AGENDA

Meeting of the:
Community, Environment & Services Committee

**Commencing at 1:30pm
on Wednesday 16 August 2023**

To be held at the
Clocktower Chambers
Palmerston Street
Westport

CORE COUNCILLOR ROLE AND RESPONSIBILITIES

The Governance role entails:

- Strategic planning and decision-making;
- Policy and strategy review;
- Community leadership and engagement, and stewardship;
- Setting appropriate levels of service;
- Maintaining a financially sustainable organisation; and
- Oversight/scrutiny of Council's performance as one team.

The governance role focusses on the big picture of 'steering the boat' - management's role focusses on 'rowing the boat'

Our commitments to best support each other and meet the challenges and opportunities of 2023 include:

CLEAR AND RESPECTFUL COMMUNICATION

We are committed to:

Actively listening and not interrupting;

Remaining conscious of 'tone', body language, and amount of time speaking (allowing time for others);

Responding/answering in a timely manner; and

Being honest, reasonable, and transparent.

TRUST AND RESPECT

We recognise that trust and respect must be earned and that a team without trust isn't really a team. Trust can be built by:

Valuing long-term relationships; being honest; honouring commitments; admitting when you're wrong; communicating effectively; being transparent; standing up for what's right; showing people that you care; being helpful; and being vulnerable.

CONTINUOUS LEARNING AND IMPROVEMENT

Continuous learning and improvement are critical for growing together as a team.

We are committed to constantly reviewing what is going well and what needs to improve in relation to the way we work together, the processes we follow, and the outcomes we deliver.

NONE OF US IS AS SMART AS ALL OF US

Community, Environment and Services Committee

Reports To: The Council

Chairperson: Joanne Howard

Deputy Chairperson: Rosalie Sampson

Membership: The Mayor, all Councillors and Māori Representative

Meeting Frequency: Bi Monthly

Quorum: A majority of members (including vacancies)

Purpose

The Community, Environment and Services Committee is responsible for:

1. Guiding and monitoring the provision of strategic community infrastructure and services to meet the current and future needs of the district and its communities.
2. Governance of recreational, event, and community facilities and amenities.
3. Facilitating community and stakeholder involvement and discussion on community infrastructure, community safety and community wellbeing matters.
4. Funding to benefit the social, cultural, arts and environmental wellbeing of communities in Buller District.
5. Advising Council on the best ways to improve Buller district's people quality of life environmentally, socially, culturally and economically by protecting and enhancing the local environment.
6. Guiding the development of Council's Climate Change Adaptation Plan.
7. Facilitating Council's engagement with stakeholders and communities of interest, including but not limited to the Punakaiki community and Youth.

> *In addition to the common delegations on page 7, the Community, Environment and Services Committee is delegated the following Terms of Reference and powers:*

Terms of Reference:

1. To provide direction on strategic priorities and resourcing for community infrastructure aligned to district development and oversight of strategic projects associated with those activities.

2. To develop policy, approve community-related strategies and plans, and monitor their implementation, including Council's Climate Change Adaptation Plan.

3. To receive and consider presentations and reports from stakeholders, government departments, organisations and interest groups on community development and wellbeing issues and opportunities.

4. To monitor Buller's social demographics and social climate to assess current and future impacts on the Council and Buller communities.

5. To determine the funding priorities for the Community Grants Allocation Panel, Long Term Plan and Annual Plan.

6. To determine the priority of Council projects suitable for contestable and philanthropic funding, excluding NZTA funding.

7. To coordinate and make decisions on proposals, applications for external funding, and the distribution of Council funding and funding provided to Council for the environment, public art, recreational and community facilities and amenity.

8. To monitor and oversee the delivery of Council's non-financial performance and non-financial key projects, against the Long Term Plan, excluding key performance indicator reporting which is the responsibility of the Finance Risk & Audit Committee.

9. To monitor Council sustainability principles and actions.

10. To monitor and oversee the Reserves and Halls Subcommittees.

11. To monitor and oversee the Creative Communities Subcommittee.

The Committee is delegated the following powers to act:

- Performing the Council's functions, powers and duties (excluding those matters reserved to the Council by law, by resolution of the Council or as otherwise delegated by Council) under the Burial and Cremation Act and the Reserves Act.
- Approval of applications for Council projects suitable for contestable and philanthropic funding.
- Approval of distributions from Council's contestable grant funding.

The Committee is delegated the following recommendatory powers:

- The Committee may make recommendations to Council.
- The Committee may make recommendations to other Committees.

Special Notes:

- The Deputy Chairperson has responsibility for the Council grants portfolio under this Committee.
- The Chief Executive Officer and Group Manager Community Services are required to attend all meetings but are not members and have no voting rights. Other Council officers may attend the committee meetings, as required.
- Written updates may be requested to be provided to Council meetings from the Chair and Group Manager Community Services from time to time.

Oversight of Policies:

- *Dwellings on Unformed Legal Road*
- *Housing for the Elderly*
- *Building on Reserve Land*
- *National Representation – Financial Assistance*
- *ANZAC Day Observance*
- *Community Grants*
- *Smokefree Environments – Council Buildings and Public Spaces*
- *Use of Council Parks, Reserves and Buildings*
- *Verandas Over Public Places*
- *NZLGA Annual Conference and Zone Meetings*
- *Petitions/Referenda*

Common Delegations

The following delegations from Council are common to the Risk and Audit Committee, the Community, Environment and Services Committee and the Regulatory, Hearings and Planning Committee within their respective areas of responsibility.

General Principal

1. The work of these Committees will be in accordance with the priorities and work programme agreed by the Council.

2. These Committees have the powers necessary to perform the Committee's responsibilities, in accordance with the approved Long Term Plan and Annual Plan budgets. Subject to confirmation of compliance with the financial strategy.

These Committees will:

Strategy, plans and policy

1. Develop and agree to strategies, plans and policies for the purposes of consultation and/or engagement with community.

2. Recommend to Council for adoption.

3. Monitor and review as and when required.

Bylaws

1. Develop and agree to the statement of proposal for new or amended bylaws for consultation.

2. Recommend to Council new or amended bylaws for adoption.

Consultation and engagement

1. Ensure appropriate, effective and transparent engagement with the community, tangata whenua and other stakeholders.

2. Conduct any public engagement required on issues before the Committee, in accordance with Council's Significance and Engagement Policy.

3. Conduct hearings, where appropriate, to consider submissions from members of the public and external organisations, making determinations on such matters unless they are reserved for Council to decide.

Submissions and legislation

1. Approve submissions to external bodies/organisations on legislation and proposals, related to the Committee's areas of responsibility, that impact governance policy or matters.

2. Monitor and oversee strategic projects and programmes.

3. Monitor Council's Asset Management Plans/Strategic Infrastructure Plan.

Contracts

1. Approve and monitor contracts and other legally binding arrangements provided that such contracts/arrangements:

    a) Do not require the approval of the whole of Council; and

    b) Fall within the budget approved under the Long Term Plan or Annual Plan and have a value exceeding the Chief Executive's financial delegation.

Other

1. Consider and make decisions which are within the Chief Executive Officer's delegations, and which the Chief Executive Officer has referred to the Committee for recommendation to Council.

2. Consider and make decisions on operational matters that fall within a Committee's area of responsibility that are outside of delegations to the Chief Executive Officer or other Council officers.

3. Commission new Committee reports and work required to respond to significant or compliance issues, or to complete the agreed programme of Council.

4. Monitor Audit recommendations and ensure completion.

Community Environment & Services Committee

16 August 2023 01:30 PM

COMMUNITY, ENVIRONMENT & SERVICES COMMITTEE

16 AUGUST 2023

AGENDA ITEM 1

Prepared by   Shelley Jope
Acting Group Manager Community Services

APOLOGIES

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1. **REPORT SUMMARY**

That the Community, Environment and Services Committee receive any apologies or requests for leave of absence from elected members.

2. **DRAFT RECOMMENDATION**

That there are no apologies to be received and no requests for leave of absence.

OR

That the Community, Environment and Services Committee receives apologies from (insert councillor name) and accepts councillor (insert name) request for leave of absence.

COMMUNITY, ENVIRONMENT & SERVICES COMMITTEE

16 AUGUST 2023

AGENDA ITEM 2

Prepared by Shelley Jope
Acting Group Manager Community Services

MEMBERS INTEREST

Members of the Community, Environment & Services Committee are encouraged to consider the items on the agenda and disclose whether they believe they have a financial or non-financial interest in any of the items in terms of Council's Code of Conduct.

Councillors are encouraged to advise the Governance Assistant, of any changes required to their declared Members Interest Register.

The attached flowchart may assist members in making that determination.

DRAFT RECOMMENDATION:

That Members of the Community, Environment & Services Committee disclose any financial or non-financial interest in any of the agenda items.
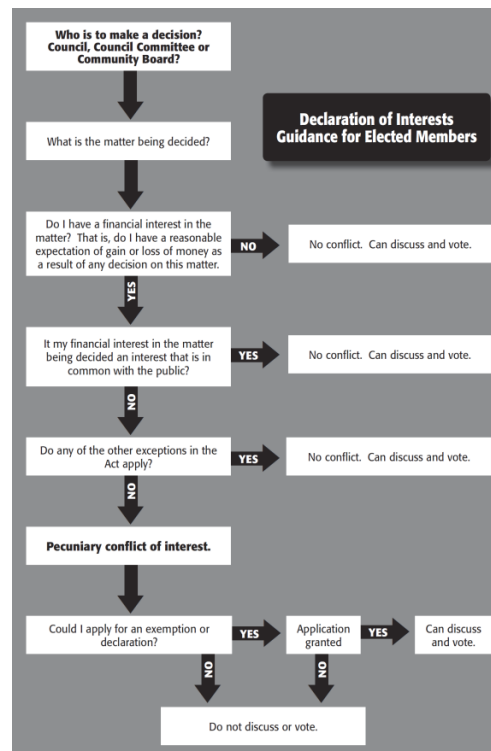
COMMUNITY, ENVIRONMENT & SERVICES COMMITTEE

16 AUGUST 2023

AGENDA ITEM 3

Prepared by   Shelley Jope
Acting Group Manager Community Services

CONFIRMATION OF MINUTES

1.   **RECOMMENDATION**

That the Community, Environment & Services Committee receive and confirm minutes from the meeting of 17 May 2023.

MEETING OF THE COMMUNITY, ENVIRONMENT AND SERVICES COMMITTEE, HELD AT 4.30PM ON WEDNESDAY 17 MAY 2023 AT CLOCKTOWER CHAMBERS, PALMERSTON STREET, WESTPORT.

PRESENT: Chair Jo Howard, G Weston, L Webb, R Sampson, Mayor J Cleine, A Pfahlert, DM A Basher, G Neylon, T O'Keefe, C Reidy, P Grafton,

IN ATTENDANCE: R Townrow, (Acting CEO), Mike Williams (Acting Group Manager Infrastructure), S Judd (Group Manager Regulatory) D Marshall (Chief Financial Officer)

Media: Ellen from Westport News

PUBLIC FORUM: Nil

MEETING DECLARED OPEN AT 4.33

Cr R Sampson left the room at 4.30pm

(4.33 C Reidy left the room)

1.   **APOLOGIES (Page 9)**
      Discussion:

> **RESOLVED:**
>
> That the Community, Environment and Services Committee receives apologies from Ned Tauwhare and accepts councillor Ned Tauwhare request for leave of absence.
>
> **Moved**
> **Cr Weston / DM Basher**
> **9/9**
> **Cr R Sampson and Cr C Reidy were absent for the vote**
> **CARRIED UNANIMOUSLY**

Cr R Sampson arrived back at 4.35pm.

2.   MEMBERS INTEREST (Page 10)
     Discussion:

RESOLVED that Members of the Community, Environment & Services Committee disclose any financial or non-financial interest in any of the agenda items.

Moved
Cr Weston / DM Basher
10/10
CARRIED UNANIMOUSLY

3.   CONFIRMATION OF MINUTES (Page 11)
     Discussion:
     RS: Re DWC recommendations for applicants 1, 2, 3 and 4
     RT: 1, 2 and 4 were granted but 3 was not recommended.

Cr C Reidy arrived back at 4.37pm

RESOLVED that the Community, Environment and Services Committee receive and confirm minutes from the meeting of 15 March 2023.

Moved
Cr Webb / Cr Sampson
11/11
CARRIED UNANIMOUSLY

4.   ACTION POINTS REPORT (Page 20)
     Discussion:
     0017 – senior housing group met, report for May Council meeting

RESOLVED that the Community, Environment & Services Committee receive the Action Points for information.
Moved
Cr Howard / Cr Grafton
11/11
CARRIED UNANIMOUSLY

Nothing to report from PE.

Coming out of PE: Cr Neylon / Cr Basher 11/11

- There being no further business the meeting concluded at 5.26 pm
- **Next meeting:** TBC, Clocktower Chambers, Palmerston Street, Westport.

Confirmed: …………………………..………………**Date**: ……..………………..

COMMUNITY, ENVIRONMENT & SERVICES COMMITTEE

16 AUGUST 2023

<div align="right">AGENDA ITEM 4</div>

Prepared by   Shelley Jope
Acting Group Manager Community Services

ACTION POINTS

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1. **RECOMMENDATION**

    That the Community, Environment & Services Committee receive the Action Point report for information.

CESC Action Points - CURRENT

No	Meeting Of / Action Point	Responsible	Update	Date Required By
			No Current Action Points at 16 August 2023	

COMMUNITY, ENVIRONMENT & SERVICES COMMITTEE

16 AUGUST 2023

AGENDA ITEM 5

Prepared by   Shelley Jope
                  Acting Group Manager Community Services

Appendices   1 Destination Management Plan
                2 Visitor Flow Report
                3 Sustainability Report

DESTINATION MANAGEMENT PLAN INFORMATION REPORT

1. REPORT SUMMARY

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

2. RECOMMENDATIONS

That the Community, Environment and Services Committee:

1.   Receives the report for information.

2.   Endorses the strategy and provides a recommendation as to how Council should engage in the Destination Management Plan as part of the Long-Term Plan process.

3. ISSUES AND DISCUSSION

In endorsing the DMP, Council will need to discuss how to best put it into effect utilising Council's Long Term Plan process. This may include the establishment of a reference group, with Terms of Reference, to ensure fair district representation.

4. CONSIDERATIONS

4.1 Strategic Impact
Tourism is an important part of the Buller economy. Supporting and encouraging tourism and the tourism sector forms part of the following Community Outcome in the Long-Term Plan:

Community Outcome 3. Prosperity:
Our district is supported by quality technology and an innovative and diverse economy that creates opportunities for self-sufficiency, sustainable growth and employment.
(Buller District Council 2021-2031 Long Term Plan)

Under the section 'Shaping Our Future – Strategic Focus' in the 2021-2031 Long Term Plan, Tourism is identified as an important factor in contributing to Socio- Economic Prosperity.

Socio-Economic Prosperity - Increasing Prosperity by Diversifying the District's Economy.
Proposed Approaches include:
3. Continuing support for the tourism industry and specific initiatives such as the Pounamu Pathway and other recreational, environmental, or cultural initiatives through advocacy, advice, or other forms of support.
(Buller District Council Long Term Plan 2021-2031 p. 25)

4.2 Significance Assessment
The decisions required to be made in this report are not deemed significant under Council's Significance and Engagement Policy.

4.3 Risk Analysis
No risks have been identified.

4.4 Values
The Buller District Values are: Community Driven, One Team, Future Focussed, Integrity and We Care. This report aligns with these values, in particular Community Driven and Future Focussed.

4.5 Policy / Legal Considerations
There are no legal or policy considerations for this information report.

4.6 Tangata Whenua Considerations
The contents of the report are not a matter requiring consultation with tangata whenua at this point.

4.7 Views of Those Affected
Public consultation is not required at this point.

4.8 Costs
Current costs are covered by exiting staff resources.

4.9 Benefits

The report and its attached documents may provide united positive pathways for tourism growth on the West Coast.

4.10 Media / Publicity

There may be media interest in the Destination Management Plan and the effect that its implementation for increased tourism could have on the Buller District.

DEVELOPMENT
WEST COAST
Te Ohu Whakawhanake o Te Tai Poutini

WÊST COAST
NEW ZEALAND
UNTAMED NATURAL WILDERNESS

Te Tai Poutini

DESTINATION MANAGEMENT PLAN

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

2022 - 2030

HI MIHI

Kei aku nui, kei aku rahi,

Kei aku whakatiketike ki te whenua

Kei aku whakatamarahi ki te rangi

Tēnā koutou katoa

Me mihi ka tika ki te hunga kua tāwhati atu rā

Ki te hunga kua kāwhakina e te ringa o Aituā

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

Ka hoki mai ki a tātou,
ki te hunga ora

Tēnā tātou

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

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

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

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

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

Ngā manaakitanga ki a tātou katoa

To my noble people,

To my esteemed elders

To our leaders

I'd like to greet you all

We acknowledge those who have passed

Those who have been taken by the hand of Calamity

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

We return to us, the living

Greetings

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

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

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

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

Best wishes to us all

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CONTENTS

EDITION 2
JANUARY 2023

Cover photo by Liz Carlson

EXECUTIVE SUMMARY
He whakarāpopoto whānui

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

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

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

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

Key themes for the implementation of the DMP are:

Establish a Destination Management system
Te whakatūnga o tētahi pūnaha Whakahaere i te Tauranga

Support economic recovery and growth
Te taumanu me te tipuranga ā-ōhanga

Enhance community engagement and social benefits
Te whakakaha i te toronga a te hapori me ngā hua ā-pāpori

Celebrate our cultural heritage
Te whakatairanga i ngā taonga tuku iho ā-ahurea

Protect our natural assets
Te tiaki i ā tātou rawa o te ao tūroa

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

Waiatoto River Safari, Haast

INTRODUCTION
He whakatakinga

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

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

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

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

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

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

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

Vision

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

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

Jackson Bay by drone | Photo RoadyNZ

TE TAI POUTINI   DESTINATION MANAGEMENT PLAN

Guiding principles

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

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

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

Kaitiakitanga
Active guardianship of our taonga and giving back to nature.

