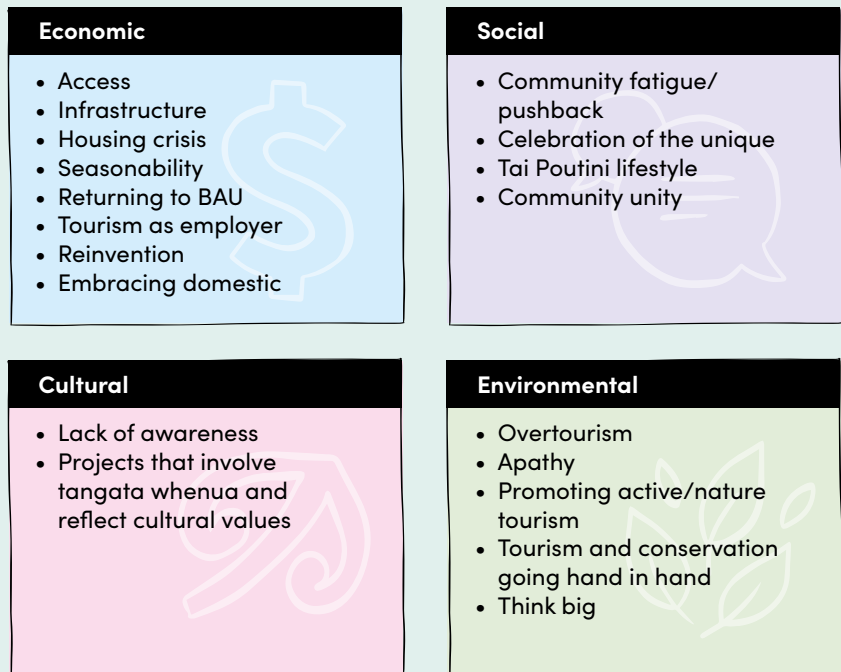
Figure 8: Tai Poutini sustainability framework





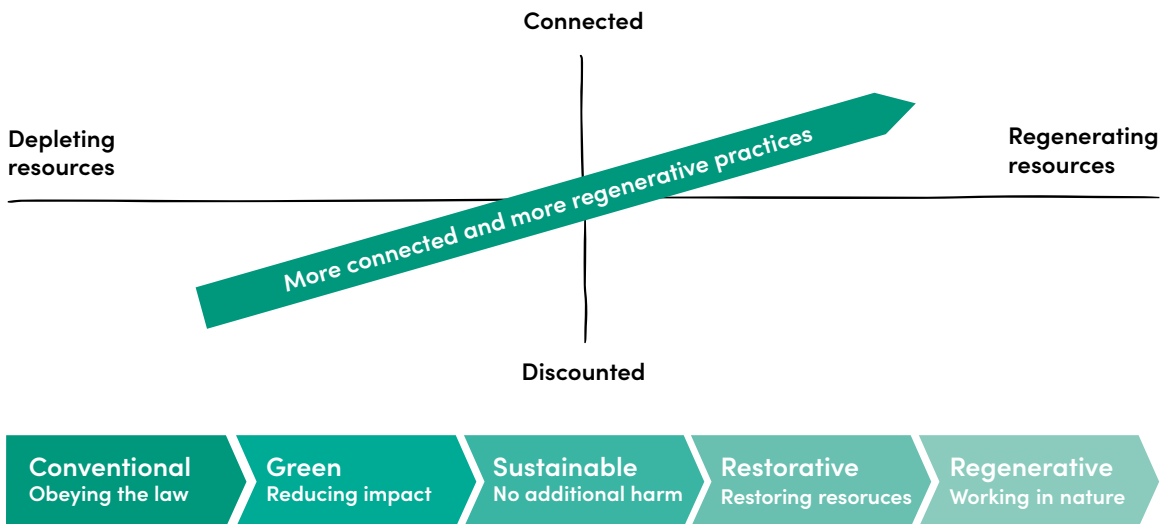
Over time the ambitions of the stakeholders may change and they will look beyond sustainability towards more regenerative approaches. Partnerships and collaboration will be key success factors in achieving these goals over time, because single stakeholders cannot create this kind of systemic change. Our collaboration approaches will need to change from disconnected individuals to connected actions to achieve lasting results. Figure 9 shows this progression from doing the bare minimum within the law to regenerative approaches on the right.

## The four pillars of development



**Figure 9: A continuum from depletion of resources to regeneration**

(based on Daniel Wahl)



The purpose of the journey is for each business to overlay this framework in their own business whilst understanding the role they play in the collective sustainable framework. Consequently, all businesses can support a regenerative Tai Poutini – even if each one is at different stage of development.

Developing a regional approach such as the **Marahau Pledge**, requires concerted action over multiple stakeholders that share a same vision, and ultimately, that are on the same journey. They may be at different stages of that journey, but will support each other to achieve a common goal.

# A regenerative approach

**A regenerative approach to tourism refers to the concept that tourism (operators and visitors) should leave a place better than it was before. Tourism should actively contribute to improving the quality of life of communities and the natural environment.**

For Te Tai Poutini the opportunity for tourism to improve cultural, environmental, social, and economic aspects of life needs to be realised, which is why we have specifically assessed and set goals in each area.

The goal is to align success in each of these to improve the overall well-being of the communities on Te Tai Poutini. This will require collaboration between stakeholders and joint efforts towards a common vision. The DMP outlines this vision and is the basis for stakeholders to come together.

# REGIONAL CHALLENGES + OPPORTUNITIES

Our data and findings show clear challenges for tourism on Te Tai Poutini in the past, and exciting opportunities to build back better in the future. We have listed them here according to the economic, social, cultural, and environmental pillars. However, some challenges impact across multiple areas.

# Pillar: Economic

## Challenges

### > Access

"The mountains that surround us are both a blessing and a curse". There is a perception among domestic visitors of Te Tai Poutini being difficult or time-consuming to travel to via road or air. While international markets may not hold this perception, the reality of Te Tai Poutini's distance from them, especially in a time of increasing awareness of air travel and fuel consumption, will also need to be overcome.

### > Infrastructure

Infrastructure has struggled to support the visitor volumes experienced in the past. Roading, carparks, bathrooms, rubbish and recycling require significant investment. Included in this is the ongoing national housing crisis; there has not been enough housing for residents, let alone seasonal tourism workers.

### > Lack of skilled workers

A big challenge in the recovery and longer-term tourism growth is the attraction and retention of skilled workers to Te Tai Poutini. This is a challenge across New Zealand and there is a lot of competition for workers.

### > Seasonality

The surge in visitor numbers over summer followed by quiet winters has made it difficult for many operators to sustain a year-round business, offer continued employment, or house workers. The effort to meet demand has undoubtedly affected the quality of the experiences in some instances.

### > Increased competition

Competition for tourists is growing with an increasing number of destinations vying for tourism dollars.

### > Lack of data

There is a clear lack of hard data enabling Tai Poutini communities to understand the value of tourism and the direct and indirect benefits that this industry generates for the region.

## Opportunities

### > Tourism as employer

The recovery of tourism employment opportunities and continued success of tourism in the region provides locals and new residents a greater diversity of employment and training pathways.

### > Reinvention

The pause enforced by the COVID-19 pandemic has allowed the space for stakeholders to reimagine tourism on Te Tai Poutini.

### > Embracing domestic

The opportunity to continue to serve the domestic market that has emerged during COVID-19 should be strengthened. Many operators are pleasantly surprised at seeing Kiwis engage with their own country.

### > Digital experience

The digital experience is becoming a more important part of the overall tourism experience, which means that we need good connectivity and seamless booking processes.

### > Real time feedback

Tourism data is often delayed and only tells us what happened in the past. With new technologies, it is increasingly possible to develop faster measurement tools to better understand consumer behaviours, key areas for development, opportunities and market failures. This helps us to gain a better understanding of the economy and how to yield consumer reviews and referrals most efficiently.

