

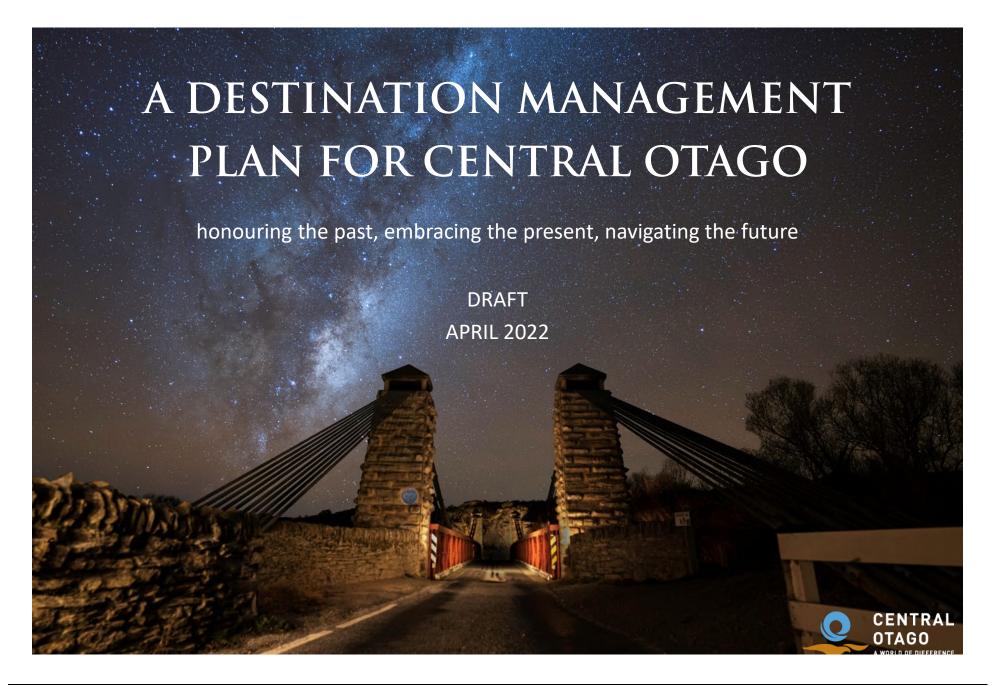
ATTACHMENTS

Council Meeting Under Separate Cover

Wednesday, 27 April 2022

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Even before the double impacts of responding to Covid and Climate Change had hit the tourism industry worldwide, reports like the Parliamentary Commissioner for the Environment's Report on Tourism, and growing concerns about parts of New Zealand experiencing 'over tourism', there were calls for a fundamental re-set or reinvention of the tourism industry.

Enter 'Destination Management Planning' - already in its early stages in New Zealand (and embraced by CODC in the Central Otago Tourism Strategy (2018- 2028), the New Zealand Government 'seized the moment' offered by the closure of New Zealand's borders to make funds available to Regional Tourism Organisations across New Zealand to develop Destination Management Plans. MBIE provided a set of best practice guidelines and the development of DMPs began. Because these plans are focussed on 'destination management' vs the more traditional RTO function of 'destination marketing', they by definition take a much more inclusive view of every interface that tourism has with every moving part of region's economy, its environment and its communities.

The ambition proposed in this DMP for Central Otago, the future states that are aspired to and the strategies and activations that are presented, will require massive shifts in the governance and management of tourism - and Central Otago is not alone in this.

Importantly this plan should not be read as some kind of tourism take-over, rather, the plan identifies all of the areas (or moving parts) where tourism can contribute far greater value to the wellbeing of the region's people and places - environmentally, socially, culturally and financially - and, as importantly, it also identifies where tourism can destroy value if left unmanaged These are referred to as the 'benefits and burdens 'of tourism, and they are explained in more detail throughout the plan particularly in relation to 'The Four Capitals & Wellbeings' framework and how it connects to the Values Based Tourism (VBT) model.

This DMP provides a blue print for the future of tourism in Central Otago that spans 50 years. But, we will fail to realise that future without committing to some critical groundwork in the first 12 months - or even the first 10 years in the life of the plan. There is an enormous exercise involved in clarifying and aligning accountabilities and responsibilities and confirming shared priorities across Council and with Kāi Tahu, external partner agencies, and other stakeholders before initiating significant change.

The reinvention of tourism is not negotiable but how we get there is.



NAVIGATING THIS PLAN

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CENTRAL



Section 1

FOREWORD

A fundamental reinvention of tourism Plan schematic



FOREWORD



The Long and the Short

This document presents a 10-Year Destination Management Plan for Central Otago, within the context of an intergenerational (50 year+) Destination Management Plan.

This is not about attempting to predict the future, but it is about preparing for it. In addition to the dynamics that are impacting on tourism today, there are a wide range of forces that will result in fundamental changes to many of the assumptions upon which the development of tourism 'as we have known it' have been based.

As Sir Jonathon Porritt, Chair of Air New Zealand's Sustainability Advisory Panel has cautioned, if we think that the impact of Covid has been challenging, wait until the full impact of addressing global climate change commitments are felt by the tourism industry.

It is partly on the basis of this outlook for the future, and partly on the basis of a Mana whenua inherent understanding of adopting planning horizons that span 100 years or more, that Central Otago District Council opted to step up to the challenge of developing a 50-year destination management plan for tourism. This is not to suggest that there aren't immediate actions to be taken - because there definitely are - but it means that the actions and decisions that are made today are being considered within the context of where we want to be tomorrow.

This Destination Management Plan includes a 50-year plan and a long-term ambition that will guide the future of tourism development in Central Otago. Based on maintaining a rolling 50-year horizon, the plan will be underpinned by a series of 10-year plans that are also developed on a rolling basis. The outline of the first 10-year plan is presented as part of this document, with a focus on initiating immediate actions and establishing the foundations of the long-term plan.

The journey that has been undertaken in the development of this Destination Management Plan has been far-reaching and inclusive of many stakeholders and different sources of information and inspiration.

Commissioned by the Central Otago District Council with guidance from Kāi Tahu, and overseen by Tourism Central Otago, this plan is for all of the people and places that help to create the magic - or differences - that set Central Otago apart, and to all of those people who share - or will share - a strong affinity with Central Otago and will want to see the magic live on for generations to come.

"Developing a Destination Management Plan for Central Otago is prioritised in Central Otago's Tourism Strategy (2018-28). It was set as a priority because a) we have seen the risks associated with unmanaged tourism growth – disillusioned communities, damage to environments, pressures on infrastructure, and mass-market visitor experiences, and b) because we wanted to very deliberately shape the kind of future for tourism that communities of Central Otago want and to avoid inadvertently becoming a spillover destination from other places.

This is why the investment in this DMP is so important to Central Otago – it is about shaping a tourism future that aligns with our shared values and aspirations for people and place. It is also why confirming the funding models that will support the implementation, not only of Central Otago's DMP, but of all of the other DMPs that are being developed around New Zealand, is so critical to being able to make the difference that everyone is seeking.

We all know that writing a plan or setting a budget is important, but delivering on a plan or a budget is what actually makes the difference." Dylan Rushbrook, General Manager, Tourism Central Otago

FOREWORD

Values-Based

This plan is based on the values expressed in Central Otago's A World of Difference Regional Identity work that was undertaken in 2005, and the values that define Kāi Tahu's place in Central Otago (undertaken in 2021/2022).

Exploring and developing a shared understanding of these of values sits at the heart of this process and this plan, and, along with the insights and learnings that have been shared throughout the development of the plan, it has been a deeply enlightening and rewarding journey.

It has also been a process that has demanded a high level of care and attention in order that the findings of the different steps in the research process and the outcomes of the many discussions that have been held, are represented with clarity and integrity

This applies not only to how the opportunities that sit before Central Otago are developed - but also to agreeing upon how to address the significant challenges that continue to present themselves to the tourism industry specifically - and to global and local economies more generally - in a world that continues to change rapidly and unpredictably.

This planning process commenced with the distribution of the New Zealand Government's STAPP funds (that were ring fenced for the development of regional DMPs) and builds on the Central Otago Tourism Strategy 2018-28 which established the foundations for destination management planning in the region. The STAPP funding has enabled the DMP to be advanced and CODC is very grateful for that because it enables the region to build a robust platform upon which to engineer the future of tourism in Central Otago.

Coinciding with the outbreak of Covid-19, and acknowledging that Central Otago's visitor economy has fared comparatively well in this environment, there are still enormous challenges ahead as the tourism industry at large looks to rebuild cashflow, reinvest in capital improvements, secure a skilled workforce and re-set for a future in which the pursuit of the benefits of tourism must be balanced by the honest recognition of, and accounting for, the burdens that also come with tourism.

It is based on these shifts and dynamics that a fundamental reinvention of the paradigms within which tourism and its related sectors are developed, managed and measured is being advanced.

Covid is not the cause of these shifts - the growth of tourism around the world was quickly becoming unsustainable - but it is the 'showstopper' that enabled pause for serious reflection and the calls for fundamental reinvention to be heard.

A Fundamental Reinvention

As part of the reinvention of tourism, 'destination management' is usurping the primacy of 'destination marketing' as a step towards ensuring that the impacts of tourism (positive and negative) are more effectively managed to deliver outcomes that enrich people and place in ways that can be sustained in the long term.

This rebalancing - from a dominant focus on marketing - to a much stronger focus on management, has meant that the centre of the tourism universe has also changed - from a dominant focus on customers to a much stronger focus on communities.

The needs and motivations of visitors are still of vital importance- it's just that there are now more voices to be heard, and a new underlying balance in the relationship between hosts and visitors must be struck.

This also means that frameworks for the future - such as this Destination Management Plan - need to:

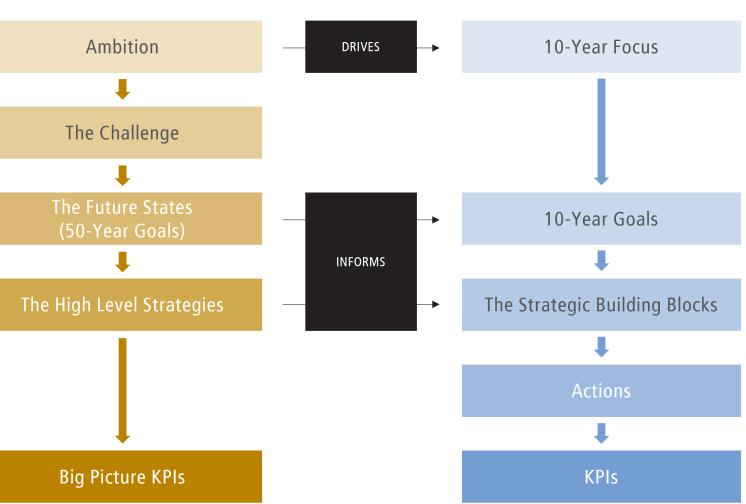
- actively serve a more diverse group of stakeholders, balancing the demands of economic growth and development with the need for shared custodianship of the environment, the aspirations of Mana Whenua and the diverse communities of Central Otago.
- accommodate the intergenerational and technological shifts that are re-shaping both these communities and the motivations and travel styles of visitors in the markets in which Central Otago competes.
- 3. be strategically and aligned with other sectors of the Central Otago economy, with neighbouring regions and national partners, and able to 'flex' with changes in policy and regulatory environments locally, nationally, globally.

The complexity of planning in this environment is significant, and that is where we believe that having both a compass and a road map can make a real difference.

THE 10-YEAR PLAN

Plan Schematic

THE LONG-TERM STRATEGY





Section $\mathbf{2}$

THE AMBITION AND THE CHALLENGE

Building blocks of the DMP



THE AMBITION AND THE CHALLENGE

Designed to reflect a whare, this schematic takes the Values Based Tourism (VBT) model that has informed the approach taken in developing this Destination Management Plan, illustrating how the components of the Plan connect as part of a broader strategic framework.

Each of the components layer-up to support achievement of the overarching ambition for the future of tourism in Central Otago, without ignoring the core challenge that has been articulated by a range of stakeholders - that is, shaping a future that is inclusive of tourism - but not at any cost.

Enabled by the partnership that has been entered into between Kāi Tahu and CODC and motivated by enhancing vs depleting the value of the four capital stocks that generate and sustain societal well-beings and living standards, the whare is grounded in the core principles of Whānaukataka, Māramataka, Kaitiakitaka and Tōnuitaka - kinship, enlightenment, guardianship and prosperity.

Realising the ambition is also highly dependent on a commitment to building five enablers - unequivocal levels of community support, strong and focused collective leadership, innovative and enabling policy settings, attracting like-minded visitors, and accessing and providing positive returns on the investment capital required to implement the plan.

The strategies and actions required to drive these enablers are presented as part of this plan.

THE AMBITION

When visitors experience our world, sharing a moment with our people and our places, they become an extension of our community - loyal advocates and believers in our causes and our dreams for generations to come.

THE CHALLENGE

Central Otago is embracing of a future that includes tourism development, however there are caveats. Tourism will need to be developed and managed in a way that protects the things that matter most to the communities of the region and some of these things are non-negotiable - the wide-open spaces, the essential character of small towns, the place of mana whenua, the freedoms that locals enjoy and that they are willing to share with visitors. Without accepting and committing to these outcomes and being prepared to meet the real costs of 'getting there' the development of tourism will not be acceptable, sustainable or viable.



THE BUILDING BLOCKS OF THE DMP

THE STRATEGIES (building blocks)

INSPIRED GOVERNANCE + LEADERSHIP (BOLD + AMBITIOUS + INCLUSIVE)	 Leadership in Environmental Management head in the clouds hands in the dirt 	 2. Next Gen - Community Engagement empowered locals inspired youth 	 3. Making a difference through placemaking exceptional places fit for purpose amenities Inclusive for all 	 4. The Talent Lab delivers breakthrough solutions growing and advancing our workforce and people 	 5. Best in Class Branding & Customer Engagement compelling conversion Driven like minded visitors become kin 	INNOVATIVE POLICIES (ALIGNED + ENABLING
	 6. High Performance Sector Driven Partnerships stronger together resilient and inclusive growth 	 7. High Impact Tourism Alliances build traction drive transformation national, international agencies + RTO partners 	 8. Sustainable Funding and Investment real costs real prices real deals real returns 	 9. Digital + Transport Connectivity innovative, cost effective, enabling 	 Product Development unfakebly Central Otago promoting our sectors 	DES & STRUCTURES ING + PRODUCTIVE)

THE 50 YEAR PLAN : FUTURE STATES

10 YEAR PLAN : FOUNDATIONS

12 MONTH PLAN : ACTIVATIONS



Section $\mathbf{3}$

ASPIRATIONS FOR THE FUTURE

APPROACH



ASPIRATIONS FOR THE FUTURE

Ehara taku toa i te toa takitahi engari he toa taconite My success is not mine alone, it is the success of the collective

Experience of living around different parts of Aotearoa New Zealand entrenched in me the importance of understanding our past and the richness Māori history offered us. Returning to Central Otago was confronting - the early presence of mana whenua was largely invisible. A deep history that surely existed but that most of us were oblivious to, that we will all be enrichened by seeking an understanding of Kai Tahu's connections with Central Otago. Like the kōwhai seeds in the parable that we have adopted, it turned out that much of our history is Kāi Tahu history, and it has been buried here for far longer than any European settlement.

That is not to suggest that there wasn't an appreciation of the need to understand that early history and its contemporary relevance, but that early attempts by Council to surface this history had not gone according to intentions. We missed many opportunities to partner with mana whenua in a way that would genuinely access it.

In 2018 we initiated the beginnings of a new journey with Kāi Tahu. I met first with the ever-wise Edward Ellison, and then with the formidable Tahu Pōtiki and his colleagues from Aukaha later that year. I will never forget Edward tempering my impatience by telling me that in the scheme of history, we were only here for a moment, and that the important thing was that when I moved on from my role, things were different from when I started. Play the long game. And then Tahu showed up, time and again committed to a new way of partnering together, to supporting that journey, and to putting his own energy into its outcome.

Several positive initiatives have followed those early meetings. We have stepped towards this moment, and through this DMP we have built real and positive traction in advancing our relationship.

Through the process we have explored our respective values and histories in Central Otago. We have found more common ground than difference. And we are now on the cusp of projecting a true reflection of the origins of Central Otago and its peopling.

The kowhai parable provides a useful point of reference as we have begun the process of unearthing the past with a commitment to regenerating the future together.

A key milestone in this process was this year's intended Waitangi Day celebrations. It was to be the first time Central Otago was to officially host this event and it was an important step in advancing our partnership, and a time when we were going to come together to present this DMP. Like so many things, COVID-19 managed to disrupt those plans. We had to cancel meeting kanohi ki te kanohi (face to face) but were thrilled to host the live streaming of a presentation by Kāi Tahu Kauhautū Edward Ellison. Edward was able to talk us through the early history of Māori in Te Waipounamu - the South Island - and in Central Otago. He shared stories of mana whenua, and a map of Kāi Tahu wāhi tūpuna (sites of significance) in Central Otago. This map is now the foundation of the 3D map of Central Otago presented in this plan.

Our tech-enabled Waitangi Day drew a wide and curious audience – more than 250 people took time out of their Waitangi Sunday to tune in and hear from Edward. That level of active interest in the region's early history has been reflected in the results of the research that was undertaken to inform the development of this plan. We have been enormously encouraged by the sentiments that the communities of Central Otago expressed with 80% of people surveyed telling us that 'sharing the sites and stories of significance to mana whenua' was important to the future of tourism in the region.

These results - among many other things that have emerged as part of this journey - have given us a sense of genuine optimism about shaping the future together.

We are both inspired and delighted to be on this journey of partnership with Kāi Tahu. There is no doubt in my mind it will enable us to travel into the future together with a greatly enriched view of the universe.

The journey to get to this point has been worth it. To embed it we are setting our sights on two key projects – working with our iwi partners to entrench the cultural mapping in our tourism work, and amplifying Project Gold. You can read more about both of these in the pages ahead, and I am sure you will agree they are worthwhile and meaningful projects to build on the momentum of our partnership with Kāi Tahu.

Sanchia Jacobs, Chief Executive, CODC

🔿 CENTRAL

ASPIRATIONS FOR THE FUTURE

Under the leadership of Sanchia Jacob (Chief Executive, Central Otago District Council), the Council initiated partnership discussions with Kāi Tahu (via their consulting arm - Aukaha - in 20XX). This laid the groundwork for the process that has been followed in the development of this DMP.

An initial meeting with Aukaha in Dunedin (December 2020) about Aukaha's engagement in the DMP process, established a commitment to base the partnership around the Values Based Tourism model beginning with developing an understanding of each other's values. A series of joint workshops and presentations has resulted in the values and narratives that are presented in this DMP.

Spanning a period of 16 months or more, the values that Kāi Tahu express in this plan were presented at a wanaka (or hui) with a panel that was representative of mana whenua for their endorsement/approval. The process has been characterised by humility, thoughtfulness and wisdom, shared respect and good humour, along with a willingness to do what it takes to reach common ground.

Significantly when the work has been presented to the Mayor and Council of CODC, to TCO's Tourism Advisory Board and leadership team, and through the community survey that was undertaken, there has been an overwhelming level of support to build on this new understanding of Kāi Tahu history in Central Otago, and to cultivate this with open minds and hearts. Strategies and plans impress some people, but it is whanaukataka that enriches.

The Parable that Inspired

Adding to the power of the work that has been shared, at one of the very early joint meetings in Ōtepoti Dunedin we talked about Central Otago's powerful landscapes and the early (pre-European) history of the region; a history that is now being surfaced as part of the destination management planning partnership with Kāi Tahu.

It is hard to imagine that the distinctive dry and barren landscape of Central Otago was once covered in kowhai and other natives. It is equally hard to believe that having been buried for 400 or 500 years under layers upon layer of detritus, that the seeds of those kowhai are germinating again and making their way back to the surface, re-colonising their old ground.

As Megan Potiki, Kāi Tahu, explained during our first meeting, having been buried or misrepresented, for many centuries themselves, bringing Kāi Tahu history and narrative into the light, is not unlike the kowhai seeds - allowing Kāi Tahu narrative to germinate and flourish again. And, while these narratives are of incredible value in explaining the very special character and 'ways' of Central Otago, to people who live in and visit the region, they also help to inform a stronger sense of pride and identity for Kāi Tahu rakatahi and the generations that will follow.

This parable has become a very powerful metaphor for us during the development of the DMP and you will see if reflected in both the transformational projects we plan to deliver and the ways in which we will engage all our communities and stakeholders in this plan.



APPROACH TO DESTINATION MANAGEMENT PLANNING



🔿 CENTRAL

Philosophy and Principles

The development of this DMP began with a challenge that asked for a bold vision and a commitment to taking brave steps. It also promoted an intergenerational approach to the development of the plan and asked that we reference the question 'are we being good ancestors' throughout the development process.

The challenge said:

"The development of the plan will be taken with strong references to MBIE's 'Destination Management Guidelines' and relevant national strategies and policy statements, as well as the District's own Long-term Plans.

The plan will also adhere to a commitment - as expressed by mana whenua- that we frame our thinking not just within a one-to-five-year planning horizon, but across a timeframe that will span the generations for 100 years or more.

This, is because ' the management decisions that are made today in an industry that is inextricably linked to the goodwill of the people of New Zealand and the increasingly fragile nature of our environment will create a legacy value that should endure well beyond our own lifetimes'

This is a big responsibility that will require a bold vision and a genuine willingness to take brave steps."

At each point in the journey, when CODC's elected members, executives and Tourism Central Otago's Tourism Advisory Board were challenged about how to move forward, the response was 'brave'.

Accepting this approach, has meant that we have adhered to some core principles:

- 1. a values-based partnership with Kāi Tahu
- 2. a fundamental shift from 'communities serving the interests of tourism' to 'tourism working in support of communities'
- 3. an approach that has consistently been about understanding bigger picture societal, environmental and economic agendas and shifts, followed by interrogating the role or contribution of tourism within that bigger picture
- 4. a research-led approach to inform the development of the plan, bring the voices of stakeholders to life and validate the underlying thinking
- 5. engagement with related sectors and interested parties that have a shared interest in in the future of tourism, and the potential, by working together, to drive transformational change
- 6. that beyond the concept of environment as 'the natural world' and the laws of nature that need to be understood and respected, that built environments, landscapes and vistas are also a core part of visitor experiences and need to be considered and managed
- 7. that to deliver on a truly intergenerational approach there is a need for an overarching long-term plan and a series of 10-year plans that will need to be refreshed on a regular cycle

APPROACH TO DESTINATION MANAGEMENT PLANNING

Values-Based Tourism – The Model

First developed in association with the Advisory Council of the Pacific Asia Travel Association (PATA) and used in an early Tourism Industry Aotearoa-led national strategy for tourism, Values-Based Tourism was also used as the framework for Central Otago's Tourism Strategy (2018 - 2028).

The model is based on the premise that tourism can only be truly sustainable if value is created and exchanged in mutually beneficial ways across the entire tourism system - host communities, visitors, business and enterprise and the environment.

More recently the model was built-out to connect with the Four Capitals and Wellbeings model that is based on the United Nations' Sustainable Development Goals (SDGs). The capitals - natural, social and cultural, human, and physical and financial - are the assets that underpin the generation of the 'wellbeings' that contribute to the living standards and intergenerational strength and resilience of economies and societies.

Looking after intergenerational wellbeing means maintaining, nourishing and growing the value of these assets and consciously working to avoid the depletion, destruction or diminishment of them.

Along with the values expressed by Mana Whenua* these are core foundations of this DMP.

Importantly, by bringing these different models or systems together, a new way of thinking about tourism has been born. The model asks that we stop and think about all of the processes within the system and contemplate whether they are driving or destroying value. It also surfaces the trade-offs that need to be made and upheld in order to maintain system-wide balance and wellbeing.

This thinking is central to understanding the burdens as well as the benefits of tourism. The unrelenting pursuit of benefits without addressing the burdens that come with tourism growth and development is neither sustainable nor regenerative. This thinking also converges with the emergence of stakeholder capitalism and donut economics .

These new paradigms all highlight the need for new and different metrics to measure tourism's contributions and costs at national, regional and enterprise levels across a much broader range of stakeholders. They also mean that there are many more voices to be heard and considered around the tourism table. The research that has been undertaken in developing this plan is reflective of this.

*Central Otago's approach to developing this DMP was based on exploring the core values that are used in VBT model with Kāi Tahu. This has resulted not only in a deeper understanding of these values, but it has enabled Kāi Tahu to reflect on the expression of their values and narratives in relation to tourism in Central Otago. This has been an invaluable contribution - grounding this plan in people and place and offering a parable that sits at the very heart of this plan.







Section 4

A BRIEF HISTORY

Kāi Tahu Footprints, Landmarks, Values and Practices Early European history Central Otago – The Region Central Otago - A World of Difference Values Our World – One World Many Dimensions

A BRIEF HISTORY - KAI TAHU FOOTPRINTS, VALUES AND PRACTICES

Kāi Tahu Footprints and Landmarks

The settlement of New Zealand by the first Polynesian explorers began around 1350 and according to Māori Tradition it was Rakaihautu and his son Te Rakihouia who first explored the South Island - Te Waipounamu.

As Te Rakihouia circumnavigated the South Island, Rakaihautu travelled inland, carrying with him a famous po or digging stick. Wherever his po touched the earth a lake was formed. This includes the lakes we now refer to as the Southern Lakes and out to the coast just south of Dunedin at Waihola.

Early evidence of Māori occupation in Otago dates back to the earliest arrivals who made their way from the Coast to the inland areas largely to gather food and other resources. Settlement proper began based on three strands of settlement - Waitaha, Ngati Mamoe and Ngai Tahu- who, with inevitable battles and the promise of a brighter future, eventually merged to become Ngai Tahu - the tangata whenua of Te Waipounamu.

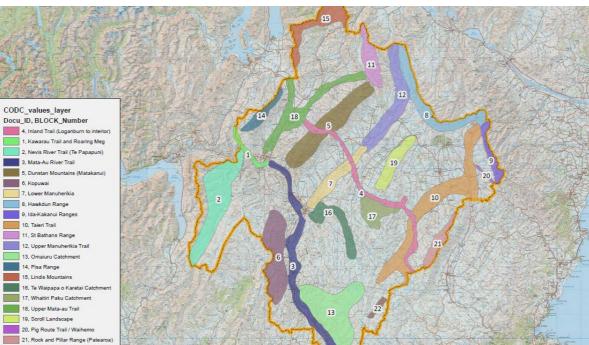
Fast forward to 13 June 1840, The Treaty of Waitangi was signed by seven of Kāi Tahu rakatira. This was followed in 1884 by the Otago Deed. It was the sale of the Otago Block that opened the way for Pakeha settlement with work on new Edinburgh (Dunedin) beginning in 1846 and the first Scottish settlers arriving in 1848.

It was the agreement made in conjunction with the signing of the Otago deed (promising that 10% of land sold would be reserved in trust for the benefit of Ngai Tahu) that was to overshadow Kāi Tahu history for the next 150 years, with the Crown and Te Runanga o Ngai Tahu finally entering into a deed of settlement in 1998, that also restored customary rights.

Beyond the collection of mahinga kai and ponaumu, Māori were present in the Otago goldfields from the early 1850s - often sharing the inland trails that they had developed with those on the hunt for gold including miners from China and the Californian and Australian gold fields and making some famous discoveries themselves. From 1861 gold mining overshadowed all other economic activity in the region and by 1870 Otago was New Zealand's wealthiest and most populous province.

An important step in mapping the footprints left by each of these phases is the development of Kāi Tahu geographical and historical 'Atlas of Place Names for Te Waipounamu'; Kā Hurumanu. The development of the Atlas sprung from a forum in 2012 when cultural mapping was seen as a priority not only as a valuable resource for Kāi Tahu whanui in the transmission of knowledge, but as a mechanism by which Tenure Review negotiations could be informed.

It is this work that underpins the map of Central Otago that is presented in this plan, and it is this same work that it is hoped to build on as part of a more detailed cultural mapping exercise that will advance recognition, understanding, and the sharing of knowledge about the sites and stories of significance to Mana Whenua within the district we now know as Central Otago.