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

Whanaungatanga
Our sense of collective belonging and identity.

Tā tātou rongo i tā tātou whai wāhitanga me te tuakiri.

Rangatiratanga
Courageous leadership and being in charge of our own destiny.

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

Pono
We are honest and sincere in everything that we do.

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

Kotahitanga
Unity and collective action.

Te renarena o te taukaea me te mahi tahi.

Destination management: A holistic and integrated approach

WHAT IS DESTINATION MANAGEMENT?

Destination management:

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

TE TAI POUTINI — DESTINATION MANAGEMENT PLAN

Key tourism stakeholders on Te Tai Poutini

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

Collaboration is critical – no one agency can manage a destination on its own and it requires coordination of, and ownership by, all stakeholders. The key stakeholders will have a role in driving the destination development.

The diagram below shows tourism stakeholders on Te Tai Poutini.

Figure 1: Types of stakeholders

Mana whenua

- Te Rūnanga o Makaawhio
- Te Rūnanga o Ngāti Waewae

Interest groups

- Heritage New Zealand
- New Zealand Alpine Club
- New Zealand Walking Trust
- Forest and Bird
- Tohu Whenua

Government – local

- West Coast Regional Council
- Buller District Council
- Grey District Council
- Westland District Council
- Development West Coast
- Destination Westland

Government – national

- Department of Conservation
- Ministry of Business, Innovation and Employment (MBIE)
- Waka Kotahi
- Tourism New Zealand
- NZ Māori Tourism
- Qualmark
- Tourism Export

Local residents

- Resident associations
- District community groups

Visitors

- Domestic
- International
- Transient work force contractors

Tourism community

- Local operators
- Inbound operators
- Event operators
- Travel agents
- Wholesale
- Transport providers

Wider business community

- District and community business associations and groups
- Business industries and sectors

Components of destination management

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

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

Read more about the components on the following pages →
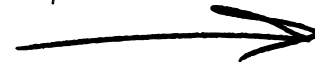
Components in detail

1 **Define the destination**

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

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

2 **Define the vision**

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

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

Of the 35% who have ever considered Te Tai Poutini

They also considered...

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

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

They also visited...

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

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

Pictured above: Jackson Bay | Photo BareKiwi

3 Data, research, and analysis

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

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

4 Strategic fit

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

6 Target markets

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

5 Brand positioning

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

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

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

International breakdown 2020

China 10%

Australia 20%

North America 16%

Europe 40%

Asia 12%
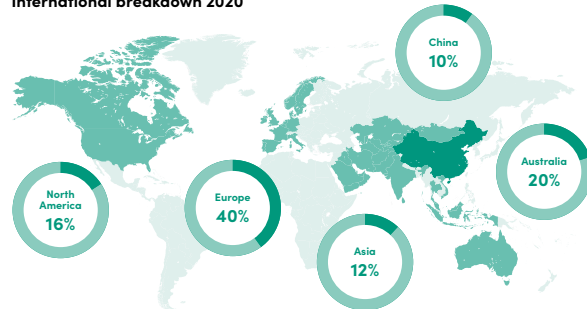
7 Experience and product development (attractions)

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

8 Access

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

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

9 Attitudes

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

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

Lake Moeraki

10 Marketing and promotion (awareness)

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

11 Amenities, services, and infrastructure

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

Lake Brunner

14 Leadership and structures

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

15 Risk and crisis management

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

12 Environmental stewardship

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

13 Capability and development

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

16 Measuring success

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

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

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

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

TE TAI POUTINI DMP *Process*

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

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

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

Pictured above: West Coast Wilderness Trail | Photo RoadyNZ

Implementing destination management

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

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

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

Benchmarking, monitoring and evaluation activity will include:

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

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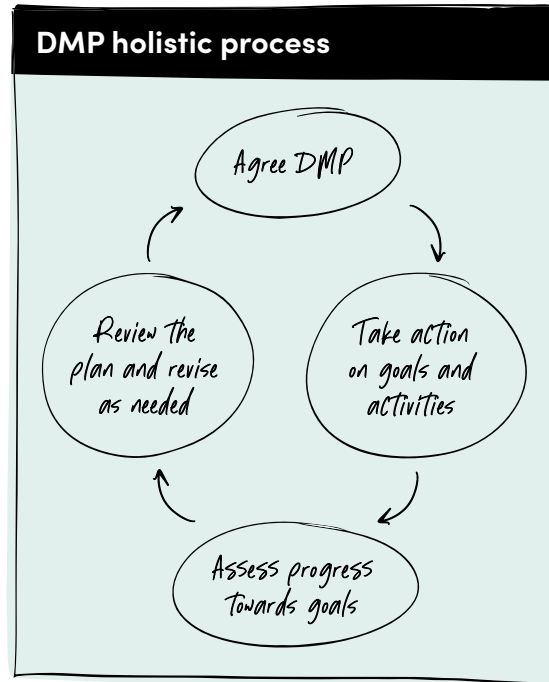
- Exploring new and more holistic ways of measuring the impact of tourism that include social, environmental and cultural impacts, and;
- Monitoring community perception and sentiment towards tourism and documenting the benefits of tourism for local communities.

Destination management approach timeline

UNDERSTANDING THE OPPORTUNITY 2021 –2022	MEASUREMENT AND BENCHARKING 2022–2024	MONITOR, ADAPT AND IMPROVE 2024 –2027	REIMAGINE 2027 – ONWARDS
Stocktake of current situation and agree on what are game changer projects for the region.	- Assemble the destination reference group. - Align the industry around measurable KPIs. - Establish a roadmap with milestones and agree on how to measure success.	Measure against milestones, revise and review, establish ongoing improvement process.	Track the journey of the DMP against previous objectives and community sentiment to ensure social license to operate. Reimagine what the destination can be in a global sense.

LEADERSHIP + GOVERNANCE

Partnerships and collaboration

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

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

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

Pounamu carving on the beach | Photo Juergen Schacke

Community engagement

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

Mana whenua co-governance

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

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

Increasing community engagement

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

Pictured above: Hokitika sunset | Photo BareKiwi

Pounamu Pathway

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

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

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

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

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

The inspiration for the Pounamu Pathway was

MĀWHERA, GREYMOUTH

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

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

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

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

DESTINATION MARKETING OR *storytelling*

Destination marketing as we know it is dead – there, we said it!

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

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

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

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

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

West Coast flora | Photo Geoff Marks

Te Tai Poutini a destination within a destination

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

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

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

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

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

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

Exploring the Brunner Mine site | Photo Stew Nimmo

Visitor profiles

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

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

Unwind weekenders are a "stretch target" and issues around accessibility will need to be managed. You'll have more buy in with accessibility than convenience. **Families** and **round trippers** are also interesting targets and work is needed to convert more of these for Te Tai Poutini.

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

Figure 2: Visitor profiles

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

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

Easiest target ➔ *Stretch target*

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

VISITOR FLOW
Summary

The Buller River | Photo RoadyNZ

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

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

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

Figure 3: Pre COVID-19 visitor flows

Figure 4: During COVID-19 visitor

Key findings across visitor flows

ACCESS (ROAD, AIR, RAIL)

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

Kahurangi National Park

Westport

Greymouth

Hokitika

• *Franz Josef*
• *Fox Glacier*

• *Haast*

Mount Aspiring National Park

• *Christchurch*

Key access points for our visitors by road, rail, and air.

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

Dining in Greymouth | Photo Stew Nimmo

ACCOMMODATION

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

EXPERIENCES

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

MAIN TOURING ROUTEST SIGNAGE / INFORMATION

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

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

CHANGING CONSUMER PREFERENCES

COVID-19 has changed the way people travel and what they expect in relation to health and safety. Experiences from other markets have shown that the pandemic has also affected how and when people plan to travel in the future. Specific points discussed during the assessment were the shorter booking horizon of New Zealand visitors, the unwillingness to pay for guides, and the general "DIY" nature of most New Zealand visitors. These are challenges for activity operators because they will need to adjust their staffing to fit the new demand patterns and balance this as international visitors return.

UNPREDICTABILITY IN MARKETS

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

Photo Franz Josef Wilderness Tours

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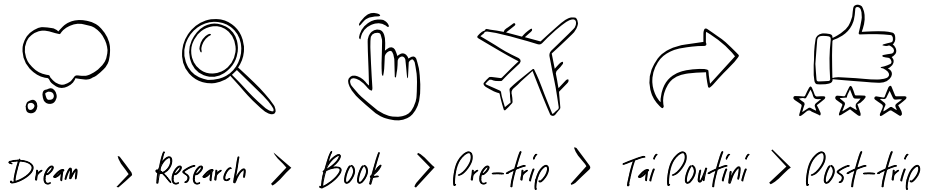
	Dream	Research	Book	Pre-trip	Tai Poutini	Post-trip
Visitors	**SEARCH FOR INSPIRATION**	**EVALUATE OPTIONS**	**SELECT AND PAY**	**TRAVEL/ RESEARCH**	**EXPERIENCE AND SHARE**	**TRAVEL AND REVIEW**
LOCAL OPERATORS	Share stories	Provide information	Booking systems	Travel service/info	Provide service	Gather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

Everyone plays a role

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

This is where in-destination management plays a key role in the destination management approach. With much focus on storytelling and bringing communities together and granting a voice to wider stakeholders, it ensures visitors feel connected to the region and its people. It provides continuous feedback to stakeholders and enriches the destination's engagement during the customer experience phase. The visitor journey map highlights which stakeholders can play an active part and must be represented in the destination management reference group to ensure the aspirations are materialised in the real world. For example, modern visitor centres are no longer limited to physical buildings, rather they represent an assortment of touchpoints, from visitor ambassadors to tourism staff, mobile information centres, websites, social media and temporary sites for festivals. Ensuring there is consistency and continuity of the destination management vision on the frontline is essential.

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TE TAI POUTINI · DESTINATION MANAGEMENT PLAN

BRAND PROPOSITION + POSITIONING

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

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

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

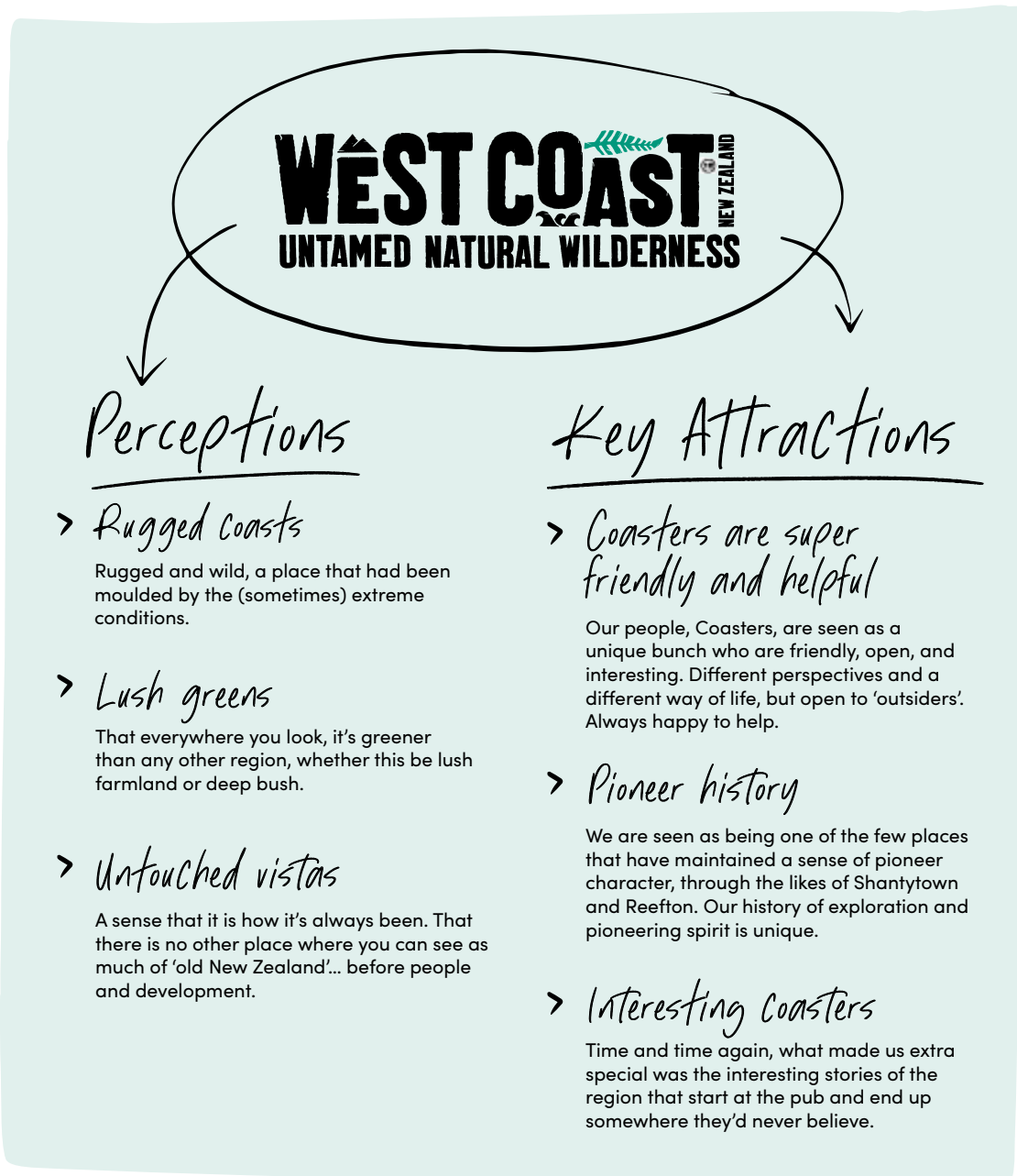Background photo: Maruia Hot Springs | Stewart Nimmo

Te Tai Poutini narrative

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

'Rugged and wild' was one of the most recurring themes when consumers thought about Te Tai Poutini. They saw it as greener than any other region. People expected to find "exotic flora and fauna, untouched, beautiful scenery, great native forests and bird life and awesome beaches". Te Tai Poutini was seen as "untamed, unspoiled, green, alive."[2] There was a sense that it is how it's always been, before people and development changed the landscape. This sentiment is already reflected in Te Tai Poutini's current branding.

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

WEST COAST NEW ZEALAND
UNTAMED NATURAL WILDERNESS

Perceptions

> **Rugged coasts**

Rugged and wild, a place that had been moulded by the (sometimes) extreme conditions.

> **Lush greens**

That everywhere you look, it's greener than any other region, whether this be lush farmland or deep bush.

> **Untouched vistas**

A sense that it is how it's always been. That there is no other place where you can see as much of 'old New Zealand'... before people and development.

Key Attractions

> **Coasters are super friendly and helpful**

Our people, Coasters, are seen as a unique bunch who are friendly, open, and interesting. Different perspectives and a different way of life, but open to 'outsiders'. Always happy to help.

> **Pioneer history**

We are seen as being one of the few places that have maintained a sense of pioneer character, through the likes of Shantytown and Reefton. Our history of exploration and pioneering spirit is unique.

> **Interesting Coasters**

Time and time again, what made us extra special was the interesting stories of the region that start at the pub and end up somewhere they'd never believe.