### > International visitation

Expectations are that international travel will reach 3.9 million by 2026. Te Tai Poutini needs to continue to position itself as an essential part of the New Zealand experience, investing to lift the quality, range and diversity of experiences.

# Pillar: Social

## Challenges

- **Loss of social licence**  
Community members have become apprehensive about returning to high visitor numbers. Better data is needed to show the direct and indirect impact of tourism.
- **Loss of people/community**  
It is not overstating it to say that some communities have been decimated by a lack of tourism due to the COVID-19 pandemic. This leads to staff shortages for tourism businesses and other social issues, the degradation of communities and quality of life.
- **Seasonality**  
Operators report mental health issues and burnout due to the extremes of activity traditionally required between high season and low season. Operators also report a lack of qualified workforce and interruption of service.
- **Connecting Te Tai Poutini to the world**  
Te Tai Poutini has a small population for the level of infrastructure that is required to move people to/from and around the region. Future infrastructure developments must consider the tourism requirements and ensure access to support connectivity and wider services, with airlines, road access and support services.

## Opportunities

- **Community unity**  
There is a strong "in-it-together" feeling of each community brought about by working together to respond to both COVID-19 and natural disaster events. The motivation to build on this and have each district of Te Tai Poutini work more collaboratively in future should be harnessed.
- **Celebration of the unique Tai Poutini lifestyle/character**  
This unique selling point is often just as, if not more, memorable for visitors as the natural landscape. Telling the stories of our people presents a great opportunity to differentiate ourselves in the market.
- **Community spirit and pride of place**  
As seen through the eyes of visitors and for visitors, this enables communities to learn more about their own communities and derive a sense of community pride and belonging. Tourism creates economic opportunities to improve the services to locals by enabling scalability in locations that have low population base, i.e. local markets, specialty retail and artisans.

# Pillar: Cultural

## Challenges

- **Lack of Māori cultural experiences**  
The overwhelming response was that far more attention and investment needs to be put onto cultural aspects and the Māori heritage of Te Tai Poutini.
- **Lack of awareness and support for cultural attractions**  
In general, there was a perceived lack of focus on the rich cultural history on Te Tai Poutini.

## Opportunities

- **Plans for overall heritage strategy**  
The unique Tai Poutini history and heritage is currently underutilised and can become a stronger asset for tourism on Te Tai Poutini.
- **Māori tourism involvement**  
High enthusiasm for this project demonstrates that there is further appetite for developments and initiatives of this nature. The project is likely to add key attractions for visitors in the coming years.

# Pillar: Environmental

## Challenges

- **Overtourism**  
Too many people degrading the natural estate was the most significant challenge for Te Tai Poutini's environment. This included freedom campers' unsavoury bathroom practices, litter and visitor disregard.
- **Lack of a shared vision**  
The tourism industry remains fragmented, there is a lack of a collective vision that encompasses stakeholders from across organisations, councils, private industry, local government, national partners, advocacy groups and mana whenua.
- **Climate Change**  
This will affect the globe but specifically Te Tai Poutini economy and travel, with more frequent adverse weather effects. Distribution networks are seeking safe destinations to avoid disruptions and significant costs to businesses, and therefore consideration of climate change effects is important. At the same time, a significant shift in consumer behaviour and preference has already begun with travellers seeking more sustainable travel options and looking to create positive impacts with their travels.

## Opportunities

- **Promoting active/nature tourism**  
Attracting the kind of visitor who appreciates and respects the environment should be targeted further, cycle and walking trails are a big part of this.
- **Tourism/Conservation going hand in hand**  
We can build further on tourism's ability to educate visitors about the importance of protecting natural assets. There is also opportunity in offering diverse employment as evidenced by the Jobs for Nature programme (Government scheme to support tourism workers during COVID-19).
- **Think big – Te Tai Poutini as a carbon neutral destination**  
Te Tai Poutini has the opportunity to position itself as a leader in carbon neutral tourism. Market trends are showing that visitors are travelling more consciously, and operators are starting their journeys towards carbon neutrality.

# STRATEGIC Plan

The following pages add detail to the priorities and projects designed to grow and sustain tourism on Te Tai Poutini.

Together, these five strategic themes and nineteen focus areas will form the basis for our action plans over the coming 1-3 years. Each of the strategic themes and focus areas will play out differently in

the three Tai Poutini districts.

We will work with the stakeholders from each district to adapt programmes to their needs to ensure that tourism activities match the local community vision. In addition to the regional focus, there are a range of strategies that are targeted at specific types of experiences or work to enhance certain types of flows.

## PILLAR:

### Regional leadership development and co-ordination



## THEME 1:

Establish a Destination Management System

*Te whakatūnga o tētahi pūnaha  
Whakahaere i te Tauranga*

The DMP takes a continuous improvement approach that will allow tourism to thrive and create maximum positive impacts over time.

## FOCUS AREAS

- Leadership and responsibilities
- Monitoring and reporting
- Visitor types, volumes and activities
- Brand development
- Consumer marketing initiatives
- Trade marketing initiatives
- Planning regulations and development
- Climate change adaptation and risk management

## OUTCOMES

- Clear roles and responsibilities defined for tourism stakeholders
- Comprehensive measurement system established and monitored
- Clear marketing and management mechanisms established
- Alignment of planning regulations for tourism
- Clear plans for climate change and risk adaptation
- Engagement and leadership from the community

## PILLAR:

### Economic development



## THEME 2:

Support economic recovery and growth

*Te taumanu me te  
tipuranga ā-ōhanga*

A tourism industry that is resilient and future-proof, that can respond to challenges and take advantage of opportunities, creating jobs and economic benefits for communities.

## FOCUS AREAS:

- Growing resilience
- Improving access
- Partnering for success
- Building operator capability
- Innovating for the future

## OUTCOMES:

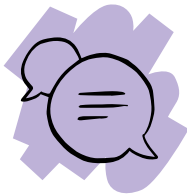
- The tourism industry is resilient and future-proof, creating jobs and economic benefits
- The tourism industry is connected and works with partners to deliver value
- Our operators have the skills and knowledge to deliver on stakeholder expectations



# Vision

By 2030, the visitor economy helps to enrich the lives of residents, supports our communities to thrive, connects and protects our cultural heritage, and helps to regenerate our natural assets.

**PILLAR:**  
**Social development**



**THEME 3:**

Enhance community engagement and social benefits

*Te whakakaha i te toronga a te hapori me ngā hua ā-pāpori*

Tourism enhances the social values held by communities – honesty, integrity, friendliness, independent thinking, and pride in the community. All stakeholders have the resources needed to support their communities, and that communities benefit from and support tourism.

**FOCUS AREAS:**

- Growing resilience
- Improving access
- Partnering for success
- Building operator capability
- Innovating for the future

**OUTCOMES:**

- The tourism industry is resilient and future-proof, creating jobs and economic benefits
- The tourism industry is connected and works with partners to deliver value
- Our operators have the skills and knowledge to deliver on stakeholder expectations

**PILLAR:**  
**Cultural development**



**THEME 4:**

Celebrate our cultural heritage

*Te whakatairanga i ngā taonga tuku iho ā-ahurea*

Culture is an underused asset. We aim to have mana whenua actively engaged in tourism and have Te Tai Poutini's unique cultural stories told clearly and powerfully. That visitors and communities recognise and value our unique culture as a key tourism asset on Te Tai Poutini.

**FOCUS AREAS:**

- Position cultural heritage as a key asset
- Mana whenua engagement
- Telling all our stories better

**OUTCOMES:**

- Mana whenua is strongly engaged in tourism
- We tell all Te Tai Poutini's unique cultural stories to drive visitation
- Culture is a key tourism asset and specific to the region

**PILLAR:**  
**Environmental development**



**THEME 5:**

Protect our natural assets

*Te tiaki i ā tātou rāwa o te ao tūroa*

Our outstanding natural environment is our main asset and will continue to attract visitors. To benefit from this long-term, tourism operators and stakeholders must work to educate visitors about the environment and protect our natural assets for future generations.