A BRIEF HISTORY – KAI TAHU FOOTPRINTS, VALUES AND PRACTICES

Grounded in these early beginnings but hidden for over 400 years, the development of this Destination Management Plan began by working with Kāi Tahu and their consulting arm Aukaha to look beyond the surface, back to the past and into the future to identify the underlying values that have been used to shape this Plan.

As part of this process, we have not endeavoured to force these values together with the values that Central Otago expresses through it's A World of Difference Regional Identity work (see further details about this below). Rather, we have sought to let both sets of values stand beside each other as fundamental reference points in the development of the DMP

Kāi Tahu with Aukaha Limited have landed on the following values as part of Central Otago's DMP process.

The Core Values

Whakapapa - the foundation from which everything is explained and connected to the Māori world, including all animate and inanimate objects, and cementing the ancient connection from the Pacific and into Te Waipounamu. Whakapapa connects layers of generations and links mana whenua and celestial life, and kinship - pivotal to identity

Mana - a layered and complex value that is earned through deeds and behaviours and that brings with it 'ownership and responsibilities' that need to be upheld.

Tapu - pervades every aspect of the Māori world, and in the past, it determined all aspects of daily life. Examples of tapu are in the actual sites known as Wahi Tapu, but it extends well beyond known and marked sites, and guidance and advice should be sought from mana whenua when accessing these places.

Mauri - generally explained as 'life force' and another value that is complex to explain. In the Māori world all things have life force and that life force can be disrupted - e.g. the pollution of rivers. Mauri can however be restored, and this is an important foundation of this plan.

& Cultural Practices

Matauraka - adaptive knowledge. Developed over many years, mana whenua had skills as scientists, astrologers, ecologists, engineers and geologists, navigators and pathfinders. This enables survival in harsh climates and confronting elements, enabling them to travel efficiently and settle the land. Developed overtime and handed down through generations, this knowledge continues to grow.

Whakawhanaukataka - encompasses the wide-ranging relationships and interrelationships that have evolved within the Central Otago region

Whakariteka - this is about preparation - gathering kai and preparing it for various seasons, and preparation to support arduous journeys and settlement across the land

Maumaharataka - recollections of the past are important and Maumaharataka includes direct memories from mana whenua as well as stories and narratives shared by others. Key to sharing these stories and narratives is the authenticity of the whakapapa surrounding them, and that where possible, offering immersive experiences as a way of telling the stories is important.

'It is in the landscape in place names, in the memories of our people, whakapapa, written, archives, recordings and so forth...'

Kāi Tahu have a breadth of historical information in te reo Māori and English that can be used in the authentication and communication of these narratives.

Whakamanuhiritaka -the practice of welcoming and being a good host to visitors and including the responsibilities of each party within this exchange. There is mana in receiving visitors and being hospitable. Sharing kai is an important aspect of this.

Ka hua o te tau - the seasons of the year in te ao Māori are a critical aspect of life and abundantly clear in Central Otago today. The extreme changes in weather from season to season not only impacted on whakariteka, but in the ways in which Māori travelled and engaged with the land and waterways

Utu - with connotations of revenge, the intent is more about reciprocity. As e.g., the Williams Dictionary has defined it, utu is "return for anything, satisfaction, reward, price, reply"

A BRIEF HISTORY – EARLY EUROPEAN HISTORY

Discoverers and Explorers

Dunedin's early settlers made several forays into Central Otago - again accompanied by Māori guides who assisted with navigation and early map making. In 1857 John Turnbull Thomson ('Surveyor Thomson') headed inland and this was followed by further visits, ultimately identifying just under 3 million hectares of land for settlement and agricultural use.

His map was published in 1860 but by then settlers were already making their way inland and claiming and settling tracts of land. In 1861 gold was discovered and a new phase in the development of Central Otago was begun. The early history of Central Otago continued to be built on a pioneering spirit and drive for betterment, interrupted - as the rest of New Zealand was - by the calls and devastation of war.

It was in 1911 that The Otago Expansion League first drew attention to the tourism potential of the Otago province. The league was indeed expansionist and they included Fiordland and Milford Sound (and presumably Queenstown and Wanaka) in their thinking. But it was not until 1947 that early tourism entrepreneurs began to develop ski fields, jet boats and air services in what is now the Southern Lakes District.

The Roxburgh Dam was part opened in 1956, and in 1982 the decision was made to initiate work on the Clyde Dam. These developments set some industries in Central Otago back ('for the good of the nation'), but they also enabled the establishment of new industries and supported population growth.

Central Otago has long been a mecca for holiday makers - whether staying in caravans or in holiday homes (or cribs as they are known in the South), or for day trips from around the South for a round of golf, outdoor ice-skating, to pick fresh fruit or go hunting and four wheel driving.

It wasn't until the year 2000 with the opening of Otago Central Rail Trail that 'visitors' really started to discover Central Otago. Linking Clyde in the west to Middlemarch in the east, the 152 kilometres trail follows the former Otago Central Railway line.

The Rail trail is badged as 'the original great ride' and it has become a quiet but transformational force in Central Otago - something of an exemplar in what tourism, when well-managed, can contribute to rejuvenating economies, communities, built heritage and the environment. The Otago Central Rail Trail Trust was originally established in 1994 by the Department of Conservation to help it raise funds to convert a disused railway line into a walking and cycling trail. The return on original investment has been magnified many times over.

With a strong domestic visitor base, international travel has grown in the region, driven in part by the Rail Trail as well as Central Otago's reputation as a wine growing region of international significance. The development of tourism experiences built around the wine industry (cellar door experiences and wine tours) is a relatively recent development, gathering real momentum from about 2016/17. The addition of Highlands Motorsport Park – multimillion dollar investment made by entrepreneur Tony Quinn - in 2013 opened up something that is much more than a racetrack, with onsite accommodation, conference and meeting facilities and a museum (and further development on the drawing board).

When the Central Otago Tourism Strategy (2018 -2028) was developed in 2017, the main driver of the Strategy was to double the value of tourism well ahead of doubling the volume of visitors and so diversifying visitor spend and better distributing the spend (seasonally and regionally). These two strategic imperatives remain as cornerstones in this Plan.

Today - and in spite of Covid, tourism in Central Otago has held strong, with some operators reporting some of the strongest seasons on record, and Central Otago taking top spot on the tourism leader board that measures year on year growth in regional spend according to MBIE's tourism Electronic Transaction Data, year ended December 2021. Of note, 65% of the total transaction spend was on 'non-tourism' expenditure.

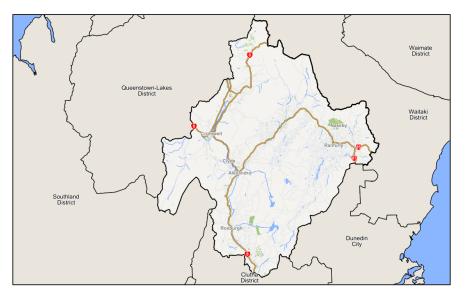
However, the sector has not been totally immune to Covid and securing and retaining the workforce that tourism needs to service the visitor industry is a significant challenge, as are the implications of climate change for the region.

Jumping forward to 2022 and reflecting on the rich and challenging history that has shaped Central Otago and the beginnings of tourism, it is not difficult to see how a compelling vision that captures the attention of a few like-minded individuals can create a world of difference". Central Otago has been built on pioneering discoveries and extreme economic cycles. And, that is the intent of this Plan – harnessing the entrepreneurial spirit that pervades Central Otago to embrace tourism to create a sustainable and inclusive future for the region.

A BRIEF HISTORY - CENTRAL OTAGO, THE REGION

Central Otago the region

Otago is New Zealand's most inland region, located as its name suggests in the centre of the southern half of the South Island. The driest, hottest, coldest part of New Zealand, it is the fourth largest TLA by land area (9969 square kilometres) and has one of the lowest population densities in New Zealand with 23,100 residents (June 2020).



Its exceptional landscapes, climatic extremes and unique soils together create an environment or 'terroir' that supports the production of ultra-premium produce - from superfine merino, premium lamb, venison and beef, world class pinot noir, export cherries, appricate, apples, award-winning spirits and more.

On that basis alone, let alone the accessibility of New Zealand's original cycle trail (The Otago Central Rail Trail) that traverses the region, it is perhaps unsurprising that Central Otago has become a highly desirable place to visit, and that a growing number of people are relocating to Central Otago to live. Central Otago resident population is expected to grow by 1.3% per annum over the next 30 years¹.

Made up of small rural towns (roughly a Cobb & Co Coach-ride apart) spread across four distinctively different wards, with many aspirations in common but uniquely different challenges. Rates of growth for example, are projected to vary considerably across each ward, and as a consequence this Destination Management Plan for Central Otago cannot offer a 'one size fits all' approach to region.

A popular destination for regular holidaymakers, the population swells over the summer months, and layering pre-covid visitor numbers across that, at peak demand there can be upwards of 15,000 people staying in -region overnight.

Not without being exposed to many significant challenges - water high up among them - Central Otago is asset rich when it comes to the resources required to build a thriving and resilient economy. Core and essential to that, are the region's strong, proud, quietly determined, innovative and entrepreneurial people. People who value their connections with each other, the rest of New Zealand, and the rest of the world, and, who uphold a set to values that sets Central Otago apart.

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A BRIEF HISTORY – A WORLD OF DIFFERENCE VALUES

Central Otago's A World of Difference Values

A key element in Central Otago's Regional Identity - ' A World of Difference' are a set of values that bind people and place.

- 1. Making a difference inspiring and leading others with our special point of difference
- 2. Respecting Others respecting our cultural and personal differences
- 3. Embracing Diversity recognising differences and embracing diversity
- 4. Adding Value always asking ourselves if there is a better way one that achieves a premium status
- 5. Showing Integrity seeking to be open and honest
- 6. Learning from the Past learning from past experiences with future generations in mind
- 7. Making a Sustainable Difference making decisions in business with the community in mind and in harmony with the environment
- 8. Protecting our Rich Heritage protecting and celebrating our rich heritage in landscapes, architecture, flora and fauna and different cultural origins
- 9. Meeting our Obligations meeting our legal obligations at both local and national levels

It is by amplifying and applying these values and behaviours in a contemporary and future-focused way, that the communities of Central Otago will create stronger touchpoints for visitors, encouraging them to become advocates and believers and part of Central Otago's extended community.

3D map incorporating Kāi Tahu's Wahi Tupuna map, a base map with GIS overlays of sites of cultural significance, conservation lands, exotic and indigenous forest, land used for pastoral, horticulture and viticulture, the main towns, visitor flows etc will be included in the final plan

Our World - One World Many Dimensions

As a consequence of the Destination Management Planning process, that has been followed, the partnership with Kāi Tahu that has evolved ,our engagement with other sectors of the region's economy and society and the dialogues that were shared with national agencies that hold responsibilities for the conservation and development of the region, along with some exceptional 'futures thinkers' the importance of understanding tourism's place in a much broader and multi-dimensional context was reinforced.

It is by weaving together the 'layers' that Central Otago is made up of, and the values that underpin each of those layers, that that we can shape a deeper understanding of people and place - past and present - and contemplate the future.



Section $\mathbf{5}$

THE CHANGING FACE OF TOURISM

Central Otago Tourism Today The Outlook for Tomorrow's Tourism Fit for the Future?

NEW FOUNDATIONS – THE TOURISM FUTURES RESEARCH

THE CHANGING FACE OF TOURISM



A map is a snapshot in time in a dynamic and changing world. Shaping the future of tourism in Central Otago through destination management planning processes is also necessarily dynamic, and those dynamics are changing at rates never before experienced in the world.

Central Otago Tourism Today

Tourism is a mainstay of Central Otago's economy and is set to become a more significant contributor to regional well-beings as Central Otago's visitor offerings are diversified and developed and as other sectors evolve, change and connect.

Developed in 2017, Central Otago's Tourism Strategy 2018 -2028 revisited the role of tourism in Central Otago, setting the industry on a solid path towards focusing on the creation of value (vs a fixation with volume).

Using the Values Based Tourism model, the definition of value that was adopted was broader than traditional economic measures and included host communities, the environment and commercial operators, as well as the value shared with visitors.

This approach has been rewarded as the community research shows with respondents clearly identifying how tourism contributes to community wellbeing. More than 90% of Central Otago's population is now connected by cycle trails, and the choice of amenities and services are supported by a 'population ' that creates a market that is bigger than the resident population alone.

This 'value over volume' and more inclusive approach - along with Central Otago's market mix (which has been predominantly domestic) - has placed Central Otago in a strong position as the tourism industry has been impacted by Covid and markets have fallen - or been forced - away.

However, in common with other destinations, workforce and other supply side issues are also being felt in Central Otago and need to be addressed.

Outside Central Otago, thinking around regenerative tourism models has advanced significantly during the 'pause' in tourism and this has both validated and strengthened Central Otago's commitment to 'Values Based Tourism" and the ways in which tourism interfaces and engages with its many stakeholders. These developments have been considered in the preparation of this plan.



THE CHANGING FACE OF TOURISM

The Outlook for Tomorrow's Tourism

As one of our 'futurists' said, anyone who thinks that they can predict the future needs to take a large dose of humility. But that does not mean that we can't project the future and in doing that, it is obvious that the complexities to be confronted are many.

Understanding these complexities and the implications of significant shifts in policies and priorities, technology and travel, customers and communities, demands a new way of thinking and managing.

Strategic foresight and responsiveness need to be built into any plans for the future.

While it is true that we can't predict the future, through the course of the research that has been undertaken to inform the development of this plan, the following drivers of change have been identified as the irrefutable truths. These are forces that must be addressed for Central Otago to be fit for the future.

THE IRREFUTABLE TRUTHS

- 1. Partnership with mana whenua and embracing Te Ao Māori can only be a real partnership when it is based on shared understandings
- 2. Climate change action starts now and it has many tentacles
- 3. Tourism needs to be developed with reference to the community's aspirations and values
- 4. Managing environmental impacts and paybacks and putting, a dollar value on them cannot be negotiable balance sheets and profit and loss statements take on new meaning
- 5. Legislative and regulatory frameworks are changing fast
- 6. Developing resilient and regenerative systems and driving sustainability initiatives are mandatory and deeds speak louder than words
- 7. Offering meaningful work and being in-tune with what this means to future generations is more important than ever
- 8. Addressing the needs of changing consumer markets understanding and responding to the motivations of tomorrow's travellers
- 9. The digital future has arrived. Covid has done what technology has long promised transforming the way we do things and establishing new expectations about how things are done

10. Authenticity is a must, and to own a genuine point of difference, it makes sense to build it on a destination's 'unfakeable assets'

Fit for the Future?

Central Otago is a region that believes in self-determination and in being closely connected to its communities and the environment - seeking outcomes that are uncompromising These beliefs will be both tested and validated as Central Otago confronts the irrefutable truths and positions for a future where:

- there are both extraordinary opportunities and extraordinary threats to be dealt with
- the 'benefits and burdens' of tourism need to be managed in transparent and front- footed ways and.
- aligning with a changing regulatory and policy environment to ensure that Central Otago and its communities are well positioned and not disadvantaged

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THE CHANGING FACE OF TOURISM

The Opportunities and the Threats

On one hand, the challenges of rapid population growth, securing a skilled workforce and finding ways in which to make housing affordable and accessible. On the other hand, the possibilities of a multi-milliondollar airport development, a pumped hydro scheme and data centres.

Climate change must sit here as well. Research by Central Otago based Bodeker Scientific Research confirms a future where the variations in the region's climate could compromise the region's primary sectors. Determining where tourism could sit in the mix is of real importance.

For a concise take on the opportunities and threats and economic development goals, Central Otago's Economic Development strategy provides great reference material with which this DMP sits in close alignment.

The Benefits and Burdens

Tourism around the world has largely been built on promoting the economic benefits of tourism which has led to a drive for escalating growth. However, even before Covid struck, there were growing concerns that the burdens associated with tourism growth were beginning to outweigh the benefits.

Moving forward there will be no choice but to show deliberate interventions in managing both. Balance sheets will need to reflect real asset values and recognise actual liabilities, and profit and loss statements will need to disclose whether the real 'cost of sales' is being recovered in the revenue lines.

Traditional tourism metrics will also need to change as accounting for tourism contributions to capital stocks and well-beings becomes common practice, and stakeholder capitalism replaces old capitalist models.

Central Otago will not be confronting these changes alone, and this is one area where there would be benefits in developing national frameworks, measurement standards and data collection protocols.

Alignment with Changes in the Regulatory & Policy Environment

The changes that are occurring and being signalled, not only in New Zealand's regulatory and policy environment but worldwide, will shift the ground upon which tourism has been built. Being aware of the real and impending changes will be fundamental to the execution of this DMP.

National agencies and advisers like DOC, Waka Kotahi, Tourism New Zealand, the Climate Change Commission, Infrastructure New Zealand and initiatives like The Reform for Local Government will be significant 'shape shifters' that tourism will need to adjust to. Strategic foresight will differentiate who earns the advantages and avoids (to the extent possible the disadvantages) by anticipating these changes.

That is why Central Otago has made a significant investment in futures thinking as part of the development of the DMP.

- Heritage & Visitor Strategy He Rautaki Taonga Tuku Iho, Manuhiri Tūārangi hoki, Department of Conservation, February 2021
- Pristine, popular... imperilled? The environmental consequences of projected tourism growth, Parliamentary Commissioner for the Environment, December 2019
- New Zealand-Aotearoa Government Tourism Strategy, Ministry of Business, Innovation & Employment | Department of Conservation, May 2019
- Ināia tonu nei: a low emissions future for Aotearoa, He Pou a Rangi Climate Change Commission, May 2021
- Destination Management Guidelines, Ministry of Business, Innovation & Employment, 2020
- Rautaki Hanganga o Aotearoa | Draft New Zealand Infrastructure Strategy, New Zealand Infrastructure Commission Te Waihanga, September 2021
- Whakarapopoto Arataki, Waka Kotahi NZ Transport Agency, August 2020



This Destination Management Plan is set to shape Central Otago for decades to come and the quality of our thinking and foresight now will affect both the benefits we realise from tourism in the future, and our success in mitigating the burdens.

It is with this responsibility in mind that CODC chose to invest deeply in listening to the needs, expectations and aspirations of the people who live, work in, and visit Central Otago, and in understanding the opportunities and challenges that lie ahead.

Details about the process that was followed, and the methodologies that were employed, are outlined in the Appendix to this Plan.

Many voices

Many people have contributed to the development of this plan; most from within Central Otago, some as visitors to the district, and others from positions of national or global 'thought leadership' on issues and opportunities that it is critical that we understand as we navigate the future – such as climate change and adaptation, sustainable business practice, trends in new transport technologies, new funding models, and the future of work.

These many voices have been captured, and insights distilled, through a systematic programme of research and analysis (as shown overleaf).

As foundations for this Plan, the research has

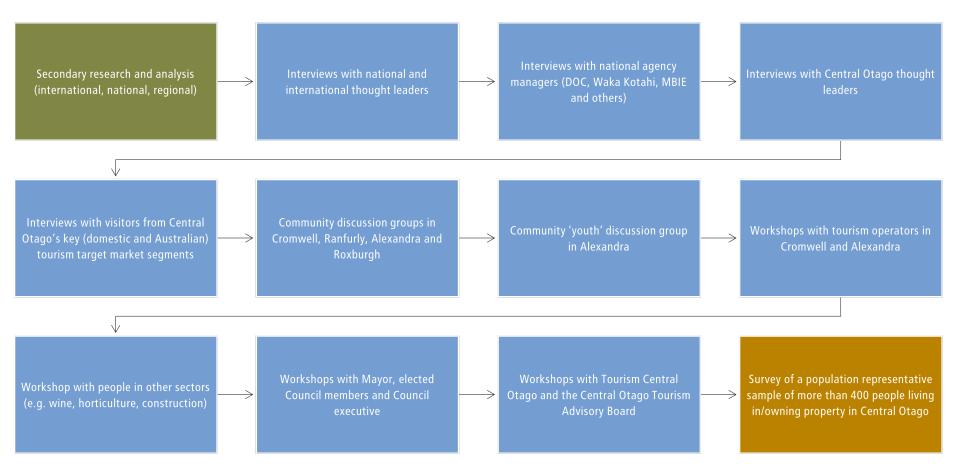
- shed light on the significant trends and disruptors that will shape our future,
- given voice to the communities of Central Otago and other stakeholders in the district's Destination Management Plan, and
- affirmed the fundamental significance of the partnership with Mana whenua.

The trends observed and the voices heard have guided our thinking on the key strategic drivers: the forces that will influence Central Otago's destination management strategy and how we must respond if we are to be 'fit for the future'.

The trends we observed

From the global/national/regional literature and inspiring conversations with a range of subject matter experts², we distilled the key trends and disruptors that are expected to shape the future. A mix of 'mega-trends' and more recent developments brought about by COVID-19 and other global events, these suggest both opportunities and challenges for Central Otago and its tourism industry in the years ahead (continued overleaf).

A systematic programme of research and analysis



Political	 The rise of geopolitical tensions Ongoing changes in border policy post-COVID (affecting New Zealand and its major source markets) Shifting emphasis from destination marketing to destination management (in part a response to social and environmental pressures pre- COVID and growing awareness of tourism's 'burdens') Growing emphasis on community 'wellbeing' as the focus for national and regional economic development (as seen in the PRISM Regional Economies Framework, for example)
Economic	 Development of new regional funding models and access to alternative forms of finance (e.g., green finance) Increasing competition for labour (adding further to the challenges of attracting, developing and retaining a skilled workforce) Growing pressure on housing availability (including accommodation for the tourism workforce) Upward pressure on the costs of finance for business
Socio-cultural	 Generational shifts shaping community aspirations and the expectations of our source markets (e.g., growing importance of 'responsible travel', sustainable tourism destinations, and authentic/ meaningful travel experiences) Rise of remote work, blending of work and leisure, and an increase in 'digital nomads' Balancing 'high tech' (airline kiosks, digital room keys, mobile wallets) with 'high touch' experiences to satisfy a fundamental need for human connection Erosion of social license for tourism in response to 'over- tourism' and related social and environmental pressures Growing emphasis on regenerative tourism (giving back communities and the environment) Growing emphasis on 'wellbeing' as a tourism driver
Technological	 Rapid acceleration in the development and uptake of digital tech and the use of new 'smart'/AI/VR technology (affecting how consumers book, buy and experience travel and how destinations interact with visitors – including to manage demand) Growing dominance/ influence of Google and (pre-COVID) Online Travel Agents (OTAs) in the travel and tourism landscape (e.g., Expedia, booking.com, TripAdvisor)
Legal	 Changes in the regulatory and policy environment affecting tourism destinations and businesses: e.g., Zero Carbon Amendment Act (2019); Waka Kotahi Road to Zero Road Safety Strategy; DOC Heritage & Visitor Strategy; immigration policy; Industry Transformation Plan for Tourism (prioritising 'better work') Ongoing development in technology outstripping regulation (e.g., e-scooters, Airbnb-style accommodation and soon, VTOL aircraft and autonomous transport)
Environmental	 Climate change, adaptation, response and mitigation The rise of circular economy and circular business models New electric/ sustainable transport technologies (land, marine, air) and wider rollout of autonomous vehicles Growing emphasis on regenerative tourism (giving back to communities and the environment)

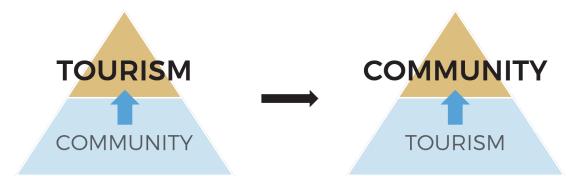
Alongside changes that can be anticipated and prepared for, there will be shocks such as those seen in recent times (natural disasters, pandemics, and war). Planning for these shocks is fundamental to resilience, and a further consideration in being 'fit for the future'.





The Voices We Heard

This Plan puts community aspirations at the heart of thinking about tourism in Central Otago and is underpinned by the philosophy that tourism should serve the community (and not vice versa). Indeed (as many destinations learned pre-COVID), tourism will ONLY thrive if it does so.



Changing the paradigm from 'communities serving the interests of tourism' to 'tourism development that serves communities'

It follows that, if tourism is to serve and truly enrich the community, it must develop in a way that aligns with, and contributes to, community aspirations and values.

Of course, there is no single 'community of Central Otago', but a mix of communities with different needs and expectations, living in different circumstances, and with different interests and aspirations.

The 23,000 residents of Central Otago are scattered across four Wards, living in remote, rural and more urban environments. Some live alone and others with extended whānau. Some are recent arrivals, others from families with multi-generational roots in Central Otago, and others mana whenua.

Some residents of Central Otago are students, many are self-employed; some work in paid, unpaid or volunteer roles, others are retired. Business owners and those in paid employment work across a wide range of sectors, including tourism and hospitality, horticulture, wine, retail, healthcare, manufacturing, and construction; others work for central or local government agencies or not-for-profits.

Central Otago's community also takes in people who own property in the district (for example, holiday homes) but who spend the majority of their time living elsewhere, and – for periods of the year – large numbers of seasonal workers.

Understanding this diversity of the population and ensuring that the **many voices** of Central Otago's communities were heard in the development of this Plan, were key considerations in the design of the research undertaken.

And this is what we heard.

The Voice of Residents

On living in Central Otago

- People **value** the Central Otago in which they live. It feels safe and caring, and it offers peace and quiet for those who want it. Many are drawn to Central Otago by work/business opportunities and value the work/life balance the district offers. Others are motivated to live in Central Otago by its appealing natural environment, and by the opportunities provided for an active outdoor lifestyle.
- BUT looking to the future, many residents would also like to see some change. They would like Central Otago to be more socially progressive, more multicultural, more open to new ideas, more creative or entrepreneurial, more welcoming of diversity, more active in its care for environment, and more affordable than it is now.

On tourism in Central Otago

Tourism is seen as important. But domestic tourism – the historical backbone of Central Otago's visitor industry – is more widely supported than international tourism activity. In part this is due to negative impacts of growth observed in other regions pre-COVID.

37% of residents rate tourism as the MOST important sector of Central Otago's economy

The economic, social, cultural and environmental benefits of tourism are well-understood and most residents – or their whānau – have experienced these benefits directly.

94% of residents say that they or a family member have benefitted from tourism in Central Otago

Equally, the burdens of tourism are felt in a range of adverse impacts and almost 90% of residents report that they or their family have been negatively affected by tourism in Central Otago.

Tourism can play a role in the changes the community aspires to, for example, by

- opening the door to a wider world view through engagement with international visitors for those who desire this.
- adding depth and richness to understanding of the district's cultural heritage through the sharing of sites and stories of significance to mana whenua.
- engaging visitors in ecological restoration initiatives; and
- supporting new cultural events or artisan enterprises.

The benefits felt most widely are:

Opening the door to a wider world view through engagement with international visitors for those who desire this.