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

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

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

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

Tiaki Promise

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

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

tiaki

CARE FOR NEW ZEALAND

Situational analysis

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

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

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

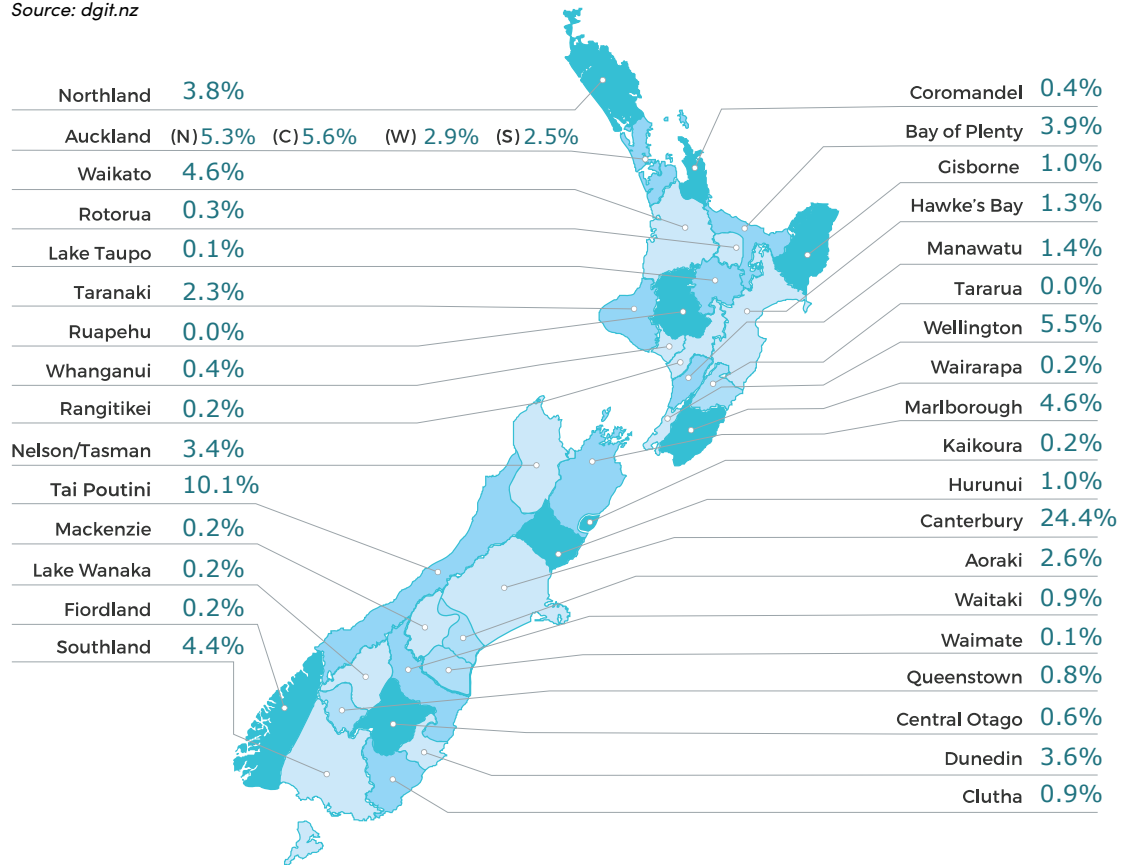## OUR TOP 5 DOMESTIC MARKETS 2021

CANTERBURY 29%

AUCKLAND 16%

TAI POUTINI 10%

WAIKATO & BAY OF PLENTY 9.3%

MARLBOROUGH & NELSON 8%
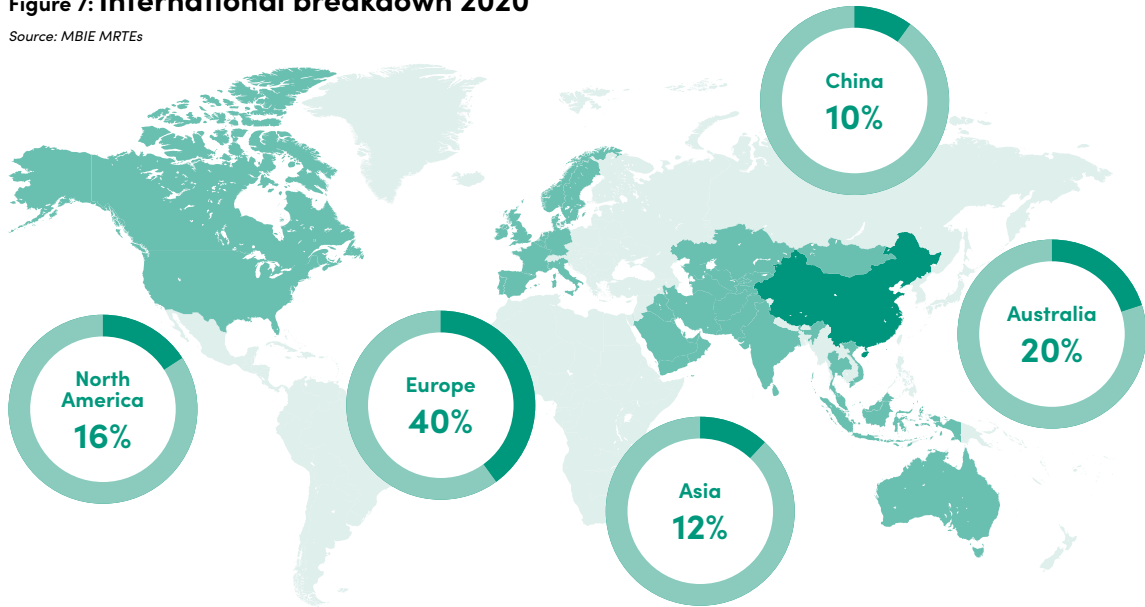
Figure 6: **Where do they come from?**

Source: dgit.nz

Northland	3.8%	Coromandel	0.4%
Auckland (N) 5.3% (C) 5.6% (W) 2.9% (S) 2.5%		Bay of Plenty	3.9%
Waikato	4.6%	Gisborne	1.0%
Rotorua	0.3%	Hawke's Bay	1.3%
Lake Taupo	0.1%	Manawatu	1.4%
Taranaki	2.3%	Tararua	0.0%
Ruapehu	0.0%	Wellington	5.5%
Whanganui	0.4%	Wairarapa	0.2%
Rangitikei	0.2%	Marlborough	4.6%
Nelson/Tasman	3.4%	Kaikoura	0.2%
Tai Poutini	10.1%	Hurunui	1.0%
Mackenzie	0.2%	Canterbury	24.4%
Lake Wanaka	0.2%	Aoraki	2.6%
Fiordland	0.2%	Waitaki	0.9%
Southland	4.4%	Waimate	0.1%
		Queenstown	0.8%
		Central Otago	0.6%
		Dunedin	3.6%
		Clutha	0.9%

TE TAI POUTINI   DESTINATION MANAGEMENT PLAN

Key international markets

Figure 7: International breakdown 2020

Source: MBIE MRTEs

China 10%

North America 16%

Europe 40%

Australia 20%

Asia 12%

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

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

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

4. Tourism Industry Aotearaoa: Tourism Summit Aotearoa Scorecard 2018

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

6. More Media World Travel Council : TRAVEL & TOURISM: ECONOMIC IMPACT 20221

THE GLOBAL LANDSCAPE [4]

International departures will reach

68%

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

82% in 2023

97% in 2024

101% of 2019 levels by 2025

with a projected 1.5 billion international departures [5]

Tourism employs

289 M

people globally, accounting for **9% of global employment** in 2021 [6]

Oceania accounts for

5.5%

market share of all global travel

Tourism contributed

6.1%

to global **GDP** in 2021

From status quo via sustainability to regeneration

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

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

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

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

Figure 8: **Tai Poutini sustainability framework**

How can we create a resilient economy?

How can we make our communities thrive?

How can we protect and celebrate our cultural identity?

How can we regenerate our environment?

Destination Management

How can we manage tourism for the benefit of all stakeholders?

TE TAI POUTINI · DESTINATION MANAGEMENT PLAN

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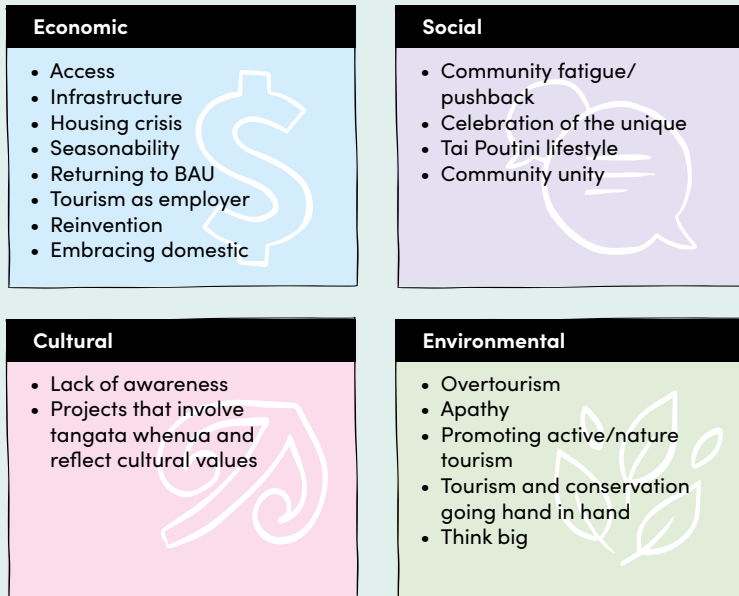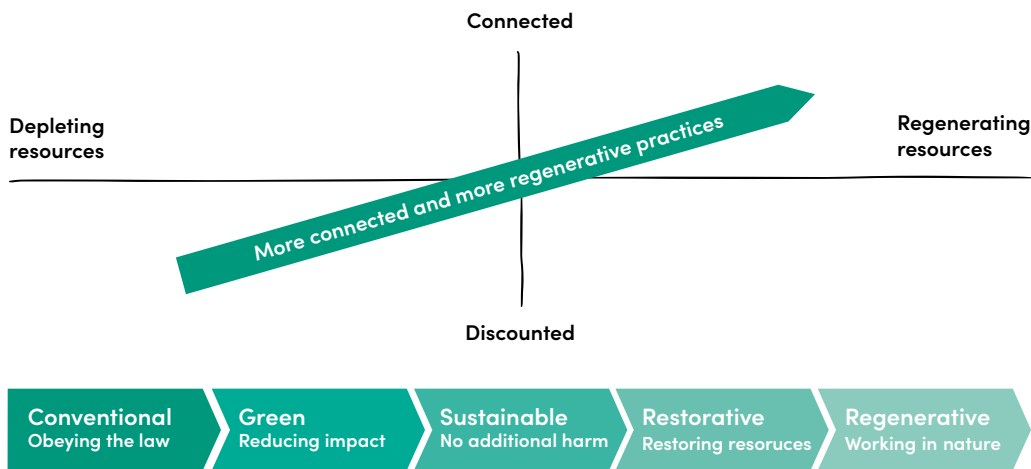
The four pillars of development

Economic
- Access
- Infrastructure
- Housing crisis
- Seasonability
- Returning to BAU
- Tourism as employer
- Reinvention
- Embracing domestic

Social
- Community fatigue/pushback
- Celebration of the unique
- Tai Poutini lifestyle
- Community unity

Cultural
- Lack of awareness
- Projects that involve tangata whenua and reflect cultural values

Environmental
- Overtourism
- Apathy
- Promoting active/nature tourism
- Tourism and conservation going hand in hand
- Think big

Figure 9: A continuum from depletion of resources to regeneration
(based on Daniel Wahl)

Connected

Depleting resources | Regenerating resources

More connected and more regenerative practices

Discounted

| Conventional Obeying the law | Green Reducing impact | Sustainable No additional harm | Restorative Restoring resources | Regenerative Working in nature |

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

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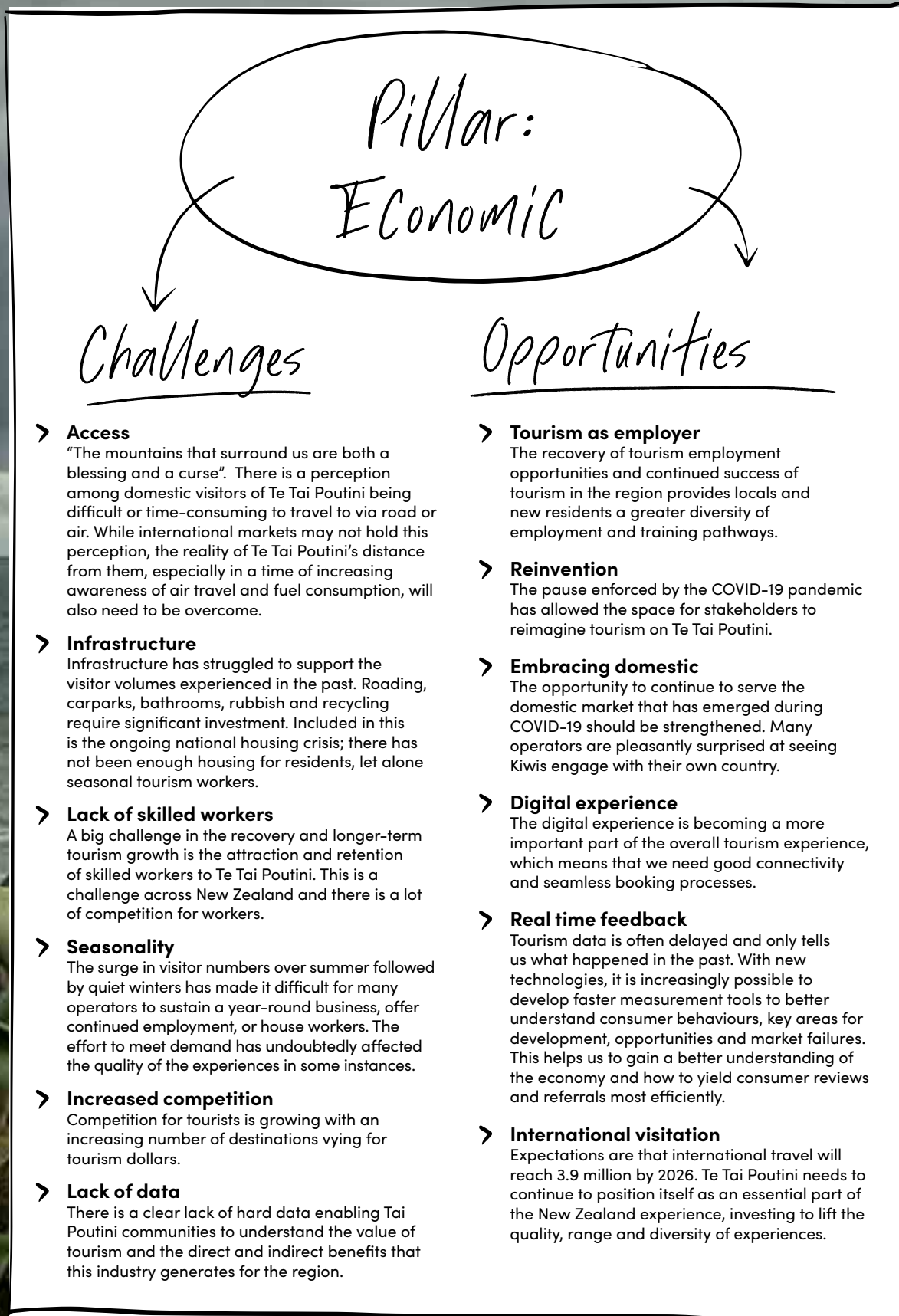
A regenerative approach

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

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

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

REGIONAL CHALLENGES + OPPORTUNITIES

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

Pillar: Economic

Challenges

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

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

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

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

> **Increased competition**
> Competition for tourists is growing with an increasing number of destinations vying for tourism dollars.

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

Opportunities

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

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

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

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

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

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

Pillar: Social

Challenges

> **Loss of social licence**
Community members have become apprehensive about returning to high visitor numbers. Better data is needed to show the direct and indirect impact of tourism.

> **Loss of people/community**
It is not overstating it to say that some communities have been decimated by a lack of tourism due to the COVID-19 pandemic. This leads to staff shortages for tourism businesses and other social issues, the degradation of communities and quality of life.

> **Seasonality**
Operators report mental health issues and burnout due to the extremes of activity traditionally required between high season and low season. Operators also report a lack of qualified workforce and interruption of service.

> **Connecting Te Tai Poutini to the world**
Te Tai Poutini has a small population for the level of infrastructure that is required to move people to/from and around the region. Future infrastructure developments must consider the tourism requirements and ensure access to support connectivity and wider services, with airlines, road access and support services.

Opportunities

> **Community unity**
There is a strong "in-it-together" feeling of each community brought about by working together to respond to both COVID-19 and natural disaster events. The motivation to build on this and have each district of Te Tai Poutini work more collaboratively in future should be harnessed.

> **Celebration of the unique Tai Poutini lifestyle/character**
This unique selling point is often just as, if not more, memorable for visitors as the natural landscape. Telling the stories of our people presents a great opportunity to differentiate ourselves in the market.

> **Community spirit and pride of place**
As seen through the eyes of visitors and for visitors, this enables communities to learn more about their own communities and derive a sense of community pride and belonging. Tourism creates economic opportunities to improve the services to locals by enabling scalability in locations that have low population base, i.e. local markets, specialty retail and artisans.

Pillar: Cultural

Challenges

> **Lack of Māori cultural experiences**
> The overwhelming response was that far more attention and investment needs to be put onto cultural aspects and the Māori heritage of Te Tai Poutini.

> **Lack of awareness and support for cultural attractions**
> In general, there was a perceived lack of focus on the rich cultural history on Te Tai Poutini.

Opportunities

> **Plans for overall heritage strategy**
> The unique Tai Poutini history and heritage is currently underutilised and can become a stronger asset for tourism on Te Tai Poutini.

> **Māori tourism involvement**
> High enthusiasm for this project demonstrates that there is further appetite for developments and initiatives of this nature. The project is likely to add key attractions for visitors in the coming years.

Pillar: Environmental

Challenges

> **Overtourism**
> Too many people degrading the natural estate was the most significant challenge for Te Tai Poutini's environment. This included freedom campers' unsavoury bathroom practices, litter and visitor disregard.

> **Lack of a shared vision**
> The tourism industry remains fragmented, there is a lack of a collective vision that encompasses stakeholders from across organisations, councils, private industry, local government, national partners, advocacy groups and mana whenua.

> **Climate Change**
> This will affect the globe but specifically Te Tai Poutini economy and travel, with more frequent adverse weather effects. Distribution networks are seeking safe destinations to avoid disruptions and significant costs to businesses, and therefore consideration of climate change effects is important. At the same time, a significant shift in consumer behaviour and preference has already begun with travellers seeking more sustainable travel options and looking to create positive impacts with their travels.