**FOCUS AREAS:**

- Regenerating nature
- Educating visitors

**OUTCOMES:**

- Tourism helps to protect our natural assets and makes them accessible
- Tourism tells the story of our tourism assets and enables visitors and communities to participate in their protection
- The natural environment attracts visitors

# THE ACTION PLAN AND PRIORITY PROJECTS



## Action Plan themes



### Establish a Destination Management system

*Te whakatūnga o tētahi pūnaha  
Whakahaere i te Tauranga*



### Support economic recovery and growth

*Te taumanu me te tipuranga ā-ōhanga*



### Enhance community engagement and social benefits

*Te whakakaha i te toronga a te hapori  
me ngā hua ā-pāpori*



### Celebrate our cultural heritage

*Te whakatairanga i ngā taonga tuku iho ā-ahurea*



### Protect our natural assets

*Te tiaki i ā tātou rawa o te ao tūroa*

# Theme One



## Establish a destination management system

### Te whakatūnga o tētahi pūnaha

FOCUS  
AREA



#### Leadership and responsibilities

Te hautūtanga me ngā haepapa

Actions	Success measures
Establish a destination reference group	<ul style="list-style-type: none"><li>• Destination reference group formed</li></ul>
Establish supporting regional and niche task forces to drive implementation	<ul style="list-style-type: none"><li>• Task forces established</li></ul>

FOCUS  
AREA



#### Monitoring and reporting

Te aroturuki me te tuku pūrongo

Actions	Success measures
Operator sentiment monitoring	<ul style="list-style-type: none"><li>• Baseline established</li><li>• Survey conducted - annually</li></ul>
Community sentiment monitoring	<ul style="list-style-type: none"><li>• Baseline established</li><li>• Survey conducted annually</li><li>• 75% of Coasters perceive tourism to be good for Te Tai Poutini</li></ul>
Visitor satisfaction monitoring	<ul style="list-style-type: none"><li>• Baseline established</li><li>• NPS / review tracking conducted annually</li><li>• Achieve Net promoter score of 85%</li></ul>

FOCUS  
AREA



#### Visitor types, volumes and activities

Ngā momo manuhiri, te tapeke me ngā ngohe

Actions	Success measures
Monitor visitor types and volumes	<ul style="list-style-type: none"><li>• Target visitor types agreed</li></ul>
Develop flow-based plans for top 5 priority flows with key operators	<ul style="list-style-type: none"><li>• Target visitor volumes agreed</li></ul>
Identify common visitor personas and patterns	<ul style="list-style-type: none"><li>• Target visitor activities agreed</li></ul>



## Brand development

Te whanaketanga o te tuakiri

Actions	Success measures
Invest in Untamed Natural Wilderness brand	<ul style="list-style-type: none"> <li>Brand guidelines and tone of voice</li> </ul>
Refresh brand identity with new imagery aligned with persons	<ul style="list-style-type: none"> <li>New imagery</li> </ul>
Review icons strategy to support brand development	<ul style="list-style-type: none"> <li>New icons and sub-icons to support regional development and achieve regional dispersal</li> </ul>
Brand campaign to connect with kiwis and Australians	<ul style="list-style-type: none"> <li>Perception research and monitoring</li> </ul>
PR activity to increase awareness for Te Tai Poutini and it's people	<ul style="list-style-type: none"> <li>EAV 600k per annum</li> </ul>
Social media presence	<ul style="list-style-type: none"> <li>Achieve 30k followers on Instagram</li> </ul>



## Consumer marketing initiatives

Ngā kaupapa whakatairanga ki ngā kiritaki

Actions	Success measures
Create consumer journey maps to better understand consumer behaviours	<ul style="list-style-type: none"> <li>New consumer journey map developed</li> <li>Identify key touchpoints and actors</li> </ul>
Consumer campaign	<ul style="list-style-type: none"> <li>Always on campaign with focus on holidays</li> </ul>
Lead acquisition	<ul style="list-style-type: none"> <li>Marketing automation and content plans</li> </ul>
Consumer newsletter	<ul style="list-style-type: none"> <li>Six newsletters per annum</li> </ul>
New consumer website	<ul style="list-style-type: none"> <li>Refresh website focused on consumer</li> </ul>
Annual visitor guide	<ul style="list-style-type: none"> <li>New visitor guide</li> </ul>
SEO strategy	<ul style="list-style-type: none"> <li>Implement SEO strategy</li> </ul>



## Planning regulations and development

Te waeture mō te whakamahere me te whanaketanga

Actions	Success measures
Work with councils to incorporate tourism goals in long-term plans	<ul style="list-style-type: none"> <li>Tourism projects are included in LTPs and annual plans</li> </ul>
Engage with connected industries to drive alignment	<ul style="list-style-type: none"> <li>Regular meetings with other sectors held, e.g. mining, agriculture, education</li> </ul>

## Climate change adaptation and risk management

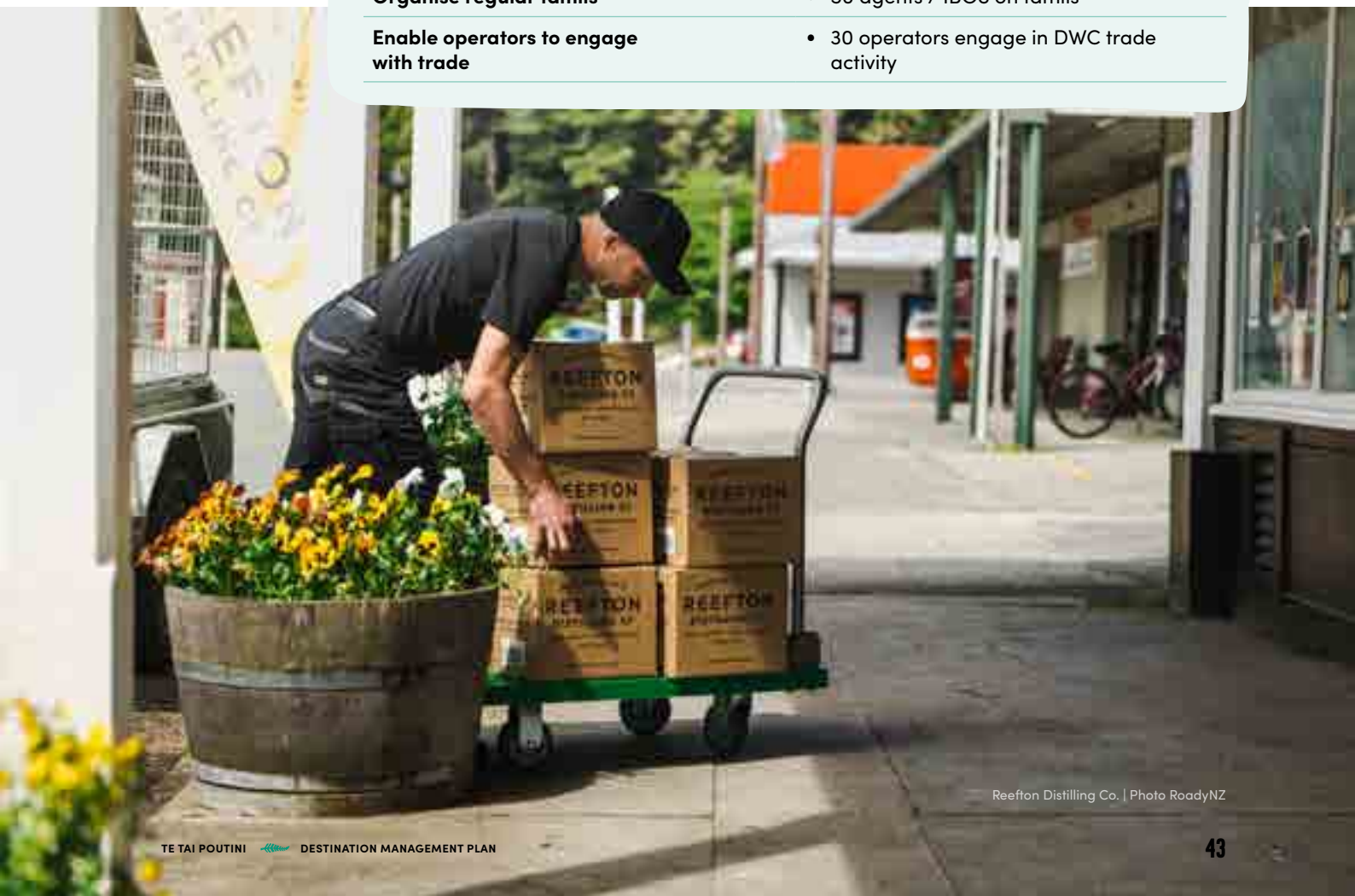
Te urutau ki te āhuarangi hurihuri me te whakahaere i ngā tūraru