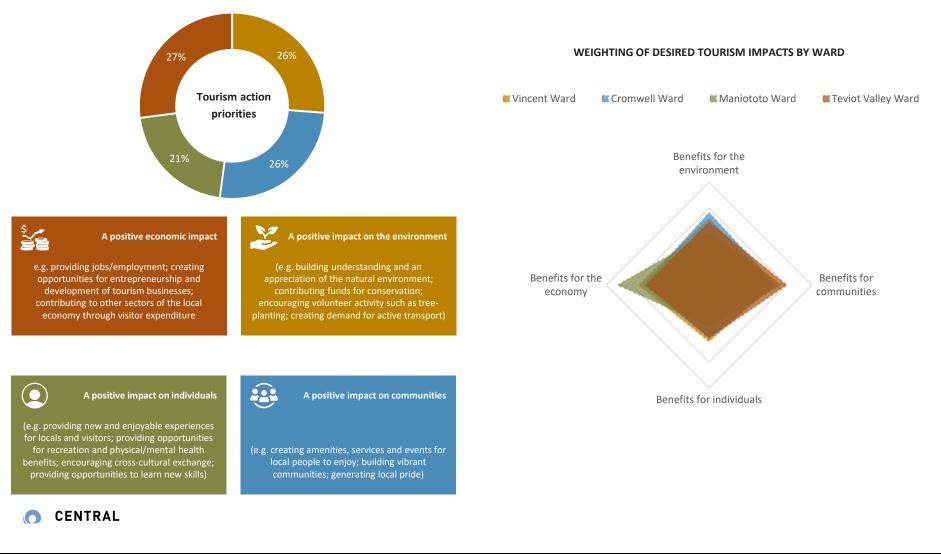
- supports local businesses (62%)
- provides employment/income (60%)
- enhances the profile/identity of Central Otago (50%)
- fosters a greater appreciation of Central Otago's historic buildings and sites (50%, and higher in Maniatoto – 68%)
- makes a wider range of products/services available (50%)
- improves services for the Central Otago community (45%)
- fosters a greater appreciation of Central Otago's natural environment (45%) makes Central Otago a more vibrant and friendly place to live (44%)
- provides opportunities to get involved with/attend local festivals and events (43%, but lower in Maniatoto - 21%)

The adverse impacts felt most widely are:

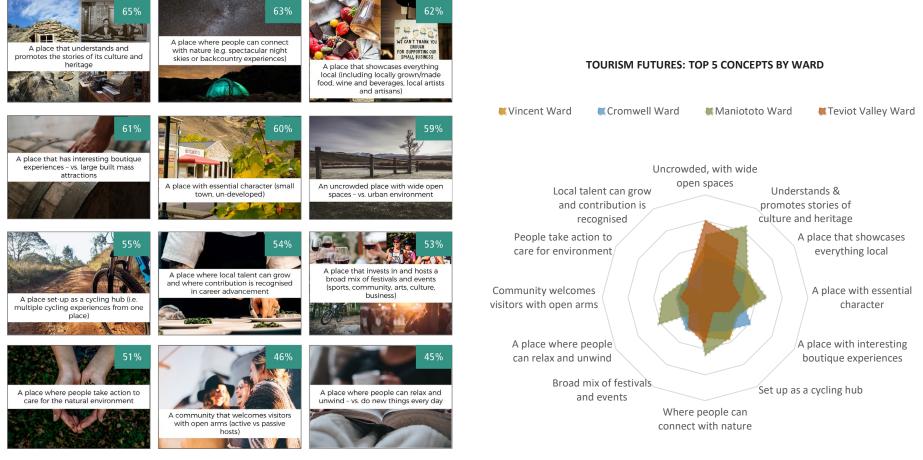
- litter and waste generation (57%, lower in Maniatoto 34%)
- pressure on community infrastructure (roads, wastewater, toilet facilities, etc.) (47%)
- damage to the natural environment (40%)
- feel less safe driving (39%, lower in Maniatoto 9%)
- higher day to day living costs (31%, higher in Cromwell 41%, lower in Maniatoto 3%)
- impact on house prices (30%)
- traffic congestion (29%, higher in Cromwell 39%, lower in Maniatoto 9%)
- difficulties finding car parking (28%, higher in Cromwell 38%, lower in Maniatoto 6%)

On Central Otago's 'tourism future'

In the simplest of terms, Central Otago's future is about balancing the benefits of tourism, while ensuring that tourism 'gives back' more than it takes: to the community, the environment, the regional economy and to visitors.

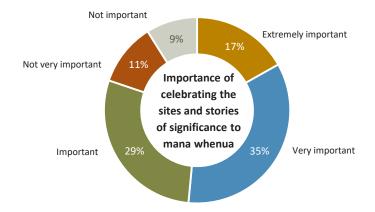


Central Otago's communities believe this is best achieved with a destination management plan focused on the following concepts.



* The percentage shown against each concept is the proportion of survey respondents who chose that option as one of their 'top 5' concepts to describe the type of destination they would like Central Otago to be in the future.

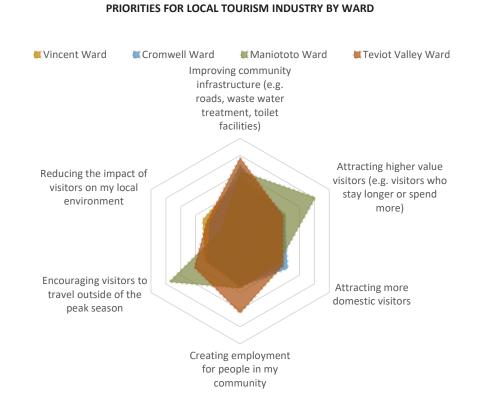
As a destination that understands and promotes the stories of its culture and heritage, the community believes it is important that Central Otago celebrates the sites and stories of significance to mana whenua.



Considering the potentially adverse effects of tourism, residents were asked to identify what they saw as the greatest risks in future development of tourism in Central Otago. These ranged from overdevelopment (loss of natural landscape, damage to the natural environment), to the crowding out of local residents from activities or experiences which they enjoy (e.g. difficulties getting access to favourite swimming spots, or activities being priced at a level only visitors can afford). While some residents were concerned about pressure on infrastructure or staffing shortages affecting the quality of the visitor experience; others were concerned about 'freeloaders' (e.g. day visitors or freedom campers contributing little to the economy and the cost of developing/maintaining community infrastructure).

It is not surprising then that the community would like to see Central Otago's tourism industry prioritise:

- Improving community infrastructure (such as roads, wastewater treatment, public toilets)
- Attracting higher value visitors (e.g. those who stay longer or spend more)
- Attracting more domestic visitors
- Creating employment for people in Central Otago communities
- Encouraging visitors to travel outside of the peak season
- Reducing the impact of visitors on the local environment



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NEW FOUNDATIONS – THE TOURISM FUTURES RESEARCH

The Voice of Tourism in Central Otago

Central Otago's tourism industry is made up primarily of small, owner-operated businesses, providing a diverse mix of accommodation, hospitality, transport, MICE³ facilities and services, visitor attractions, cycle tourism and other activities for leisure and business visitors.

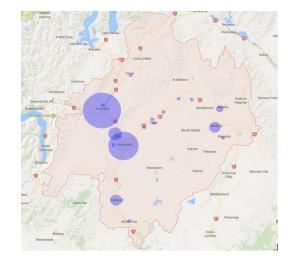
A 'stock take' undertaken to inform the development of the Central Otago Tourism Strategy in 2018⁴ showed that there were 418 individual entities involved in the tourism sector, the largest group of which were accommodation operators (174). Although holiday parks/campgrounds provide the largest proportion of commercial accommodation in Central Otago (based on 'stay units'), boutique-style accommodation (including B&B's, cottages, country hotels and farm stays) dominate built accommodation in Central Otago, along with motels and the rental of private homes through peer-to-peer sites such as Airbnb.

At that time, Central Otago was also the base for 58 organisations providing 'visitor activities' (including cycling and mountain biking, golf and various tours and packages), 43 arts, culture and heritage services (mainly galleries and heritage/museum sites), 41 'primary industry operators' (largely wineries/vineyards) and 78 businesses providing wine and food (a mix of cafes, restaurants, artisan food markets and cellar doors). The largest groups of operators are clustered around Cromwell and Alexandra/Clyde, with sizeable 'pockets' in the Roxburgh, Ranfurly and Naseby areas.

Recent workshop discussions highlighted some of the challenges facing the supply-side of Central Otago's tourism sector: including seasonality of visitor demand, capacity to invest in product development and promotion, workforce development (especially given shortages in worker accommodation, seasonal highs and lows, and sometimes poor rates of pay), and regulatory compliance (including consenting and concession processes with DOC). Some in the industry also point to challenges resulting from a predominance of 'lifestyle businesses, including an inability/unwillingness to invest in sector development, and business closedowns which compromise the visitor experience at certain times of day (afternoons/evenings), days of week (weekends) or months of the year (off-peak/out of season).

Many of these themes are also evident in the survey feedback. When asked to identify the major challenges that tourism businesses in Central Otago will face over the next 10 years, people working in tourism/accommodation/ food services focused on workforce issues, seasonality, worker accommodation and uncertain market conditions. Also evident were concerns about retaining the character of Central Otago, managing the impact of tourism on communities and the environment and – for business owners in particular – succession planning/attracting a next generation of business owners into the industry.

At the same time, opportunities are seen to abound, centred in particular on cycle tourism, cross-sector collaboration, initiatives to extend visitor length of stay/increase expenditure, 'buy local' activations, extension of touring routes and enhancement of the region's events portfolio.



The Challenges

- Workforce/attracting and retaining staff (57%)
- Seasonality/seasonal highs and lows (54%)
- Accommodation for people working in tourism (48%)
- Uncertain market conditions (42%)
- Retaining the character of Central Otago (36%)
- Managing the impact of tourism on communities (32%)
- Managing the impact of tourism on the environment (31%)
- Succession planning/attracting the next generation of tourism business owners (31%)
- Regulatory compliance (27%)

The Opportunities

- Cycle tourism/cycle trail development (72%)
- Collaboration with other sectors (e.g. wine, film) (70%)
- Extending visitor length of stay (58%)
- Increasing visitor expenditure (53%)
- 'Buy local' opportunities (48%)
- Development/extension of touring routes (47%)
- Enhancing Central Otago's events portfolio (46%)

🔿 CENTRAL

NEW FOUNDATIONS – THE TOURISM FUTURES RESEARCH

The Voice of Related Sectors

People working in other sectors also recognise the value of tourism both to the district as a whole, and to their individual sectors.

65% of people working in sectors other than tourism believe that Central Otago's tourism activities and recreational assets are important to the success of their sector.

There is widespread support for collaboration between tourism and other sectors of Central Otago's economy. At the same time, there is recognition of impending challenges (especially in the context of climate change) and potential points of conflict or competition for resources – be these for labour, water, land or energy use. These issues are highlighted in Central Otago's Economic Development Strategy and call for a joined-up approach on solutions for the wider region and any case that may be made for funding or finance.

What differentiates Central Otago from other destinations



An uncrowded place with wide open spaces

(rather than an urban environment)



A place that celebrates the seasons

Mine and Com

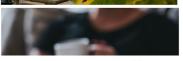
A place set-up to encourage active transport

(e.g. cycling as a means of travel between areas)

A place that has interesting boutique experiences

(rather than large built mass attractions)

A place with essential character (i.e. small town, un-developed)



A place where you can relax and unwind

(rather than doing new things every day)



A place that celebrates the stories (culture/heritage) of the region





A place that celebrates locally grown/made food, wine and beverages



The Voice of Central Otago's Visitors

At any point throughout the year, Central Otago's community also includes people visiting on business, on holiday, to attend events, to visit local friends or family, or for other reasons; and staying for a day, a night, a week or longer. Considering visitors as de facto members of the Central Otago community is consistent not only with the Ambition laid out in this Plan but with community aspirations to host visitors as 'guests' (and not, as we found in the research, to separate them from our communities in 'purpose-built villages').

Getting a true fix on visitor volumes is challenging: the data is simply not available. However, as part of the stock take undertaken for Central Otago's Tourism Strategy it was estimated that Central Otago hosted around 60,000 international visitors staying overnight in 2017, and around 315,000 domestic visitors (a total of 375,000 overnight visitors). It is estimated that each visitor stayed an average of 2.3 nights and, collectively, visitors spent \$188 million in the district that year.

The market has changed significantly since 2017, not least as a result of COVID and the closing of New Zealand's international border. However, both anecdote and evidence suggest that Central Otago has avoided the worst of the market turmoil in recent years; not least due to its historical strength in the domestic market and the market 'pull' of its cycle tourism offering (including the new Lake Dunstan Trail). Central Otago saw +19.3% growth in visitor expenditure in 2021 (compared with 2020) – topping 31 regions and well ahead of the national average of +4%.

Central Otago's tourism offering is well-aligned to the needs of its New Zealand and Australian target market segments: travel consumers who 'get' the region and what it offers. This is reflected in the remarkable degree of alignment between the characteristics that target market visitors believe differentiate Central Otago from other regions, and what the community sees as the foundations for its 'tourism future'.



NEW FOUNDATIONS – THE TOURISM FUTURES RESEARCH

Our visitors

Our ideal visitor is not defined by age or income, or by where they come from, but instead by their values, motivations or 'mindset'.

In 2018, Tourism Central Otago led the national tourism industry in its thinking about the region's visitor markets: developing a set of 'personas' (developed in 2018 and refreshed in 2021) to describe the people who best understand and appreciate the essential character of Central Otago, and who our communities would most like to welcome as visitors. These people value what our communities value, respect our natural environment, and enjoy the world-class experiences that (only) our region offers.

Drawn from all walks of life - throughout New Zealand and internationally – Central Otago welcomes these visitors in the spirit of whanaukataka, knowing that our hospitality will be reciprocated with care for our people and place.

Visitors motivated to	and what Central Otago offers
	These visitors want to detach from the stress and pressure of their everyday lives and to return from a short break or holiday in Central Otago feeling recharged and refreshed.
Escape and relax	Central Otago's wide-open spaces, nature-based experiences, and the character of our small towns (the very antithesis of 'city hustle and bustle') provide the perfect setting in which to relax and unwind.
	These visitors want to spend quality time with their whanau and friends; strengthening relationships and creating memories that will last a lifetime.
Bond with others	Central Otago provides ample opportunity for shared activities and experiences, in a relaxed and welcoming environment. Whether these involve cycling a trail, playing a round of golf, staying for a few nights at a favourite DOC campsite, learning how beer is brewed, stargazing on a night-sky tour, or taking a spin in a go-kart, the experiences we offer are ones in which everyone can participate, and around which enduring memories can be built.
	Motivated by a desire for exploration and discovery, these visitors seek out the unfamiliar and return home from their travels with new knowledge or new skills.
Explore and discover	The stories of mana whenua in Central Otago - and later generations of residents who have made the region their home and a place of innovation for endeavours ranging from wine production to wool, fruit, fashion and scientific research – are the foundations of a compelling experience for visitors seeking new knowledge, authentic experiences, and meaningful connection with our local people and places.
	Often as a personal reward for hard work, these visitors seek to indulge in a little luxury and comfort – to treat themselves.
Indulge	Central Otago's boutique accommodation and local experiences offer that 'special something' not available to everyone. Whether this is access behind the scenes to a working high-country farm, a personal tour of heritage sites with an expert guide, sharing dinner with other guests at a luxury heritage hotel, or glamping under Central Otago's wide-open skies, the immersive and highly personalised nature of these experiences is deeply rewarding.
	For these visitors, holidays are a chance to get outside, get active and make the most of the natural environment; an opportunity to test personal limits through physical activity.
Find personal challenge and achievement	Central Otago's cycle and walking trails, motorsport offering, and endurance events all set the stage for personal challenge and achievement (with the extra promise of time and space to relax and unwind in our stunning natural landscapes and hospitable small-town environment).



Section 6

THE LONG-TERM DESTINATION MANAGEMENT PLAN

- The Ambition and the Future States
- The Challenge
- The Overarching Strategies
- The Big Picture KPIs



Based on what the communities of Central Otago told us, what Ngai Tahu has shared with us, what the region's visitor markets are seeking, and reflecting on the philosophy that underpins the Values Based Tourism model that we have adopted, the overriding ambition that drives this plan is:

The Ambition

'When visitors experience our world, sharing a moment with our people and our places,

they become an extension of our community - loyal advocates and believers in our causes and our dreams for generations to come'

We know this as whanaukataka* - or kinship - and we believe that it is by creating this strong sense of connection and common purpose that tourism can make a lasting difference

(* whanaukataka - relationship, kinship, sense of family connection, a relationship developed through shared experiences and working together which provides people with a sense of belonging. It develops as a result of kinship rights and obligations, which also serve to strengthen each member of the kin group. It also extends to others to whom one develops a close familial, friendship or reciprocal relationship with.)

The Future States we Aspire to

A significant part of The Ambition is the articulation of the 'future states' or long-term goals that underpin realisation of the long-term ambition for Central Otago (see overleaf).

These future states all intersect as part of the broader tourism system, as reflected in the Values-Based Tourism Framework. Some of them imply significant trade-offs, some imply new ways of thinking and doing, and others require solutions and interventions that may not have been thought of yet and that invite challenging the status quo.

The long-term or overarching strategies presented in this plan attempt to map a forward path and, together with the 10-Year plan, they demonstrate the commitment required to activate this journey.

As part of Central Otago's drive towards the achieving The Ambition and the desired future states, there is a core challenge that needs to be respected and observed.

The Challenge

Central Otago is embracing of a future that includes tourism development, however there are caveats.

Tourism will need to be developed and managed in a way that protects the things that matter most to the communities of the region and some of these things are non-negotiable - the wide-open spaces, the essential character of small towns, the place of mana whenua, the freedoms that locals enjoy and that they are willing to share with visitors.

Without accepting and committing to these outcomes and being prepared to meet the real costs of 'getting there' the development of tourism will not be acceptable, sustainable or viable.

Future States (Long-Term Goals)		
in relation to the Four Capitals/Wellbeings		
Social and cultural capital	 The stories of Central Otago's culture and heritage are widely understood and shared Kāi Tahu's values are embedded in 'place' and embraced by all people (including whakapapa, mana and tapu) Communities are vibrant, welcoming, diverse and inclusive Arts and creativity are valued and nurtured Youth are empowered to make a difference The essential character of Central Otago's small towns and rural areas is maintained and new developments respect this Visitor expenditure is supporting facilities, services and amenities valued by Central Otago's communities Visitor experiences are enriching and enduring Whakapapa – layers of generations are connected, mana whenua and celestial life are linked, and kinship – pivotal to identity – is acknowledged Mana – is earned through deeds and behaviours, bringing with it 'ownership and responsibilities' that need to be upheld Tapu is understood not only in relation to sacred sites, but as part of daily life and the protection of people 	
Natural capital	 Central Otago has achieved net-zero carbon status 100% of Central Otago's energy requirements are being met by renewable energy sources Opportunities abound for people to connect with, and be enriched by, Central Otago's unique natural environment (earth, water, sky) Communities play an active role in the conservation and regeneration of Central Otago's ecosystems Important natural areas are protected from development Biodiversity is improved Mauri - the life force of all things - is respected and it is understood that it can be disrupted (e.g. pollution of rivers) and restored Ka hua o te tau - the seasons of the year are a critical aspect of life in Central Otago - and call for Whakariteka - preparedness with harvesting and travelling 	
Human capital	 Visitor expenditure is enabling ongoing investment in workforce development across all sectors of the economy Opportunities abound to grow local talent through education, rewarding employment, entrepreneurship and enterprise development and the ongoing acquisition of skills and knowledge Accessible recreational opportunities support healthy communities Matauraka – adaptive knowledge is shared and grown Maumaharataka – recollections of the past are shared in authentic and immersive ways Whakamanuhiritaka – the responsibilities of welcoming and hosting visitors are understood as are the responsibilities of visitors in these exchanges 	
Physical and financial capital	 Connectivity and infrastructure are state-of-the-art and fit for the needs of communities and visitors Visitors meet their real costs and contribute willingly to the costs of maintaining and restoring the special character of Central Otago Tourism provides a 'shop window' for other export industries and sectors of the economy (including inward investment and migration) The stock of housing in Central Otago is sufficient for the needs of its communities, long- and short-stay visitors and seasonal workforce Mana (second meaning) – mana also refers to the longstanding occupation and Ngãi Tahu's tribal authority across the large area of Te Waipounamu that goes well beyond modern day boundaries and Marae Utu – beyond a common understanding of utu as revenge, utu is understood to mean reciprocity – return, reward, price, satisfaction 	
and recognising crit	tical enablers	
Community support	 Central Otago's communities actively welcome and embrace visitors and are supportive of tourism activity in the region Communities are championing new initiatives and setting the standards to which we expect visitors to conform 	
Leadership	 Leadership of destination management drives collaboration (within and beyond the region) and supports the attainment of long-term goals All of the key stakeholders are around the table and co-investing Whakawhanaukataka – the wide-ranging relationships and interrelationships that have evolved within the Central Otago region are appreciated and respected 	
Policy settings	National and regional policy settings support Central Otago's ambition and long-term goals	
Visitor engagement	Visitors in key target markets are inspired by their experience of Central Otago and feel a deep sense of connection to the region	
Access to capital	Smart funding/financing and circular investment models are in place to support a regenerative tourism system in Central Otago	

CENTRAL As italicised above: The values and cultural practices that have been developed by Kāi Tahu for inclusion in this plan are recognised in the definition of these future states. Further work is required to translate them into appropriate lower test states with agreed KBIs. This will be a priority in the programme of work that is expressed in the 10 Year.

Ambition + Challenge = The Overarching Strategies

As part of presenting each strategy, and drawing on the background research and findings, examples of how the strategy could be activated as part of the DMP are provided. Further details about the proposed actions can be found as part of the first 10-Year Plan.

STRATEGY 1: LEADERSHIP IN ENVIRONMENTAL MANAGEMENT			
The Strategy We will develop partnerships with lead agencies and change- makers to quantify the impacts of tourism on Central Otago's environment(s) and seek not only to eliminate or mitigate those impacts, but to go beyond, helping to offset the impacts of other sectors in the economy that also contribute to tourism's success, while helping to build more resilient and adaptive ecosystems.	 The Rationale There are many moving parts to environmental management. In addition to contributing to national programmes like emission reductions plans (ERPs) Central Otago will need to confront the challenges that climate change will bring to the microclimate that gives Central Otago a competitive edge in horticulture, viticulture and other primary industries. Tourism cannot solve all of these things, but it will need to play its part, minimising the footprint created both directly and indirectly by servicing visitor's needs. This big stuff matters, but as part of addressing improvements to waste management, it is clear from the community survey that reducing litter and the dumping of rubbish is a priority. While slower growing, the sequestration of carbon in indigenous forests has an edge over exotic forest. In Central Otago and reflecting on the kowhai parable, this places a particular emphasis on the regeneration and re-establishment of native plantings on a scale that makes a difference. 	Actions An amped up Project Gold, Bodecker Scientific's carbon footprint initiative.	
	STRATEGY 2: NEXT GEN COMMUNITY ENGAGEMENT		
The Strategy We will explore and evolve 'best of breed' engagement models that enable direct and real time feedback on new ideas and initiatives, and the delivery of fast and responsive solutions to any emerging tourism pinch points.	The Rationale The development of this DMP has been based on extensive community research - qualitative and quantitative. This means that there can be a high level of confidence in acting on what the communities of Central Otago have expressed in relation to tourism today, and their hopes for the future. However, an important conclusion from the research was that while there some opinions or beliefs that are held in common across Central Otago, there are also some differences that should be respected and addressed. The differences are apparent in the individual communities across the district and particularly marked in the views held by youth. The challenge is to ensure that these voices are clearly and consistently heard on tourism matters - and that generational, societal and economic changes are monitored and understood.	Actions A really amazing interactive tech platform that may not have been invented yet - a Bot or concierge that sorts issues out, GPS systems, a 'Shadow Board' that is recruited to shadow the Tourism Advisory Board (or other governance structure).	
	STRATEGY 3: MAKING A DIFFERENCE WITH PLACEMAKING		
The Strategy We will map and explore placemaking initiatives that add new layers of understanding and experience for our people, our visitors and our places. We will activate new regional development projects (e.g. the proposed data storage facility in Clyde or Lake Onslow's Pumped Hydro) - to contribute to place- making initiatives that will deliver additional benefits to our communities and our visitors.	The Rationale Placemaking is all about 'strengthening the connection between people and the places they share' and the collaborative process through which 'people are inspired to collectively reimagine and reinvent public spaces'. This can also occur at a regional or entire destination level and was part of the futures research that also included what people didn't want to change and the kind of tourism development that would be encouraged vs discouraged. Central Otago District Council has driven a number of master and spatial planning exercises, that have informed District and Long-Term Plans. A master plan for tourism that specifically maps visitor flows and specifies where there are opportunities and 'no go' zones for tourism development should be explored. Importantly, the plan should be developed to allow for innovation and new enterprises that might emerge that don't compromise the core values of communities and mana whenua, and that capitalise on the relationships with other sectors where possible.	Actions The Cultural Mapping and Whenua Pou project with Kāi Tahu (likely to be one of the three 'transformational projects); extension of the Tohu Whenua programme in Central Otago.	

	STRATEGY 4: THE TALENT LAB	
The Strategy Central Otago will pilot the development of a 'talent lab' - an integrated system by which local talent can be grown and external talent can be attracted, to create a talent pipeline that is continuously, unskilled and renewed, establishing pay scales that incentivise great performance (for which customers will be happy to pay).	The Rationale Developing Central Otago's tourism workforce has always had its challenges, and in that, Central Otago has not been alone. Covid has exacerbated the workforce shortages that have been a persistent challenge for tourism for years, and as a consequence there are both long term and immediate issues to be addressed (refer 10-Year Plan for short term responses). As digital functionality replaces human functionality the demand for human contact and shared experiences will increase. This suggests a future that will be both high touch and high tech. A level of digital competency will be a foundation skill, and delivering immersive and transformative experiences will become a skill to be mastered. The development of the talent lab should include school visits, work experiences, great on-boarding and mentoring experiences, the development of micro-quals and providing people with coaching in business management and entrepreneurship to develop the next generation of owner-operators and managers. The Talent Lab will need to include solutions to worker housing.	Actions Pilot projects with OPC (and/or UoO) to develop short courses/micro quals and with primary and secondary schools to develop programmes that start well before NCEA.
	STRATEGY 5: BEST IN CLASS BRANDING AND CUSTOMER ENGAGEMENT	
The Strategy We will connect with our target audiences in ways that show a strong empathy with the end-to-end customer journey and post visit loyalty, establishing a lifelong connection with Central Otago. Engagement will be based on a genuine appreciation both of what it is that visitors are seeking and how Central Otago can deliver on those needs unlike anywhere else. As part of building this relationship, Visitors will be invited to share in what Central Otago has to offer and to contemplate what they can offer Central Otago in return.	 The Rationale Central Otago was early to adopt persona research as a way of understanding the motivations of travellers and how to connect with those segments of the market that were a 'best fit' with Central Otago's Visitor offering - well beyond 'people considering a holiday in the next 12 months'. Customer engagement models also means identifying and actively managing the touchpoints throughout the customer journey, and collecting insights that will help to build out the understanding of Central Otago's personas and extending digital capabilities to inform how to target and engage - pre-travel, in-region and post trip. Digital and mobile technologies can also be used to influence behaviours and manage peak demand - e.g. Campermate-like tools. At least for the foreseeable future Central Otago will continue to embrace lighthouse and challenger brand thinking - projecting Central Otago's values, beliefs and core purpose as points of connection with like-minded people. This approach along with the Values Based Tourism model led to the positioning "Find Yourself but not too many others - Central Otago" a values vs volume-based proposition, and a way of differentiating Central Otago from some of its neighbours. Challenger thinking was developed by 'eatbigfish' as a means of helping to establish a strong point of difference in highly competitive markets. e.g. growth in the craft beer movement, which is another classic example of a value over volume approach. "The cultural distrust of Big, they argued, created a renewed romance with Small. The touchstone of the craft beer movement is that it is the ideological opposite of Big Beer; the product, (we are invited to believe) has been made with love by real people for the pleasure of its drinkers, rather than financially engineered for the efficiency of the corporation and the primacy of shareholder returns". 	Actions Development of a sophisticated customer engagement model, leverage the Tiaki Promise or create a Central Otago Code of Conduct/Pledge? A loyalty card?