Opportunities

> **Promoting active/nature tourism**
> Attracting the kind of visitor who appreciates and respects the environment should be targeted further, cycle and walking trails are a big part of this.

> **Tourism/Conservation going hand in hand**
> We can build further on tourism's ability to educate visitors about the importance of protecting natural assets. There is also opportunity in offering diverse employment as evidenced by the Jobs for Nature programme (Government scheme to support tourism workers during COVID-19).

> **Think big – Te Tai Poutini as a carbon neutral destination**
> Te Tai Poutini has the opportunity to position itself as a leader in carbon neutral tourism. Market trends are showing that visitors are travelling more consciously, and operators are starting their journeys towards carbon neutrality.

STRATEGIC *Plan*

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

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

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

PILLAR:

Regional leadership development and co-ordination

THEME 1:

Establish a Destination Management System

Te whakatūnga o tētahi pūnaha Whakahaere i te Tauranga

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

FOCUS AREAS

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

OUTCOMES

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

PILLAR:

Economic development

THEME 2:

Support economic recovery and growth

Te taumanu me te tipuranga ā-ōhanga

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

FOCUS AREAS:

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

OUTCOMES:

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

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Vision

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

PILLAR:
Social development
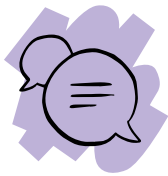
THEME 3:
Enhance community engagement and social benefits

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

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

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

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

PILLAR:
Cultural development

THEME 4:
Celebrate our cultural heritage

Te whakatairanga i ngā taonga tuku iho ā-ahurea

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

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

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

PILLAR:
Environmental development

THEME 5:
Protect our natural assets

Te tiaki i ā tātou r awa o te ao tūroa

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

FOCUS AREAS:
- Regenerating nature
- Educating visitors

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

THE ACTION PLAN AND PRIORITY PROJECTS

Action Plan themes

Establish a Destination Management system
Te whakatūnga o tētahi pūnaha Whakahaere i te Tauranga

Support economic recovery and growth
Te taumanu me te tipuranga ā-ōhanga

Enhance community engagement and social benefits
Te whakakaha i te toronga a te hapori me ngā hua ā-pāpori

Celebrate our cultural heritage
Te whakatairanga i ngā taonga tuku iho ā-ahurea

Protect our natural assets
Te tiaki i ā tātou rawa o te ao tūroa

Franz Josef Glacier | Photo RoadyNZ

Theme One

Establish a destination management system

Te whakatūnga o tētahi pūnaha

Leadership and responsibilities
Te hautūtanga me ngā haepapa

Actions	Success measures
Establish a destination reference group	• Destination reference group formed
Establish supporting regional and niche task forces to drive implementation	• Task forces established

Monitoring and reporting
Te aroturuki me te tuku pūrongo

Actions	Success measures
Operator sentiment monitoring	• Baseline established Survey conducted – annually
Community sentiment monitoring	• Baseline established • Survey conducted annually • 75% of Coasters perceive tourism to be good for Te Tai Poutini
Visitor satisfaction monitoring	• Baseline established • NPS / review tracking conducted annually • Achieve Net promoter score of 85%

Visitor types, volumes and activities
Ngā momo manuhiri, te tapeke me ngā ngohe

Actions	Success measures
Monitor visitor types and volumes	• Target visitor types agreed
Develop flow-based plans for top 5 priority flows with key operators	• Target visitor volumes agreed
Identify common visitor personas and patterns	• Target visitor activities agreed

FOCUS AREA >

Brand development
Te whanaketanga o te tuakiri

Actions	Success measures
Invest in Untamed Natural Wilderness brand	• Brand guidelines and tone of voice
Refresh brand identity with new imagery aligned with persons	• New imagery
Review icons strategy to support brand development	• New icons and sub-icons to support regional development and achieve regional dispersal
Brand campaign to connect with kiwis and Australians	• Perception research and monitoring
PR activity to increase awareness for Te Tai Poutini and it's people	• EAV 600k per annum
Social media presence	• Achieve 30k followers on Instagram

FOCUS AREA >

Consumer marketing initiatives
Ngā kaupapa whakatairanga ki ngā kiritaki

Actions	Success measures
Create consumer journey maps to better understand consumer behaviours	• New consumer journey map developed • Identify key touchpoints and actors
Consumer campaign	• Always on campaign with focus on holidays
Lead acquisition	• Marketing automation and content plans
Consumer newsletter	• Six newsletters per annum
New consumer website	• Refresh website focused on consumer
Annual visitor guide	• New visitor guide
SEO strategy	• Implement SEO strategy

FOCUS AREA >

Planning regulations and development
Te waeture mō te whakamahere me te whanaketanga

Actions	Success measures
Work with councils to incorporate tourism goals in long-term plans	• Tourism projects are included in LTPs and annual plans
Engage with connected industries to drive alignment	• Regular meetings with other sectors held, e.g. mining, agriculture, education

TE TAI POUTINI DESTINATION MANAGEMENT PLAN

FOCUS AREA >

Climate change adaptation and risk management
Te urutau ki te āhuarangi hurihuri me te whakahaere i ngā tūraru

Actions	Success measures
Create list of all risks to tourism sector on Te Tai Poutini and prioritise	• Full risk inventory established for the tourism industry
Complete risk assessment with stakeholders for tourism sector by sub-region and develop contingency plans for highest risks	• Contingency plans prepared and available to stakeholders

FOCUS AREA >

Trade marketing initiatives
Ngā kaupapa tauhokohoko

Actions	Success measures
International trade program	• Implement an international trade programme
Agent trainings	• Training for 2,500 agents offered
Attend offshore trade events in top 5 markets	• Attendance in partnership with Tourism New Zealand
IBO sales visits	• 12 activities annually
TECNZ Conference, Trenz, IBO Days, TIA Summit	• Attend 4 industry events per annum
Trade newsletter	• 4 annual trade newsletters distributed
Organise regular famils	• 50 agents / IBOS on famils
Enable operators to engage with trade	• 30 operators engage in DWC trade activity

Reefton Distilling Co. | Photo RoadyNZ

Theme Two

Support economic recovery and growth

Te taumanu me te tipuranga

FOCUS AREA >

Growing resilience
Te whakakaha i te aumangeatanga

Actions	Success measures
Grow visitor yield	• # higher yield per visitor
Attract new tourism businesses	• # of new tourism businesses
Diversify experiences and segments	• More diverse visitor base (domestic and international) • New experiences created
Disperse visitors regionally	• Higher visitor yield outside hotspots • Greater awareness of remote areas • Visitor numbers through occupancy providers
Implement regional events strategy	• Implement regional events plan • Support the development of 6 new events on Te Tai Poutini

FOCUS AREA >

Improving access
Te whakapakari i te whai wāhitanga

Actions	Success measures
Monitoring transport capacity on Te Tai Poutini – air, public road transport, rail	• Transport capacity dashboard developed, and gaps addressed
Monitoring for planned closures and supporting impacted stakeholders	• Proactive monitoring in place to predict impacts on tourism • Information updates provided to tourism operators and communities
Develop wayfinding strategies	• Wayfinding requirements identified by district and key traveller type • Digital and physical options explored and priced

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TE TAI POUTINI DESTINATION MANAGEMENT PLAN

FOCUS AREA

Partnering for success
Te mahi tahi e angitu ai

Actions	Success measures
Engage and align with national stakeholders	• Formal partnerships with key national stakeholders are made or maintained (MBIE, MFE, DOC, TNZ, TIA, CHNZ, etc.)
Engage and align with local stakeholders	• Formal partnerships or agreements with local stakeholders on tourism projects
Engage with surrounding RTOs	• Active in the "Top of the South" group • Partnership with ChristchurchNZ
Encourage collaboration amongst operators	• Operators collaborate on projects and packages great regional connections
Lead Tai Poutini Tourism Summit Annual Event	• 100 attendees
Develop co-investment partnership with industry	• Reach $100k co-investment in DWC activity

FOCUS AREA

Building operator capability
Te whakapakari i ngā pūkenga whakahaere

Actions	Success measures
Provide practical training for operators	• Service levels increase – guest measures • Operators confidence improves – survey participation in DWC-led professional development programmes • 6 programs delivered - reaching over 100 participants
Provide professional development for owners	• Owner confidence improves (tourism sentiment index)
Encourage enrolment in quality programmes	• 75% of businesses signed up to Tiaki Promise • 75% of business signed up to Tourism Sustainability Commitment • 80% of businesses Qualmark registered

FOCUS AREA

Innovating for the future
Te auaha mō te ākengokengotanga

Actions	Success measures
Provide training for innovation	• Innovation training programmes offered • Cross-industry innovation sessions held to foster collaboration
Encourage tourism start-ups on Te Tai Poutini	• Tourism incubator or accelerator programme planned • # of start-ups in tourism rises
Connect with the next generation	• YES engaged in tourism

Theme Three

Enhance community engagement and social benefits

Te whakakaha i te toronga a te

FOCUS AREA >

Restoring and managing community trust

Te whakahaumanu me te ārahi i te whakapono o te hapori

Actions	Success measures
Community sentiment monitoring	• Community sentiment baseline established • Survey conducted annually • Goals set to improve on gaps • 75% of Coasters perceive tourism to be good for Te Tai Poutini
Involve communities in local tourism planning	• Community representation on local tourism groups

FOCUS AREA >

Operators support their communities

Ngā kaiwhakahaere me ō rātou hapori

Actions	Success measures
Operators support community projects and give back	• Operator support for community projects baseline recorded and reported

TE TAI POUTINI DESTINATION MANAGEMENT PLAN

Theme Four

Celebrate our cultural heritage
Te whakatairanga i ngā taonga tuku

FOCUS AREA >

Position cultural heritage as a key asset
Te whakanohonga o ngā taonga tuku iho ā-ahurea hei rawa tāpua

Actions	Success measures
Tell authentic cultural stories	• Development of regional cultural maps and narrative

FOCUS AREA >

Mana whenua engagement
Te toronga ki te mana whenua

Actions	Success measures
Overlay Tikanga Māori and Te Reo Māori on strategies	• Placenames and concepts presented bi-lingual

FOCUS AREA >

Telling all our stories better
Te whakanikonga o te kōrerotanga o ā tātou kōrero katoa

Actions	Success measures
Support operators and communities in telling their stories	• Storytelling guides developed for operators • Storytelling workshops held
Engaging indigenous and non-indigenous tourism operators	• Support cultural narrative for all businesses

Theme Five

Protect our natural assets

Te tiaki i ā tātou rawa o te ao tūroa

FOCUS
AREA

Regenerating nature
Te whakarauora anō i te taiao

Actions	Success measures
Operators support natural regenerating projects	• Operator support for regeneration projects baseline recorded and reported
Operators measure their footprint and reduce impact	• # operators measuring their footprint baseline established • Growth in operator #s over time • Measurable reductions over time

FOCUS
AREA

Educating visitors
Te whakaako i ngā manuhiri

Actions	Success measures
Roll out Tiaki values across Te Tai Poutini	• More businesses demonstrating Tiaki values • Guests educated on Tiaki values and how they relates to Te Tai Poutini
Prepare guides for Tai Poutini visitors	• Content developed on Tai Poutini values and how to be a good visitor here
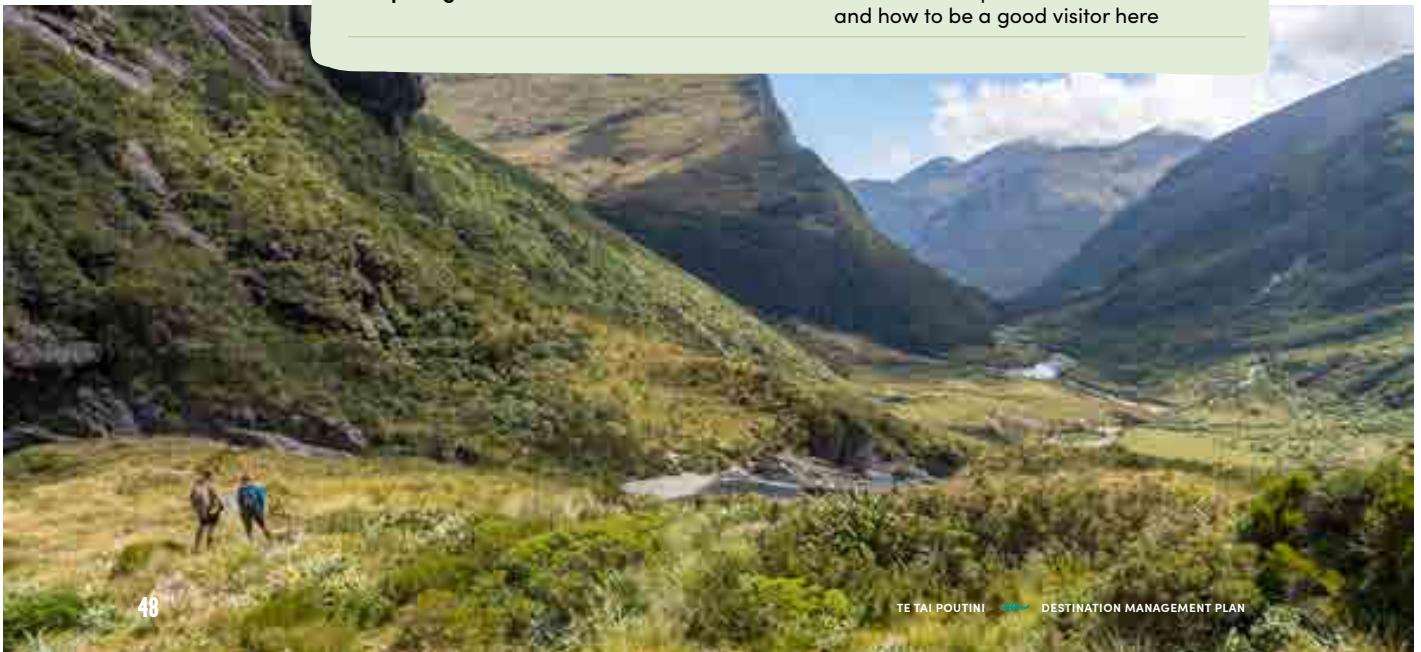
Priority projects and activities 2023

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

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

PROJECT	PURPOSE	ACTIVITIES	METRICS
ESTABLISH DESTINATION MANAGEMENT REFERENCE GROUP	A reference group will guide the implementation of the projects and objectives set out in this plan.	• Develop terms of reference • Identify members and establish group	• Group established, regular meetings held, positive feedback from stakeholders
MEASURE AND IMPROVE SUSTAINABILITY ACROSS THE SECTOR	Conduct baseline assessments and set improvement goals. Work with tourism operators to measure their footprints and start along this journey.	• Identify businesses that are already measuring sustainability • Start pilot programme to encourage more businesses to measure footprints • Assess regional footprint • Set up monthly courses to bring operators together	• # operators measuring carbon • # operators zero carbon certified • # of operators signed up to TSC Overall carbon footprint • Climate mitigation plan
BUILDING OPERATOR CAPACITY	Training and networking to enable tourism operators to optimally drive their business, e.g. business model reinvention, strategic collaboration, sustainability, and market research topics.	• Training needs analysis • Monthly courses to bring operators together • Training success analysis – impact and satisfaction	• Guest satisfaction, • NPS scores • Learner feedback on courses • Course attendance
INNOVATION ECO-SYSTEM FOR TOURISM	A tourism innovation eco-system on Te Tai Poutini to help existing businesses improve and create opportunities for new businesses to emerge.	• Establish pilot programme	• Number of accelerator programmes run, number of innovation training sessions, number of graduate start-ups
WORKFORCE DEVELOPMENT FOR TOURISM	Attract workers to the region and retain those that are already living here. Develop locals to work in the tourism sector by making it an attractive industry for work.	• Work with industry to identify skills shortages on Te Tai Poutini • Work with national partners (e.g. Go with Tourism) to identify what is holding staff back from moving to Te Tai Poutini • Identify training possibilities for locals who want to switch to the tourism industry or want to upskill to more senior positions	• Number of jobs created • Positive community sentiment on tourism

DISTRICT PERSPECTIVES
Buller

Punakaiki River. Photo BareKiwi.