Actions	Success measures
Create list of all risks to tourism sector on Te Tai Poutini and prioritise	<ul style="list-style-type: none"> <li>• Full risk inventory established for the tourism industry</li> </ul>
Complete risk assessment with stakeholders for tourism sector by sub-region and develop contingency plans for highest risks	<ul style="list-style-type: none"> <li>• Contingency plans prepared and available to stakeholders</li> </ul>

## Trade marketing initiatives

Ngā kaupapa tauhokohoko

Actions	Success measures
International trade program	<ul style="list-style-type: none"> <li>• Implement an international trade programme</li> </ul>
Agent trainings	<ul style="list-style-type: none"> <li>• Training for 2,500 agents offered</li> </ul>
Attend offshore trade events in top 5 markets	<ul style="list-style-type: none"> <li>• Attendance in partnership with Tourism New Zealand</li> </ul>
IBO sales visits	<ul style="list-style-type: none"> <li>• 12 activities annually</li> </ul>
TECNZ Conference, Trenz, IBO Days, TIA Summit	<ul style="list-style-type: none"> <li>• Attend 4 industry events per annum</li> </ul>
Trade newsletter	<ul style="list-style-type: none"> <li>• 4 annual trade newsletters distributed</li> </ul>
Organise regular famils	<ul style="list-style-type: none"> <li>• 50 agents / IBOS on famils</li> </ul>
Enable operators to engage with trade	<ul style="list-style-type: none"> <li>• 30 operators engage in DWC trade activity</li> </ul>



# Theme Two



## Support economic recovery and growth

Te taumanu me te tipuranga

FOCUS AREA



### Growing resilience

Te whakakaha i te aumangeatanga

Actions	Success measures
Grow visitor yield	<ul style="list-style-type: none"> <li># higher yield per visitor</li> </ul>
Attract new tourism businesses	<ul style="list-style-type: none"> <li># of new tourism businesses</li> </ul>
Diversify experiences and segments	<ul style="list-style-type: none"> <li>More diverse visitor base (domestic and international)</li> <li>New experiences created</li> </ul>
Disperse visitors regionally	<ul style="list-style-type: none"> <li>Higher visitor yield outside hotspots</li> <li>Greater awareness of remote areas</li> <li>Visitor numbers through occupancy providers</li> </ul>
Implement regional events strategy	<ul style="list-style-type: none"> <li>Implement regional events plan</li> <li>Support the development of 6 new events on Te Tai Poutini</li> </ul>

FOCUS AREA



### Improving access

Te whakapakari i te whai wāhitanga

Actions	Success measures
Monitoring transport capacity on Te Tai Poutini – air, public road transport, rail	<ul style="list-style-type: none"> <li>Transport capacity dashboard developed, and gaps addressed</li> </ul>
Monitoring for planned closures and supporting impacted stakeholders	<ul style="list-style-type: none"> <li>Proactive monitoring in place to predict impacts on tourism</li> <li>Information updates provided to tourism operators and communities</li> </ul>
Develop wayfinding strategies	<ul style="list-style-type: none"> <li>Wayfinding requirements identified by district and key traveller type</li> <li>Digital and physical options explored and priced</li> </ul>



## Partnering for success

Te mahi tahi e angitu ai

Actions	Success measures
Engage and align with national stakeholders	<ul style="list-style-type: none"> <li>Formal partnerships with key national stakeholders are made or maintained (MBIE, MFE, DOC, TNZ, TIA, CHNZ, etc.)</li> </ul>
Engage and align with local stakeholders	<ul style="list-style-type: none"> <li>Formal partnerships or agreements with local stakeholders on tourism projects</li> </ul>
Engage with surrounding RTOs	<ul style="list-style-type: none"> <li>Active in the "Top of the South" group</li> <li>Partnership with ChristchurchNZ</li> </ul>
Encourage collaboration amongst operators	<ul style="list-style-type: none"> <li>Operators collaborate on projects and packages great regional connections</li> </ul>
Lead Tai Poutini Tourism Summit Annual Event	<ul style="list-style-type: none"> <li>100 attendees</li> </ul>
Develop co-investment partnership with industry	<ul style="list-style-type: none"> <li>Reach \$100k co-investment in DWC activity</li> </ul>



## Building operator capability

Te whakapakari i ngā pūkenga whakahaere

Actions	Success measures
Provide practical training for operators	<ul style="list-style-type: none"> <li>Service levels increase – guest measures</li> <li>Operators confidence improves – survey participation in DWC-led professional development programmes</li> <li>6 programs delivered – reaching over 100 participants</li> </ul>
Provide professional development for owners	<ul style="list-style-type: none"> <li>Owner confidence improves (tourism sentiment index)</li> </ul>
Encourage enrolment in quality programmes	<ul style="list-style-type: none"> <li>75% of businesses signed up to Tiaki Promise</li> <li>75% of business signed up to Tourism Sustainability Commitment</li> <li>80% of businesses Qualmark registered</li> </ul>

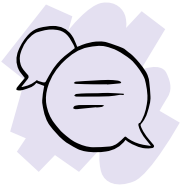


## Innovating for the future

Te auaha mō te ākengokengotanga

Actions	Success measures
Provide training for innovation	<ul style="list-style-type: none"> <li>Innovation training programmes offered</li> <li>Cross-industry innovation sessions held to foster collaboration</li> </ul>
Encourage tourism start-ups on Te Tai Poutini	<ul style="list-style-type: none"> <li>Tourism incubator or accelerator programme planned</li> <li># of start-ups in tourism rises</li> </ul>
Connect with the next generation	<ul style="list-style-type: none"> <li>YES engaged in tourism</li> </ul>

# Theme Three



## Enhance community engagement and social benefits

Te whakakaha i te toronga a te

FOCUS  
AREA



### Restoring and managing community trust

Te whakahaumanu me te ārahi i te whakapono o te hapori

#### Actions

Community sentiment monitoring

#### Success measures

- Community sentiment baseline established
- Survey conducted annually
- Goals set to improve on gaps
- 75% of Coasters perceive tourism to be good for Te Tai Poutini