STRATEGY 6: HIGH PERFORMANCE SECTOR-DRIVEN PARTNERSHIPS				
The Strategy We will pursue the development of brilliant cross sector models and partnerships that amplify the ripple effects of tourism across other sectors of the economy (and vice versa) as one means of improving the resilience of the Central Otago economy and optimising the contributions that are made to regional wellbeing. This approach will extend to joined-up problem solving - meeting the challenges of climate change, worker housing and more.	The Rationale Covid has left many sectors exposed and responding to the challenges of climate change will deliver another round of pain and adjustment. Without in any way diminishing the scale of the challenge, these 'existential threats' have encouraged better integrated thinking and stronger partnerships across the different sectors of regional economies. This has become a new reality and it holds significant opportunities. There are also opportunities to be developed, including with food and beverage, biotech, arts, and other sectors. However, collaboration doesn't happen by accident, it must be deliberately engineered into product design and development, and region-wide responses to change. It should be closely aligned with economic development strategies and investment cases and reflected in policies and regulation.	Actions To drive demand for the region's products and services, events are a powerful tool e.g. tourism and wine - The Vintage Run, tourism and natural fibres - Wool On, tourism and film - 'The Power of the Dog' 'experiences' - 'The Musterers' Ball'. On the supply side, access to affordable housing/worker accommodation is not an issue for tourism alone.		
	STRATEGY 7: HIGH-IMPACT TOURISM ALLIANCES			
The Strategy We will imagine and initiate a range of tourism partnerships with like-minded destinations and other partners, introducing new thinking and new models that will drive transformational change, contribute reciprocal benefits and enable new standards of performance In-region, we will strengthen our business relationships with operators and industry stakeholders collaborating with them to bring visitors to the region and, as part of the reinvention of tourism, equipping them with the tools, knowledge and inspiration required to drive business success in an operating environment that will deliver new challenges at an unrelenting pace.	 The Rationale In addition to cross sector partnerships, there are tourism relationships that can be leveraged to encourage visitation on the demand side and resolve issues on the supply side. Central Otago neighbours and works with six other RTOs and there are already opportunities that have been developed to add to the broader region's product offering. These include the Central Otago Touring Route and the extension of the cycle trail network, and the development of new events. However, geographic proximity should not be the only precondition for these working relationships and they don't need to be based on complicated fixed partnerships or MoUs but should be flexible and fleet of foot with super-fast "time to market". They might be local, national or international (including, 'like' or complementary regions in NZ and internationally). Most importantly, they should be ambitious and well targeted. Within Central Otago how are stronger relationships between the public and private sectors being forged? 	Actions An operator WOF test to understand baseline preparedness; collaboration with other RTOs and national tourism bodies to advocate for new industry benchmarks/measures of performance.		

STRATEGY 8: FUNDING AND INVESTMENT

The Strategy

The Rationale

The Rationale

We will evaluate the long-term public-sector funding requirements and private sector opportunities associated with the development of tourism in Central Otago and identify opportunities to promote new more inclusive partnership models that include Central Government Agencies, Local Government, the private sector, special purpose funds like green finance and partnership funding with iwi.

Beyond the financial hardship that many in tourism and related sectors have experienced, Covid has exposed the flaws in current funding and investment models - pricing and other commercial signals are not necessarily reflective of the true cost of sales, money is not necessarily reinvested where it is earned, and funds are not always directed to the areas of greatest need. And, there are many instances where, if properly accounted for, the burdens associated with tourism have not been balanced by the apparent benefits and it is communities rather than consumers that are left to shoulder the costs. In short, the economics of tourism need to be revisited and as part of that new funding and investment models need to be explored. As an extension of this, the ways in which the contributions and costs of tourism are measured need to be reinvented to reflect a balanced scorecard approach. New models like City Deals (and regional deals), commonplace in Australia and the UK and designed to direct infrastructure spending to projects that boost productivity, employment, and economic growth, need to be explored and adapted to Central Otago (potentially as a test case for New Zealand?). Governance models that are reflective of new economic thinking and stakeholder capitalism also need to be investigated and established.

STRATEGY 9: TRANSPORT AND DIGITAL CONNECTIVITY

The Strategy

We will adopt a 'fit for the future' approach to infrastructure investment and development, seeking smart and cost-effective solutions to meeting the needs of our communities and our visitors, the carbon zero development of tourism, and the efficient movement of people to and through the region.

We will establish strong working relationships with a range of partners and promote Central Otago as a trial site for some new innovations and developments as an investment in the region's future.

To support the sustainable - or regenerative - development of tourism in Central Otago there will be a need for investment in Central Otago's public infrastructure - from waste management systems to transport systems, digital connectivity and region-wide access to electric charging stations or sustainable fuels.

In addition to supporting accessibility, connectivity and sustainability for visitors, these investments will also support the attraction and development of new businesses and workers to Central Otago.

Taking a step into the not-to-distant future, the significant advances that are occurring in the development of autonomous vehicles/driverless shuttles and in aviation - short hop electric, 'whisk' transfers, VTOL (sites and flight paths) will need to be understood and provided for along with access to satellite internet in more remote areas.

Actions

Actions

A scoping study to understand the future of connectivity (real and virtual) and what it could mean for Central Otago, which in turn maps significant shifts in visitor flows and sets a context for infrastructure planning (including EV charging network), and operator education programmes (e.g. to drive fleet conversion).

Integrate thinking about wider social

issues - e.g. affordable/ working

infrastructure or development

Corporate Social Responsibility

investments - leverage the

housing as part of wider

Commitments of others

STRATEGY 10: NEW PRODUCT DEVELOPMENT

The Strategy

We will add to our portfolio of visitor experiences based on our 'unfakeable assets' in ways that engage our communities, inspire mana whenua and deliver experiences that provide a depth of value to our visitors in ways that enable and stronger contributions being made to Central Otago's capital stocks and wellbeings.

The Rationale Actions Staying true to Central Otago's' unfakeable assets' is non-negotiable and sits well with the fact that both today's and The EHCO Experience, Night Sky tomorrow's consumers are seeking authentic and more meaningful visitor experiences. Tourism - JV with Otago Museum, UoO; Central Otago product And, there are any number of drivers to suggest that having a portfolio of ideas for new product development (including development review (including upgrades and extensions) makes sense - resilience is one thing (diversifying the range of visitor experiences that are cycling, motorsport, arts, food and available), seasonality is another (developing year-round attractions), as is changing customer expectations (including beverage). sustainability, 'voluntourism' and more), creating or securing new events and so on. In addition, and in Central Otago's case, there are also some exceptional development opportunities to activate based on the certification and acquisition of assets that offer the potential for new visitor experiences. The partnership that has been developed with Kāi Tahu and the opportunity to share their narratives and values in everything that we do across the region, both transcends and grounds all of these opportunities.

The Big Picture KPIs

The future states that are presented here have been built on the findings from the extensive body of research that has informed the development of this Destination Management Plan.

They are reflective of what the communities of Central Otago have said, what the tourism and related industries are seeking, the aspirations of Kāi Tahu, national and regional policy statements and strategies and futures research.

The future states and supporting KPIs are not intended to reflect CODC's policy position in any of these areas; rather the future states are designed to be considered and debated as part of shaping the strategies and policies that will need to be developed to support the implementation of this Plan.

There are many areas in which CODC's existing and future plans will define what is possible, and other areas where the future states might drive innovation in policy settings. This is all part of the journey and the commitment to intergenerational thinking, values and partnerships that this Plan has been built on.

	Future States (Long-Term Goals)	High-level KPIs (measuring progress towards long-term goals)
Four capitals/wellbe	ings	
Social and cultural capital	 The stories of Central Otago's culture and heritage are widely understood and shared Kãi Tahu's values are embedded in 'place' and embraced by all people Communities are vibrant, welcoming, diverse and inclusive Arts and creativity are valued and nurtured Youth are empowered to make a difference The essential character of Central Otago's small towns and rural areas is maintained and new developments respect this Visitor expenditure is supporting facilities, services and amenities valued by Central Otago's communities Visitor experiences are enriching and enduring 	 Central Otago's communities feel a deep sense of connection with the culture and heritage of the region and a strong sense of 'pride in place' Central Otago's communities believe that tourism is a net contributor to quality of life in the region Youth have a clear and apparent voice in decision-making on issues that will affect the region's 'tourism future' Tourism's growing contribution is inclusive of all people in Central Otago Visitors are enriched by their experience of Central Otago and leave with a deep sense of connection
Natural capital	 Central Otago has achieved net-zero carbon status 100% of Central Otago's energy requirements are being met by renewable energy sources Opportunities abound for people to connect with, and be enriched by, Central Otago's unique natural environment (earth, water, sky) Communities play an active role in the conservation and regeneration of Central Otago's ecosystems Important natural areas are protected from development Biodiversity is improved 	 Tourism's direct, indirect and induced carbon emissions are reducing There are a wider range of low-impact opportunities for people to experience Central Otago's natural environment There is growing support for the restoration of Central Otago's ecosystems and protection of important natural areas
Human capital	 Visitor expenditure is enabling ongoing investment in workforce development across all sectors of the economy Opportunities abound to grow local talent through education, rewarding employment, entrepreneurship and enterprise development and the ongoing acquisition of skills and knowledge Accessible recreational opportunities support healthy communities 	 There is quantifiable evidence that tourism is supporting employment and opportunities for business growth across all sectors of the economy There are viable and attractive career pathways for all people
Physical and financia capital	 Connectivity and infrastructure are state-of-the-art and fit for the needs of communities and visitors Visitors meet their real costs and contribute willingly to the costs of maintaining and restoring the special character of Centra Otago Tourism provides a 'shop window' for other export industries and sectors of the economy (including inward investment and migration) The stock of housing in Central Otago is sufficient for the needs of its communities, long- and short-stay visitors and seasona workforce 	 target markets; support the delivery of exceptional visitor experiences; and help to maximise the benefits of tourism while minimising the burdens

	Future States (Long-Term Goals)	High-level KPIs (measuring progress towards long-term goals)
Enablers		
Community support	 Central Otago's communities actively welcome and embrace visitors and are supportive of tourism activity in the region Communities are championing new initiatives and setting the standards to which we expect visitors to conform 	Social license is maintained or strengthened More benefits of tourism are reported, and fewer adverse impacts
Leadership	 Leadership of destination management drives collaboration (within and beyond the region) and supports the attainment of long-term goals All of the key stakeholders are around the table and co-investing 	Collaborative leadership structures and practices are in place to support destination management goals
Policy settings	National and regional policy settings support Central Otago's ambition and long-term goals	 Policy settings support initiatives aligned with long-term goals Policy settings discourage initiatives not aligned with long-term goals
Visitor engagement	Visitors in key target markets are inspired by their experience of Central Otago and feel a deep sense of connection to the region	 Visitors are motivated to purchase Central Otago product, to return on future visits, and to recommend Central Otago to friends and whānau Visitors are respectful, and contribute willingly to initiatives that protect the unique character and environment of the region
Access to capital	Smart funding/financing and circular investment models are in place to support a regenerative tourism system in Central Otago	Destination managers and tourism operators have sufficient access to capital to support activities that contribute to other long-term goals

Future States (Long-Term Goals)	Social and Cultural Capital Enriching an Embracing	Natural Capital Restorative and Resilient	Human Capital Advancing and Growing	Financial and Physical Capital Attracting and Returning
Strategy 1 – Leadership in Environmental Management	\checkmark	\checkmark	\checkmark	\checkmark
Strategy 2 – Next Gen Community Engagement	\checkmark		\checkmark	
Strategy 3 – Making a Difference with Placemaking	\checkmark		\checkmark	
Strategy 4 -The Talent Lab			\checkmark	\checkmark
Strategy 5 – Best in Class Branding and Customer Engagement	\checkmark	\checkmark	\checkmark	
Strategy 6 – High Performance Sector-Driven Partnerships			\checkmark	\checkmark
Strategy 7 – High-Impact Tourism Alliances				\checkmark
Strategy 8 – Funding and Investment		\checkmark	\checkmark	\checkmark
Strategy 9 – Transport & Digital Connectivity		\checkmark	\checkmark	\checkmark
Strategy 10 – New Product Development	\checkmark	\checkmark		\checkmark





Building the Foundations for the Future The KPIs



Introduction

As described by Professor Sir Peter Gluckman in the introduction to Auckland's recently released "Reimagining Tamaki Makaurau Auckland' (which also takes a 50-year view of the future) imagining what the future could look like if we are ambitious about building the kind of future we are capable of, allows us to look ahead to what might be, and to backcast from there to identify the decisions we need to make now and over the coming years if we are committed to realising that future.

This is a great description of the framework that has been developed for CODC's DMP - future casting 50 years hence as best we can, presenting both an ambition and a definition of the challenge ahead along with the over-arching strategies that will enable Central Otago to create that future, and then backcasting to today and building a 10-year plan that will set Central Otago on the right course for the future.

Building the Foundations for the Future

The plan assumes the same ambition and challenge as the Long-Term Plan and brings a 10-year focus to establishing the foundations that will be needed in pursuit of the long-term ambition.

The words that are commonly used in the plan are: scoping, exploring, modelling, planning, seeding, piloting, engaging, consulting, advancing. And, importantly, the discipline of objectives and actions are also built into this plan.

Using the long-term strategies as the framework, the following initiatives have been proposed.

1. LEADERSHIP IN ENVIRONMENTAL MANAGEMENT		
Objective Our immediate objective is to activate a project that will enable tourism to take the immediate steps required to reduce the environmental footprint of visitors to Central Otago, underpinned by a commitment to achieving continuous improvement in reducing negative impacts In later years we will build this out alongside other sectors of the Central Otago economy to contribute to the mitigation of other impacts on the environment.	 Actions Our immediate action is to partner with mana whenua, DOC and local organisations to supercharge 'Project Gold' and the restoration of our ecosystems. We will also partner with Bodeker Scientific to understand the impacts of climate change on Central Otago and to build on their early investment in measuring and monitoring the carbon footprint of the visitor industry and looking at the implications of addressing the 3 'scopes' - dealing not only with the direct footprint of tourism in Central Otago but counting for the indirect and induced impacts. 	
2. NEXT GEN COMMUNITY ENGAGEMENT		
Objective To build a strong sense of ownership and pride in the DMP across the communities of Central Otago, customising some of our approaches to reflect the different needs and aspirations of the different communities that make up our region, and to motivate members of these communities to start making a difference themselves - i.e., can we ask visitors to live by certain values if our communities aren't living by them - e.g. littering, recycling.	 Actions Our first step in the ongoing process of community engagement will be roadshow to launch the DMP and highlight our ambition and 10-year plans. We are considering a community activation as part of the roll out that would be based on making small packets of eco-sourced Köwhai seed available to all households and that, once cultivated, will be planted together at an agreed site as a shared reserve. We hope to do this in partnership with mana whenua and DOC. As part of the 10-year plan we will also be exploring 'next gen' community engagement models. While we can use traditional measures and means for monitoring community sentiment, we would like to develop ways of securing real time feedback and problem solving. 	

Objective

3. MAKING A DIFFERENCE WITH PLACEMAKING			
Objective There are already a number of community supported projects underway as part of Central Otago's LTP. These will enhance the visitor experience, and we would suggest that each of those projects is considered within the context of this DMP. Our immediate objective in this area is to engage the region's communities in the cultural mapping and Whenua Pou project that has been discussed with Mana Whenua. We see this as a transformational project that will be prioritised.	 Actions To get the cultural mapping project underway, we need to agree the brief with Kāi Tahu and scope the process, deliverables and budget. We will be advancing this as one of the three transformational investment projects that the Minister of Tourism has requested as part of receiving the STAPP funding. In addition to the cultural mapping, whenua Pou and Rakaihautu ' monument' project, there are enormous opportunities to engage with Kāi Tahu in a range of other projects and developments, from Central Otago's F&B strategy to night sky tourism and workforce development initiatives. All of these initiatives will need to be scoped with, and considered by, Kāi Tahu and the CODC. Alongside these initiatives, we will also look to extend the Tohu Whenua programme in Central Otago, in partnership with DOC. 		
4. THE TA	LENT LAB		
Objective Growing and attracting the talent required to service the visitor industry and other partner sectors of the economy in Central Otago is a priority and the marketplace is complex and highly competitive. Our objective is to do things a bit differently and create a 'Talent Lab' for tourism and partner sectors in Central Otago. This will need to be a joined-up approach across all stages in the education cycle and include work experience, mentoring and professional development and upskilling programmes. Again, we see Mana Whenua as partners in this.	 Actions Kickstart a scoping exercise to identify/confirm the components of the Talent Lab Project (e.g. would it include access to worker accommodation and some kind of 'getting started' welcome to Central Otago kit?), identify and canvas the idea with the partners we would need to engage in collaborating in this venture. Aim to run pilot programmes within the first two years of 'the Plan'. 		
5. BEST IN CLASS BRANDING AND CUSTOMER ENGAGEMENT			
Objective Largely an in-house project, the aim is to recalibrate TCO's approaches to branding and marketing and customer engagement so that they are closely aligned with the aspirations of the DMP. This project should also include smart data capture to advance understanding of consumers, their motivations and behaviours and what the various trigger points are e.g., does pushing tips, deals or ideas to visitors while they are 'in-region' deliver good levels of conversion?	 Actions While this could be managed as part of a BAU approach, it may warrant additional brand and customer journey research to inform future direction and work programmes. Step one could be to undertake an initial 'audit' internally and then consider the Terms of Reference for additional research and development. Smart data capture processes should also be explored. 		

6. HIGH PERFORMANCE SECTOR-DRIVEN PARTNERSHIPS

Objective

The aim of this work is to harness the strength and ambitions of other sectors in Central Otago's economy to contribute, alongside tourism, to more and better regional prosperity and wellbeing, and where possible to identify shared risks and explore ways in which they might be addressed.

Meeting the challenges and realising the ambition outlined in this DMP will require much stronger collaboration

with operators within Central Otago and with tourism industry partners outside the region. Current engagement

and partnership models are not as effective as they could be, and while Covid has been a factor in that, more

effective and joined up models need to be put in place. The shifts and challenges in the operating environment

Actions

- At a tactical level workshopping the DMP with leaders and stakeholders from other key sectors should be advanced with the objective of identifying opportunities to strengthen the visitor offering and the achievement of the long-term ambition, for the betterment of all.
- Events and the development of new visitor products/experiences might be one way of activating these opportunities, and there are examples like establishing 'The Vintage Run' with wine, developing a model that will enable Wool-On to thrive, and opportunities to leverage with film.
- As outlined in the long-term plan, collaboration with these sectors should eventually build out to include carbon-zero initiatives, transport and infrastructure planning and spatial planning that accommodates different land uses and access to necessary and scarce resources.

7. HIGH-IMPACT TOURISM ALLIANCES

Objective

are too big to go it alone.

Actions

- Investigate new and improved partnership models with partner RTO's and national entities. Develop shared project plans and assign responsibilities.
- Deliver programmes that will support business transformation and consider carrot and stick approaches to shifting performance and confronting issues that need to be resolved.
- Nothing will change unless structures and processes also change e.g. funding models, certification processes, data collection etc.
- n.b in pushing the boat out with tourism partnerships, timing will be critical. Although Central Otago has
 fared incredibly well through Covid, there are still a number of pain points to be addressed and the phasing-in
 of new models or ways of doing business will need to accommodate this.

8. FUNDING AND INVESTMENT

Actions

Objective

Suggesting that the resources that will be needed to drive the implementation of DMP's across New Zealand will be considerable is a massive understatement. While new long-term funding and investment models will be explored as part of the DMP process, there are no easy answers.

The case for ongoing funding to support the early implementation of DMPs has been put to Government, and it is unclear which way that will go. What is clear is that the full burden of this cannot be placed on Local Government and their communities, the private sector or their customers or mana whenua.

Yes, there are different ways of structuring funding packages and the 'City Deals" model is one such way, but it will take time to investigate how this model might be applied in New Zealand. In the interim, the objective is to (a.) estimate the costs involved in rolling out the early years of the DMP and (b.) explore how to engage and align with key external stakeholders to prioritise and fund the initial programme of work.

n.b. people hours should be included as part of estimating implementation costs.

- Agree ASAP on the best way to 'cost' the programme of work that is outlined in this DMP and 10-Year Plan, confirm the priority projects and identify sources of funding.
- Consider asking RTNZ or TIA to ask the same of other RTOs as part of strengthening the case that is put before Government.

9. TRANSPORT AND DIGITAL CONNECTIVITY			
Objective To scope the infrastructure requirements required to support the development of tourism in Central Otago in the next 10- 20 years, and to model these requirements using different growth scenarios and flow models (including pressure points).	 Actions This might be something that can be achieved by working across councils, partner RTOs and Waka Kotahi, or it might be another example of a project that needs to be driven at a national level and that reflects phased recovery in visitor numbers? 		
10. NEW PRODU	CT DEVELOPMENT		
Objective To ensure that Central Otago's visitor offering is 'fit for the future'.	 Actions Update the product stocktake undertaken as part of the development of the Central Otago Tourism Strategy. Identify both gaps and opportunities, in Central Otago's current product offering that, if filled and developed would contribute to the achievement of the region's long-term ambition, and scope the nature of new product development opportunities that could be activated. Model what tourism might look like if the gaps were filled and opportunities developed (reference point 9 above) Eden Hore Central Otago, night sky tourism and other core projects e.g. walking tracks, should be contenders as transformational projects. 		

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The KPIs

	Future States (Long-Term Goals)	10-Year Goals	KPIs
Four capitals/wellbeing	IS		
Social and cultural capital	 The stories of Central Otago's culture and heritage are widely understood and shared Kãi Tahu's values are embedded in 'place' and embraced by all people Communities are vibrant, welcoming, diverse and inclusive Arts and creativity are valued and nurtured Youth are empowered to make a difference The essential character of Central Otago's small towns and rural areas is maintained and new developments respect this Visitor expenditure is supporting facilities, services and amenities visitor experiences are enriching and enduring 	Tourism is contributing increasingly to the facilities, services and amenities valued by the communities of Central Otago Tourism is a partner in key community initiatives (such as the redevelopment of the memorial hall/museum) and is adding a 'visitor lens' to enhance these developments and drive new revenue flows Plans for the creation of a Raikahautu have been kickstarted Cultural mapping - key project milestones have been met	The sites and stories of significance to mana whenua are prominent in new community facilities and public wayfinding/signage There is quantifiable evidence of visitors' contribution to social and cultural capital/wellbeing in Central Otago Tourism product development needs have been fully scoped, and key initiatives advanced
Natural capital	 Central Otago has achieved net-zero carbon status 100% of Central Otago's energy requirements are being met by renewable energy sources Opportunities abound for people to connect with, and be enriched by, Central Otago's unique natural environment (earth, water, sky) Communities play an active role in the conservation and regeneration of Central Otago's ecosystems Important natural areas are protected from development Biodiversity is improved 	The direct, indirect and induced carbon footprint of tourism in Central Otago have been measured and a monitoring programme is in place All entities involved in tourism are equipped with tools to measure their carbon footprint The restoration of targeted areas has been advanced with native plantings improving the region's biodiversity, restoring native habitats and adding to carbon sinks New opportunities have been created for communities and visitors to connect with, and to appreciate, the natural environment (and the narratives of mana whenua)	A baseline measure of the direct, indirect and induced carbon footprint of tourism in Central Otago has been established and targets set for the following 10-year period The number of kōwhai and other native species planted by the communities of Central Otago is increasing year on year The engagement of visitors in Project Gold is increasing (e.g. funds raised for gathering seeds, growing seedlings are increasing year on year) There is quantifiable evidence of visitors' contribution to natural capital/wellbeing of Central Otago
Human capital	 Visitor expenditure is enabling ongoing investment in workforce development across all sectors of the economy Opportunities abound to grow local talent through education, rewarding employment, entrepreneurship and enterprise development and the ongoing acquisition of skills and knowledge Accessible recreational opportunities support healthy communities 	• Visitor expenditure is making an increasing contribution to employment opportunities and business activity across all sectors of the Central Otago economy The 'Talent Lab' is fully scoped and plans developed to attract and grow the talent required to service the visitor industry in Central Otago have been trialed	There is quantifiable evidence that visitor activity (in-region and post-visit) is contributing to the revenues of organisations in other sectors New high-performance partnerships are in place with [industry sectors] An initial set of courses has been developed and piloted in association with Talent Lab partners There is quantifiable evidence of visitors' contribution to human capital/wellbeing of Central Otago
Physical and financial capital	 Connectivity and infrastructure are state-of-the-art and fit for the needs of communities and visitors Visitors meet their real costs and contribute willingly to the costs of maintaining and restoring the special character of Central Otago Tourism provides a 'shop window' for other export industries and sectors of the economy (including inward investment and migration) The stock of housing in Central Otago is sufficient for the needs of its communities, long- and short-stay visitors and seasonal workforce 	• Connectivity and infrastructure requirements have been scoped and costed Innovative solutions to house the tourism workforce (including seasonal workers) have been developed •	scoped

	Future States (Long-Term Goals)	10-Year Goals	KPIs
Enablers			
Community support	 Central Otago's communities actively welcome and embrace visitors and are supportive of tourism activity in the region Communities are championing new initiatives and setting the standards to which expect visitors to conform 	 Central Otago's communities' welcome visitors and are supportive of tourism activity in the region Central Otago's communities are taking an active interest in how they can contribute to the betterment of visitor experiences Systems are in place to capture community feedback in real-time and to monitor community sentiment 	impacts
Leadership	 Leadership of destination management drives collaboration (within and beyond the region) and supports the attainment of long-term goals All of the key stakeholders are around the table and co-investing 	Leadership of destination management drives collaboration (within and beyond the region) and supports the attainment of the 10-year goals	 Collaborative leadership structures and practices have been embedded to drive and support the implementation of Central Otago's Destination Management Plan
Policy settings	National and regional policy settings support Central Otago's ambition and long-term goals	Regional policy settings support Central Otago's ambition and 10-year goals	 An audit of policy settings has been completed and any opportunities to strengthen policy settings have been identified Work has commenced on strengthening policy settings to support Central Otago's ambition and long-term goals
Visitor engagement	Visitors in key target markets are inspired by their experience of Central Otago and feel a deep sense of connection to the region	Visitors in key target markets are inspired by their experience of Central Otago and feel a deep sense of connection to the region	 Visitor satisfaction is maintained or strengthened Propensity to recommend Central Otago is maintained or strengthened Visitor engagement in key community/environmental initiatives is increasing Average visitor expenditure is increasing (across the region, across all sectors of the economy, during and post-visit)
Access to capital	Smart funding/financing and circular investment models are in place to support a regenerative tourism system in Central Otago	Smart funding/financing and circular investment models are in place to support a regenerative tourism system in Central Otago	 Destination managers and tourism operators have sufficient access to capital to support activities that contribute to other long-term goals A first 'regional deal' is up and running

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Section 8

THE 12-MONTH PLAN



THE 12-MONTH PLAN

Cascading from the Long-Term Plan and 10-Year Plan, there are a series of immediate priorities that will need to be addressed in the first year of the DMP.

The focus for Year One is on rolling out engagement and partnership programmes and exploring and scoping the details of new projects that will underpin the delivery of the plan and contribute to regional wellbeing. It is essential that this process includes a comprehensive review of the DMP in relation to Council's existing and future work streams, policy development programmes and resourcing.

Year One of the DMP will also include a project to explore the suitability of different leadership and governance models to oversee the rollout of the plan. Central Otago is not alone in the need to revisit and reinvent tourism leadership and governance. The scope of DMPs, the stakeholder relationships that need to be managed, and the range of initiatives that will need to be introduced to 'reinvent tourism' are vast and will require a new range of skills and expertise.

The first year of the DMP implementation process will largely focus on rolling the plan out to support engagement and activation with key stakeholder groups - including communities, operators, industry partners and national agencies.