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

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

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

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

Figure 10: Total visitation

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

International overnight visitors — 118k
Domestic day visitors — 323k
International day visitors — 118k
Domestic overnight visitors — 206k

TE TAI POUTINI · DESTINATION MANAGEMENT PLAN
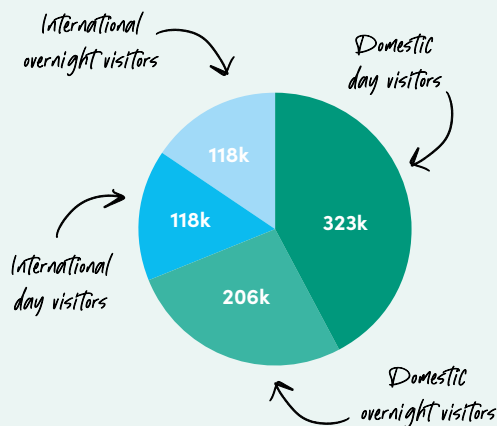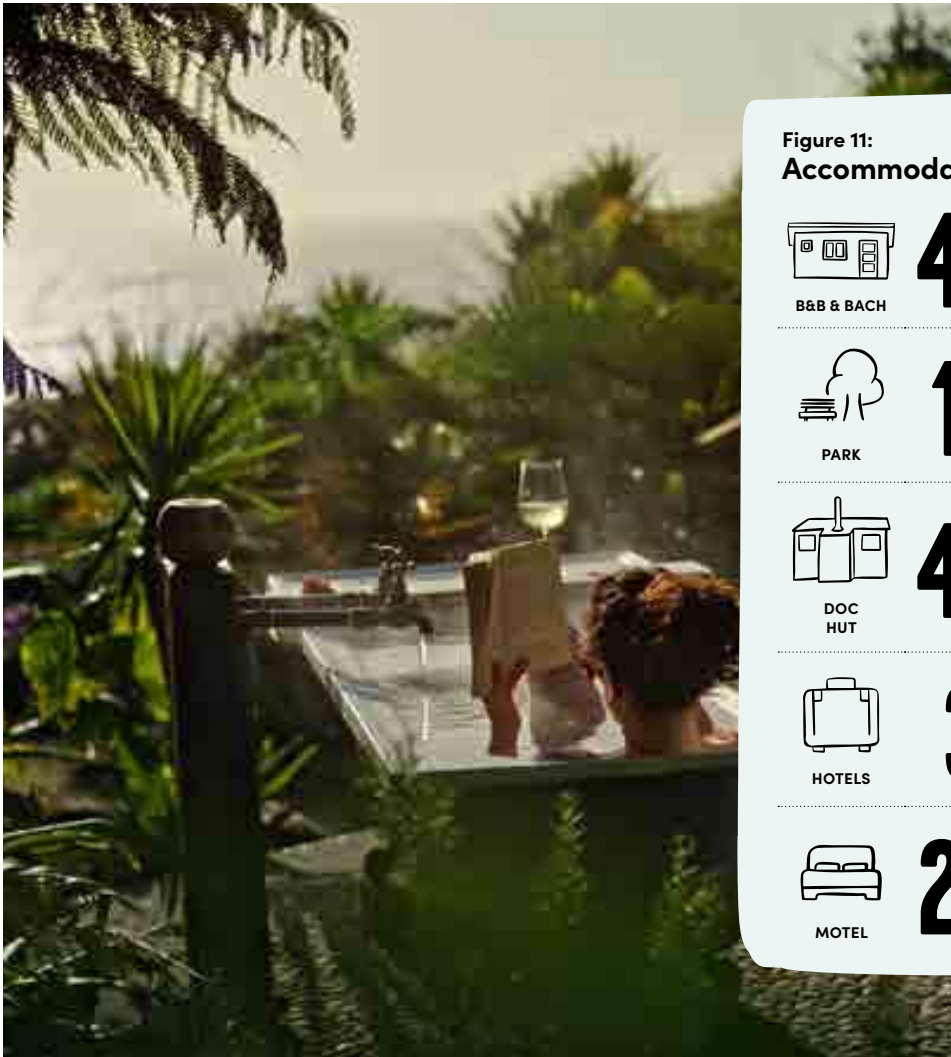
Figure 11:
Accommodation providers | Buller

B&B & BACH	**46**	BACKPACKER	**6**
PARK	**11**	DOC CAMPS	**10**
DOC HUT	**40**	FARMSTAY & GLAMP	**4**
HOTELS	**3**	LUXURY	**0**
MOTEL	**25**	SERVICED	**1**

Challenges and opportunities

Strengths

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

Weaknesses

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

Opportunities

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

Threats

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

Stakeholder input

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

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

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

Environmental
- Dependence on natural products
- Freedom camping impacts

Buller's key icons and attractions
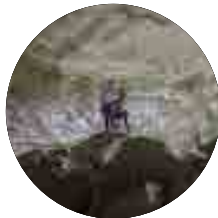
ŌPARARA ARCHES

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

SCENIC BULLER GORGE

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

REEFTON TOWN

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

OLD GHOST ROAD

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

CAPE FOULWIND

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

WESTPORT | KAWATIRI

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

PANCAKE ROCKS BLOWHOLES

PANCAKE ROCKS AND BLOWHOLES
Awesome, mesmerising natural drama as the ocean surges through towering pancaked limestone formations.
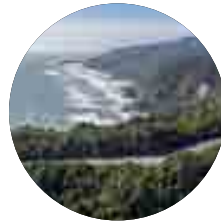
THE GREAT COAST ROAD
An acclaimed, spectacular road trip unfolds into glorious coastal vistas, photo ops and lovely picnic spots.

PAPAROA TRACK
Aotearoa's newest Great Walk and mountain biking trail travels across mountain tops into lush coastal rainforest.
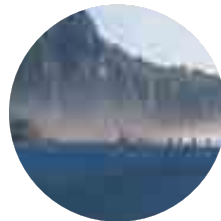
BEACHES
Golden sunsets over pristine sandy beaches in sublime bays, deserted rocky shore, and forests of nikau palms rustling in the sea breeze.

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

TRUMAN TRACK
Picture perfect. A gentle walk in the woods beneath a tranquil sub-tropical canopy emerging above a secluded sandy bay.

APPENDIX A

DISTRICT PERSPECTIVES
Westland

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

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

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

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

Figure 12: Total visitation

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

Domestic day visitors 430k

International overnight visitors 539k

International day visitors 561k

Domestic overnight visitors 274k

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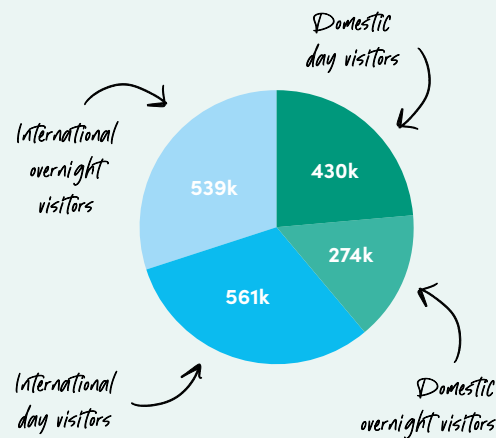
Figure 13:
Accommodation providers | Westland

B&B & BACH	**49**	BACKPACKER	**9**
PARK	**10**	DOC CAMPS	**9**
DOC HUT	**106**	FARMSTAY & GLAMP	**1**
HOTELS	**12**	LUXURY	**0**
MOTEL	**32**	SERVICED	**0**

Lake Matheson | Photo RoadyNZ

Challenges and opportunities

Opportunities

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

Weaknesses

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

Threats

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

Strengths

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

Stakeholder input

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

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

Cultural
- Lack of cultural storytelling

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

Westland's key icons and attractions

HOKITIKA GORGE

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

HOKITIKA TOWNSHIP

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

LAKE KANIERE

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

ROSS GOLDFIELDS

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

WEST COAST WILDERNESS TRAIL

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

LAKE MĀHINAPUA

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

TE TAI POUTINI   DESTINATION MANAGEMENT PLAN

GLACIER COUNTRY

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

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

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

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

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

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

HAAST
WORLD HERITAGE

HAAST PASS | TIORA-PATEA
Spectacular, 140km Wanaka to Westland highway; short walks to glacial blue pools, roaring waterfalls, undulating forests, coastal wetlands.

JACKSON BAY | OKAHU
Sleepy fishing village with an iconic crayfish cafe; watch out for passing penguins and tiny Hector's dolphins surfing the waves.
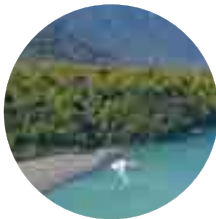
HAAST RIVER | AWARUA
From the edge of paradise, jet boat up the Haast River for total immersion in some of the world's purest World Heritage landscapes.

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

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

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

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TE TAI POUTINI   DESTINATION MANAGEMENT PLAN

APPENDIX A

DISTRICT PERSPECTIVES
Grey

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

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

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

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

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

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

Figure 14: Total visitation

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

International overnight visitors — 116k
Domestic day visitors — 288k
International day visitors — 116k
Domestic overnight visitors — 184k
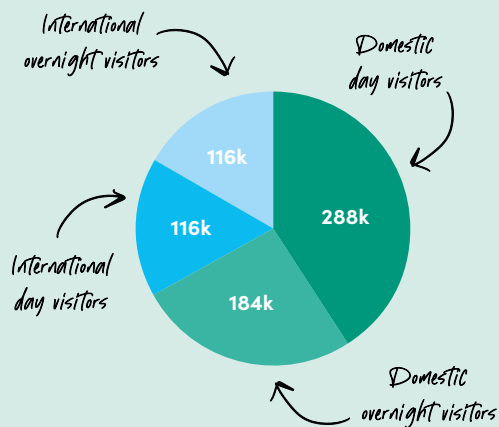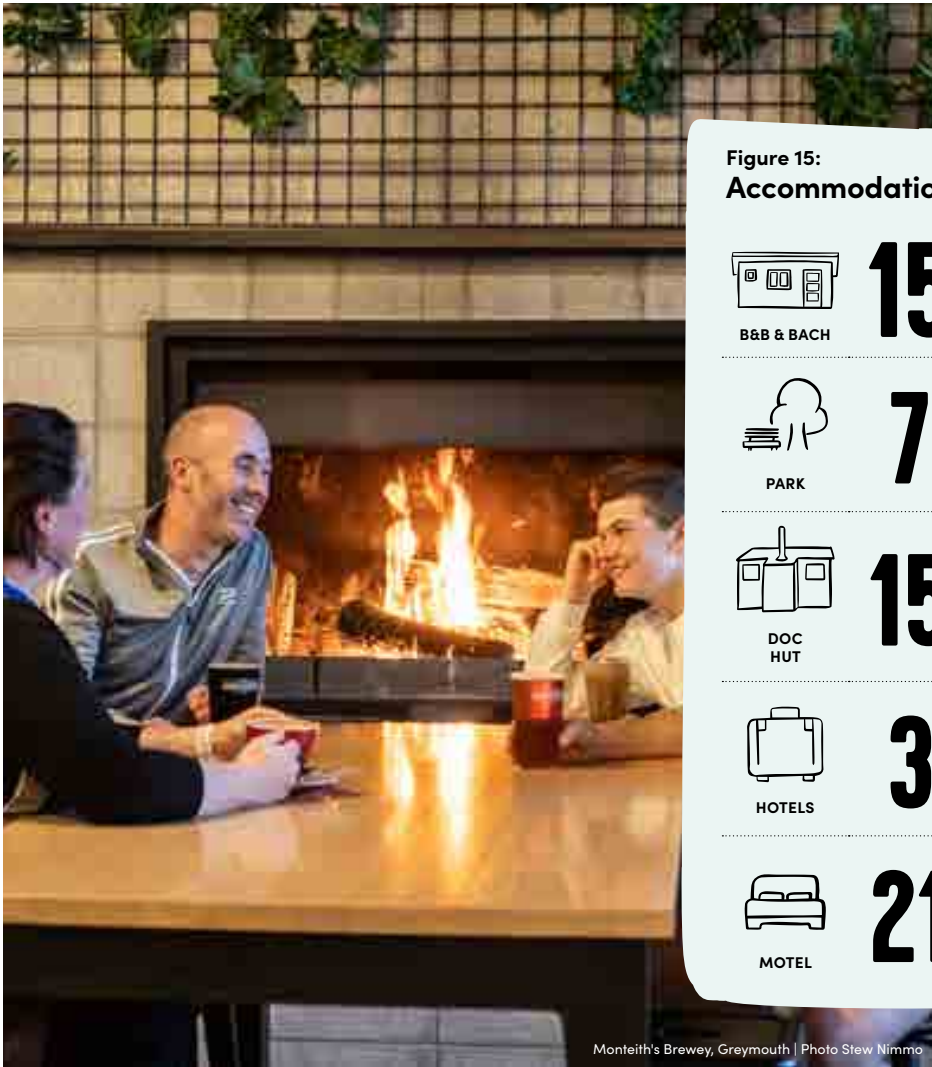
Figure 15:
Accommodation providers | Grey

B&B & BACH	15	BACKPACKER	3
PARK	7	DOC CAMPS	0
DOC HUT	15	FARMSTAY & GLAMP	0
HOTELS	3	LUXURY	1
MOTEL	21	SERVICED	-

Monteith's Brewey, Greymouth | Photo Stew Nimmo

Challenges and opportunities

Strengths

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

Weaknesses

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

Opportunities

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

Threats

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

Stakeholder input

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

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

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

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

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Grey's key icons and attractions
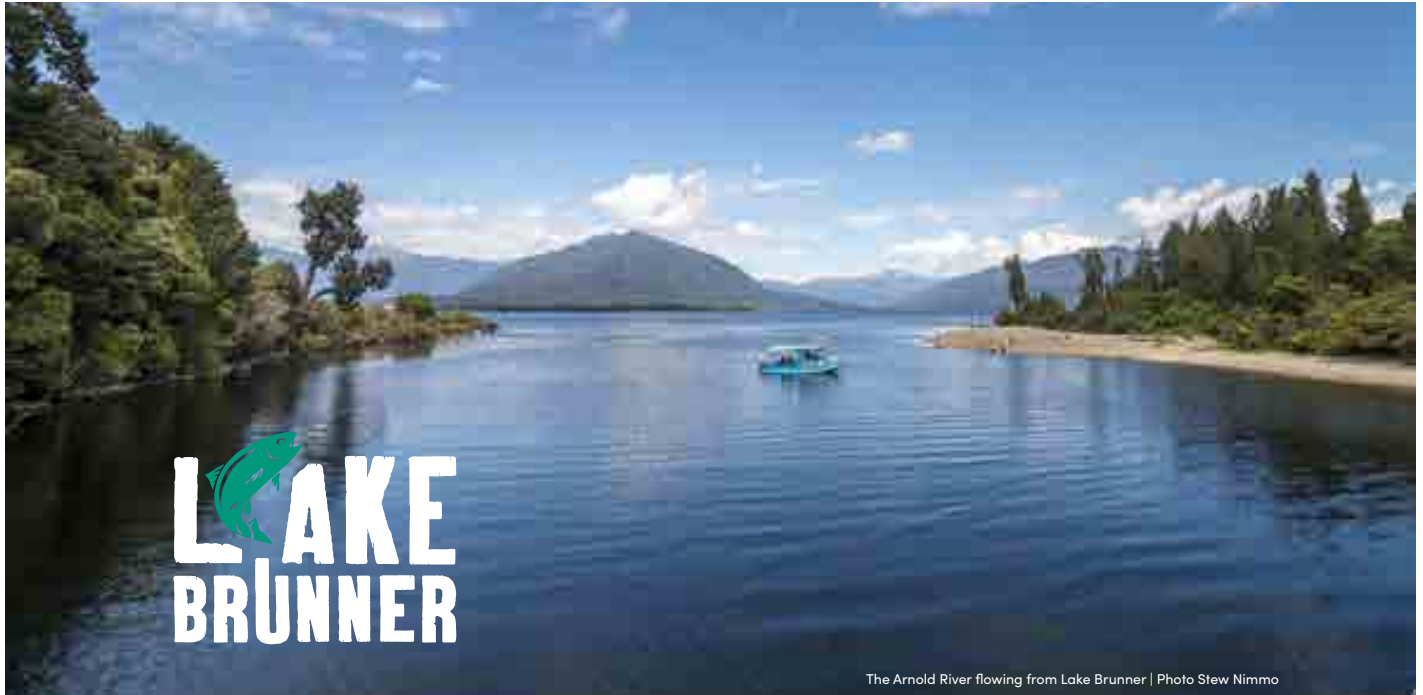
The Arnold River flowing from Lake Brunner | Photo Stew Nimmo

MOANA | LAKE BRUNNER

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

TRANZ ALPINE TRAIN

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

BROWN TROUT CAPITAL OF NZ

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

GREYMOUTH | MĀWHERA

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

HISTORIC BRUNNER MINE

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

HISTORIC BLACKBALL

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

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DEVELOPMENT
WEST COAST
Te Ohu Whakawhanake o Te Tai Poutini

WÊST COAST
NEW ZEALAND
UNTAMED NATURAL WILDERNESS

Te Tai Poutini
VISITOR FLOW REPORT

JUNE 2023

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Prepared for Development West Coast
Dr David Ermen
Destination Capacity Ltd

CONTENTS

INTRODUCTION
He whakatakinga

Development West Coast (DWC) is coordinating the development and implementation of a Destination Management Plan (DMP) for the West Coast region according to the MBIE DMP guidelines[1].

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

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

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

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

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

Roberts Point Track, Franz Josef | Photo Geoff Marks

ACTIVITIES PERFORMED

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

engage with stakeholders on the West Coast.

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

Workshop engagement activities

Data collection workshop
15.11.21 Westport
16.11.21 Greymouth
17.11.21 Fox and Franz
18.11.21 Hokitika

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

| OCT 2021 | NOV 2021 | DEC 2021 | JAN 2022 | FEB 2022 | MARCH 2022 | APRIL 2022 |

Preparation and briefings with key stakeholders
Preliminary discussions and document reviews established the background for the data collection workshops.