Involve communities in local tourism planning

- Community representation on local tourism groups

FOCUS  
AREA



### Operators support their communities

Ngā kaiwhakahaere me ō rātou hapori

#### Actions

Operators support community projects and give back

#### Success measures

- Operator support for community projects baseline recorded and reported



# Theme Four



## Celebrate our cultural heritage

Te whakatairanga i ngā taonga tuku

FOCUS  
AREA

### Position cultural heritage as a key asset

Te whakanohonga o ngā taonga tuku iho ā-ahurea hei rawa tāpua

#### Actions

Tell authentic cultural stories

#### Success measures

- Development of regional cultural maps and narrative

FOCUS  
AREA

### Mana whenua engagement

Te toronga ki te mana whenua

#### Actions

Overlay Tikanga Māori and Te Reo Māori on strategies

#### Success measures

- Placenames and concepts presented bi-lingual

FOCUS  
AREA

### Telling all our stories better

Te whakanikonga o te kōrerotanga o ā tātou kōrero katoa

#### Actions

Support operators and communities in telling their stories

Engaging indigenous and non-indigenous tourism operators

#### Success measures

- Storytelling guides developed for operators
- Storytelling workshops held
- Support cultural narrative for all businesses

# Theme Five



## Protect our natural assets

Te tiaki i ā tātou rawa o te ao tūroa

FOCUS AREA



### Regenerating nature

Te whakarauora anō i te taiao

#### Actions

**Operators support natural regenerating projects**

**Operators measure their footprint and reduce impact**

#### Success measures

- Operator support for regeneration projects baseline recorded and reported
- # operators measuring their footprint baseline established
- Growth in operator #s over time
- Measurable reductions over time

FOCUS AREA



### Educating visitors

Te whakaako i ngā manuhiri

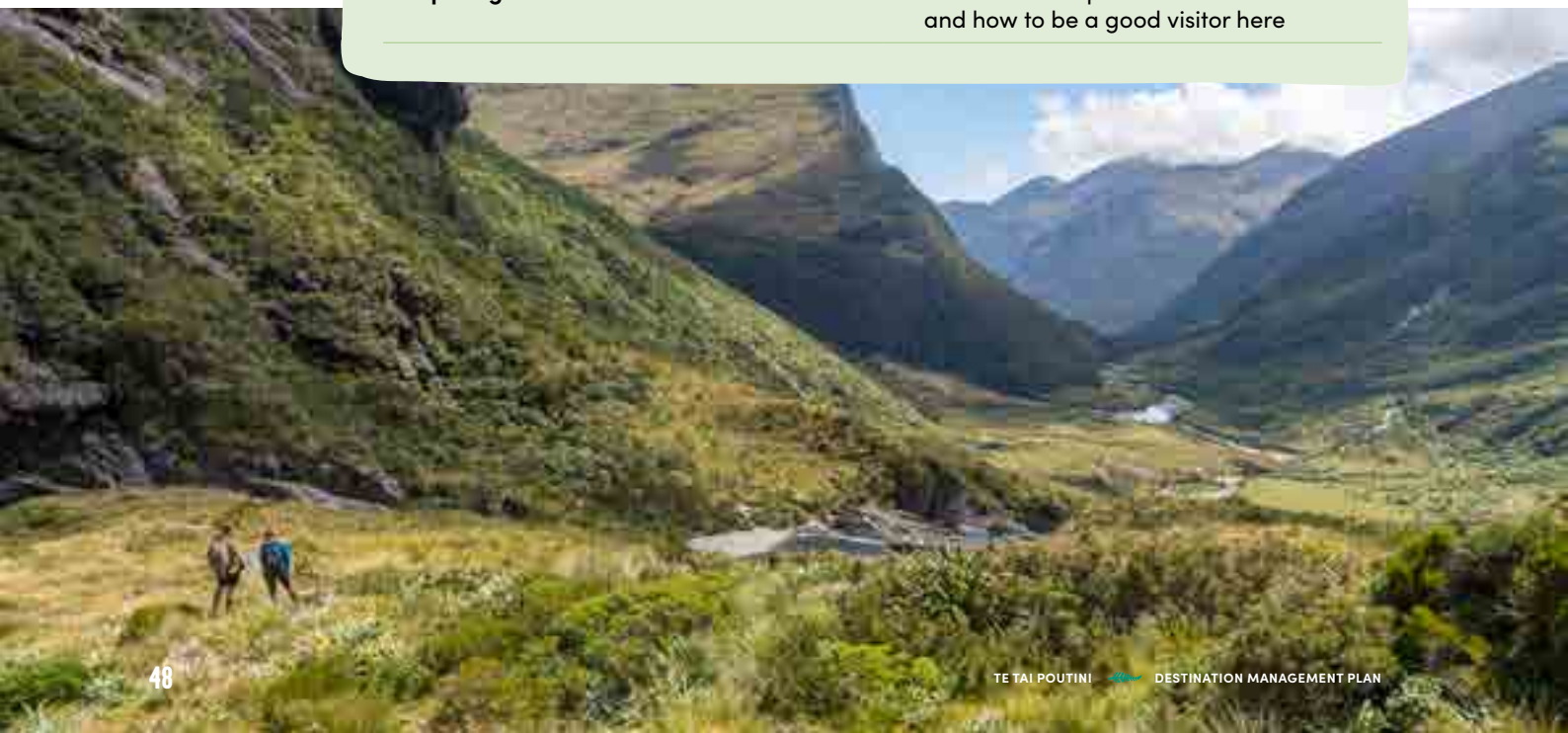
#### Actions

**Roll out Tiaki values across Te Tai Poutini**

**Prepare guides for Tai Poutini visitors**

#### Success measures

- More businesses demonstrating Tiaki values
- Guests educated on Tiaki values and how they relates to Te Tai Poutini
- Content developed on Tai Poutini values and how to be a good visitor here



# Priority projects and activities 2023

To achieve the goals and outcomes identified in the previous section, there is a range of projects already identified that can help Te Tai Poutini to achieve the desired impact.

Key projects have positive and lasting impacts on more than one district or community. We have suggested the following as priority projects for destination management and will work with stakeholders to establish the roles and responsibilities to implement these.

PROJECT	PURPOSE	ACTIVITIES	METRICS
<b>ESTABLISH DESTINATION MANAGEMENT REFERENCE GROUP</b>	A reference group will guide the implementation of the projects and objectives set out in this plan.	<ul style="list-style-type: none"> <li>• Develop terms of reference</li> <li>• Identify members and establish group</li> </ul>	<ul style="list-style-type: none"> <li>• Group established, regular meetings held, positive feedback from stakeholders</li> </ul>
<b>MEASURE AND IMPROVE SUSTAINABILITY ACROSS THE SECTOR</b>	Conduct baseline assessments and set improvement goals. Work with tourism operators to measure their footprints and start along this journey.	<ul style="list-style-type: none"> <li>• Identify businesses that are already measuring sustainability</li> <li>• Start pilot programme to encourage more businesses to measure footprints</li> <li>• Assess regional footprint</li> <li>• Set up monthly courses to bring operators together</li> </ul>	<ul style="list-style-type: none"> <li>• # operators measuring carbon</li> <li>• # operators zero carbon certified</li> <li>• # of operators signed up to TSC Overall carbon footprint</li> <li>• Climate mitigation plan</li> </ul>
<b>BUILDING OPERATOR CAPACITY</b>	Training and networking to enable tourism operators to optimally drive their business, e.g. business model reinvention, strategic collaboration, sustainability, and market research topics.	<ul style="list-style-type: none"> <li>• Training needs analysis</li> <li>• Monthly courses to bring operators together</li> <li>• Training success analysis – impact and satisfaction</li> </ul>	<ul style="list-style-type: none"> <li>• Guest satisfaction,</li> <li>• NPS scores</li> <li>• Learner feedback on courses</li> <li>• Course attendance</li> </ul>
<b>INNOVATION ECO-SYSTEM FOR TOURISM</b>	A tourism innovation eco-system on Te Tai Poutini to help existing businesses improve and create opportunities for new businesses to emerge.	<ul style="list-style-type: none"> <li>• Establish pilot programme</li> </ul>	<ul style="list-style-type: none"> <li>• Number of accelerator programmes run, number of innovation training sessions, number of graduate start-ups</li> </ul>
<b>WORKFORCE DEVELOPMENT FOR TOURISM</b>	Attract workers to the region and retain those that are already living here. Develop locals to work in the tourism sector by making it an attractive industry for work.	<ul style="list-style-type: none"> <li>• Work with industry to identify skills shortages on Te Tai Poutini</li> <li>• Work with national partners (e.g. Go with Tourism) to identify what is holding staff back from moving to Te Tai Poutini</li> <li>• Identify training possibilities for locals who want to switch to the tourism industry or want to upskill to more senior positions</li> </ul>	<ul style="list-style-type: none"> <li>• Number of jobs created</li> <li>• Positive community sentiment on tourism</li> </ul>

APPENDIX A

# DISTRICT PERSPECTIVES

## Buller

Punakaiki River. Photo BareKiwi.