This process will be designed to:

- 1. cultivate a shared understanding of the purpose of the DMP and what needs to change
- 2. advance the 10 strategies that are core to the plan, encouraging early thinking about how to embed them in business plans and relationships
- 3. kick start the activations that set the foundations for the future

Actions	Social and Cultural Capital Enriching an Embracing	Natural Capital Restorative and Resilient	Human Capital Advancing and Growing	Financial and Physical Capital Attracting and Returning
 Strategy 1 – Leadership in Environmental Management pursue discussions with Bodeker Scientific about climate change initiatives (measurement of carbon footprints) scope opportunities to super-charge Project Gold with key partners activate an anti-litter crusade 	\checkmark	\checkmark	\checkmark	\checkmark
 Strategy 2 – Next Gen Community Engagement a series of workshops to explore how community groups, mana whenua, special interest groups, younger generations and new immigrants would like to be engaged in thinking about tourism - could be as high touch as community open days or as high tech as a smart app also note values project in strategy 3 below 	\checkmark		\checkmark	
 Strategy 3 – Making a Difference with Placemaking confirm scope and secure funding for Cultural Mapping project in partnerships with Kāi Tahu initiate review of Central Otago's A World of Difference values to confirm contemporary expressions of those values e.g. what does embracing of diversity look like in 2022 	\checkmark		\checkmark	

THE 12-MONTH PLAN

Actions	Social and Cultural Capital Enriching an Embracing	Natural Capital Restorative and Resilient	Human Capital Advancing and Growing	Financial and Physical Capital Attracting and Returning
 Strategy 4 -The Talent Lab investigate opportunities to extend current youth employment schemes to include tourism explore development of tourism micro-quals with education providers (Otago Polytechnic or University of Otago) initiate discussions re-creating The Talent Lab Village (Highlands?) 			\checkmark	\checkmark
 Strategy 5 – Best in Class Branding and Customer Engagement overhaul marketing strategies to reflect the ambition of the DMP (visitors become kin) update customer journey mapping and review effective of TCO 'touch points' review effectiveness of brand communications - lighthouse thinking and connection with like-minded audiences 	\checkmark	\checkmark	\checkmark	
 Strategy 6 – High Performance Sector-Driven Partnerships encourage participation from other economic sectors that interface with tourism to identify opportunities for developing stronger shared work programmes - including marketing, event development and issues resolution - e.g. workforce development and upskilling, worker accommodation commence development of suite of sector partnership plans - F&B (WIP) including arts, heritage, film and incorporating the Cultural Mapping project with Kãi Tahu 			\checkmark	\checkmark
 Strategy 7 High-Impact Tourism Alliances review opportunities for regional collaboration based on points of intersection in DMPs - shared challenges? joint development opportunities? advocate for development of new performance metrics and partnership funding models 				\checkmark
 Strategy 8 – Funding and Investment detailed scoping of costs to implement key DMP initiatives and identification of funding/investment partners assessment of tourism's investment needs - e.g. cycle trail maintenance and upgrades commission report on adapting City/Regional Deals model for Central Otago (mindful of local govt. reform) 		\checkmark	\checkmark	\checkmark
 Strategy 9 – Transport & Digital Connectivity explore transport flow modelling and adaptations required – EV vehicle and cycle charging, fleet conversion, short hop electric air etc advance and support development of digital shopfronts e.g. digital wine cluster initiative to leverage visitor loyalty 		\checkmark	\checkmark	\checkmark
 Strategy 10 - New Product Development commission product development Master Plan for Central Otago - including Eden Hore Central Otago, cycle and walking trails, night sky tourism and more consider needs of new and changing markets, build accessibility considerations and programmes into the plan identify commercial partners 	\checkmark	\checkmark		\checkmark



Section 9

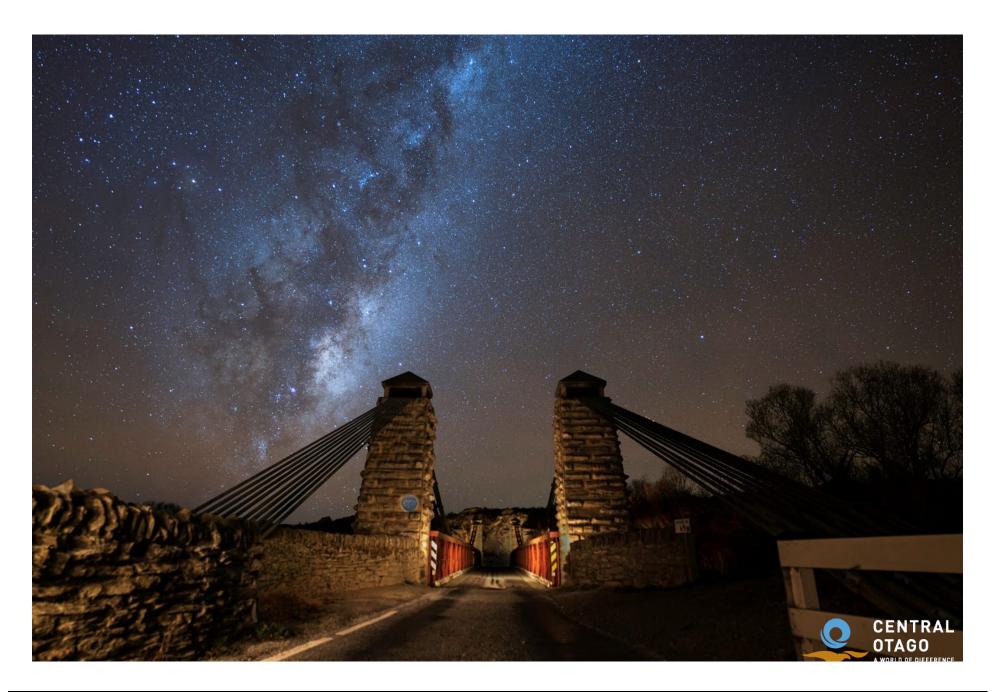
ACKNOWLEDGEMENTS & ATTACHMENTS



ACKNOWLEDGEMENTS & ATTACHMENTS

In the final version of the Plan, this section will include:

- Acknowledgements of the many people who contributed to this Plan
- References (to the various documents/resources consulted in the preparation of this Plan)
- Research design (outline of research undertaken to inform development of this Plan)



CENTRAL OTAGO COMMUNITY ENGAGEMENT SURVEY

DECEMBER 2021 – JANUARY 2022





CENTRAL OTAGO COMMUNITY ENGAGEMENT SURVEY

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CENTRAL OTAGO COMMUNITY ENGAGEMENT SURVEY BACKGROUND, OBJECTIVES & METHODOLOGY

Currently in development, Central Otago's Destination Management Plan puts the community's needs and aspirations at the heart of thinking about tourism development, both now and into the future. As foundations for the Plan, a series of workshops were held across the region: with residents of all four wards, with youth, with tourism operators and with people working in other sectors of Central Otago's economy. These workshops canvassed aspirations for the future, views on tourism in Central Otago, and perspectives on how tourism could, and should, develop over a planning horizon of 50 years or more.

A larger-scale survey was then developed to firstly validate, and then build upon, findings from the community workshops: to highlight common perspectives, to clarify where views might differ across Central Otago's many individual communities of interest, and to help in formulating and prioritising action plans. To provide a national and wider regional context for the survey findings, the Central Otago Community Engagement Survey also included a set of measures drawn from Angus & Associates' Views on Tourism programme which runs in a number of adjacent regions, in other communities across New Zealand, and internationally (in Australia and Ireland).

The specific objectives of the research were to provide insight on: -

- G
- 1. How the community currently sees Central Otago and the vision they have for the region's future
- 2. How tourism is viewed by the community (i.e. importance of tourism, benefits and adverse impacts)
- 3. Challenges and opportunities for tourism businesses
- 4. Areas of focus and priorities for the future regarding tourism in Central Otago

The survey questionnaire was designed in consultation with Tourism Central Otago and the survey run online between 1 December 2021 and 19 January 2022. The final survey sample comprised n=406 people aged 18 years or more (n=392 being residents of Central Otago and n=14 people who own a holiday house in Central Otago but live outside the region). The sample was sourced via a combination of databases supplied by CODC, residents recruited at sites in/around Cromwell, Alexandra, Roxburgh and Lowburn by Angus & Associates field staff, and independent 'opt-ins' through promotion of the survey at Council service centres and other public sites.

Following quality control and data cleaning procedures, the final survey sample was weighted to reflect the characteristics of Central Otago's population aged 18 years or more, with regards to ward, gender and age, and based on 2018 Census NZ data.

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PERCEPTIONS OF CENTRAL OTAGO SUMMARY: PERCEPTIONS OF CENTRAL OTAGO

As seen in the prior qualitative research, residents choose to live in Central Otago for a variety of reasons: from job/business opportunities to a more favourable work/life balance, having friends or family in the region, the appeal of the weather/climate, the natural environment/scenery, and/or opportunities for a more active outdoor lifestyle. The weather/climate and natural environment/scenery are more often motivators for older residents (aged 50+) while recent arrivals to Central Otago are more likely to have relocated for job/business opportunities and a better work/life balance.

Central Otago residents were asked how they would describe Central Otago to others living outside the region, by rating contrasting attributes on a scale. Central Otago is undisputedly described as a safe, growing and caring place to live. Other attributes that were strongly associated with the region include actively caring for the environment, being exciting, expensive, a place of endless opportunity and creative or entrepreneurial.

Perceptions of the region vary by demographic profile. Older residents (aged 65+) are more likely to describe Central Otago as progressive, open to new ideas, a place of endless opportunity and creative or entrepreneurial, while younger residents (aged 15-29) are more likely to describe the region as being quiet, dull and a place of little opportunity. Those who live in Vincent Ward are more likely than other Central Otago residents to describe the region in a negative light, as being old fashioned, dull, unimaginative or pedestrian, stuck in the past, socially conservative, valuing uniformity, and a place of little opportunity.

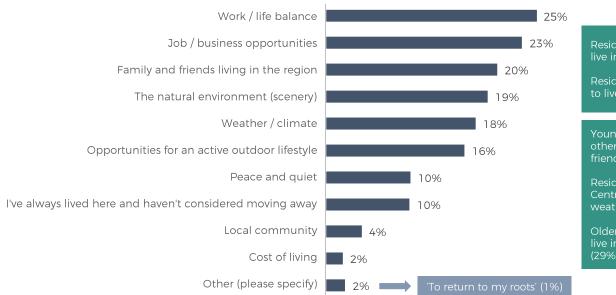
Using the same attribute scale, residents were then asked to describe Central Otago as they would like it to be for themselves and their whānau in the future (looking ahead to 2050 and beyond). The greatest shifts from the current positioning to the desired positioning see Central Otago as more socially progressive, multicultural, open to new ideas, progressive, and somewhat more affordable.



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MOTIVATORS FOR LIVING IN CENTRAL OTAGO

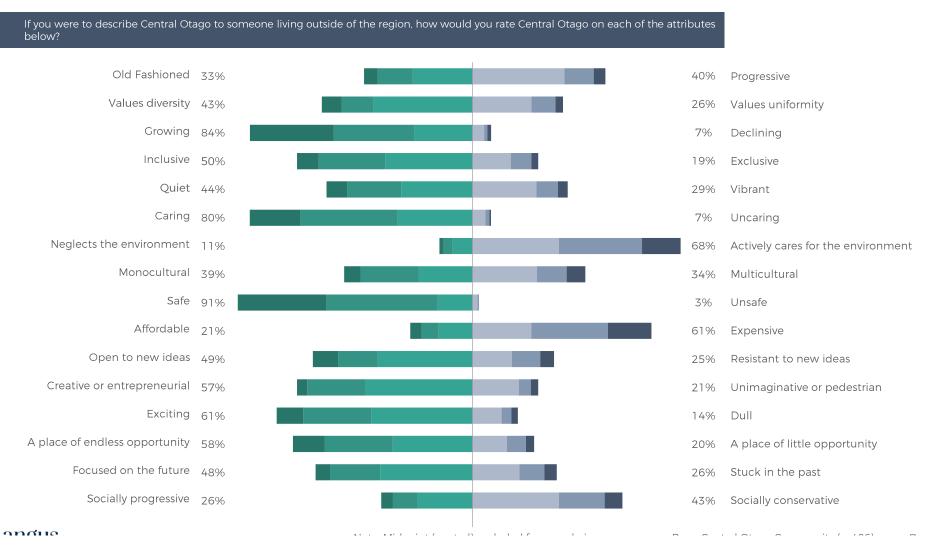
Firstly, what is the main reason you choose to live in Central Otago? Please select 1 or 2 options



Residents of Maniototo Ward are more likely than others to live in Central Otago for job/business opportunities (40%). Residents of Teviot Valley Ward are more likely than others to live in Central Otago for the local community (12%). Younger residents (aged 18-29 years) are more likely than others to live in Central Otago because they have friends/family living in the region (53%). Residents aged 50-64 are more likely than others to live in Central Otago for the work/life balance (32%) and the weather/climate (25%). Older residents (aged 65+) are more likely than others to live in Central Otago for the natural environment/scenery (29%).

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CURRENT CHARACTERISTICS OF CENTRAL OTAGO



CURRENT CHARACTERISTICS – PERCEPTION PROFILES

Old Fashioned (33%)	Progressive (40%)	Safe (91%)	Unsafe (3%)
Live in Vincent Ward (44%) Arrived in 2020 or later (55%)	Live in Cromwell Ward (50%) or Teviot Valley Ward (50%) Aged 65+ (56%)	Male (95%) Arrived between 2000-2009 (97%) Live in Teviot Valley Ward (100%)	
Values diversity (43%)	Values uniformity (26%)	Affordable (21%)	Expensive (61%)
Work in Tourism, Accommodation or Food Services industries (56%)			Holiday house in Central Otago (92% Live in Cromwell Ward (76%) Aged 30-49 (69%)
Growing (84%)	Declining (7%)	Arrived in 2010 of later (50%)	Families with kids any age (71%)
Live in Cromwell Ward (93%)	Arrived in 2020 or later (19%)	Open to new ideas (49%)	Resistant to new ideas (25%)
Inclusive (50%)	Exclusive (19%) Aged 30-49 years (29%)	Aged 65+ (60%)	Aged 30-49 (38%) Families with kids <18 years (35%)
	Families with kids <18 years (27%)	Creative or entrepreneurial (57%)	Unimaginative or pedestrian (21%)
Quiet (44%)	Vibrant (29%)	Aged 65+ (66%)	Live in Vincent Ward (29%)
Aged 15-29 (60%) Live in Vincent Ward (56%) Arrived in 2020 or later (68%)	Live in Teviot Valley Ward (49%) Live in Cromwell Ward (40%) Work in Tourism, Accommodation or Food Services industries (46%)	Exciting (61%) Live in Cromwell Ward (68%) or Maniototo Ward (78%) or	Dull (14%) Live in Vincent Ward (22%)
Caring (80%) Aged 65+ (89%)	Uncaring (7%)	Teviot Valley Ward (76%) Work in Tourism, Accommodation or Food Services industries (72%)	Aged 15-29 (41%) Arrived in 2020 or later (27%)
Live in Maniototo Ward (90%) Arrived in 2020 or later (97%)	Live in Maniototo Ward (90%) Aged 50-64 (12%)		A place of little opportunity (20%) Live in Vincent Ward (26%)
Neglects the environment (11%) Aged 65+ (17%)	Actively cares for the environment (68%)	Live in Maniototo Ward (79%) Aged 65+ (72%)	Aged 15-29 (38%) Arrived in 2020 or later (40%)
Arrived prior to 2000 (18%)		Focused on the future (48%)	Stuck in the past (26%)
Monocultural (39%) Employed in paid work (45%)	Multicultural (34%) Live in Teviot Valley Ward (61%)	Live in Cromwell Ward (55%) or Maniototo Ward (61%) or Teviot Valley Ward (63%)	Live in Vincent Ward (34%) Aged 30-49 (35%)
		Socially progressive (26%)	Socially conservative (43%)
		Work in Tourism, Accommodation or Food Services industries (37%)	Live in Vincent Ward (50%) Didn't grow up in Central Otago (49%

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DESIRED (FUTURE) CHARACTERISTICS OF CENTRAL OTAGO



DESIRED SHIFTS IN CENTRAL OTAGO CHARACTERISTICS

Ranked by Desired Shift	Current (Average)	Future (Average)	Сар	Desired Shift Direction
Socially progressive vs. Socially conservative	4.3	2.4	-1.82	Towards socially progressive
Monocultural vs. Multicultural	3.9	5.7	1.80	Towards multicultural
Affordable vs. Expensive	4.8	3.1	-1.76	Towards affordable
Open to new ideas vs. Resistant to new ideas	3.7	1.9	-1.75	Towards open to new ideas
Old fashioned vs. Progressive	4.0	5.7	1.62	Towards progressive
Focused on the future vs. Stuck in the past	3.7	2.1	-1.57	Towards focused on the future
Values diversity vs. Values uniformity	3.7	2.2	-1.48	Towards valuing diversity
Creative or entrepreneurial vs. Unimaginative or pedestrian	3.5	2.1	-1.40	Towards creative or entrepreneurial
Neglects the environment vs. Actively cares for the environment	5.0	6.4	1.33	Towards actively caring for environment
A place of endless opportunity vs. A place of little opportunity	3.3	2.2	-1.15	Towards endless opportunities
Inclusive vs. Exclusive	3.5	2.4	-1.11	Towards inclusive
Quiet vs. Vibrant	3.7	4.8	1.09	Towards vibrant
Exciting vs. Dull	3.2	2.3	-0.96	Towards exciting
Caring vs. Uncaring	2.6	1.7	-0.92	Towards caring
Safe vs. Unsafe	2.0	1.4	-0.57	Towards safe
Growing vs. Declining	2.3	2.6	0.25	Towards declining

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SUMMARY: VIEWS ON TOURISM IN CENTRAL OTAGO

While the vast majority of Central Otago residents agree that international tourism is good both for New Zealand and for the Central Otago region, almost threequarters of residents also believe that international visitors put too much pressure on New Zealand, and more than 60% believe that international visitors put too much pressure on the Central Otago region – both significantly higher proportions than the Views on Tourism national benchmark for the year ending December 2021. This is reflected in the District's Tourism Approval Rating (TAR) of 14 (on a 1-100 scale) which is lower than the national benchmark of 28. With the international border currently all-but-closed, it is clear that residents are reflecting in part on the situation as it was pre-COVID (and also in the neighbouring Queenstown Lakes District, based on discussions during the community workshops).

Domestic tourism is viewed much more favourably, with almost universal agreement by Central Otago residents that domestic tourism is good both for New Zealand and for the Central Otago region. Even so, one in four Central Otago residents believe that domestic visitors are putting too much pressure on Central Otago - a similar proportion to the Views on Tourism benchmark. At 66, Central Otago's domestic TAR score does however sit comfortably above the national benchmark.

The vast majority of Central Otago residents (94%) indicate that they and their families have experienced the **benefits** of tourism in the region. These benefits are felt most frequently in terms of support for local businesses, opportunities for employment/income, contribution to regional profile/identity, greater appreciation of historic buildings and sites, and access to a wider variety of goods and services than might otherwise be the case. A comparison with the national benchmark shows that **these and many other benefits are felt more widely by residents of Central Otago than they are by residents of other regions.**

Tourism in Central Otago is also felt to benefit other sectors: two in three Central Otago residents who work outside of tourism, accommodation and food services believe that Central Otago's tourism activities and recreational assets are important to the success of the sector in which they work. Overall, one in three residents rate tourism as the **most important** sector for the Central Otago economy.

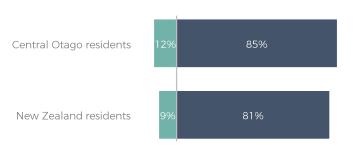
While the benefits of tourism are widely felt, survey results indicate that the majority of residents (88%) have also experienced **adverse effects** of tourism activity in Central Otago. Most common amongst these are litter and waste generation, pressures on community infrastructure (e.g. roads, waste water, toilet facilities), damage to the natural environment, and concerns about safety when driving. As with benefits, many adverse impacts are also felt more keenly by residents of Central Otago than they are by residents of other New Zealand regions.

Looking to the future, the largest groups of Central Otago residents would like the local tourism industry to focus on improving community infrastructure, attracting higher value visitors, attracting more **domestic visitors** and creating employment. This emphasis on high value visitors is much more prominent amongst Central Otago residents than it is amongst residents of other regions.

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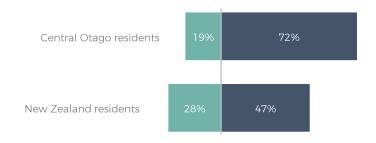
INTERNATIONAL TOURISM

Thinking about international tourism (i.e. international visitors coming to New Zealand) to what extent do you agree or disagree with each of the following...

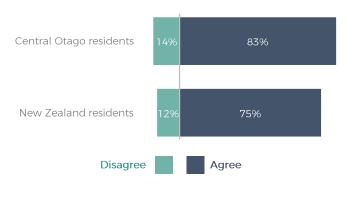


International tourism is good for <u>New Zealand</u>

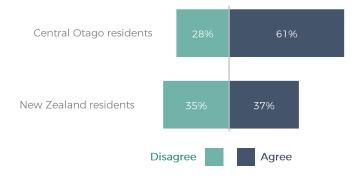
International visitors are putting too much pressure on New Zealand



International tourism is good for my region



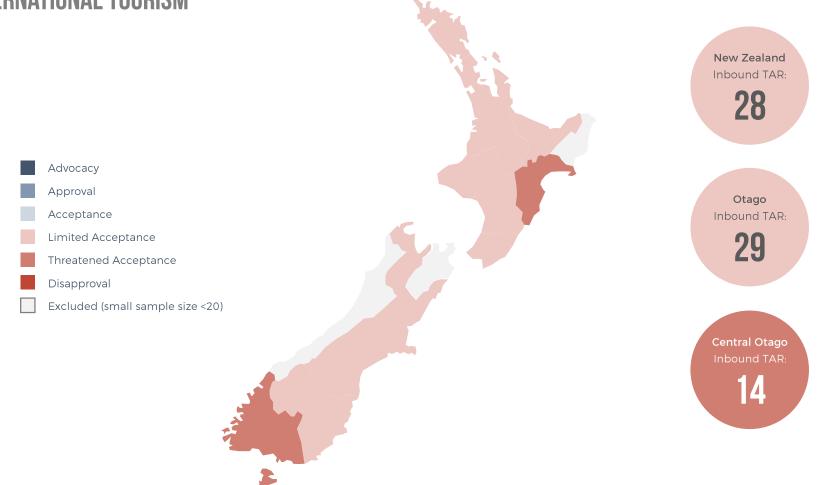
International visitors are putting too much pressure on my region



Base : Central Otago Community (n=406)

Base : NZ Residents (n=3,075) from A&A Views on Tourism Programme YE Dec 2021



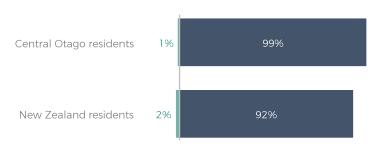


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Base : Central Otado Community (n=406) _ .

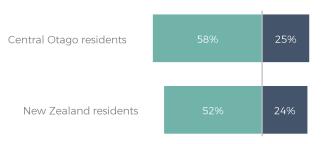
DOMESTIC TOURISM

Thinking about domestic tourism (i.e. New Zealanders travelling within New Zealand) to what extent do you agree or disagree with each of the following...

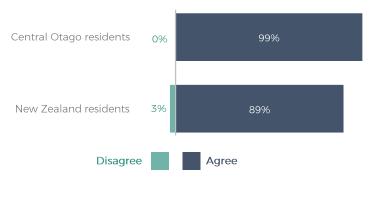


Domestic tourism is good for <u>New Zealand</u>

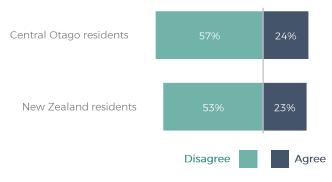
Domestic visitors are putting too much pressure on New Zealand



Domestic tourism is good for my region



Domestic visitors are putting too much pressure on my region



Base : Central Otago Community (n=406)

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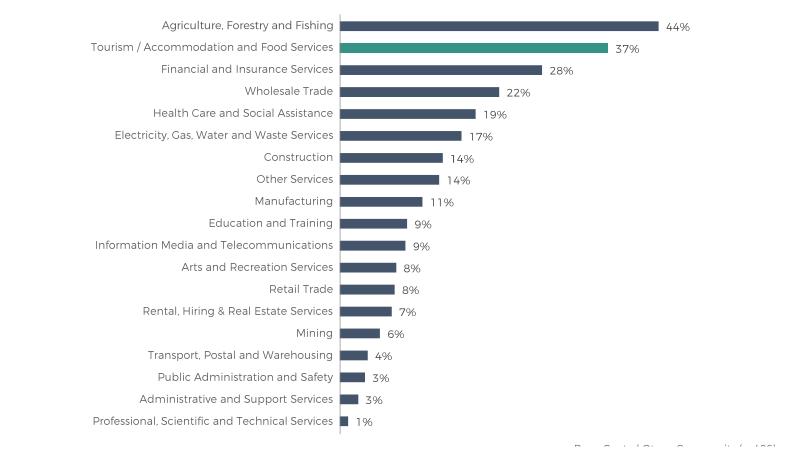


Base : Central Otado Community (n=406)

RELATIVE IMPORTANCE OF TOURISM

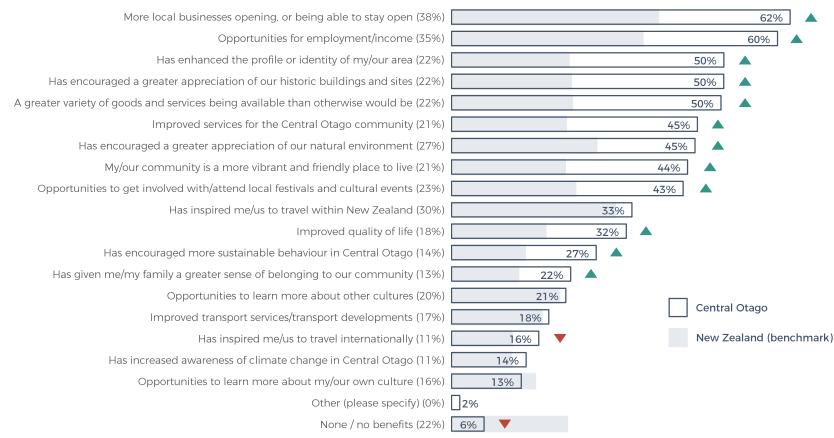
In your opinion, which if the following sectors are the most important to the Central Otago economy?

RANKED AS #1 MOST IMPORTANT SECTOR TO THE CENTRAL OTAGO ECONOMY



BENEFITS OF TOURISM

In which of the following ways, if any, would you say you/your family benefit from tourism activity in Central Otago?



Benefit (% of New Zealand who have experienced benefit)

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The (\blacktriangle / igvee) indicate statistically significant differences

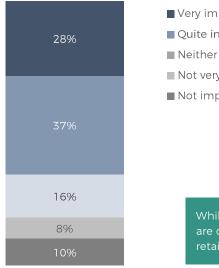
Base : Central Otado Community (n=406)

IMPORTANCE OF TOURISM TO OTHER SECTORS

How important would you say that Central Otago's tourism activities and recreational assets are to the success of the sector in which you work (e.g. because of the visitor expenditure or other activity that they bring: because they attract people to live and work in the region)?

65% of Central Otago residents who work outside of the tourism industry (i.e. not in tourism, accommodation or food services) believe that Central Otago's tourism activities and recreational assets are important to the success of the sector in which they work

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Very important Quite important

- Not very important
- Not important at all

While sample sizes are too small to be conclusive, it appears that Central Otago's tourism activities are of particular importance to those working in rental, hiring and real estate services; manufacturing; retail trade: and arts and recreation services.

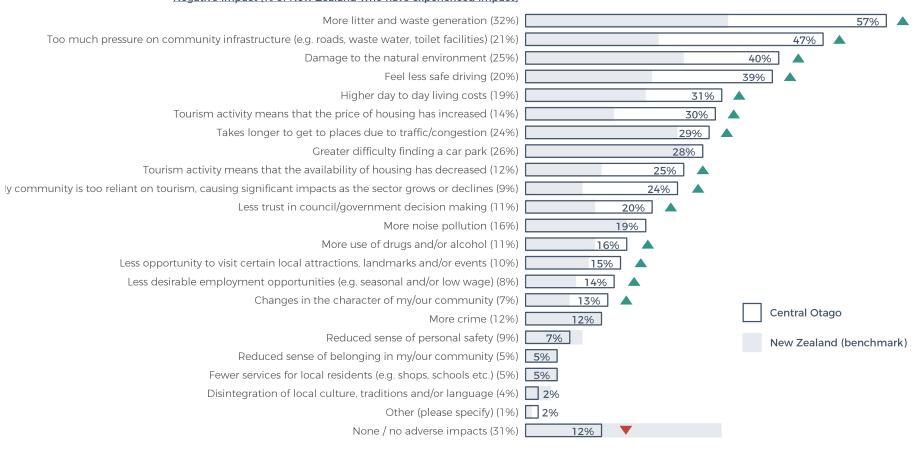
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ADVERSE IMPACTS OF TOURISM

In which of the following ways, if any, would you say you/your family are negatively impacted by tourism activity in Central Otago?



Negative impact (% of New Zealand who have experienced impact)

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The (ightarrow / igsim) indicate statistically significant differences –

Base : Central Otado Community (n=406)



Thinking about the areas in which tourism has negatively impacted you/your family, to what extent do you agree or disagree that enough action is taken to address these...