Various follow-up discussions with stakeholders
Discussions with stakeholders to fill data gaps and examine solutions.
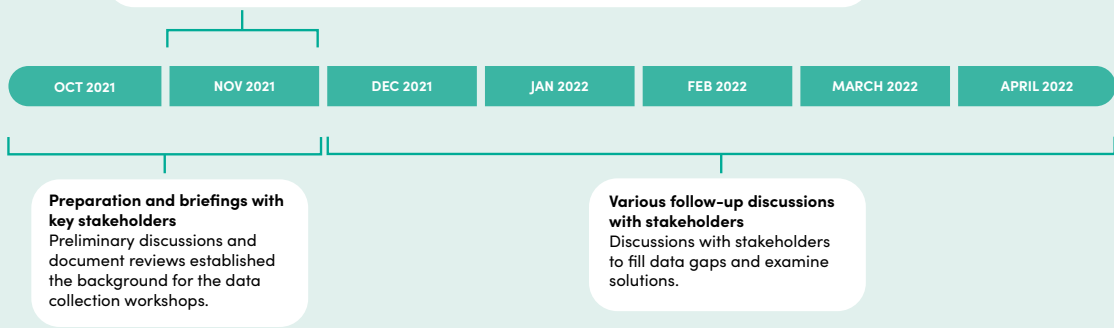
FLOW *Overview*

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

✓ **Development stages**
Future, new, developing, mature, declining, on hold due to COVID

✓ **Duration**
Day or overnight

✓ **Successes**
What went/goes well in this flow

✓ **Challenges**
Before COVID or current

✓ **Solutions**
Potential solutions for improving the flow

✓ **Research needed**
What more do we want to know about this flow?

✓ **Key operators**
Clearly defined or vague

✓ **Market influencers**
Do we know how to encourage this market to visit?

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

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

Callery Gorge | Photo Geoff Marks

Flow types

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

BUSINESS TRAVEL

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

LEISURE TRAVEL

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

EVENTS

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

TEMPORARY RESIDENTS

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

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

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

Overview map

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

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

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

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

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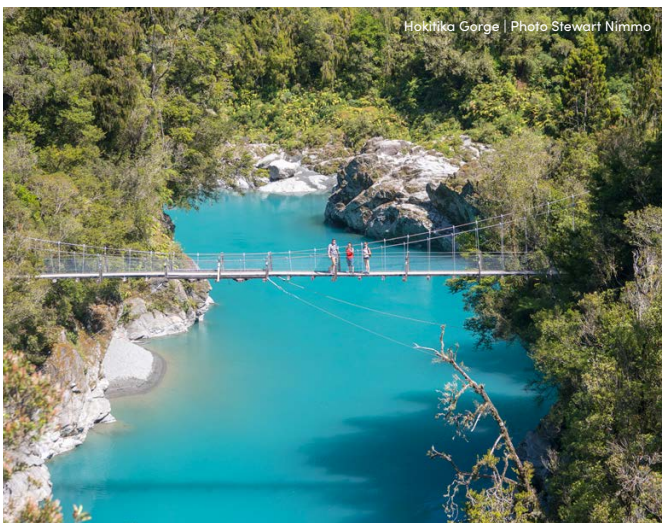

Figure 1: Overview of all mapped flows

Figure 2: South Westland Flow summary

Figure 3: Nelson adventure junkies flow map

Hokitika Gorge | Photo Stewart Nimmo

KEY FINDINGS
across Flows

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

soundsAIR

Kahurangi National Park

Westport

AIR NEW ZEALAND

Greymouth

Hokitika

TranzAlpine
THE GREAT JOURNEYS OF NEW ZEALAND

InterCity

Franz Josef
Fox Glacier

Christchurch

Haast

Mount Aspiring National Park

InterCity

InterCity

Key access points for our visitors by road, rail, and air.

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

ACCESS (ROAD, AIR, RAIL)

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

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

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

The Buller River | Photo RoadyNZ

ACCOMMODATION

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

Figure 5: Guest nights on the West Coast by property type[2]

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

Legend:
- Holiday parks and campgrounds: 21.0k
- Hotels 14.3k
- Motels and apartments (6–20) 13.5k
- Motels and apartments (6–20) 13.5k
- Lodges and boutique accommdation 4.2k
- Motels and apartments (>20) 1.5k

2. https://teic.mbie.govt.nz/dataRelease/adp/

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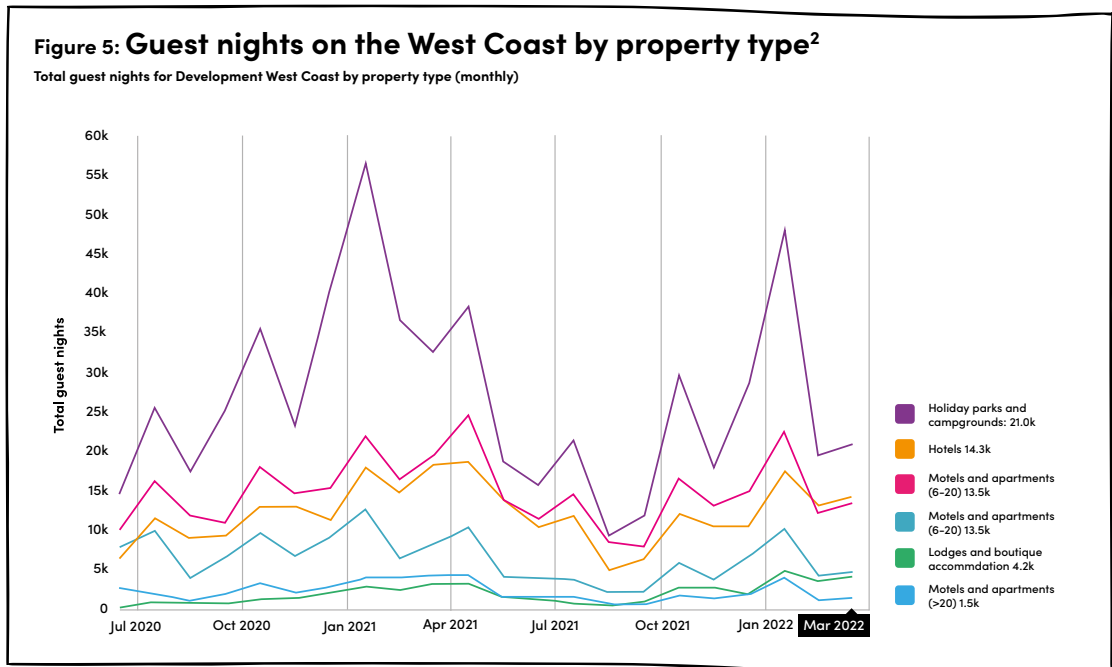
Welcome Flat Hut, Copland Track | Photo RoadyNZ

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

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

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

3. https://www.tripadvisor.co.nz/Attraction_Review-g660716-d17562726-Reviews-Paparoa_Track-Punakaiki_West_Coast_Region_South_Island.html

EXPERIENCES

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

SIGNAGE / INFORMATION

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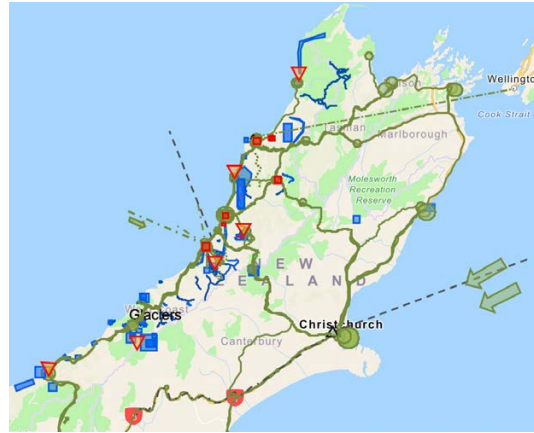

Figure 7: Experience overview for natural and cultural experiences on the West Coast with the main touring routest

CHANGING CONSUMER PREFERENCES

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

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

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

UNPREDICTABILITY IN MARKETS

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

The Greymouth i-Site | Photo Stewart Nimmo

Key opportunities across flows

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

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

WHAT DOES THIS MEAN FOR DESTINATION MANAGEMENT?

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

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

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

Lake Mapourika | Photo Franz Josef Wilderness Tours

RECOMMENDATIONS

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

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

1 >

Consultation and task forces

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

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

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

2 >

Connect with surrounding regions

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

Photo above: Dining in Greymouth | Stewart Nimmo

TE TAI POUTINI VISITOR FLOW REPORT

3 >

Developing new products to fill gaps

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

4 >

Next Steps on visitor flow management

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

5 >

Arranging resources and assigning accountability

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

Purpose	Identify one operator per flow that is essential to the flow and could lead the flow development. The goal will be to turn several operators into 'flow champions' to have them share the approach and encourage others to support them. With a strong champion it will be easier for DWC to take a support role and assist several flows at once. Once all the operators in one flow are identified, DWC could help coordinate an experience exchange group for those operators to work together to further develop business within the flow.
Activities	• Select champion per priority flow • Provide training and guidance • Hold regular meetings to keep up with progress • Share success stories with other operators to encourage collaboration • Facilitate mastermind groups to encourage information exchange within flows
Stakeholders	DWC, key operators
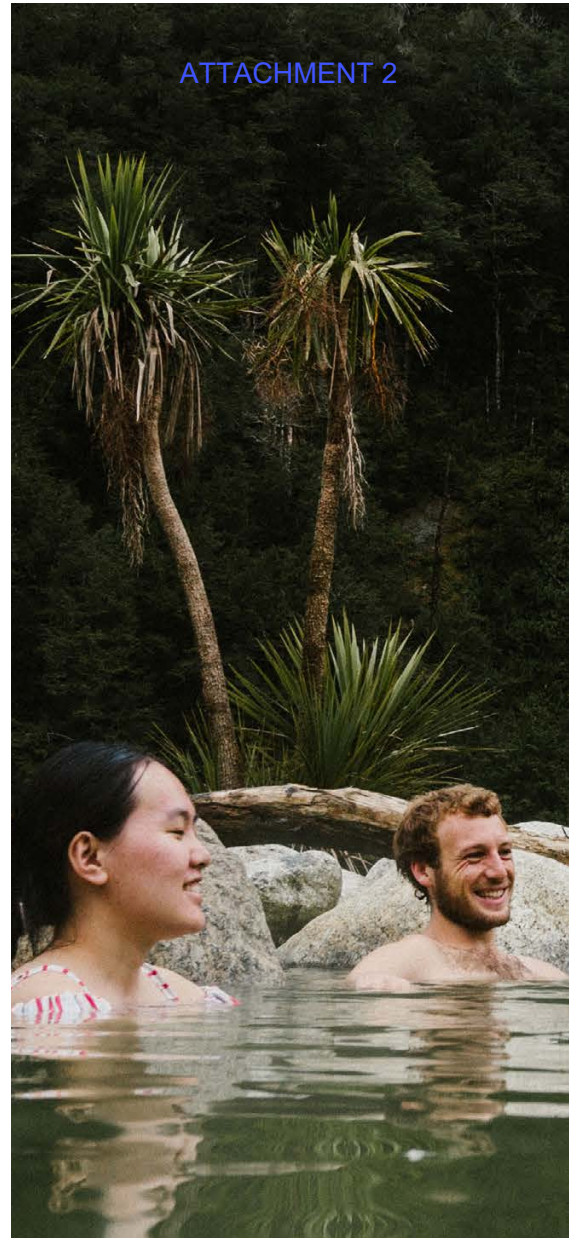
Maruia Hot Springs | Photo Stewart Nimmo

6 Install for ongoing update and facilitate the process

Purpose	The final step is to turn the maps and marketing processes into a living management plan. It is important to have a coordinator that can keep an overview of what is going on in the different flows and can coordinate with the flow champions on a regular basis. Regular events can help to gather ongoing input. The maps and processes can also be installed in a public space or online to allow input at all times. The key goal is to not have the assessment disappear in a draw. It should be out in public so that we can crowd source new details and developments regularly. This does take some staff time and coordination from the lead organisation but will provide ongoing updates.
Activities	• Employ/train a visitor flow champion at DWC • Revise flow maps and Excel regularly as new information becomes available • Hold an update event every 12 months where operators can share what has changed on their flows, what are new challenges, and what are possible solutions. • Hang key maps on an accessible wall at DWC so that visitors can provide input on an ongoing basis with Post-its OR make digital maps available and ask for feedback • Give regular updates to operators if research shows there might be changes coming
Stakeholders	DWC, operators

7 Limitations

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

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

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

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

Whio | Liz Carlson
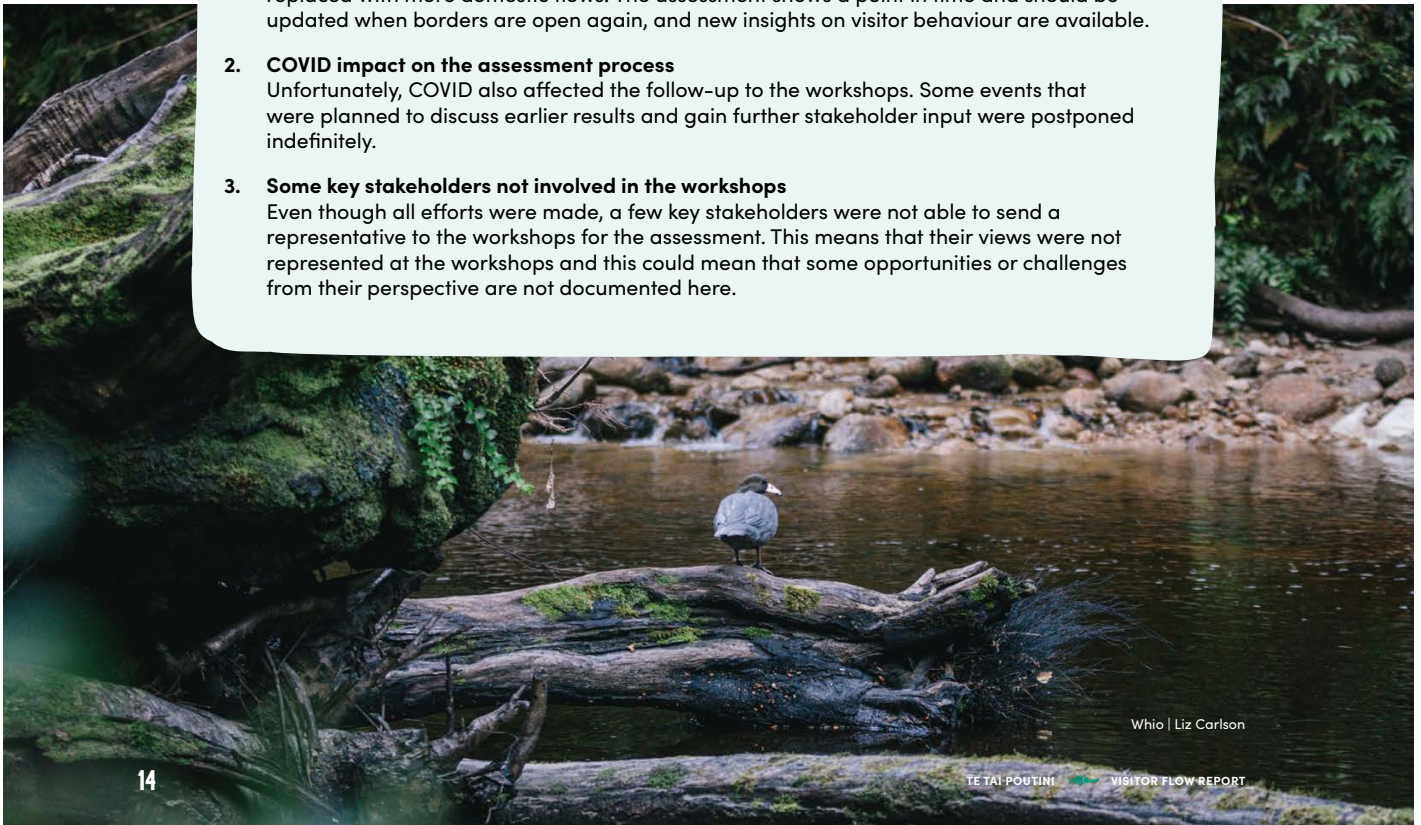
Old Ghost Road | Richard Rossiter

APPENDIX 1
– Methodology and Approach

The methodology is based on the St. Gallen Model for Destination Management[4], which has been applied internationally to assess and manage destinations.

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

Install for ongoing update and facilitate the process

Follow the visitors and draw the maps

Arrange the resources and negotiate accountability

Overlap the maps and strategise

Fill in the processes and share the tasks

Explore the networks and identify the levers

Step 1
Draw the maps

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

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

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

This provides a solid qualitative basis for further quantitative modelling.
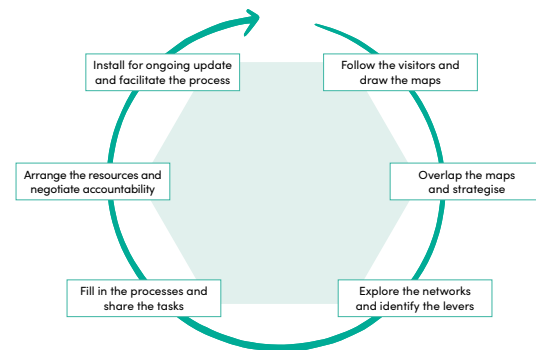
Step 2
Overlay and strategise

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

Step 3
Explore the networks

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

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

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Step 4

Explore processes

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

The marketing processes for each flow analyse:

- **Key players**
  Who is the key player involved in this flow? These are usually operators or attraction providers. For many natural areas, like a national park or conservation area, DOC will be the key player as they have influence over who can operate in these areas.