**Buller district covers Westport, Karamea, Reefton and Inangahua Junction. Westport is the second largest town on Te Tai Poutini, home to 45% of the district population. The district is home to two of the regional icons, the Ōparara Arches and the Punakaiki Rocks and Blowholes. It is an access point from Nelson and Lewis Pass.**

With 143 establishments, Buller is home to 33% of all accommodation supply on Te Tai Poutini. With 380 rooms, it has 19% of the commercial accommodation capacity.

Buller has 27 recorded product/tourism experiences, including DOC trails, and paid attractions, and 22% of the total supply of all Tai Poutini activities.

International visitors represented 38% (\$26m) of the total tourism district spend whilst domestic visitors made up 62% (\$42m). Buller was the least reliant on the visitor sector with only \$68m annual spend.

**Figure 10: Total visitation**

Prior to COVID-19, total visitation to the district was 2% of the total South Island visitation at 766k visitors, made up of:

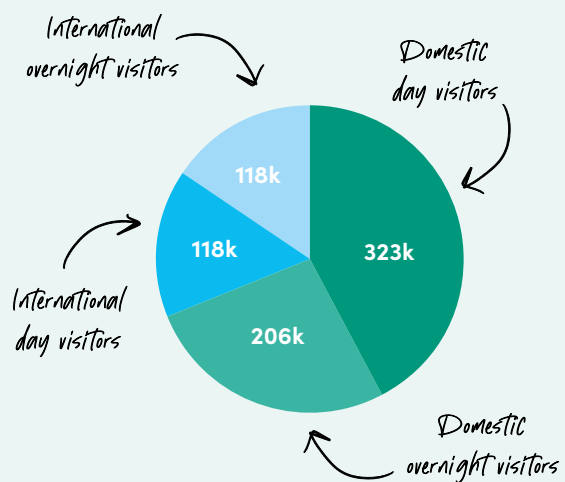
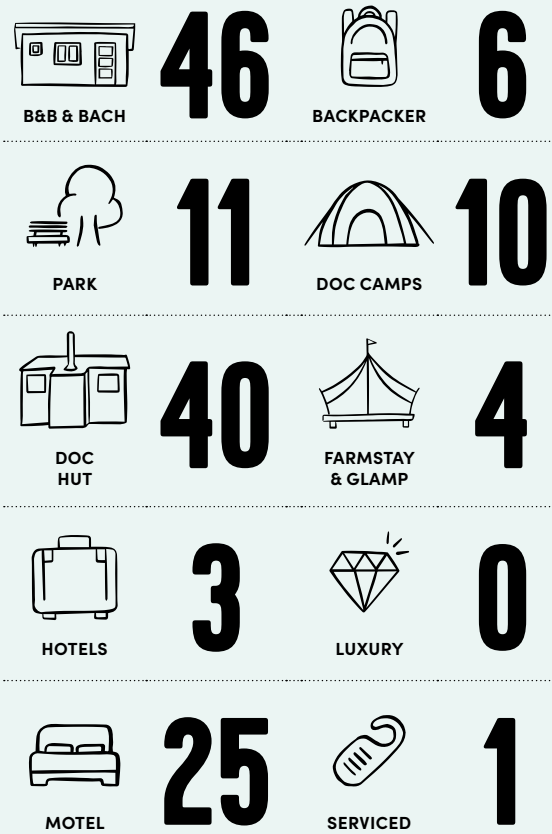




Figure 11:  
Accommodation providers | Buller



## Challenges and opportunities

### Strengths

- Icons
- DOC investment and tracks
- Cycling offering (Heaphy track, Old Ghost Road)

### Weaknesses

- Thoroughfare for most international visitors
- Lack of diverse offering
- Lack of housing for staff

### Opportunities

- Developing sustainable business practices
- Drive more events to the district
- Develop more tourism products to diversify the market portfolio.
- Connect icon attractions on itineraries
- Connect with Top of the South cluster

### Threats

- Climate change and weather events
- Lack of skilled staff
- Accessibility (road/track closures)
- Clash with other industries

### Stakeholder input

#### Economic

- Low visitor numbers pre COVID-19 (+/-)
- Lack of skilled staff

#### Social

- Housing shortages due to floods
- Varying impact on communities
- Small laid-back community

#### Cultural

- Māori cultural stories not promoted
- Focus on mining/settler culture (+/-)

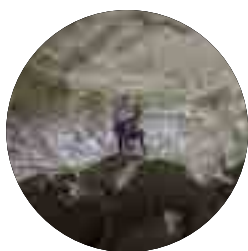
#### Environmental

- Dependence on natural products
- Freedom camping impacts

# Buller's key icons and attractions



## OPARARA ARCHES



### ŌPARARA ARCHES

A secret world of 4-million-year-old limestone arches, final resting place of the biggest-ever find of moa sub-fossils.



### SCENIC BULLER GORGE

Follow a breath-taking scenic route carved through the gorge by the mighty Buller River as it flows down to the Tasman Sea.



### REEFTON TOWN

Reefton shines with tasty treats, quirky vintage shops, historic street lights and tales of gold.



### OLD GHOST ROAD

This long-forgotten gold miners' road for cyclists and hikers traverses 85km of majestic native forest, open tussock tops, river flats and forgotten valleys.



### CAPE FOULWIND

Lively Cape Foulwind harbours a NZ fur seal colony, an outstanding year-round wildlife experience on a short scenic walk.



### WESTPORT | KAWATIRI

First gold, then coal - get a glimpse of life underground, go on an outdoor adventure, or explore the northern Tai Poutini from here.

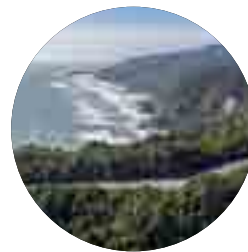


# PANCAKE ROCKS BLOW HOLES



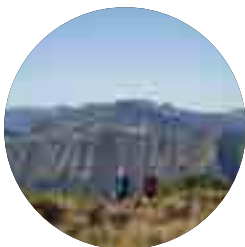
## PANCAKE ROCKS AND BLOWHOLES

Awesome, mesmerising natural drama as the ocean surges through towering pancaked limestone formations.



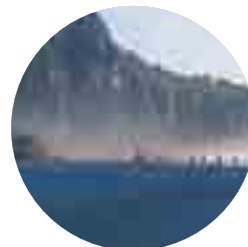
## THE GREAT COAST ROAD

An acclaimed, spectacular road trip unfolds into glorious coastal vistas, photo ops and lovely picnic spots.



## PAPAROA TRACK

Aotearoa's newest Great Walk and mountain biking trail travels across mountain tops into lush coastal rainforest.



## BEACHES

Golden sunsets over pristine sandy beaches in sublime bays, deserted rocky shore, and forests of nikau palms rustling in the sea breeze.



## CAVING

Explore a thrilling labyrinth alive with magnificent subterranean formations and glowworm galaxies, then float out on an underground stream.



## TRUMAN TRACK

Picture perfect. A gentle walk in the woods beneath a tranquil subtropical canopy emerging above a secluded sandy bay.