Negative impact (ranked by prevalence)					
More litter and waste generation (57%)	10%		43%		3%
Too much pressure on community infrastructure (e.g. roads, waste water, toilet facilities) (47%)	8%		37%	2%	
Damage to the natural environment (40%)	7%	28	%	4%	
Feel less safe driving (39%)	8%	2	29%	3%	
Higher day to day living costs (31%)	7%	22%	2%		
Tourism activity means that the price of housing has increased (30%)	4%	25%	2%		
Takes longer to get to places due to traffic/congestion (29%)	3%	22%	4%		
Greater difficulty finding a car park (28%)	4%	21%	3%		
Tourism activity means that the availability of housing has decreased (25%)	5%	18%	19		
community is too reliant on tourism, causing significant impacts as the sector grows or declines (24%)	4%	19%	2%		
Less trust in council/government decision making (20%)	1% 17%	6 2%	_		
More noise pollution (19%)	3% 14%	% 2%	Disa	<mark>gree</mark> enough actior	n is being taken
More use of drugs and/or alcohol (16%)	1% 14%	19	Agre	enough action is	being taken
Less opportunity to visit certain local attractions, landmarks and/or events (15%)	3% 9%	3%	Neith	her agree nor disagi	ree/Don't know
Less desirable employment opportunities (e.g. seasonal and/or low wage) (14%)	4% 9%	2%			
Changes in the character of my/our community (13%)	1%10% 1	19			
More crime (12%)	10% 2	:%			

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Note: Negative impacts are ranked by rate of agreement;

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Base : Central Otago Community (n=406)

IDEAS FOR MANAGING ADVERSE IMPACTS OF TOURISM

[Asked of those negatively impacted by tourism activity and who disagree that enough action is being taken to address these] What more do you think could be done?

LITTER & WASTE

"Better recycling initiatives at CODC and stronger environmental packaging requirements from manufacturers."

"Community / school roadside litter drives."

"More bins and signage. Regular bin emptying. The dump could do with an upgrade in Cromwell."

"More regular emptying of rubbish bins in towns, campsites and other public locations."

"Tourism businesses taking on more proactive role to reduce waste with their customers."

"Standardise public litter collection/recycling areas in each small town/suburb so it is easy to find. Remove small bins around town - they fill and overflow too quickly (labour intensive to maintain). Encourage 'Take your rubbish with you till you find the Waste & Recycling Centre' - service these regularly."

"There is a major lack of bins around the lake and green ways/walkways."

COMMUNITY INFRASTRUCTURE

"Transport and waste issues generated by increases due to tourism need better infrastructure. These should be paid or contributed to by the visitors that are contributing to said issues. Suggest Central Government involvement and more levies on the services that these people use."

"Infrastructure needs to be prioritised at the same rate as tourism has appeared to be over recent years. We see infrastructure services being removed from Maniototo rather than being improved (even down to the number of rubbish bins)."

"Several intersections are very unsafe at peak seasons, and could be upgraded to provide better visibility. Roundabouts would be a far better alternative at a few intersections, and more no parking lines around intersections, particularly with big trucks or people towing boats or caravans are parked very close to an intersection."

"More public toilet facilities, improvements in our waste water so Queenstown's grey water isn't dumped into the Kawarau River."

NATURAL ENVIRONMENT

"Support stronger national and local government attempts to curb freedom camping, no matter whether international or domestic visitors."

"More education around respecting and preserving our environment. Limit number to places of significance."

"There seem to be 4WD tracks all over the hills around Central Otago - why so many? Could they be reduced in number- tourists could still get to amazing places, but we could reduce the scars on the landscape."

"We are losing our water quality, and if this continues we will lose tourists and locals because of it. There is a big push for sustainable tourism, CODC needs to be at the forefront of this, role-modelling and helping other businesses to follow suit. Tourists need to be given the opportunity to give back to a place, not only take."

"Stop the new proposed airport - perfect test of a few grubby dollars over the environment. When the peace and green is gone you never get it back."

IDEAS FOR MANAGING ADVERSE IMPACTS OF TOURISM (CONT.)

[Asked of those negatively impacted by tourism activity and who disagree that enough action is being taken to address these] What more do you think could be done?

SAFER DRIVING

"Education - Needs to be realistic estimates of time taken to get places. "

"Locals trying to overtake tourists is the most unsafe thing happening out there - need more traffic police."

"An effective public transport system that encouraged people out of single driver commuter vehicles."

"Stringent testing at car rental offices - don't give them the keys until they've done a basic test!"

"Improve intersections and visibility, more passing lanes on all roads as a lot of people towing boats and caravans, and lake gazing hold everyone up, causing frustration and ultimately poor driving decisions"

"Driver education. Campervans etc holding up massive lines of traffic and not pulling over causes drivers to behave poorly due to frustration."

"People who live in countries that drive on the righthand side of the road should refrain from driving in New Zealand for 48 hours after arrival in NZ."

LIVING COSTS

"Community cards for elderly and lower income families providing reduced prices on locally produced food and services"

"Supermarket prices need to go down."

"Councils need to invest/educate about co-housing."

"I disagree enough is being done, but I have no idea what to do. It's a capitalist market."

"Take initiatives to reduce the dramatic growth of the region. We need to slow to gradual sustainable growth, not explosive growth."

CAR PARKING

"Assign more parking through Alex and Cromwell -Cromwell is especially bad for elderly residents."

"Enforcement of restrictions."

"Free designated public car parks for tourists."

HOUSING

"Reducing tourism activity would decrease growth and the demand for services, thus reducing the demand for housing and increasing availability."

"No housing available in Alexandra. Council are doing absolutely nothing about it and won't allow developers to build."

"Central Otago will always attract those working in Oueenstown who cannot afford a house there. It is out of CODC control unless they were to develop thousands of cheap sections; that will never happen. Housing does need to be on unproductive land e.g. below the clock to the Manuherikia could be thousands of sections with good sunshine and not impact on horticultural land."

"Rental costs are high and a shortage of houses in the area due to holiday homes (Air BnB)."

"International/transient workers here to fill temporary or seasonal jobs have been pushing up the price of rental accommodation, affecting the availability and cost for workers who are permanent residents."

IDEAS FOR MANAGING ADVERSE IMPACTS OF TOURISM (CONT.)

[Asked of those negatively impacted by tourism activity and who disagree that enough action is being taken to address these] What more do you think could be done?

RELIANCE ON TOURISM

"Tourism is pushed daily through media in Central Otago, which on one hand is good for tourism operators when times are good, but then come all the 'woe is me' stories when it goes turkey up."

"The tourism industry in Central Otago should focus on an 'under the radar' approach designed to attract wealthy visitors who value their privacy, expect first class service and seek exceptional experiences. Such persons are likely to spend far more than the 'average' tourist and stay longer in the district. Fewer visitors, higher returns and lesser impact!"

"Sponsor business incubators and encourage high value job creation businesses. Too many of our jobs are minimum wage."

"We have a real opportunity to build our profile as a hub for transport and warehousing as it relates to the construction sector. We could also be a much stronger service centre for professional services, health etc. Remote workers as an opportunity as well - enjoy the lifestyle and work from home in Central Otago"

NOISE POLLUTION

"Light and noise pollution fundamentally changes the experience and amenity of an area. The increasing and ever expanding lights and noise of seemingly uncontrolled subdivisions and industrial areas, more boats, jet skis and helicopters unfortunately need to be controlled in some way."

"Lake Dunstan is visually beautiful, but the noise pollution is 24 hours. The noise created by traffic on SH8 on the eastern side travels across the lake to the Western side. The Western side is the area where many cyclists (the cycle track) and families gather for picnics and swimming. Could a traffic-noise-reducing berm be erected along the eastern side of Lake Dunstan?"

"Noise from jet skis and motor boats is heard in all areas. It would be great if some larger areas of the lake could be put aside for swimming and nonmotorised vessels only. There seems to be no monitoring of Marine Traffic Rules and council information boards at the ramps contradict the National Marine Traffic Rules in terms of speed."

EMPLOYMENT OPPORTUNITIES

"Crack down on orchard owners ripping employees off, providing sub standard, in many cases, illegal accommodation and poor wages/working conditions. Same goes for rest homes, and presumably many other industries. All you hear about is how hard it is to find staff, labour shortages, cost of labour blah blah blah. If owners paid their staff well, and provided good working conditions, there would be no issue finding staff. The minimum wage is there for a reason."

"It seems that orchardists are only willing to employ people who can work a full-day. Many locals (older folk, parents of schoolkids etc) could manage 4 hours a day, or 2 days a week? The fruit would be picked, plus extra cash for locals to spend in the community."

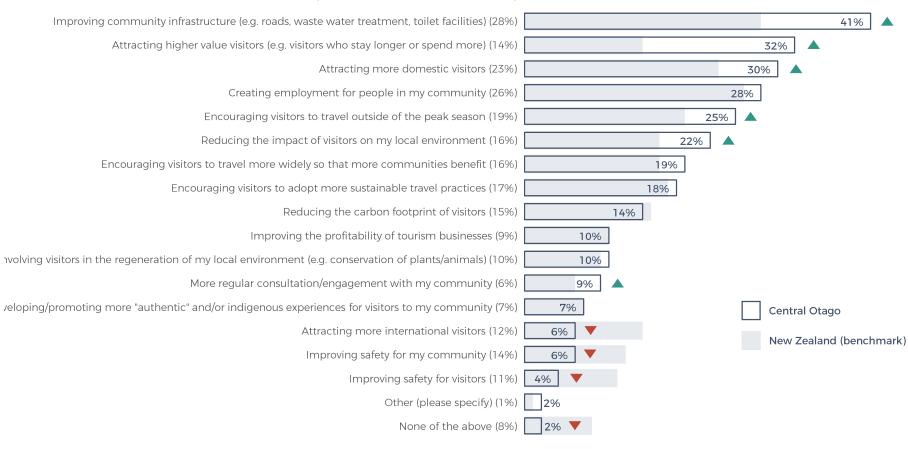
"Reduce use of international tourists in horticulture and viticultural labour force. Pay living wages."

"Not enough action is done to spread the government type jobs to Cromwell, plus very poor employment opportunities for 40+ female age group unless you like pruning vines, picking fruit, cleaning motels or working in the supermarket."

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On which of the following would you like your local tourism industry to focus most in the future? Please select up to three options



Future foci (% of New Zealand who selected focus)

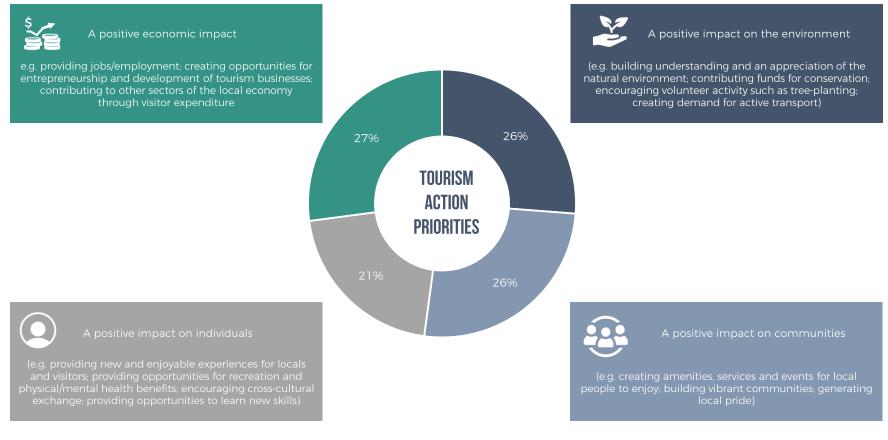
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The (ightarrow / igsim) indicate statistically significant differences

Base : Central Otado Community (n=406)

PRIORITISING TOURISM ACTION

Following are four areas in which action could be taken to ensure that tourism has positive impacts. To help in prioritising action plans, please tell us how important you think each of these is by allocating a total of 100 points between them.



TOURISM RISKS

And considering the potentially adverse impacts of tourism, what are the greatest risks that you see in future development of tourism in Central Otago (if any)?

"Our strength is our sense of space and time - the new trail (LDT) is the first time that Central Otago has had to deal with volume over value. I am not sure it is what we want. People just come in ride the trail over 3-5 hours and then leave. No real connections made with Central Otago. Is this what we really want? If we go back to our core values i.e. World of Difference is this a match?"

"An airport in Tarras might change things up. I don't know that this would be a great thing. Noise pollution in the Cromwell basin. Stress on infrastructure and the environment."

"Burnout of staff due to an excessive numbers of visitors, but no staff available. Make it favourable for trained and skilled staff to come to the region (accommodation options, good wages, training/development opportunities)."

"Developing too many businesses that totally rely on tourists - this can impact hugely on the entire community when something like Covid19 rears its ugly head and stops visitors coming here. We must develop things that will still survive if another worldwide pandemic or other catastrophe happens." "I worry that there is not enough rental housing for people who want to live and work in Central Otago, creating a bottleneck that affects the ability of businesses to expand. They can't always get the workers because the interested potential employees can't find somewhere to live."

"Infrastructure HAS to be upgraded to maintain and cope with the influx of visitors to our area in peak times. Last season we had two days of rain and ended up having to boil our water for almost four weeks as the waste water and treatment plant couldn't cope. Naseby water tanks weren't even full for preparation of the visitors in December!"

"Local communities being financially disadvantaged due to rising costs from tourists buying holiday homes. Local activities and cafes (etc) raising prices to maximise income from tourists, which then makes it unaffordable for locals."

"Too many people means ruined beauty spots with rubbish, over populated, traffic. Too many people also means increased housing demand on areas that have always been natural spots, farmland etc." "Losing the local community if we are too focused on attracting and meeting the needs of tourists, becoming too reliant on them for our economic sustainability."

"Losing the very things people want - tranquillity, slow pace, expansive areas without buildings. Bringing too many people at once puts too much pressure on services, more need to be built and so it rolls on."

"More litter, possible damage to environment (e.g. going off trails, fires), busier roads & communities - which is fine as long as impatient Kiwi drivers behave as well!"

"More of what has happened in the past. In other words, more money orientated than what is good for the community with lip service to environmental issues."

"I am not supportive of the model that attracts only high-end visitors who stay longer and spend more. This is small box thinking. Opportunity exists for better liaison between tourism and horticulture/agriculture/ viticulture sectors to support seasonal workers to work and play and spend money in Central Otago."

And considering the potentially adverse impacts of tourism, what are the greatest risks that you see in future development of tourism in Central Otago (if any)?

"Over development of infrastructure, airports, roads, freedom camping etc, to the level that we lose the area's major points of difference - environment, scenery, quiet etc. Look at Queenstown/Wanaka if you want to see what we must avoid."

"Aiming for volume rather than quality."

"Overcrowding, especially in small communities. Prior to Covid, Clyde had become a nightmare to live in with constant vehicle and human congestion, even visitors were commenting on how busy it was and not what they were looking for or expecting when visiting small town Central. Lockdown has caused a reset and I hope it will not return to pre-Covid levels."

"The potential cheapening if not the loss of those qualities which presently mark Central Otago as a "World of Difference', so that we become just 'another place".

"Traffic congestion. Cromwell was a nightmare over Xmas/New Years and that was only domestic tourists."

"Loss of sustainability - not enough focus on climate change and reducing waste." "Unrestrained freedom camping and no requirement to contribute to the cost of providing the services that they have travelled here to enjoy. Unrestrained building of holiday homes which serves to push up prices of housing for locals and puts pressure on health services at holiday times."

"As tourism grows, so must the ability of businesses to ramp up to be able to deal with the visitors in a way that offers authentic real experiences. Already its hard to process 50 people off a bus by many of our businesses so tourism needs to ramp slowly so that businesses can grow carefully."

"Becoming dependant on high price activities that families and locals can't afford to do (i.e. the potential to loose Cromwell Mini Golf due to the lease not being renewed). Also no longer having a campground as an affordable accommodation option for families and seasonal staff."

"Budget tourists travelling in vans with no toilets and polluting our lake shores."

"Central Otago may become a transactional district with high resident turnover and reduced community spirit due to a lack of pride and commitment." "Congestion, and pressure on services from people who contribute little to the local economy or to costs of services. This potentially happens with some local cycle trail users who bike and leave."

"Ending up like Queenstown and losing the natural beauty that Central Otago offers. We need to encourage tourism whilst maintaining as much of the natural beauty we can."

"Environmental degradation, biodiversity loss, loss of natural landscapes and stimulating too much growth in our communities."

"Exclusivity, which would diminish the old world character and essence of what Central Otago evokes in visitors and locals with an appreciation for its truly unique landscapes and mix of new and old, e.g. wine growing (cellar doors) with heritage appreciation (Mitchells cottage)."

"Growing too fast and putting too much extra pressure on our housing stock (with many buying properties to convert to visitor accommodation)."

"Damage / lack of respect for the environment."



CHALLENGES & OPPORTUNITIES SUMMARY: OPPORTUNITIES & CHALLENGES FOR TOURISM BUSINESSES

Central Otago residents who work or own businesses in the tourism industry (tourism, accommodation or food services) were asked to identify what they believe to be the biggest opportunities and challenges for tourism businesses in the region over the next ten years.

Cycle tourism/cycle trail development and collaboration between tourism and other sectors (e.g. horticulture, film, wine) are highlighted as the two most significant opportunities for tourism businesses in the region. A focus on extending visitor length of stay, increasing average visitor expenditure, maximising 'buy local' opportunities, developing/extending touring routes and enhancing the region's events portfolio are also seen as potentially fruitful for the region. Commonly identified as opportunities for **new product/business development** are retail and food service development, night sky experiences, backcountry experiences, and lake-based activities.

Workforce issues (i.e. attracting and retaining staff) are predicted to be the most significant challenge for tourism businesses; followed by the perennial issue of seasonality. The availability of worker accommodation, managing tourism's impacts on environment and community, and (amongst business owners) attracting the next generation of business owners/entrepreneurs are also seen as significant challenges for tourism entities over the medium term.

For owners/managers working in the sector, seasonality, workforce challenges and uncertain market conditions are predicted to be the biggest three challenges for Central Otago tourism businesses over the next decade.



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CHALLENGES & OPPORTUNITIES

OPPORTUNITIES FOR TOURISM BUSINESSES IN CENTRAL OTAGO

And what do you believe will be the biggest opportunities for tourism businesses in Central Otago over the next 10 years?

Cycle tourism/cycle trail development (64%)	72%
Collaboration between tourism and other sectors (e.g. horticulture, film, wine) (65%)	70%
Extending visitor length of stay (67%)	58%
Increasing visitor expenditure (65%)	53%
'Buy local' opportunities (e.g. showcasing local wine, food or artisans) (47%)	48%
Development/extension of touring routes (28%)	47%
Enhancing Central Otago's events portfolio (41%)	46%
Collaboration with neighbouring regions (49%)	43%
Collaboration between tourism operators (55%)	39%
New product/business development (47%)	38%
New domestic markets/market segments (21%)	33%
Committing to new business practices that equip the sector to deal with climate change (24%)	28%
New international markets/market segments (49%)	28%
Showcasing the sites and stories of significance to mana whenua (20%)	26%
Updating/enhancing existing products (29%)	26%
Engaging in projects to restore/protect the natural environment (24%)	26% Employed in Tourism Industry
New transport technology/connections (21%)	19% Owner/Manager in Tourism Industry
Other (4%)	
None of the above (0%)	1%

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Biggest opportunities (% of Owner/Manager in Tourism Industry)

CHALLENGES & OPPORTUNITIES

NEW PRODUCT/BUSINESS DEVELOPMENT OPPORTUNITIES

What opportunities do you see for new product/business development?

"Night sky. Guiding into the back country/ experiencing life away from the big city. Finding and telling the story of the hidden gems for people to see (i.e. Falls Dam outlet as a simple example) rather than the stock standard "take a photo here" vision that gets sold to visitors."

"Domestic travel trade looking to the area rather than international markets."

"Need to restore the Tairi Gorge train. Promotion of winery tastings. Strong nationwide marketing of all the bike trails." "Digital technology opportunities. Would require top class digital technology connections to be readily available throughout the region not just as "hubs"".

"Astro tourism in Naseby. Greater investment in tourist and worker accommodation across the Region. Improved transport connections with Dunedin and Queenstown to bring more visitors to the region. Encouraging tourists to stay longer by increasing tourist options outside of the Clutha basin."

"Retail and visitor experience, creating new businesses for seasonal tourists, accommodation, food industry etc." "Tours involving Māori culture/stories. Historic sites highlighted more in self drive tours connecting regions together. Innovative fun things to do outside Queenstown."

"More restaurants especially and more services/retail."

"Perhaps more development and promotion of the retail and evening restaurant/dining sector which is lacking in CO but would encourage a better dollar spend per visitor. Also some more lake based adventure activities?"

"We have a beautiful lake which has potential for new business ventures"

.....

"Taking visitors out to the high country - more engagement with our farming community."

CHALLENGES & OPPORTUNITIES

CHALLENGES FOR TOURISM BUSINESSES IN CENTRAL OTAGO

What do you believe will be the biggest challenges that tourism businesses in Central Otago will face over the next 10 years?

Workforce/attracting and retaining staff (70%)	57%			
Seasonality/seasonal highs and lows (81%)	54%			
Accommodation for people working in the sector (48%)	48%			
Uncertain market conditions (66%)	42%			
Retaining the character of Central Otago (26%)	36%			
Managing the impact of tourism on communities in Central Otago (27%)	32%			
Managing the impact of tourism on the environment (24%)	32%			
Succession planning/attracting next generation of business owners into industry (48%)	31%			
Regulatory compliance (27%)	24%			
Funding destination marketing (35%)	23%			
Developing the domestic market/market segments (29%)	23%			
Meeting changing consumer needs or expectations (4%)	21%			
Preventing uncontrolled growth (8%)	20%			
Maintaining community support for tourism/social license (31%)	19%			
Developing the international market/market segments (34%)	18%			
Impacts of climate change (13%)	17%			
Quality of digital connectivity/infrastructure in Central Otago (25%)	16%			
Financing product upgrades/improvements and/or new business development (21%)	14%			
Increased competition in the market (4%)	14% Employed in Tourism Industry			
Funding destination management (26%)	8% Owner/Manager in Tourism Industry			
Access to technology/emerging technology (13%)	5%			
None of the above (0%)	1%			

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Biggest challenges (% of Owner/Manager in Tourism Industry)

CHALLENGES & OPPORTUNITIES REGULATORY COMPLIANCE CHALLENGES

You have indicated that you see regulatory compliance as a significant challenge for tourism businesses over the next 10 years. Please describe below the specific challenges that you see (for example, in relation to which regulations/agencies).

"Central Otago council. The cost for running a restaurant/bar - building warrant of fitness cost is around \$5,000 per year for us on top of rates and water (\$10,000), while there is no regulation on Airbnb or holiday homes rented to the public for profit."

"DOC concession costs; HR health & safety costs."

"More and more rules being pushed down from government to be managed by business owners or local government without sufficient funding or support."

"Rapidly increasing costs and levels of compliance for all hospitality businesses."

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"No compliance for Airbnb. Compliance costs for accommodation providers is a daily battle." "Health and safety requirements, COVID-19 compliance, liability insurance, supply chain compliance etc, employment legislation and obligations, risk management."

"Building more accommodation units/getting consents/building permits -local council. Water legislation - 3 Waters/Lake Onslow development - national government/time lines."

"Long term leases for sustainability of businesses."

"H&S, climate change, taxation, actually it seems to me some government (local and national) agency is/will be charging us for everything and then also telling us what we can and can't do!"

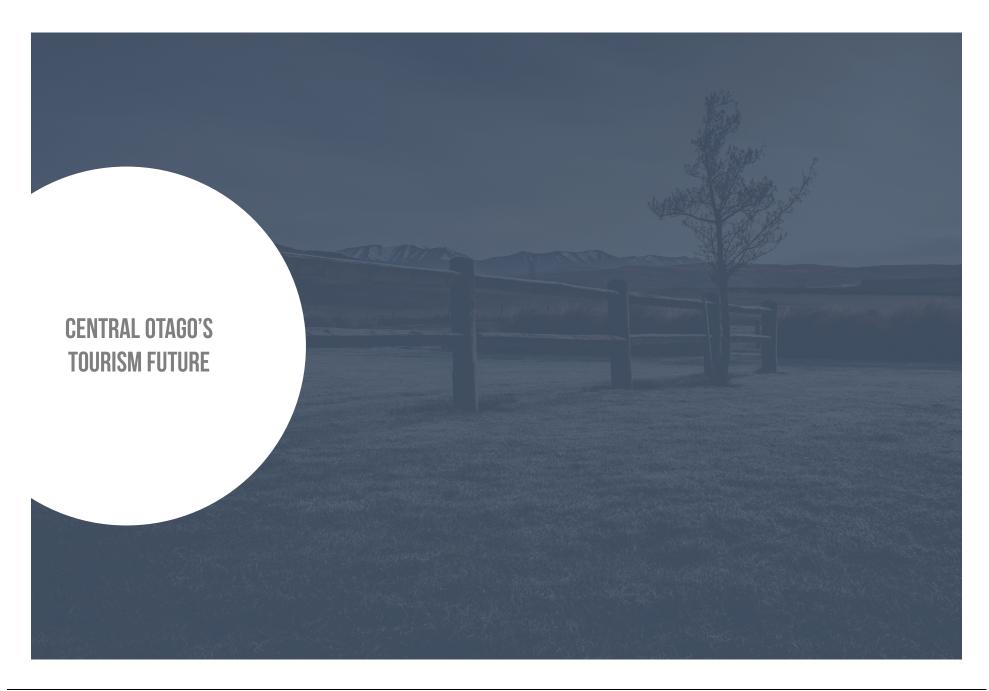
"The costs for small businesses to comply with regulations is huge."

"Growing number of Airbnb type accommodation providers that aren't compliant, portable food venues not compliant, Accommodation providers selling alcohol, not licensed to do so."

"Council does not follow thru or check businesses enough."

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TOURISM FUTURE

SUMMARY: CENTRAL OTAGO'S TOURISM FUTURE

Central Otago residents were asked which of 24 predefined concepts, based on ideas emerging from the destination management planning process, best reflect the type of destination that they would like Central Otago to be in the future. The top concepts captured themes also emerging from the earlier community workshops and included -

- a place that understands and promotes the stories of its culture and heritage;
- a place where people can connect with nature (e.g. spectacular night skies or backcountry experiences);
- a place that showcases everything local (including locally grown/made food, wine and beverages, local artists and artisans);
- a place that has interesting boutique experiences vs. large built mass attractions;
- a place with essential character (small town, un-developed);
- an uncrowded place with wide open spaces vs. urban environment; and
- a place set-up as a cycling hub (i.e. multiple cycling experiences from one place).

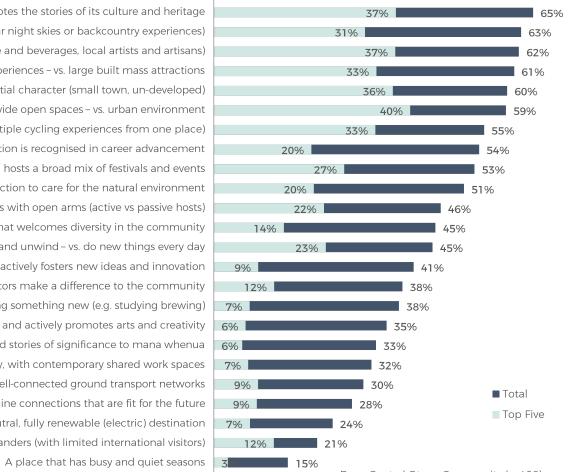


One in two Central Otago residents believe it is very (or extremely) important that Central Otago celebrates the sites and stories of significance to mana whenua (and a further 29% agree that this is 'somewhat important' – taking the total to 80%). Residents who identify as Māori. and recent arrivals to the region. are more likely to consider this important.

As noted in earlier workshops with the Central Otago community, and in research with the domestic visitor market, there isn't currently a well-developed understanding of what sites and stories are of significance to mana whenua (with knowledge of Central Otago's history centring primarily on the Gold Rush and, later, hydro development). Suggestions on ways in which the region could celebrate the sites and stories of significance to mana whenua include educating both visitors **and locals** (especially tourism operators) through signage, museums and school curriculum; increasing use of Te Reo for place/street names; planting native trees; and a greater emphasis on Matariki/Waitangi Day celebrations in the region. Residents do however acknowledge the importance of consulting with mana whenua before any decisions are taken on what sites to prioritise, and how stories are best told.