- **Market mavens (Influencers)**
  Who influences visitor opinion on this flow? These are sometimes difficult to assess at first but can yield very direct rewards if they are identified. For example, the influencer for tour groups would be the inbound operator who plans and arranges the tour.

- **What is/was going well in this flow?**
  This can relate to progress, job creation, awards, customer satisfaction, etc.

- **What are/were/will be challenges?**
  These can relate to sustainability dimensions

- **What are possible solutions?**
  The workshops are a great opportunity to get stakeholder input on innovative solutions

Old Ghost Road | Hage Photo

- **What else do we need to know?**
  This creates suggestions for further market research and analysis

- **Finally, who is responsible for this flow?**
  This puts the responsibility with one person (not an organization) to manage this flow. This may need further work after the workshops in steps 5 and 6.

Step 5

Arrange resources

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

Step 6

Update and facilitate

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

APPENDIX 2
A flows-based approach and MBIE DMP Guidelines

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

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

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

ATTACHMENT 2

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

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DEVELOPMENT
WEST COAST
Te Ohu Whakawhanake o Te Tai Poutini

WEST COAST NEW ZEALAND
UNTAMED NATURAL WILDERNESS

Te Tai Poutini
SUSTAINABILITY
FRAMEWORK

JUNE 2023

Prepared for Development West Coast
Dr David Ermen
Destination Capacity Ltd

Wilson Creek Canyon, Haast | Photo Roady NZ

CONTENTS

INTRODUCTION
He whakatakinga

Development West Coast (DWC) is coordinating the development and implementation of a Destination Management Plan (DMP) for the West Coast region according to the Ministry of Business Innovation and Employment (MBIE) DMP guidelines[1]. This report outlines work undertaken in 2021 for DWC to develop a sustainability framework as part of the inputs for the DMP and as a basis for the regional goals.

There are a number of frameworks available that can support destinations to become more sustainable, reducing negative impacts and increasing local community benefits. The question is where to start on this journey as a region and as an EDA. In the first section, the report summarises international and national frameworks that were reviewed as part of this work and proposes a simple structure for the West Coast framework that aligns with best practice and the MBIE guidelines.

A vital component of the DMP process is stakeholder engagement and the second part of the report presents the results of stakeholder consultations undertaken in four locations on the West Coast – Westport, Greymouth, Hokitika, and Glacier Country. This provides an overview of the key risks and opportunities in each framework area – Economic, Social, Culture, and Environment – and the goals the destination stakeholders can set in order to address these.

The third part of the report makes recommendations as to how this framework can form the basis for regional tourism objectives and plans.

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1. https://www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-projects/destination-management-guidelines/
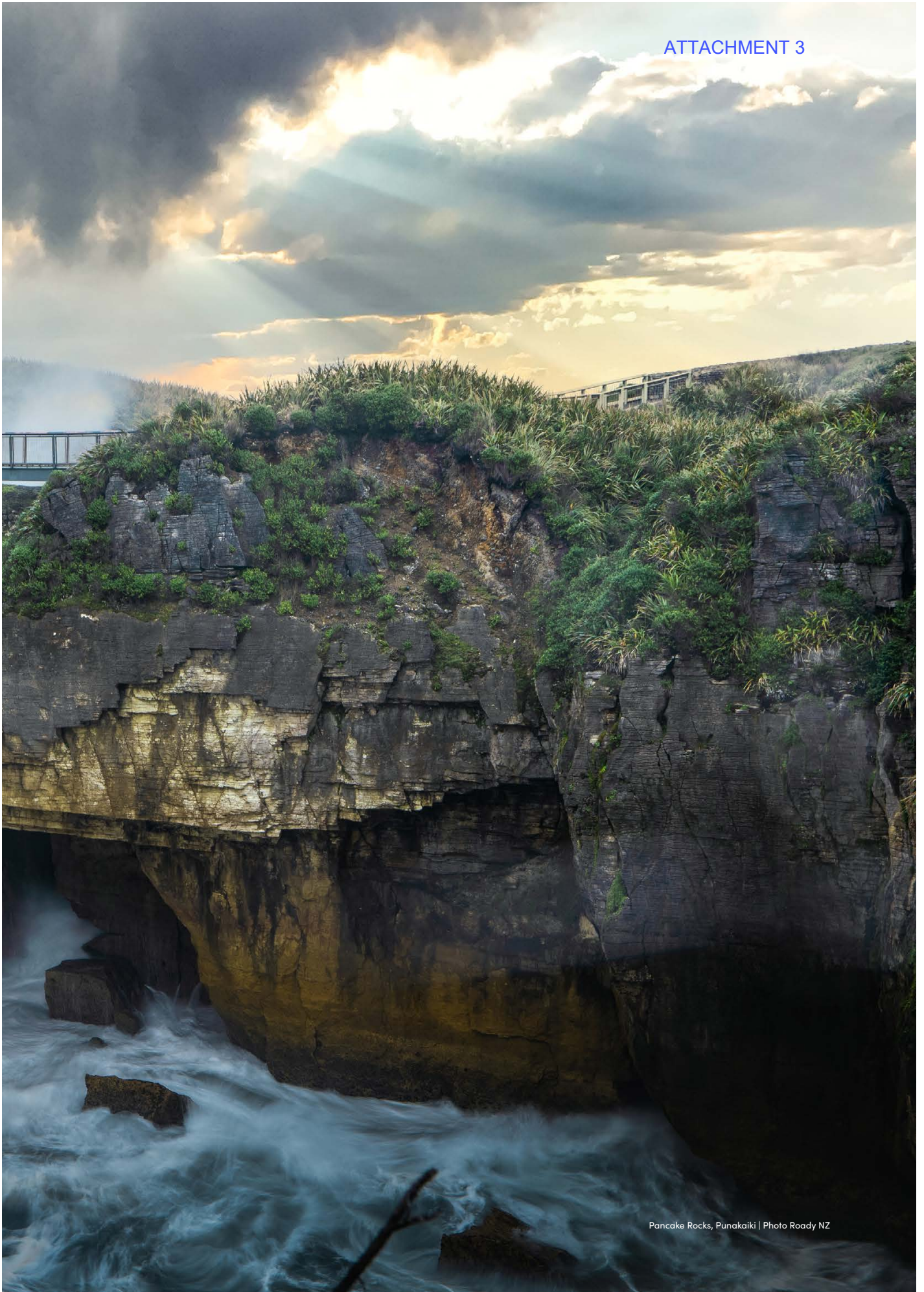
Pancake Rocks, Punakaiki | Photo Roady NZ

FRAMEWORK
design

This section introduces the four key sources that have fed into the design of the West Coast framework and are relevant references for tourism stakeholders.
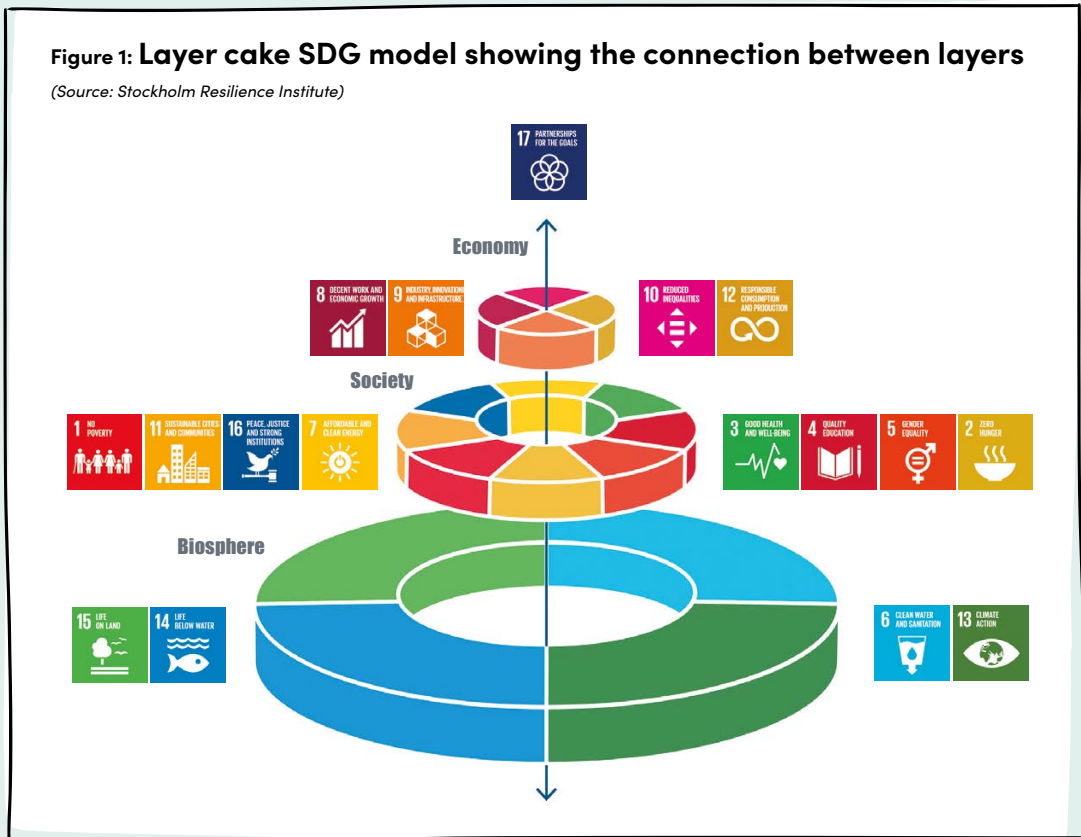
Fox Glacier | Tourism West Coast

1 The Sustainable Development Goals

At the highest level, the UN's SDGs provide a global platform for sustainable development that is good for our planet and people[2]. The SDGs are made up of 17 goals that cover a variety to issues, including poverty reduction, health and wellbeing, water quality, decent work, and more. They are applicable to all industries and all nations – developing and developed.

Although the goals are not legally binding, New Zealand has committed to delivering "productive, sustainable and inclusive economic development" in line with the SDGs. The first voluntary national review was published in 2019 and provides a baseline for future development[3].

Figure 1 shows the SDGs as they relate to our biosphere, society, and economy[4]. This means that we must maintain a healthy biosphere to have a healthy society. A healthy and long-term sustainable economy is only possible if the base layers of the cake are in place and finally SDG 17 "Partnership for the Goals" connects all levels through stakeholder collaboration.

Regional development in New Zealand is driven by national SDG commitments and tourism as an industry has a big opportunity to make a positive contribution. In 2017, UNWTO published their "Journey to 2030" report which presented ways in which tourism can be a force for good[5]. The SDGs provide a great base to set strategies, but their indicators are not immediately graspable for tourism operators – although the UNWTO report showed how many large tourism companies were making positive contributions to the goals already.

Figure 1: Layer cake SDG model showing the connection between layers

(Source: Stockholm Resilience Institute)

2. https://sdgs.un.org/goals
3. https://www.mfat.govt.nz/en/peace-rights-and-security/our-work-with-the-un/sustainable-development-goals/new-zealands-frst-voluntary-national-review-vnr/#bookmark2
4. https://www.stockholmresilience.org/research/research-news/2016-06-14-the-sdgs-wedding-cake.html
5. https://www.unwto.org/global/publication/tourism-and-sustainable-development-goals-journey-2030

2 The Global Sustainable Tourism Criteria

The Global Sustainable Tourism Council (GSTC) is an independent and neutral organisation that has developed a global set of minimum standards for sustainable tourism[6].

There are two sets of criteria – one for industry operators and one for destinations. Both sets of criteria are built on the same four pillars:

This means that both destination managers and private sector operators can work on the same pillars yet apply standards that fit with their role in the tourism system. The destination standards are mapped to the SDGs, which means that working with the GSTC criteria can help destinations understand where they contribute to overarching development goals[7]. The industry standards then provide a practical link for the private sector operators in the destination to improve their business sustainability.

Cultural impacts

Socioeconomic impacts

Sustainable management

Environmental impacts

3 The Treasury's living standards framework

One level of the government's 2021 living standards framework outlines what makes New Zealand wealthy[8]. They break this wealth down into four capitals (see Figure 2).

The four capitals together determine New Zealand's wealth, and we must work towards protecting all of them to ensure that New Zealand thrives. The whole framework is wrapped in the New Zealand culture because all of our actions happen within that culture. Government decisions are driven by this framework, so the pillars are important to consider for the West Coast.

Figure 2: Part of the Living Standards Framework showing the four capitals
(Source: Treasury)

4 The MBIE Destination Management Guidelines

Since the purpose of the West Coast framework is to set goals for destination management, the MBIE guidelines are also a frame that we must take into account. According to their definition, destination management...

> *"... brings together different stakeholders to achieve the common goal of developing a well-managed, sustainable visitor destination. It is an ongoing process that requires destinations to plan for the future and considers the social, economic, cultural and environmental risks and opportunities"[9].*

Social, economic, cultural, and environmental aspects are all important when looking at the overall health and success of a destination and they align closely with all the previous frameworks.

In addition to the approaches discussed above, there are also tourism industry specific operator sustainability frameworks, like the TIA Tourism Sustainability Commitment[10] and Qualmark's Sustainable Tourism Business Award[11]. These are both useful for supporting operators to raise their sustainability and both have pillars closely aligned to the above frameworks.

6. https://www.gstcouncil.org/gstc-criteria/
7. https://www.gstcouncil.org/gstc-criteria/gstc-and-sdgs/
8. https://www.treasury.govt.nz/information-and-services/nz-economy/higher-living-standards/our-living-standards-framework
9. https://www.mbie.govt.nz/immigration-and-tourism/tourism/destination-management-guidelines/
10. https://sustainabletourism.nz/about-us/
11. https://www.qualmark.co.nz/en/learn-about-us/how-qualmark-works/
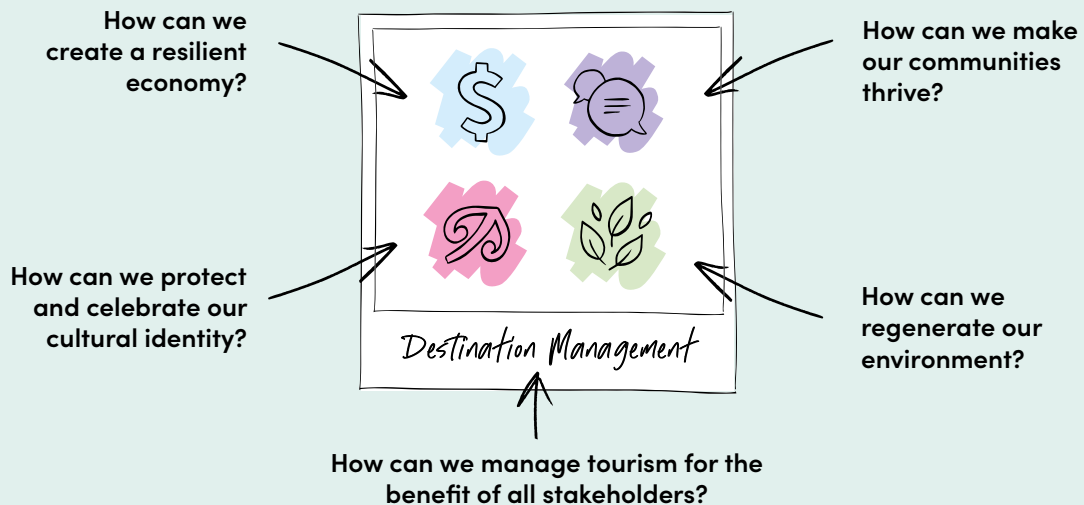
THE WEST COAST
Framework

The goal of this framework is to align with international frameworks and ensure that we can set holistic goals that will ensure the West Coast takes a holistic view of sustainability.

The suggested framework is based on goals in four pillars – Economic, Social, Culture, and Environment. We will refer to these as the goal pillars. Destination Management will form the fifth pillar because it is only through sustainable management that the destination can achieve results in the other pillars. This is based on the GSTC's pillar A on sustainable management. Figure 3 shows questions to ask for each pillar.

Over time the ambitions of the stakeholders may change and they will look beyond sustainability towards more regenerative approaches. Partnerships and collaboration will be key success factors in achieving these goals over time, because single stakeholders cannot create this kind of systemic change. Culture will need to change to achieve lasting results.

The next section presents the results of initial stakeholder consultations on the West Coast regarding the four goal pillars of the model. Destination management was not covered directly but did come up in many of the conversations as essential.

Figure 3: **West Coast Sustainability Framework with ambitions**

How can we create a resilient economy?

How can we make our communities thrive?

How can we protect and celebrate our cultural identity?

How can we regenerate our environment?

Destination Management

How can we manage tourism for the benefit of all stakeholders?

Dorothy Falls, Lake Kaniere, Hokitika | Roady NZ

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STAKEHOLDER *input*

A series of workshops in November 2021 was the basis for these results. In each workshop, a group of stakeholders from the private and public sectors were asked about the challenges or risks and opportunities and successes they could identify in each of the four pillars – Economic, Social, Culture, and Environment.

The whole process was repeated three times in each workshop – once for the pre-COVID times, once for the time during COVID, and then looking forward beyond COVID. The goal of this approach was for participants to reflect on what was good and bad in the past before looking at the present and future. The question was: What do you really want to recover from the pre-COVID times and what is actually going quite well right now?