APPENDIX A

# DISTRICT PERSPECTIVES

## Westland

### Westland District is home to most of Te Tai Poutini's tourism infrastructure.

For the last 100 years, Fox and Franz Josef have been attracting international visitors to explore the glaciers and Westland Tai Poutini National Park. With 228 establishments Westland is home to 52% of all accommodation providers on Te Tai Poutini, with DOC huts comprising of 46% of the accommodation properties.

With 1118 rooms, it has 57% of the commercial accommodation capacity on Te Tai Poutini. Westland, more specifically Glacier Country is also home to 64% of the activities and attractions providers on Te Tai Poutini. COVID-19's impact on South Westland was documented as wiping out 97.5% of all tourism revenue for the region.

Of the estimated \$10.2B spend on the South Island, Westland District achieved the highest proportion of international spend per TLA of all South Island regions, with 207M (66%) from international visitors and 106m (34%) from domestic visitors.

Figure 12: Total visitation

Prior to COVID-19 total visitation to the district was 4.6% of the total South Island visitation at 1.8m visitors, made up of:

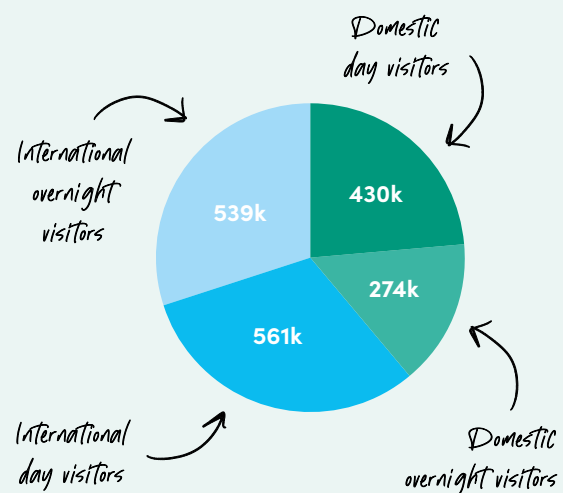






Figure 13:  
Accommodation providers | Westland



Lake Matheson | Photo ReadyNZ

## Challenges and opportunities

### Opportunities

- Reimagine tourism in Glacier Country
- Focus on new products and markets, e.g. wellness tourism
- Attract more events to increase visitation
- Keep protecting nature and keep community spirit
- Look for visitor/community value match
- Diversify tourism products to increase year-round visitation and grow complimentary industries
- Improve wayfinding and create visitor hubs

### Weaknesses

- Dependent on mass tourism on short-time frames
- Small community base
- Vulnerable infrastructure
- Strong seasonality
- Lack of visitor amenities, e.g. toilets

### Threats

- Climate change and weather events
- High-risk profile for travel to South Westland
- Ending Jobs for Nature
- Damaged infrastructure or access

### Strengths

- Icons and famous sites
- Established tourism products
- Some famous events, e.g. Hokitika Wild Foods, Coast to Coast

### Stakeholder input

#### Economic

- Loss of businesses and jobs hurt the community
- Opportunities to focus on new types of visitors

#### Social

- Not enough workers or volunteers in the community
- Social license was lost before COVID-19
- Not enough housing for workers

#### Cultural

- Lack of cultural storytelling

#### Environmental

- The environment was harmed before COVID-19
- Jobs for Nature has helped the recovery
- Backpacker management
- Litter and waste management issues
- Too many helicopters operating (noise pollution)

# Westland's key icons and attractions



## HOKITIKA GORGE

Insta dreams; an easy forest walk and a surreal symphony of vibrant turquoise waters amid lush green forest and pure white limestone cliffs.



## HOKITIKA TOWNSHIP

A quirky little town where larger-than-life driftwood sculptures populate the wild beach and heavenly sunsets complete the day.



## LAKE KANIERE

A tranquil gem, Lake Kanieri sets the scene for wilderness idylls - hiking, mountain biking, fishing, boating, pure night sky viewing.



## ROSS GOLDFIELDS

Hike for a day in the hills or wander in the miners' footsteps; fortunes were made and lost on these old gold trails.



## WEST COAST WILDERNESS TRAIL

Gentle cycle trails trace coastal waterways, through virgin forest, around lakes and beaches with hospitable stops along the way.



## LAKE MĀHINAPUA

A dream canvas of majestic mountain views, brooding rainforest remnants and reflections in mirrored waters; walk, bike or kayak.

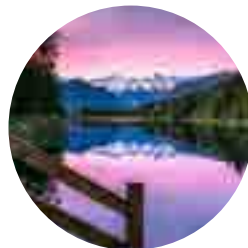


# GLACIER COUNTRY



## GLACIERS

Unique twin glaciers; hike across a river of ice and explore luminous blue caves in the only place on earth where glaciers meet coastal rainforest.



## LAKE MATHESON

On a blue sky day, Lake Matheson's tranquil waters capture perfect postcard images - glorious reflections of New Zealand's highest mountain.



## WESTLAND TAI POUTINI NATIONAL PARK

World-class mountain-to-ocean scenery, glaciers, wild trails, lovely lakeside camping spots, and a haven for endangered wildlife.



## FOX GLACIER TOWNSHIP

A little town with a warm heart, Fox is the gateway to adventure highs - from skydiving to heli-hiking, mountain biking and ice climbing.



## ŌKĀRITO

Humans are rare around languid Ōkārito Lagoon but New Zealand's largest unmodified wetland brims with wildlife encounters unseen elsewhere.



## FRANZ JOSEF TOWNSHIP

The laidback resort is a hub for wildlife conservation, hospitality, cosy accommodation, thrilling adventure and memorable scenic activities.



# HAAST



## WORLD HERITAGE



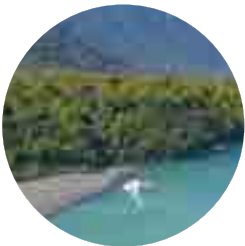
### HAAST PASS | TIORA-PATEA

Spectacular, 140km Wanaka to Westland highway; short walks to glacial blue pools, roaring waterfalls, undulating forests, coastal wetlands.



### JACKSON BAY | OKAHU

Sleepy fishing village with an iconic crayfish cafe; watch out for passing penguins and tiny Hector's dolphins surfing the waves.



### HAAST RIVER | AWARUA

From the edge of paradise, jet boat up the Haast River for total immersion in some of the world's purest World Heritage landscapes.



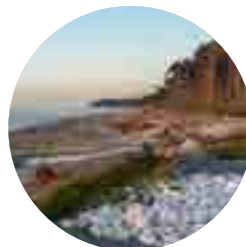
### HANGING LAKES

Magestic wilderness unveiled; a short scenic flight lands beside two pristine hanging lakes, jewels in a hidden alpine valley.



### WAIATOTO RIVER

Aotearoa unfiltered, where time stands still; follow a turquoise river into an awe-inspiring rocky valley of deep green forests and soaring mountains.



### BRUCE BAY | MAHITAHU

A wild, windswept beach with expansive, untamed ocean vistas, fringed with a dense forest of rimu trees growing right on the shoreline.

## APPENDIX A

# DISTRICT PERSPECTIVES

## Grey

### Grey District is the gateway for Kiwirail and an important access point to explore Te Tai Poutini.

To the north lies the Great Ocean Road and the Pancake Rocks to the south is the gateway to the glaciers through the Glacier Highway, to the east lies Moana and Lake Brunner.

Grey District has a long history of mining and an important seaport. Greymouth | Māwhera is the largest town on the Coast, with 43% of the district population living in the township; it has significant cultural significance to Iwi as a Pa Site. 65% of the Grey form part of the Conservation Estate, providing many local walks to enjoy.