TOURISM FUTURE TOURISM FUTURES — KEY CONCEPTS

Which of these concepts reflect the type of destination that you would like Central Otago to be in the future? And which five would you say best reflect the type of destination that you would like Central Otago to be in the future?

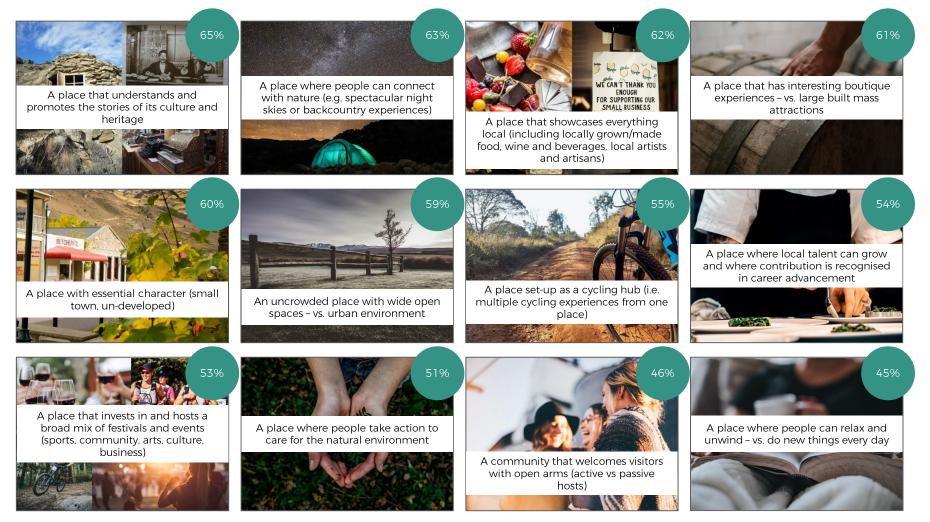


A place that understands and promotes the stories of its culture and heritage A place where people can connect with nature (e.g. spectacular night skies or backcountry experiences) A place that showcases everything local (incl. food, wine and beverages, local artists and artisans) A place that has interesting boutique experiences - vs. large built mass attractions A place with essential character (small town, un-developed) An uncrowded place with wide open spaces - vs. urban environment A place set-up as a cycling hub (i.e. multiple cycling experiences from one place) A place where local talent can grow and where contribution is recognised in career advancement A place that invests in and hosts a broad mix of festivals and events A place where people take action to care for the natural environment A community that welcomes visitors with open arms (active vs passive hosts) A place that welcomes diversity in the community A place where people can relax and unwind - vs. do new things every day A place that actively fosters new ideas and innovation A place where visitors make a difference to the community A place where people can spend a weekend learning something new (e.g. studying brewing) A place that invests in and actively promotes arts and creativity A place where people understand the sites and stories of significance to mana whenua A place where people can travel to holiday and work remotely, with contemporary shared work spaces A place that has low impact and well-connected ground transport networks A place with regional airline connections that are fit for the future A carbon neutral, fully renewable (electric) destination A place developed mainly for New Zealanders (with limited international visitors)

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TOURISM FUTURE

TOURISM FUTURES — KEY CONCEPTS (TOP 12)



TOURISM FUTURE

IMPORTANCE OF MANA WHENUA SITES AND STORIES

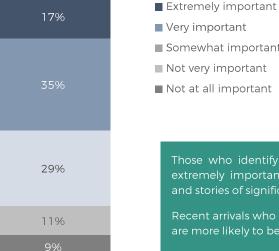
In your opinion, how important is it that Central Otago celebrates the sites and stories of significance to mana whenua?

52% of Central Otago residents believe that it is very/extremely important that Central Otago celebrates the sites and stories of significance to mana whenua

"The reason I think it is important to do more in this space is that the knowledge is not widely known... it should be and then we could celebrate it more confidently."

"I suppose it says something that I don't know

much of before the gold-rush. Do we have sites and stories of significance to mana whenua?"



- Somewhat important
- Not very important
- Not at all important

Those who identify as Māori are more likely to believe it is extremely important that Central Otago celebrates the sites and stories of significance to mana whenua (41%).

Recent arrivals who re-located to Central Otago in 2020 or later are more likely to believe it to be extremely important (42%).

"Although that this is really important it is also important that other cultures and history is not overshadowed by this. We have a lot of Chinese and Scottish history which has also hugely contributed to where we are today."

CELEBRATING SITES AND STORIES OF SIGNIFICANCE TO MANA WHENUA

And what are the kinds of things that Central Otago could do to celebrate the sites and stories of significance to mana whenua?

"Consult with mana whenua to see what sites and stories they want to celebrate, then do that."

"Ensure information is available about significant sites and history, train and engage with tourism operators to ensure they are familiar with, and able to recite those stories. While Māori history is scarce in Central Otago it should be discussed and known by everyone interacting with our visitors. Most of the "history" of Central Otago is presented as Gold Rush and beyond, not pre-gold rush."

"Recognise who mana whenua and ahi ka are here in the valleys."

"Hui with local iwi rununga. Inventory and protect mana whenua sites. Develop a partnership and understand how celebrate sites and stories."

"Matariki celebrations. Kopuwai re-enactments? Using the original Māori/Te Reo names for places around Central Otago. The ambassador programme has a large portion of its content based around the early Māori settlers - be great to endorse that more."

"Genuine celebration of Waitangi Day and Matariki."

"Actively encourage traditional plantings e.g. natives, kowhai trees etc. This would bring in more native birds. Alexandra would have to dig deep to find relics further back than the gold miners!"

"Signs up in appropriate places telling the story of that place. Refresh the Central Stories museum so the stories are told. Street names in Te Reo. A reconstruction village of what the place was like pre European times. Plant more native trees to return areas to what Central Otago was like in pre European times."

"Be far more open to learning about the stories of the area and respecting the local iwi connections, genuinely participating as te ao pakeha in terms of the 3 Ps of Te Tiriiti o Waiatangi: partnership, participation and protection. This includes exploring what the 3Ps could look like if there was a deliberate emphasis from leadership on our district and seen as a key part of our heritage."

"The pathways iwi took to travel from one coast to another. The place names and their stories. But don't forget the UNIQUE PART the Manuherikia played in our GEOLOGICAL history...remember how rich this area is in FOSSIL deposits." "Most rivers and mountains have Māori names - not all of which are in common usage, and there are some legends associated with various landforms, but generally the interior parts of the South Island were not sites of permanent Maori settlement. What sites and stories that there are should be promoted on explanatory boards etc."

"Encourage Te Reo in an inclusive manner."

"Educate locals AND visitors. It's very hard to find any information around town, it needs to be easy so locals learn the stories and get used to telling them"

"Ensure a local focus within the area's school curriculums so our young people grow up with a good understanding of the history of the area and its people (of all cultures). Increased sign boarding places of significance. Better resourcing of museums and organisations that support local history."

"Matariki celebrations. Te Reo classes. Walking tours with mana whenua. Opportunities to learn stories and history. Hands-on learning/demonstrations e.g. collecting flax for weaving, mahinga kai."



GENERAL FEEDBACK

This research is being undertaken to help shape the destination management plan for Central Otago. Is there anything else you would like to mention, relating to tourism in Central Otago over the next 30 - 50 years?

"Tourism needs to work hand in hand with all aspects of the community. We do not need to work against each other. It is super important that our "LOCALS" are on board. The importance of our previous generations who have lived and breathed Central Otago are key. Tourism operators need to put "community" first to ensure our businesses are successful for decades to come. This means all major decisions need to be made strategically not focussing on the bottom line. Therein lies the challenge."

"Better signage...its the one biggest thing I hear from tourists and visitors. Maybe free local maps at all businesses to hand out."

"Central Otago is investing heavily in cycle trail infrastructure and right now has the opportunity to be a cycling flagship region for the world. I would love to see our region be the go to bike region for all manner of cycling related activities."

"Expansion and more of everything cannot continue there is a tipping point where you lose that special Central Otago. Good luck with judging that point!"

"I want it to stay as it is. Not be developed and crowded like Queenstown."

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"Everybody I know hates what Queenstown has turned into - so far from the Central Otago experience we all knew as kids. That congestion and sheer volume of people should be avoided in any developments - so far I feel Cromwell developments have been good."

"A mix of markets is important - domestic is very important, international/FIT/Bus/Back packer/motorhome - diversity of offerings... all important. spread the eggs over multiple baskets."

"Have less very quiet periods and less very busy periods. Try to smooth the influx of visitors and create more seasonal offerings."

"It is very important that any tourism in this area must play a role in RESTORATION of our landscape...it can no longer be passive. This business needs to play an active role in maintaining a QUALITY DESTINATION approach. It can no longer, like the farming industry, fail to invest at all levels in the natural landscapes... where there is damage, where there is pollution... then the perpetrators must play their part in restoration and minimization of environmental impact."

"I think it is important to maintain and promote the sense of space that we have in Central... the big skies... the daily changing exhibition of amazing clouds... the nightly display of stars and planets (and aurora and satellites). We have vast arrays of gentle hills and rugged hills to wander around. It's a family-friendly environment, but with enough challenges for the extreme outdoors adventurers. We don't need 'Disney input' for visitors...we need to keep our authentic New Zealand ambience and encourage others to visit and join in. Most of us have chosen to live here, in small towns and rurally ... why would we want to change Central to look like somewhere else? We can go visiting outside Otago if we want a change of scene. We can promote our beautiful (but invasive) display of wild flowers (weeds) - come see them while you can!"

"It should be a destination for NZers, quiet, unhurried, natural and real and not littered with campervans and tourists who only want expensive infrastructure."

"It's a great place. We should happily share it, but do all that's possible to preserve what makes it special. Wide open spaces, peacefulness (and that includes Tarras!), the history, the gold mining, and of course the easy going."

This research is being undertaken to help shape the destination management plan for Central Otago. Is there anything else you would like to mention, relating to tourism in Central Otago over the next 30 - 50 years?

"Keep Central Otago pest-free as much as possible Wilding pines, rabbits, gorse... none of this belongs in our landscape. Keep the roads safe for greater traffic volumes and keep our lakes clean. Look after the people who have lived here for a long time, and LISTEN to their advice. They know this country like the backs of their hands, and know what works here and what doesn't. Some back office pen pushers with 'great ideas' are more likely to cause irreparable harm than good."

"Well the problem remains that the decision-makers are largely business people and naturally proexploitation of the environment via the tourism sector. There's been too much focus on mechanised, carbonintensive tourism (international visitors, helicopter flights to Milford, catering to the rich etc.). This is unsustainable. We need to plan for environmentallysensitive tourism - domestic mainly."

"We need to target tourists with money rather than budget travellers that travel on extremely tight budgets and don't respect our local natural environment (i.e. tourists who travel in cans without toilet facilities)." "We need to showcase the unique beauty of Central Otago to international and domestic visitors and create an infrastructure to support an increase in tourism and an increase in the dollar spend and length of stay of each tourist whilst still maintaining that unique beauty. High quality evening dining choices are seriously lacking. Would also like to see year round promotion of tourists to the area - not just peak season."

"We need to be very careful not to damage the way of life here, as has been done in Queenstown, in chasing the tourist dollar. It needs to be done sustainably and with consideration for the environment and those people who live here."

"We cannot predict 30-50 years out how travellers will be travelling, but we do know that Central Otago will be pan important part of a secondary network of places and destinations (as opposed to the Queenstown/Wanaka, Christchurch, Rotorua, Auckland top spots). Let's embrace that and be the very best we can be by being innovative well appreciating our past, inclusive while retaining that Central reservedness etc." "Don't let tourism overtake the social fabric of our community. Central Otago is in desperate need of adequate housing and when tourism comes first (as it has started to in Bluff, Southland), then the locals end

up losing their community and there's a lack of decent accommodation (both renting and buying)."

"Tourism needs to contribute to the region, but not at the cost of losing the regional identity. The pandemic has highlighted the disaster of over developing tourist centres. Queenstown has suffered badly, and is paying for the monoculture it has developed, encouraging international and Auckland tourists, and largely ignoring the rest of the domestic market. while smaller centres have done well, even flourished. It has also given New Zealanders the opportunity to enjoy our own country without having to negotiate international tourism - buses, crowds, rudeness, rubbish, unusual and often dangerous driving habits. The Arts in Central Otago need to be supported and

marketed by one coherent body."

"Keep it simple, don't over think things. Create a family friendly environment. When we shifted here it was the friendly country town feel that we loved."

This research is being undertaken to help shape the destination management plan for Central Otago. Is there anything else you would like to mention, relating to tourism in Central Otago over the next 30 - 50 years?

"Take care not to lose the essence of our place. Look after the environment, the water quality. Our water used to be pristine. Plant more trees. I hate that the pines are being dropped and left with no substitute planted. We need more shade to enjoy our hills and this has been taken away. I'd hate Alex to be mass developed and lose our country ruralness. Verge space in rural areas for horse riders not fences to the road edge everywhere. Keep the beautiful poplar and willow trees that are being knocked down for massive irrigators. Farming practice is trashing our area. Cows in Central Otago - bizarre."

"Quality tourism rather than quantity - Central Otago is special and unique. 'Best kept secret'. Once in a lifetime type of a place. Please keep it a special place and focus on building and investing in the communities to be able to benefit from tourism but have other industries that work alongside tourism and agriculture to provide year round business and thriving communities."

"Alexandra's town centre is appalling. Heaps of empty shops. Shops there are junk (vaping stores and \$2 shops). Needs a total revamp or people will not be encouraged to spend time in town, let alone money." "Planning should concentrate on relationships with the local communities and building from there. Sometimes it seems there are so many new groups set up to develop the next best thing for Central Otago but the community doesn't really become a part of these. I guess I'm saying less administrative and planning groups and more collaborative communication."

"Keep it rolling! Central Otago can definitely stand with the most desirable tourist hot spots in NZ but its different 'flavour' is what makes it unique and that should always be emphasised and promoted to set us apart from the rest."

"Please ensure our rivers and waterways are given the respect they deserve. Dairy Farming is encroaching on our area and changing our gorgeous Central Otago landscapes whilst abusing our waterways, for their own gain. Tourism also needs to be sustainable and kind to our environment which is why people are wanting to visit us. We are 'a land of difference', lets keep it that way."

"I hear there are a few Gin distilleries opening up, so perhaps capitalise on that and include it adjacent to the promotion of wine." "Make it genuinely sustainable. Become far more connected to what is truly going to give our future generations the ability to say those living in 2021 were

a key part of ensuring and enabling us to have a future with hope and sustainable practices which are in harmony with how we live on our planet in this part of the world. Truly look hard and robustly at what 'making a world of difference' really does mean for our young ones today. We cannot afford to ignore their pleas and their wonderful wisdom. Any decisions now must see us walking alongside our youth. We need to

be seen to acknowledge the shortcoming of expedient tourist ventures, rather than continue to perpetuate it for short term gain. Those ventures are just about profit margins. We have to look at tourism and destination management which is determined by what will see our youth and those who socially have not had the good fortune to have spare dollars very much cherished and invited to participate in our district and community."

"Alexandra is an affordable place for ordinary New Zealand families to holiday in, especially those with young children or three generations. I would like to see it continue to develop that way so that holiday pleasure is not only for those with disposable money."

This research is being undertaken to help shape the destination management plan for Central Otago. Is there anything else you would like to mention, relating to tourism in Central Otago over the next 30 - 50 years?

"A revised district plan, focused on discrete areas of high density housing, preserving the open spaces between settlements. Make it easy to get resource consent for small subdivisions to provide food and accommodation along tourist trails. More cycle and walking paths. Within townships, as well along the Clutha river and to give access to conservation lands. More conservation reserves and focus on preserving wetlands and areas of native vegetation. Continued emphasis on predator control. No new airports."

"I want my great grandchildren to be in awe of our landscape it's protection and care, not despising our lack of forethought and planning."

"I would like to emphasise the importance on how greed can very easily become detrimental to an area from a tourism point of view. Selling ourselves cheap or over selling ourselves is never going to be a good long-term plan. What makes Central the place to be is the lack of people and environments we have that are unique to here. People come here to be "up in the back country". This can easily be lost if we try to over develop tourism here."

"I would like to see more things aimed at families and young children." "It is going to take a lot of flexibility and adaptability to deal with the uncertainty that, really, we are only just beginning to experience in terms of the Covid-10 pandemic. Having plans that are flexible and adaptable is going to be critical."

"Just back-pedal a bit and cope better with what is already happening here. Take a long look at the impact tourists will have and try to overcome the dollar signs. One realises that you can't stop progress, but make sure it is sustainable and without detriment

to the region's people and surroundings."

"Keep making good camping areas for self contained vehicles but maybe charge a small daily fee at these sites to cover toilets and rubbish collection."

"Keep the open spaces open! The appeal of Central Otago is access to the mountains and trails in the great wide open. And don't give the greenies so much say. We can't all walk or ride push bikes over these mountains."

"Longer term town planning is vital, so the area is developed more cohesively, rather than individual developers doing it in a piecemeal way." "Maintain the early charm and character of the district. Stop rampant and intensive development spreading across the hillsides and rural areas. Keeping development in the towns more authentic to the history of the area - i.e. character buildings, more natural materials. Keep it natural and let visitors experience the quiet and peaceful serenity, the scenery, happy local people. Do not allow the creation of theme park like attractions designed to draw tourists here for non-authentic experiences. Charge a premium for tourists to view and experience what we have - they cant find this anywhere else. No more low value, high volume visitors."

"More crop and food research type tourism. People coming and seeing/participating in new crop development with sustainable practises. Could offer courses. Would also have positive effect by making research self funding."

"Our water quality is embarrassing to show any tourist. Please clean up our drinking water and rivers. Stop Queenstown sewage going into Lake Dunstan."

"Don't kill the goose! Chasing the dollar and thoughtless development will only destroy what we have got."

This research is being undertaken to help shape the destination management plan for Central Otago. Is there anything else you would like to mention, relating to tourism in Central Otago over the next 30 - 50 years?

"People come here for the openness of the countryside, the people, the environment, the fruit, the unique experiences, the light, the colours, the skydon't let everything get so big that it spoils what makes it different. Balance and spread out over distances and seasons."

"Finally do something significant with the Cromwell mall. Come to some compromise with the individual owners so that it can be a vibrant shopping area not just a place full of banks and real estate agents."

"The industry needs to be resilient enough to withstand changes to both our country's and the World economy. It will need to plan for changes bought about by climate change and natural events, including earthquakes. Our transport system and roading is very vulnerable with access to much of the area confined to one or two highways that pass through mountain passes and river gorges - all susceptible to slips etc."

"We need to develop a destination that has at its core our community and meets their interests so that they are proud to invite visitors to share our place and people - only when we are truly attractive to ourselves can we attract domestic and international guests." "The difficulty of developing Tourism in an area like Central Otago is finding the balance between preserving the character or reason why people come here without inundating the area with so many visitors that it changes that character. It is something of a chicken and egg situation. You can't provide services for visitors until there are enough visitors to justify the service!"

"There is a pool of very talented people who have moved into the region in recent years who have great ideas to progress and develop Central Otago as a destination, however there is still very much a culture of the 'old guard' that is impeding moving forward. The opportunities for the region are currently being limited by the feeling that change is not embraced and that's 'not how we've always done it'."

"Tidy up riverside areas and recreation areas for locals to be able to enjoy before focusing on tourists."

"Allow for the development of unique accommodation for visitors that reflect the things that characterise Central Otago (e.g. units on vineyards, with views of the rocks and hills of Central Otago, built of stone / timber to reflect the history of the area)." "Build on what we are doing now. Use our cycle ways as a huge attraction. Making access to paths along the beautiful Clutha river is great. We need more spots for people to be able to set up camp. We need to be seen as the destination for recreational activities and sports. We have everything here and it doesn't take long to get anywhere."

"We need to look at things in a more sustainable way where the overseas tourist is a bonus rather than being the reason for an industry or business. There needs to be focus on sustainability with the local market first. When covid hit it was very evident that while New Zealanders would be happy to support tourism providers, they had created and geared their industry purely with the big \$\$ of overseas travellers in mind making their tourism experience out of reach of the standard New Zealander to experience."

"Another special interest that should be considered as part of the destination management plan is golf. Golf assets provide recreational benefit to the community but despite Central Otago Council owning extensive golf assets (50-100m) they are driving virtually no domestic or international tourism outcomes from these "



APPENDIX SURVEY DATA WEIGHTING

	Pre-Weighting	Post-Weighting		
Central Otago District:	%	%		
Vincent Ward	46	47		
Cromwell Ward	41	37		
Maniototo Ward	7	8		
Teviot Valley Ward	6	8		
Age:	%	%		
18 - 19 years	1	5		
20 - 29 years	5	11		
30 - 39 years	14	14		
40 - 49 years	20	15		
50 – 59 years	25	18		
60 – 69 years	19	19		
70+ years	15	18		
Gender:				
Male	36	49		
Female	61	48		
Gender Diverse	1	1		
Prefer not to say	2	2		
Base: Total Sample	n=	n=406		

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APPENDIX

SAMPLE PROFILE

Connection with Central Otago	%
Live in Central Otago	97
Own a holiday house in Central Otago	3
Base: Total Sample	n=406

Household Composition	%
My husband, wife or partner	74
My mother and/or father	5
My children aged under 5	9
My children aged 5 to 17	19
My children aged 18 or older	5
Other family / whānau	8
Other person(s)	5
None of the above - I live alone	9
Prefer not to answer	3
Couples (No Kids)	48
Families (Kids Any Age)	28
Families (Kids <18 years)	25
Base: Total Sample	n=406

Ethnicity	%
NZ European	84
Māori	5
British	2
Other	10
Prefer not to say	4
Base: Total Sample	n=406

Grew up in Central Otago	%
Grew up in Central Otago	27
Did not grow up in Central Otago	73
Base: Central Otago Residents	n=392

Arrival in Central Otago	%
Prior to 1980	4
1980 - 1989	6
1990 - 1999	11
2000 - 2009	24
2010 - 2019	44
2020 or later	10
Base: Did not grow up in Central Otago	n=304

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APPENDIX

SAMPLE PROFILE

Occupation	%
Employed full-time in paid work (30+ hours)	45
Employed part-time in paid work (<30 hours)	8
Unpaid/volunteer work (full-time or part-time)	7
Self-employed	33
Studying	6
Looking after family and/or home	4
Looking for work or unemployed	0
Retired	18
Beneficiary	1
Prefer not to answer	1
Base: Total Sample	n=406

Industry Administrative and Support Services 5 Agriculture, Forestry and Fishing 13 Arts and Recreation Services 3 Construction 9 Education and Training 4 Electricity, Gas, Water and Waste Services 3 Financial and Insurance Services 1 Health Care and Social Assistance 4 Information Media and Telecommunications 0 Manufacturing 2 Mining 1 Other Services 2 Professional, Scientific and Technical Services 8 Public Administration and Safety 6 Rental, Hiring & Real Estate Services 1 Retail Trade 5 Tourism / Accommodation and Food Services 23 Transport, Postal and Warehousing 1 Wholesale Trade 0 Other 8 Base: Employed / Self-employed n=329



VISITOR INSIGHTS PROGRAMME

MARKET PERCEPTIONS: CENTRAL OTAGO

JULY - DECEMBER 2021



MARKET INSIGHTS PROGRAMME: MARKET PERCEPTIONS

BACKGROUND & RESEARCH APPROACH

Background

Angus & Associates is an independent research and strategic planning consultancy specialising in tourism and leisure. The Market Perceptions programme, a component of our Visitor Insights Programme (VIP), is designed to monitor perceptions of regional travel destinations within New Zealand and to meet the needs of organisations across the industry, including Regional Tourism Organisations/Economic Development Agencies. The Market Perceptions programme offers subscribers a cost-effective approach to profiling current and potential visitors to their region and to monitoring and benchmarking brand perceptions, through a syndicated survey of the domestic and Australian travel markets.

Research Approach

The Market Perceptions programme is conducted online, including on mobile devices. A total sample of at least n=7,200 New Zealand and Australian travellers are included in the programme each year (a monthly sample of n=300 New Zealanders and n=300 Australians), recruited via Dynata's consumer panel. Respondents must be aged 18+ years and must have travelled overnight within the past 12 months to participate in the research. Quotas based on New Zealand and Australian census data (region of residence, gender and age) have been set to ensure a representative and consistent sample to accurately monitor changes over time. Tourism Central Otago joined the Market Perceptions programme in July 2021. This report is based on data collected between July and December 2021.

The 'regional benchmark' referenced in this report is the average across 13 destinations – Auckland, Waikato, Bay of Plenty, The Coromandel, Tairāwhiti, Rotorua, Taupō, Hawke's Bay, Ruapehu, Waitaki, Central Otago, Queenstown and Dunedin.

For more information about this research please contact:

Tourism Central Otago Dylan Rushbrook 021 285 0625 dylan.rushbrook@codc.govt.nz

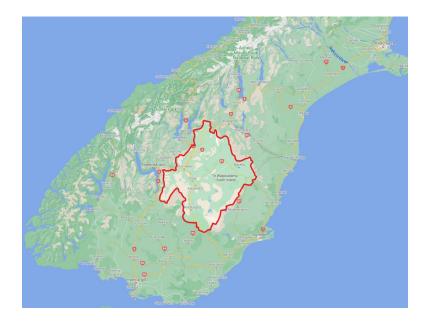
Angus & Associates (04) 499 2212 marketperceptions@angusassociates.co.nz

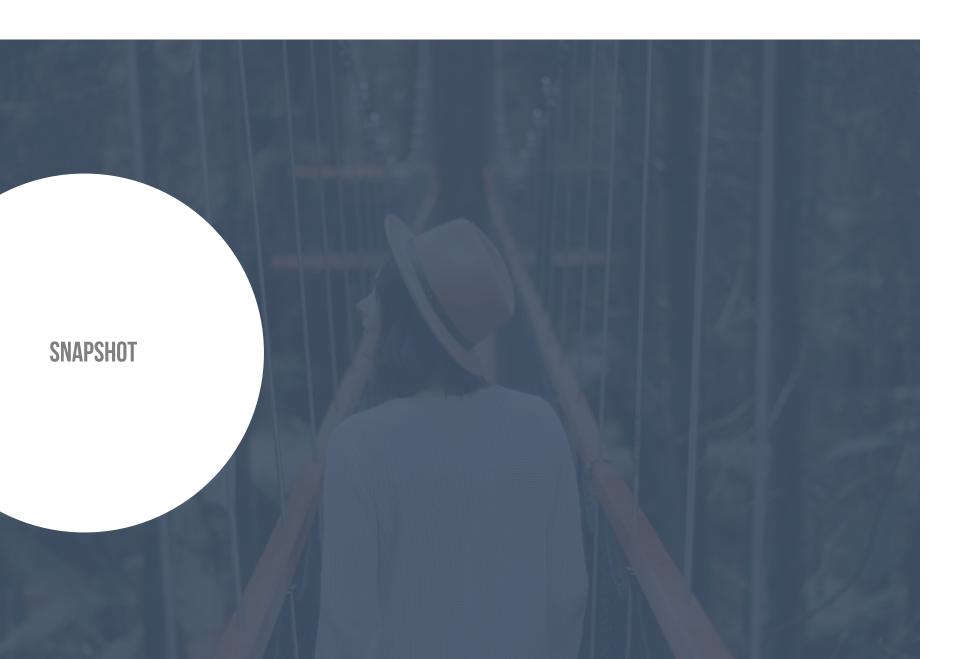
MARKET INSIGHTS PROGRAMME: MARKET PERCEPTIONS

Tourism Central Otago is aware that there is some confusion in the market about the geographical boundaries of Central Otago. In prior research, it has been clear that when domestic and Australian travellers think of Central Otago the first places that have tended to to come to mind have been Queenstown and Wanaka.

To assess how the market's understanding of the region is changing over time, while also getting an accurate 'read' on market perceptions of 'the real Central Otago', Angus & Associates' Market Perceptions research begins with a question that asks respondents what places come to mind when they think of Central Otago.