This lead to interesting discussions amongst participants and sometimes realisations that there were aspects of the past that they did not want to repeat. At the end of each topic the participants were asked to vote for the most important challenges and opportunities.

Figure 4: **Workshop process for sustainability framework discussions**

Buller River | Roady NZ
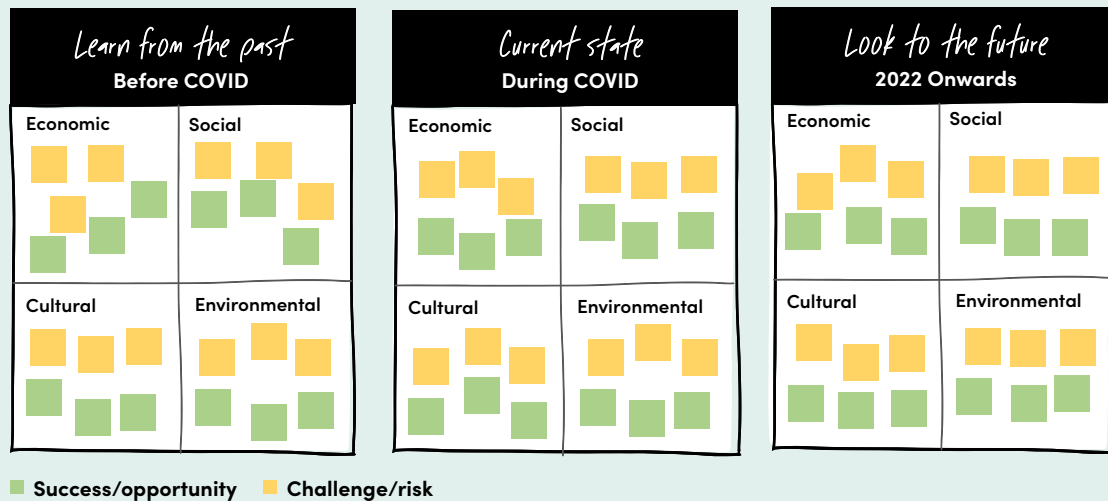
Key risks and opportunities for each region

Each of the following four sections describes the key results regarding the future from each workshop. Opportunities are shown in green and risks in yellow. The last sections present the overall most critical challenges and opportunities as well as an attempt to verbalise goals in each of the pillars that would move the Coast towards a more resilient and sustainable future.

› Greymouth

Economic

Opportunities
- More open access and transport into the region
- Bring tourism back but in a sustainable way

Challenges
- Tourism industry, local government won't align at the same time to speed up resolution
- DWC cannot solve all the problems itself as it doesn't have the resources needed.

Social

Opportunities
- High values. Visitors more than just $ (align to our values).
- Work altogether as one. Unity for the region (common goal)

Challenges
- Lack of leadership with tackling issues
- Lack of housing for staffing and general public

Cultural

Opportunities
- Wider celebration of the people and place

Challenges
- Lack of engagement with Iwi

Environmental

Opportunities
- West coast to become the reference for sustainability in NZ
- Sustainability is essential in all aspects
- Put emphasis environment, regenerative rather than sustainable

Challenges
- Tourism returning to pre-COVID impact again if poorly regulated
- Councils not embracing need to address climate and biodiversity crisis

> Hokitika

Economic

Opportunities
- Business telling their story of resilience
- Support business to continue to invest in sustainability
- Maintain domestic market

Challenges
- What can we learn from post COVID European market open up?
- How to maintain new assets?
- Less tourism dollars

Social

Opportunities
- Cultural opportunities in partnership with iwi

Challenges
- Local leadership need to be more visionary

Cultural

Opportunities
- Pounamu pathway greater cultural story telling

Challenges

Environmental

Opportunities
- More active tourism with less climate impact
- Nature tourism everywhere not just icons

Challenges
- Return to high visitor numbers too quickly
- Carbon positive travel

> Fox

Economic

Opportunities
- Less seasonal
- Money to implement changes
- Predator free best natural values in the world?
- Visitors numbers returning

Challenges
- That tourism will go back to overtourism
- Transport infrastructure

Social

Opportunities
- Measure of values
- Vibrant, lively based community

Challenges
- Staff housing
- Connecting the dots from community to operators to big business in positive way

Cultural

Opportunities
- Capitalizing on cultural history
- Education + awareness

Challenges

Environmental

Opportunities
- Reversion to same behaviors / reimagining a 'myth'
- Return of freedom camping

Challenges
- New decarbonizing opportunities
- West coast 1st carbon free tourism region – electric buses, no noise, more birds
- Predator Free South Westland

TE TAI POUTINI SUSTAINABILITY FRAMEWORK

> Westport

Economic

Opportunities
- Locals have opportunities to benefit economically from tourism
- Underwrite successful/ profitable businesses

Challenges
- Lack of housing & staff accommodation
- Business as usual
- Accommodation for visitors for the next 1–2 years, due to current accommodation being taken up due to flood?

Social

Opportunities
- Increase the population base and provide jobs

Challenges
- Not learning from COVID
- How to change preconceptions of the West Coast

Cultural

Opportunities
- Realise the importance + value of culture (Maori, European + other culture) to West Coast offering

Challenges
- West coast needs impetus to change
- Cultural tension – last 150 vs. last 600 years

Environmental

Opportunities
- Low carbon tourism
- Opportunity to restore and take care of our environmental footprint with regards to visitors/tourist
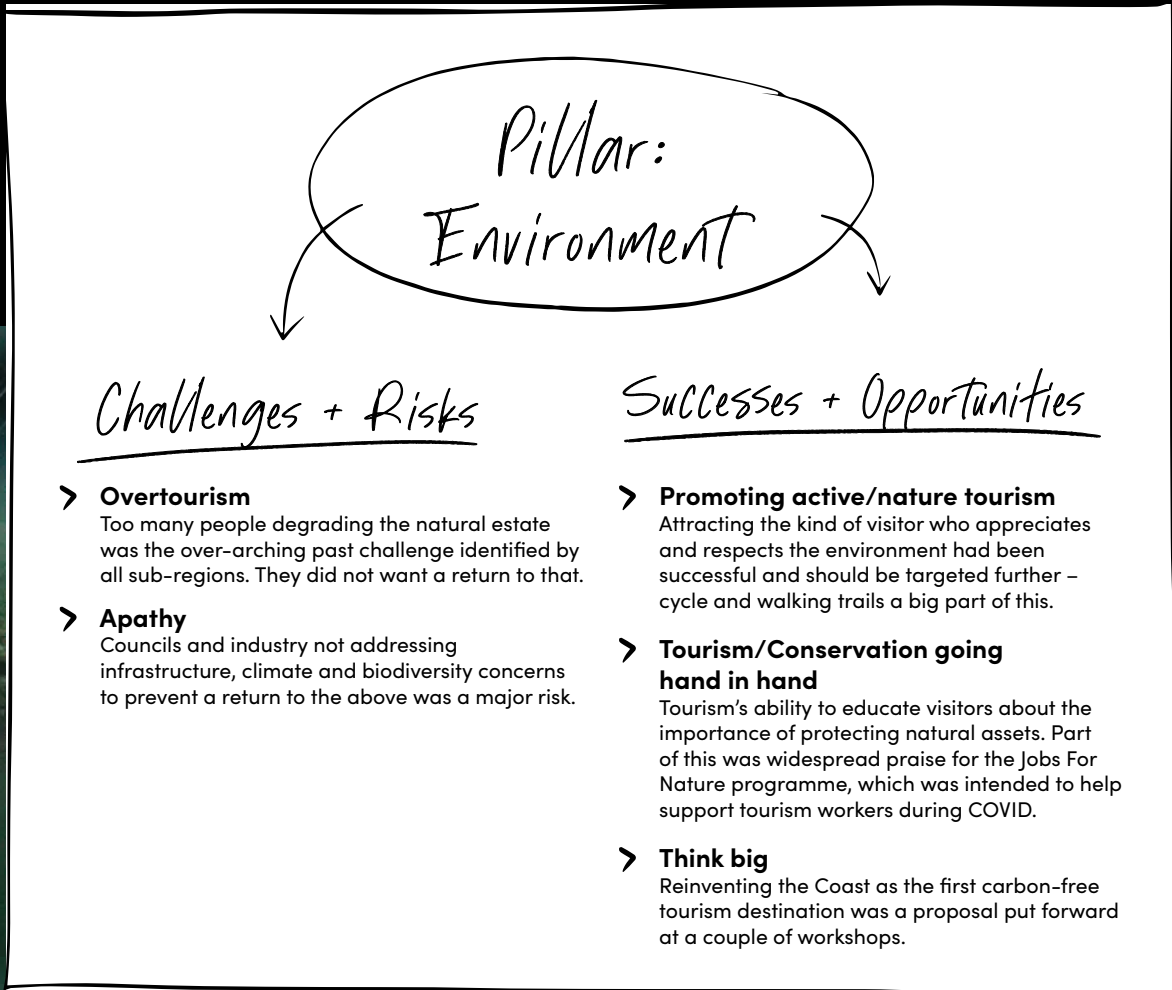- Connectivity for cycle / walking trails

Challenges
- Carbon consciousness and impact on travelling to the West Coast
- More roads + track closure due to climate change
- Natural disaster (AF8

Punakaiki River Kayaks

OVERALL WORKSHOP
Summary

The following tables provide the overall assessment of the key challenges and opportunities that the participants across all workshops saw. These are valuable inputs for the destination management planning process.

Pillar: Environment

Challenges + Risks

> **Overtourism**
> Too many people degrading the natural estate was the over-arching past challenge identified by all sub-regions. They did not want a return to that.

> **Apathy**
> Councils and industry not addressing infrastructure, climate and biodiversity concerns to prevent a return to the above was a major risk.

Successes + Opportunities

> **Promoting active/nature tourism**
> Attracting the kind of visitor who appreciates and respects the environment had been successful and should be targeted further – cycle and walking trails a big part of this.

> **Tourism/Conservation going hand in hand**
> Tourism's ability to educate visitors about the importance of protecting natural assets. Part of this was widespread praise for the Jobs For Nature programme, which was intended to help support tourism workers during COVID.

> **Think big**
> Reinventing the Coast as the first carbon-free tourism destination was a proposal put forward at a couple of workshops.

Whio | Photo Liz Carlson

TE TAI POUTINI   SUSTAINABILITY FRAMEWORK

Pillar: Economic

Challenges + Risks

> **Access**
Perception of Coast being hard to get to/affected by weather events/distance from international markets..

> **Infrastructure**
Not enough investment by local government/ national government/ industry/ DOC in facilities to support the visitor volumes they have experienced – roading, carparks, bathrooms, rubbish and recycling.

> **Housing crisis**
Not enough housing for residents, let alone seasonal workers.

> **Seasonality**
Affects each sub-region somewhat differently but overall, the huge surge in numbers over summer and quiet winters meant it was hard to sustain a year-round business, continue employment, house workers, and avoid mental health issues and burnout (Social but included here).

> **Same old same old**
All of the sub-regions expressed a desire not to return to the past style of tourism (big bus tours speeding through and only stopping at the iconic spots/freedom campers with their attendant waste management problems – both groups not able or inclined to spend money). The risk was that entrenched councils and operators would simply revert to the numbers game.

Successes + Opportunities

> **Tourism as employer**
The growth of tourism employment opportunities was noted as a positive balance to the traditional industries of farming, forestry and mining.

> **Reinvention**
All of the sub-regions were enthused about the chance to reinvent tourism in a post–COVID world.

> **Embracing domestic**
The opportunity to continue to serve the domestic market that had emerged during COVID was seen as important, with workshop attendees pleasantly surprised at seeing Kiwis engage with their own country.

Pillar: Social

Challenges + Risks

> **Community fatigue/pushback**
> Several sub-regions felt their communities were either sick of over-tourism, or had been decimated by the lack of tourists caused by COVID (including loss of workers and of creative business owners). simply revert to the numbers game.

Successes + Opportunities

> **Celebration of the unique West Coast lifestyle/character**
> Several sub-regions noted this USP as being just as memorable for visitors as the natural landscape.

> **Community unity**
> Both the "in-it-together" feeling of each community brought about by COVID and by natural disaster events, but also the hope that each community on the Coast would start to work together more when it came to tourism.

Pillar: Culture

Challenges + Risks

> **Lack of awareness**
> The main challenge identified across the sub-regions was that not enough awareness or support was given to the cultural aspects and Māori heritage of the Coast.

Successes + Opportunities

> **Pounamu Pathway**
> This planned development was mentioned by most of the sub-regions as a good initiative to link iwi storytelling and sites to existing visitor flows.

# GOALS FOR
Te Tai Poutini

The following is a first attempt to verbalise the types of objectives that would drive a long-term vision for the tourism industry on the Coast. These are all interconnected

Together, these goals provide a framework that will guide specific objectives and targets for our industry. Destination management is the process that we will establish to help us achieve these goals.

ECONOMIC
We want to create a tourism industry that is resilient and future-proof, creating sustainable jobs and economic benefits. This means that it can respond to challenges and take advantage of opportunities. We cannot do this in isolation, and the sector must be connected locally, regionally, nationally and internationally to industry, community, government and customers. We will work with partners to drive value in our offering and impacts. Lastly, West Coast tourism operators must have the skills and knowledge required to deliver on visitor expectations and create local benefits.
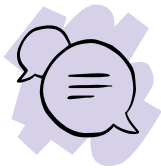
SOCIAL
All stakeholders will have the resources they need to support operators and communities, and in turn, communities will benefit from and support tourism on the Coast.

CULTURE
Culture is an underused asset at this point. We aim to have mana whenua actively engaged in tourism and to have all of the Coast's unique cultural stories told clearly and powerfully. We want visitors and communities to recognise and value our unique culture as a key tourism asset on the Coast.

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

We can think big and become leaders in carbon neutral travel.

IMPLICATIONS
for the DMP

The summary of the challenges and opportunities in the previous section and the individual workshop summaries are useful to continue stakeholder discussions in the locations. This will be vital in a region as large and diverse as the coast. The West Coast DMP will build on this report and the following recommendations are intended to make the most of this framework for the future development of the tourism industry on the Coast.

MEASUREMENT

Before stakeholders can set specific targets and goals in each area, they need to conduct a baseline assessment and put measurement systems in place. A key part of the DMP will be setting up a new toolbox of measurement that can track indicators in each of the pillars. For environmental goal, this may relate to carbon measurement and reduction for tourism operators. For social elements, a regular community sentiment analysis could help to track tourism's social license to operate and make adjustments if communities are – again, in some cases – getting upset by the number or types of visitors to their community.

CONNECTION AND LEADERSHIP

Connections between stakeholders in different areas of the tourism eco-system and in different districts or regions will be vital to creating real change in the four areas. Leadership was a challenge mentioned in several workshops, so putting together a leadership group to connect the stakeholders and align them towards a common vision could support future development. Over time, this group could grow to include representatives from related industries, like agriculture or transport to ensure that there is broad alignment on the vision and goals to ensure the whole West Coast region prospers. The key will be to identify roles and responsibilities for different stakeholders to work towards the goals.

VALIDATION

The challenges, opportunities, and goals presented here are based on a series of workshops and have only been validated with a few stakeholders in follow-up discussions. Due to COVID restrictions, larger launch events were not possible. Therefore, it will be essential to validate the goals with key stakeholders to ensure that they are aligned and supportive of this agenda. As one of the workshop participants mentioned, DWC cannot solve all the problems and as with the DMP process, they are only the facilitators and require everyone's input to develop the industry.

West Coast Wilderness Trail | Photo Roady NZ

CONSTANT IMPROVEMENT CYCLES
The inputs from these workshops and the DMP are tools in the process of managing tourism on the West Coast. The key to success is establishing systems that can learn and adapt to changes in external conditions to continue working towards the goals. One way to do this is through improvement or impact cycles[12]. The cycle goes from planning to doing to assessing to reviewing the plans and back to the start. This recommendation is closely related to the measurement and leadership points above, because we need data to measure progress and leadership to create the changes in the plans and systems. For the DMP this is vital because establishing a good destination management system can ensure stability and resilience in the future. People and conditions will change, but the system can continue once established.

RISK MANAGEMENT
The stakeholder consultation brought up a variety of perceived risks in all pillars. As part of the destination management system it would be sensible to implement a risk tracking and mitigation planning process. This could be as simple as creating a list of all possible risks – from flight cancellations through to natural disasters – and working out the likelihood of these occurring and the impact that an event would have. This would give the leadership group and overview of where the risks lie and the ability to develop plans and strategies to mitigate any negative impacts.

SUSTAINABILITY SUPPORT FOR OPERATORS
The tourism operators on the West Coast are all on their individual sustainability journey – some are far along and some at the beginning. In order to create change in all four pillars across the region, it would be valuable to create a programme or support mechanism to help operators improve their sustainability. The key is to give operators the knowledge and confidence to take steps to improve their own business and create value for their communities. For that there are a variety of operator focused programmes, like TIA's Tourism Sustainability Commitment, Qualmark's Sustainable Tourism Business Award, or carbon measurement solutions, like Toitu or Ekos that can all be part of the solution. DWC could help to coordinate these programmes and create communities of practice on the Coast.

12. https://www.thinknpc.org/starting-to-measure-your-impact/the-cycle-of-good-impact-practice/

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