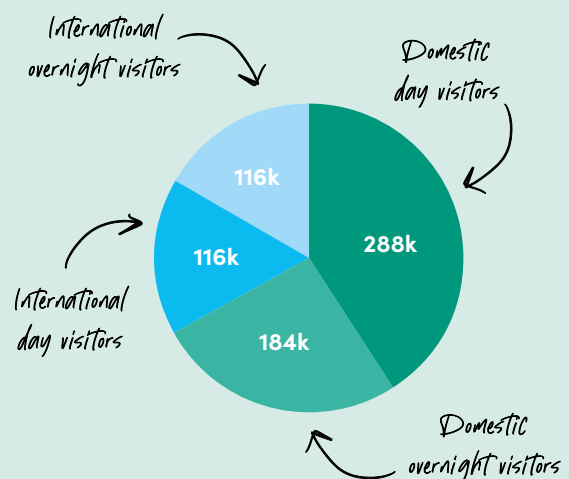
Grey has the least amount of documented tourism providers, accounting for 13.4% (17) of all providers on Te Tai Poutini. Grey is home to one of the regional icons, Lake Brunner.

With 65 establishments Grey is home to 15% of all accommodation providers on Te Tai Poutini. With 483 rooms, it has 24.4% of the commercial accommodation capacity.

Grey District was the least reliant on international tourism for visitor spend prior to COVID-19 with only 30% of spend (\$35M) from international visitors and 70% (\$83M) from domestic visitors.

Figure 14: Total visitation

Prior to COVID-19 total visitation to the district was 2% of the total South Island visitation at 703k visitors made up of:





Monteith's Brewery, Greymouth | Photo Stew Nimmo

Figure 15:  
Accommodation providers | Grey



## Challenges and opportunities

### Strengths

- Paparoa Great Walk development
- Lake Brunner and related experiences
- West Coast Wilderness Trail
- Access gateway for train and Arthur's Pass

### Weaknesses

- Wayfinding for visitors
- Loss of connection with mana whenua
- Lack of authentic experiences
- Lack of visitor amenities (e.g. toilet blocks)

### Opportunities

- Reconnection with mana whenua
- Cultural storytelling
- Connecting with other icons
- Better stakeholder collaboration
- Town centre upgrade – Māwhera development
- Developing sustainable business practices
- Diversify product offering
- Invest in new accommodation options
- Improve wayfinding and information centres

### Threats

- Climate change and weather events
- Dependence on train connections
- Lack of environmental management

### Stakeholder input

#### Economic

- Low visitor numbers pre COVID-19
- Visitors just passing through
- Lack of skilled staff
- Seasonality impacted benefits

#### Social

- Housing shortages
- Unattractive town centre
- Disconnect between community and tourism
- Loss of social license

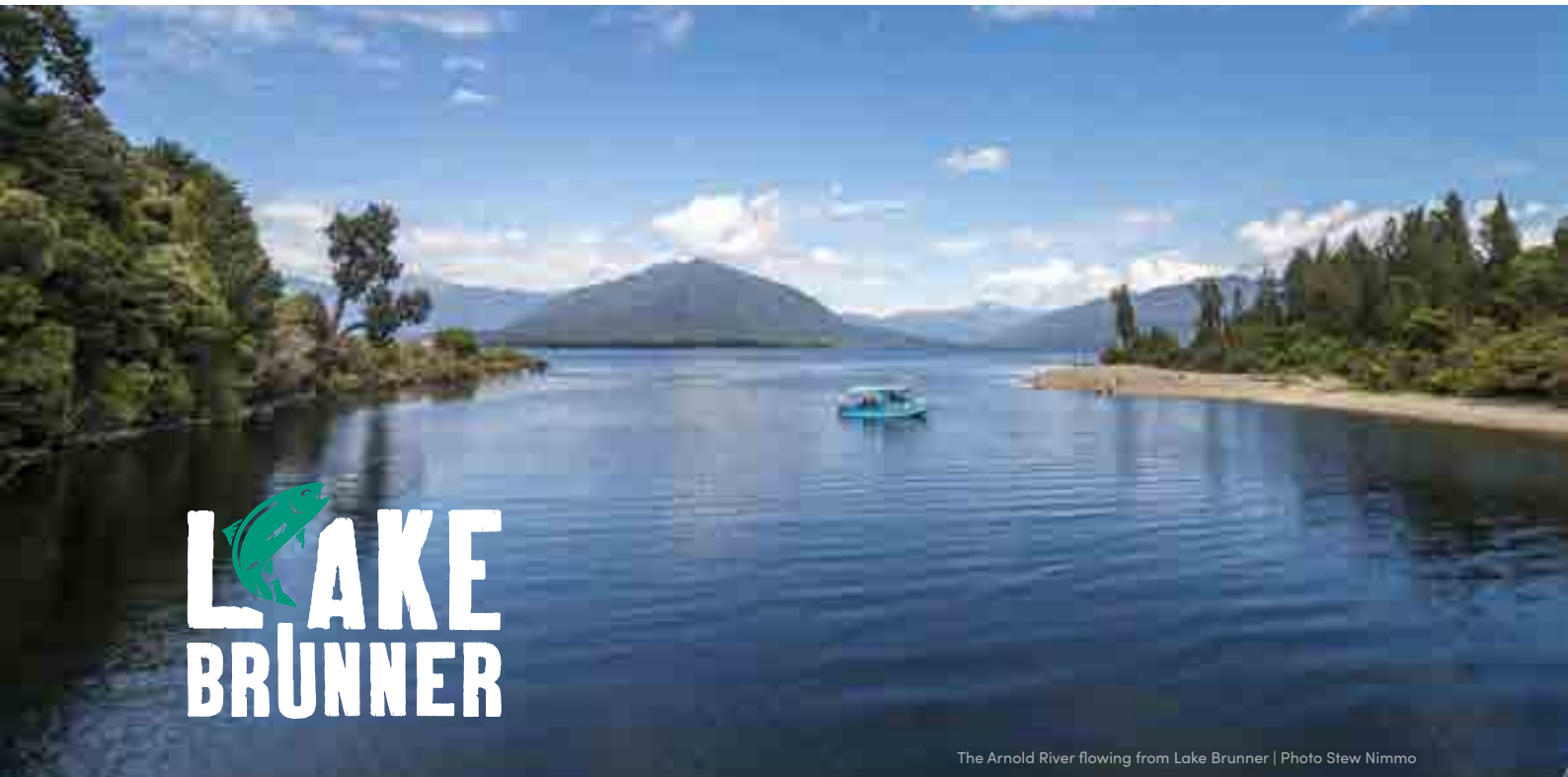
#### Cultural

- Loss of connection with mana whenua
- Lack of cultural awareness

#### Environmental

- Freedom camping impacts
- Lack of recycling infrastructure
- Vulnerable access and roading

# Grey's key icons and attractions



## LAKE BRUNNER

The Arnold River flowing from Lake Brunner | Photo Stew Nimmo



### MOANA | LAKE BRUNNER

Nature reigns supreme over this peaceful lakeside resort shrouded by virgin bush and alpine peaks perfectly mirrored in the pristine waters.



### TRANZ ALPINE TRAIN

Settle in for a spectacular rail journey revealing snow capped mountains, braided rivers, alpine valleys and lakes.



### BROWN TROUT CAPITAL OF NZ

True year-round world-class fishing on pristine lakes and remote rivers where the big brown ones are waiting.



### GREYMOUTH | MŌWHĒRA

Hospitality has a history in Greymouth - Te Tai Poutini's biggest town, fishing port and proud home of New Zealand's original craft beer.



### HISTORIC BRUNNER MINE

These now peaceful relics are a poignant monument to Te Tai Poutini's hard won and sometimes tragic mining heritage.



### HISTORIC BLACKBALL

Back in 1908 the Blackball miners' strike ignited the New Zealand Labour movement, now this tiny town lies at the start of the Paparoa Great Walk.



**DEVELOPMENT**  
WEST COAST

*Te Ohu Whakawhanake o Te Tai Poutini*

**WEST** NEW ZEALAND  
**COAST**  
UNTAMED NATURAL WILDERNESS