The correct context is then set by displaying a map of the region and explaining that, when we talk about Central Otago in the survey, we're referring to the region highlighted and not to Queenstown, Wanaka or Arrowtown, which are all part of the Queenstown Lakes District. This means that respondents have the correct understanding of Central Otago when answering the survey questions that follow.

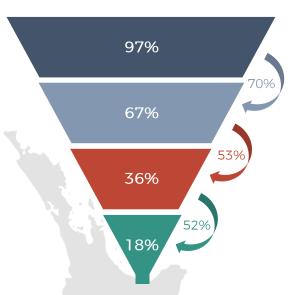




SNAPSHOT (JULY - DECEMBER 2021)

3 out of **4** New Zealanders travelled domestically in the past 12 months

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AWARENESS

Heard of Central Otago

KNOWLEDGE

/isited Central Otago or have some ideas about what to do there

APPEAL

Consider Central Otago to be 'highly appealing'

PROPENSITY TO VISIT

Will probably/ definitely visit Central Otago in the next 12 months



10% of New Zealanders (excluding Central Otago residents) who travelled domestically in the past 12 months visited Central Otago

New Zealand travellers associate Central Otago with...

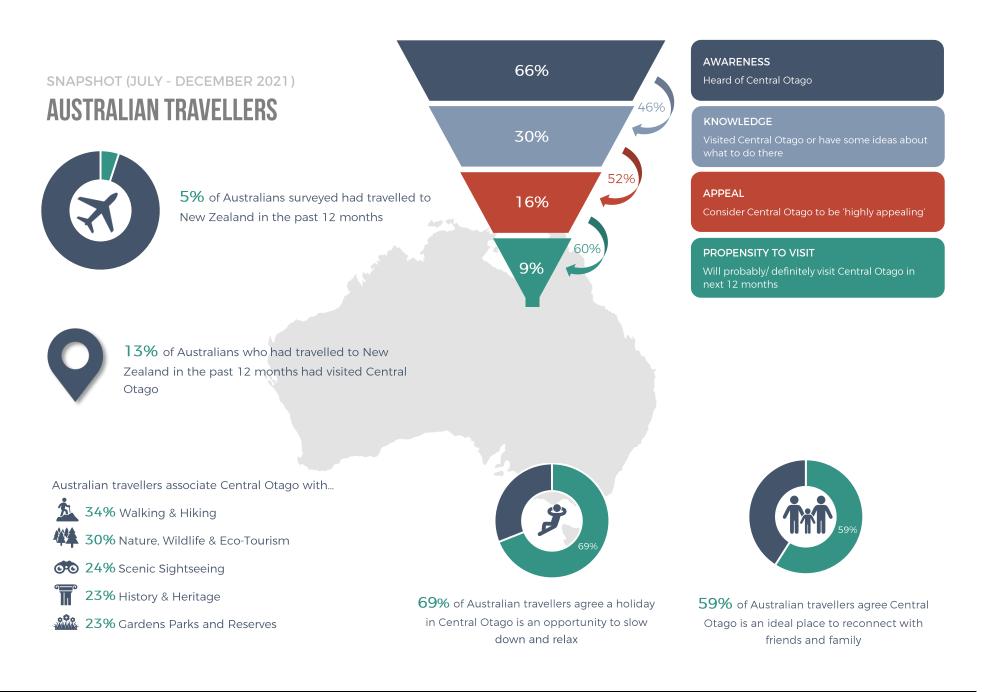


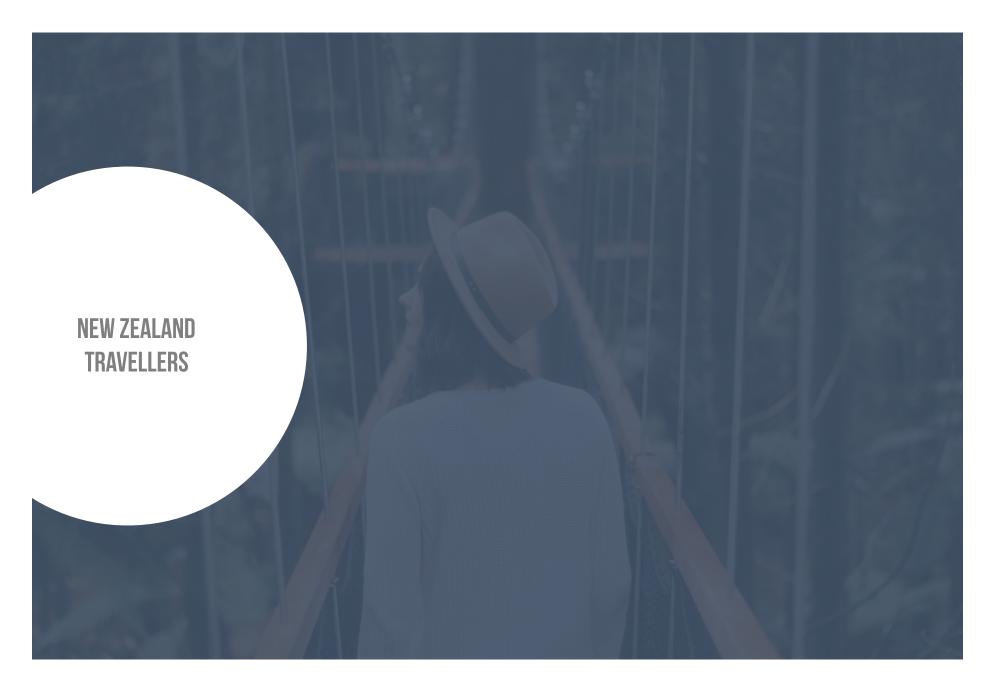


72% of New Zealand travellers agree a holiday in Central Otago is an opportunity to slow down and relax



51% of New Zealand travellers agree Central Otago is an ideal place to reconnect with friends and family





NEW ZEALAND TRAVELLERS CENTRAL OTAGO UPDATE: JULY – DECEMBER 2021

While the percentage of New Zealanders (aged 18+) travelling domestically remained stable at 77%, the past year has been influenced by increased profile of domestic travel as well as increased domestic competition and destination marketing by other regions.

Of the New Zealanders who had travelled domestically in the past 12 months, 10% visited Central Otago, with 7% staying overnight. This is likely to be lower than normal given the extended lockdown in Auckland. Central Otago's key markets originate from Canterbury, Otago and Southland with a strong representation from Auckland given the distance to travel.

There is some confusion around the geographical boundaries of Central Otago. When New Zealand travellers think of Central Otago the first places that come to mind are Queenstown, Wanaka and Arrowtown (closely followed by Alexandra and Cromwell/Bannockburn). After answering this question, respondents are then shown a map of Central Otago so the following questions are then answered with the correct context.

72% of New Zealand travellers strongly or somewhat agree that Central Otago is a great place to relax and unwind while 51% see the region as a great place to reconnect with family and friends. Interestingly cycling/biking comes fourth in terms of associated activities, behind walking/hiking, wineries and scenic sight seeing.

Central Otago's appeal is stronger than the regional benchmark with a significant lift in appeal postvisitation which presents a great opportunity for word of mouth and visitor advocacy.

The main barrier to travel is having no reason to visit Central Otago, followed closely by the perception that it is inconvenient to get to the region.

Auckland, Otago and Canterbury residents are the most likely to visit Central Otago in the next 12 months. The age range and household composition of intending visitors are similar to the total sample.

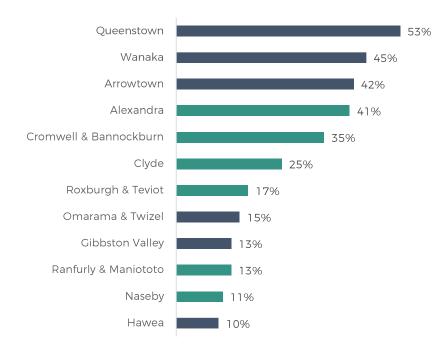


AUSTRALIAN TRAVELLERS

CENTRAL OTAGO ASSOCIATIONS

When you see 'Central Otago', which of the following places do you think of?





TOP-OF-MIND PLACES

Base: Total sample (n=1897)

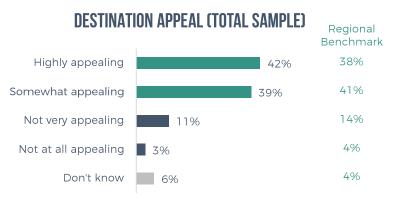
MARKET PENETRATION, FAMILARITY & DESTINATION APPEAL

In the past 12 months, where (if anywhere) have you travelled? How familiar are you with Central Otago as a destination to visit for a short break or holiday? How appealing is Central Otago to you as a destination for a short break or holiday?



Base: Travelled around NZ in past 12 months, excluding residents (n=1855)

Familiarity	%	Regional Benchmark
I have visited Central Otago	52	68%
l have never visited, but do have some ideas about what you can do there	16	13%
I have never visited, and don't know much about what you can do there	29	16%
I have never heard of Central Otago	3	2%



Base: Total sample who have heard of Central Otago, excluding residents (n=1838)



VISITOR PROFILES

The profile of the total sample and profile of visitors from New Zealand to Central Otago?

	Total Sample (excl. residents)	Visited Central Otago (Past 12 Months)	
Region of Residence	%	%	Age
Northland	4	3	18-19 years
Auckland	33	22 🗸	20-29 years
Waikato	10	5 🔻	30-39 years
Bay of Plenty	6	5	40-49 years
Tairā whiti/Gisborne	1	0	50-59 years
Hawke's Bay	4	2	60-69 years
Taranaki	3	1	70+ years
Manawatu-Whanganui	5	2 🔻	Household Composition
Wellington	11	5 🔻	My husband, wife or p
Tasman	1	3	My mother and/or fath
Nelson	2	1	My children aged und
Marlborough	1	1	My children aged 5 to
West Coast	1	1	My children aged 15 c
Canterbury	12	25 🔺	Other family/relatives
Otago	5	20 🔺	Other person(s)
Southland	2	5	None of the above – I l
Base:	n=1897	n=187	Base:

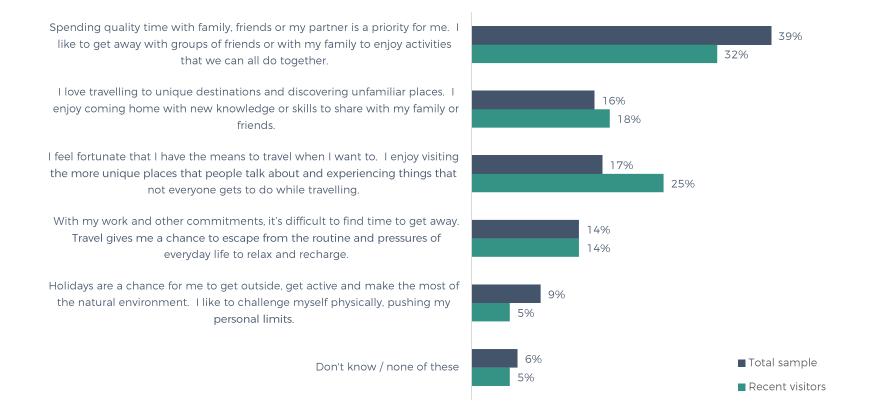


	Total Sample (excl. residents)	Visited Central Otago (Past 12 Months)
Age	%	%
18-19 years	3	3
20-29 years	18	15
30-39 years	17	וו 🔻
40-49 years	16	12
50-59 years	17	16
60-69 years	14	20 🔺
70+ years	15	23
Household Composition	%	%
My husband, wife or partner	63	79 🔺
My mother and/or father	8	4 🔻
My children aged under 5	11	8
My children aged 5 to 14	17	10 🔻
My children aged 15 or older	13	12
Other family/relatives	9	5 🔻
Other person(s)	9	4 🔻
None of the above – I live alone	12	10
Base:	n=1897	n=187

CENTRAL OTAGO VISITOR PROFILES (PERSONAS)

Which one of the following best describes you and your views on travel and holidays?





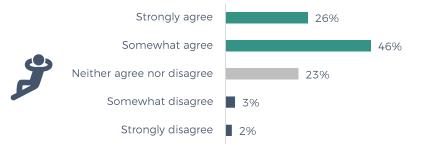
Base: Total sample, excluding residents (n=1897); Visited Central Otago in past 12 months (n=187)

CENTRAL OTAGO POSITIONING

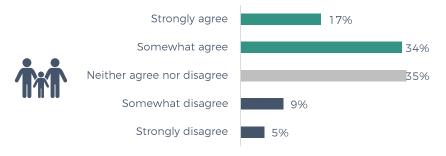
What is the first thing that comes to mind when you think about Central Otago? To what extent do you agree or disagree with the following statements?



A holiday in Central Otago is an opportunity to slow down and relax



Central Otago is an ideal place to reconnect with friends and family





ACTIVITIES / EXPERIENCES ASSOCIATED WITH CENTRAL OTAGO

Which, if any, of the following activities or experiences do you associate with Central Otago?

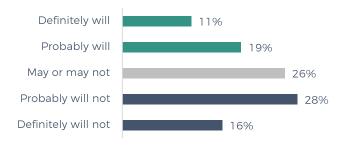


PROPENSITY TO VISIT & BARRIERS TO VISITING

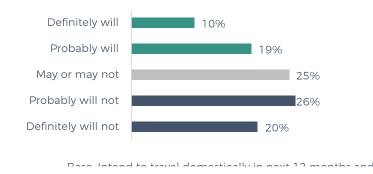
How likely are you to visit Central Otago within the next 12 months? (for any reason / for leisure purposes) You mentioned that you are unlikely to visit Central Otago within the next 12 months. Why is that?

83% of NZ travellers intend to travel domestically in the next 12 months (i.e. definitely / probably will travel around NZ)

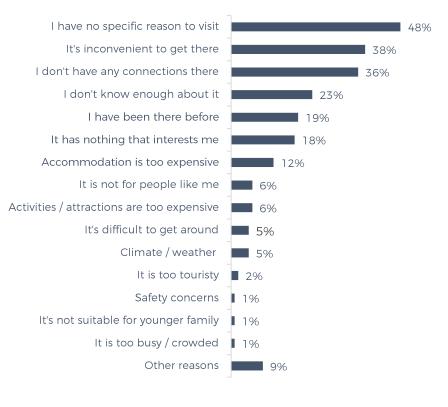
PROPENSITY TO VISIT CENTRAL OTAGO IN NEXT 12 MONTHS (ANY REASON)



PROPENSITY TO VISIT CENTRAL OTAGO IN NEXT 12 MONTHS (LEISURE)



BARRIERS TO VISITING CENTRAL OTAGO



Pass Intend to travel domestically in payt 12 menths and have beard of

FUTURE VISITOR PROFILES

How likely are you to visit Central Otago for leisure purposes within the next 12 months?

	Total Sample (excl. residents)	'Definitely' will visit Central Otago (Next 12 Months)		Total Sample (excl. residents)	'Definitely' will visit Central Otago (Next 12 Months)
Region of Residence	%	%	Age	%	%
Northland	4	2	18-19 years	3	1
Auckland	33	27	20-29 years	18	15
Waikato	10	5 🔻	30-39 years	17	19
Bay of Plenty	6	6	40-49 years	16	18
Tairāwhiti/Gisborne	1	1	50-59 years	17	17
Hawke's Bay	4	3	60-69 years	14	13
Taranaki	3	1	70+ years	15	18
Manawatu-Whanganui	5	2 🔻	Household Composition	%	%
Wellington	11	7	My husband, wife or partner	63	72 🔺
Tasman	1	1	My mother and/or father	8	4 🔻
Nelson	2	1	My children aged under 5	11	13
Marlborough	1	1	My children aged 5 to 14	17	21
West Coast	1	1	My children aged 15 or older	13	12
Canterbury	12	17	Other family/relatives	9	6
Otago	5	20	Other person(s)	9	8
Southland	2	7	None of the above – I live alone	12	8
Base:	n=1897	n=178	Base:	n=1897	n=178

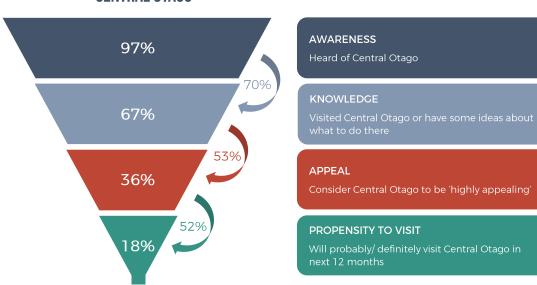


CONVERTING AWARENESS TO VISITATION

The funnel metric below illustrates the path to purchase in the sense that it explores someone's awareness of the destination, the knowledge they have of what to do at the destination, how appealing they find the destination and how likely they are to visit in the future. 97% of New Zealand travellers have heard of Central Otago. Going down the funnel, a new path to purchase measure is added each time. This means that the 18% at the bottom of the funnel represents the proportion of New Zealand travellers who have:

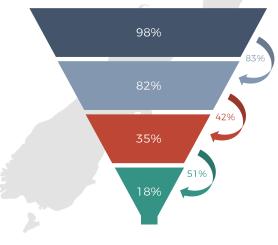
- Heard of Central Otago, <u>and</u>
- Visited Central Otago or have some ideas about what to do there, and
- Consider Central Otago to be highly appealing, and
- Will probably / definitely visit Central Otago in the next 12 months

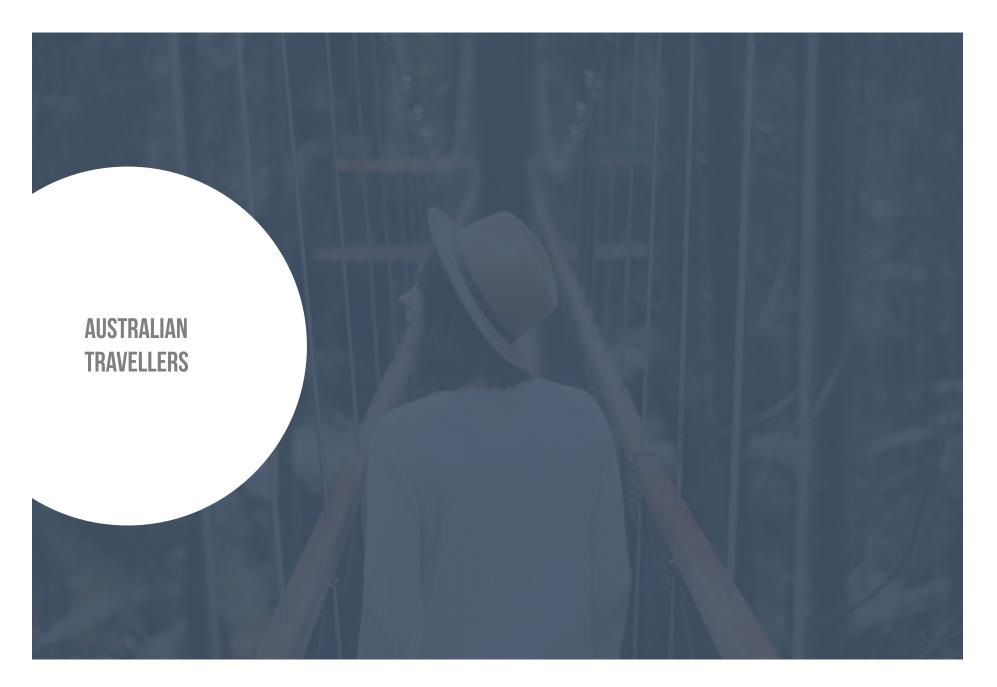
The smaller numbers on the right hand side of the funnel represent the conversion between each of the stages.



CENTRAL OTAGO

REGIONAL BENCHMARK





AUSTRALIAN TRAVELLERS CENTRAL OTAGO UPDATE: JULY – DECEMBER 2021

The continued border closure during 2021 has resulted in a very small sample size for the survey answers related to visitation and results should be interpreted with caution. The Trans-Tasman bubble opened from April 19 to June 26 and for a further short period between July 4 and July 23. This has allowed for some responses from people who have visited Central Otago in the past 12 months however numbers are so low they are not statistically valid and have not been included in this report.

Awareness of Central Otago and propensity to visit results should be understood in the context of a lockedout country and the uncertainty of border opening dates. That said, perceptions remain valid and important given the impending reopening of the border.

81% of Australian travellers consider Central Otago to be highly or somewhat appealing which is on par with the regional benchmark.

69% of Australian travellers strongly or somewhat agree that Central Otago is a great place to relax and unwind while 59% see the region as a great place to reconnect with family and friends. Australian travellers associate Central Otago with natural landscapes, walking/hiking and scenic sightseeing. Wineries and cycling/biking do not feature as highly as they do in the domestic market.

Of Australians who intend to travel to New Zealand in the next 12 months, 15% 'definitely will' visit Central Otago. The sample size for barriers to travel to Central Otago is small and results should be treated with caution but the main barrier is no reason to travel or not knowing enough about the region.

Despite the lockdowns and border closure there remains a strong intent among Australian travellers to visit New Zealand in the next 12 months.



AUSTRALIAN TRAVELLERS CENTRAL OTAGO ASSOCIATIONS

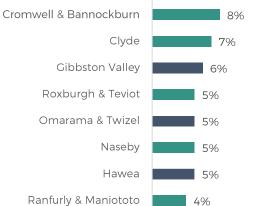
When you see 'Central Otago', which of the following places do you think of?



Queenstown Wanaka 11% Alexandra 10% Arrowtown 9% 8% Clyde 7%

TOP-OF-MIND PLACES

25%



Base: Total sample (n=1839)

4%

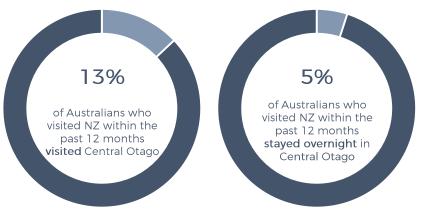
AUSTRALIAN TRAVELLERS

MARKET PENETRATION, FAMILARITY & DESTINATION APPEAL

In the past 12 months, where (if anywhere) have you travelled? How familiar are you with Central Otago as a destination to visit for a short break or holiday? How appealing is Central Otago to you as a destination for a short break or holiday?

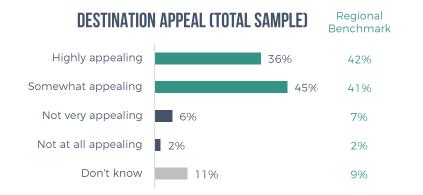


5% of Australians surveyed visited New Zealand in the past 12 months



Base: Travelled around NZ in past 12 months, (n=120)

		Regional
Familiarity	%	Benchmark
I have visited Central Otago	15	26%
l have never visited, but do have some ideas about what you can do there	16	20%
I have never visited, and don't know much about what you can do there	36	31%
I have never heard of Central Otago	34	23%



Base: Total sample who have heard of Central Otago (n=1214)

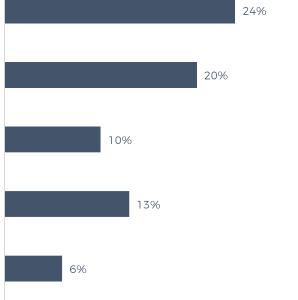
AUSTRALIAN TRAVELLERS **CENTRAL OTAGO VISITOR PROFILES (PERSONAS)**

Which one of the following best describes you and your views on travel and holidays?



29%





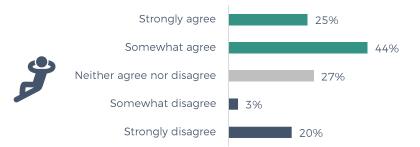
AUSTRALIAN TRAVELLERS

CENTRAL OTAGO POSITIONING

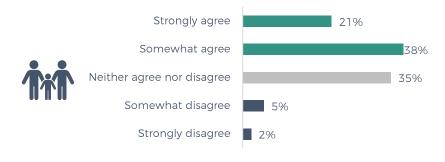
What is the first thing that comes to mind when you think about Central Otago? To what extent do you agree or disagree with the following statements?



A holiday in Central Otago is an opportunity to slow down and relax



Central Otago is an ideal place to reconnect with friends and family



Base: Module sample who have heard of Central Otago (n=539)



AUSTRALIAN TRAVELLERS ACTIVITIES / EXPERIENCES ASSOCIATED WITH CENTRAL OTAGO

Which, if any, of the following activities or experiences do you associate with Central Otago?

Top 15 Activities / Experiences	Total Sample
	%
Walking & Hiking	34
Nature, Wildlife & Eco-tourism	30
Scenic Sight-Seeing	24
History & Heritage	23
Gardens, Parks & Reserves	23
Wineries	21
Family Activities	21
Restaurants, Cafés & Bars	19
Cycling/Mountain Biking	18
Māori/Pacific Culture	17
Shopping	16
Golf, Fishing & Hunting	15
Spa & Wellness	15
Arts & Culture	14
Adrenaline Activities	13
Don't know	21
Base:	n=539



AUSTRALIAN TRAVELLERS

PROPENSITY TO VISIT & BARRIERS TO VISITING

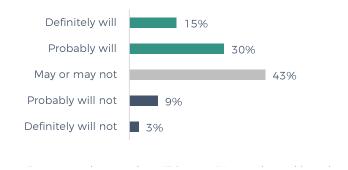
How likely are you to visit Central Otago within the next 12 months? (for any reason / for leisure purposes) You mentioned that you are unlikely to visit Central Otago within the next 12 months. Why is that?

38% of Australian travellers intend to travel to New Zealand in the next 12 months (i.e. definitely / probably will travel)

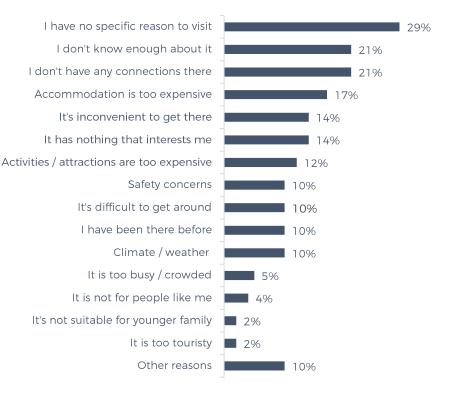
PROPENSITY TO VISIT CENTRAL OTAGO IN NEXT 12 MONTHS (ANY REASON)



PROPENSITY TO VISIT CENTRAL OTAGO IN NEXT 12 MONTHS (LEISURE)



BARRIERS TO VISITING CENTRAL OTAGO



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AUSTRALIAN TRAVELLERS **FUTURE VISITOR PROFILES**

How likely are you to visit Central Otago for leisure purposes within the next 12 months?

	Total Sample	'Definitely' will visit Central Otago (Next 12 Months)
Region of Residence	%	%
Australian Capital Territory	2	4
New South Wales	32	32
Northern Territory	1	2
Queensland	20	17
South Australia	8	7
Tasmania	3	4
Victoria	24	25
Western Australia	10	11
Base:	n=1839	n=133

	Total Sample	'Definitely' will visit Central Otago (Next 12 Months)
Age	%	%
18-19 years	3	2
20-29 years	16	16
30-39 years	18	35 🔺
40-49 years	18	32 🔺
50-59 years	17	וו 🔻
60-69 years	14	5 🔻
70+ years	14	1
Household Composition	%	%
My husband, wife or partner	59	62
My mother and/or father	6	5
My children aged under 5	12	21
My children aged 5 to 14	21	56 🔺
My children aged 15 or older	15	13
Other family/relatives	8	3 🔻
Other person(s)	4	4
None of the above - I live alone	16	5 🔻
Base:	n=1839	n=133

AUSTRALIAN TRAVELLERS

CONVERTING AWARENESS TO VISITATION

The funnel metric below illustrates the path to purchase in the sense that it explores someone's awareness of the destination, the knowledge they have of what to do at the destination, how appealing they find the destination and how likely they are to visit in the future. 66% of Australian travellers have heard of Central Otago. Going down the funnel, a new path to purchase measure is added each time. This means that the 9% at the bottom of the funnel represents the proportion of Australian travellers who have:

- Heard of Central Otago, and
- Visited Central Otago or have some ideas about what to do there, <u>and</u>
- Consider Central Otago to be highly appealing, and
- Will probably / definitely visit Central Otago in the next 12 months

The smaller numbers on the right hand side of the funnel represent the conversion between each of the stages.





