

# A DESTINATION MANAGEMENT PLAN FOR CENTRAL OTAGO

honouring the past, embracing the present, navigating the future

Even before the double impacts of responding to COVID-19 and climate change had hit the tourism industry worldwide, reports like the Parliamentary Commissioner for the Environment's Report on Tourism, and growing concerns about parts of New Zealand experiencing 'over tourism', there were calls for a fundamental re-set or reinvention of the tourism industry.

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

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

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

This DMP provides a blueprint for the future of tourism in Central Otago that spans 50 years. In order to succeed our plans for the future we will need to commit to some critical groundwork in the first 12 months - or even the first 10 years in the life of the plan. There is an enormous exercise involved in clarifying and aligning accountabilities and responsibilities and confirming shared priorities across Council and with Kāi Tahu, external partner agencies, and other stakeholders before initiating significant change.

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

What this plan means for	
Central Otago's Communities	A reassurance that the things that matter most to our communities have been identified and accounted for and that their voices will remain central to the further development of tourism - creating the future our communities aspire to versus having tourism and its unintended consequences shape the future
Mana Whenua Kāi Tahu	A sense of belonging and a belief in partnerships that are inclusive of matauranga maori and celebrated by all
Tourism Operators	Confidence in the future direction of tourism and what it means for the financial capital that they have at risk in the industry, and the investment that new operators might contemplate in the future
Central Otago District Council and Tourism Central Otago	A clear direction that encompasses the many moving parts of the tourism system - a platform for policy and strategy development and alignment
Central Otago's Visitors	A compelling and believable promise of what to expect and the invitation and the inspiration to become lifelong (intergenerational) loyalists to the region
Other Sectors	A commitment to creating shared solutions to both opportunities and threats in ways that advantage individual sectors and the wellbeings of the region as a whole
Investors	Confidence in the 'bankability' that tourism investment in Central Otago offers and in the broad based support for delivering a return on that investment
Partner Regional Tourism Organisations	Respect for the expectations and dreams that Central Otago's visitor industry (inclusive of communities, environment, operators and other stakeholders) hold, and a willingness to work in partnership to leverage shared opportunities and address common threats
National Agencies	A clear understanding of the future direction and end games that Central Otago is pursuing through tourism, and willingness to engage on that basis to deliver common good

# NAVIGATING THIS PLAN

## In this Plan you will find:

A statement of our **Ambition** for tourism in Central Otago

A statement of **Challenge** that sets out the conditions that need to be met to create the future we aspire to

Our **Values** – the core principles and beliefs that will guide our behaviour

A **Long-term Destination Management Plan** that describes the ‘future states’ we aspire to (our long-term goals), the 10 strategies we will use to achieve these goals, and a set of key performance indicators (KPIs) by which we will measure progress

A **10-Year Destination Management Plan** that includes a set of nearer-term goals, actions, and the KPIs we will use to measure progress in the next 10 years

A **12-Month Action Plan** - our action plan for the immediate future

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# SECTION 1

## FOREWORD

A fundamental reinvention of tourism  
Plan schematic

# FOREWORD



## The Long and the Short

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

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

As Sir Jonathon Porritt, Chair of Air New Zealand's Sustainability Advisory Panel, has cautioned – “if we think that the impact of COVID-19 has been challenging, wait until the full impact of addressing global climate change commitments are felt by the tourism industry”.

It is partly based on this outlook for the future, and partly on the basis of a mana whenua inherent understanding of adopting planning horizons that span 100 years or more, that Central Otago District Council opted to step up to the challenge of developing a 50-year destination management plan for tourism. There are immediate actions to be taken, but these actions and decisions made today are being considered within the context of where we want to be tomorrow.

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

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

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

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

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

*We all know that writing a plan or setting a budget is important, but delivering on a plan or a budget is what actually makes the difference.”*

Dylan Rushbrook, General Manager, Tourism Central Otago

# FOREWORD

## Values Based

This plan is based on the values expressed in Central Otago's A World of Difference Regional Identity values and the values that define the place of Kāi Tahu in Central Otago.

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

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

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

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

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

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

COVID-19 is not the cause of these shifts – the growth of tourism around the world was quickly becoming unsustainable – but it is the showstopper that enabled pause for serious reflection and the calls for fundamental reinvention to be heard.

## A Fundamental Reinvention

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

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

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

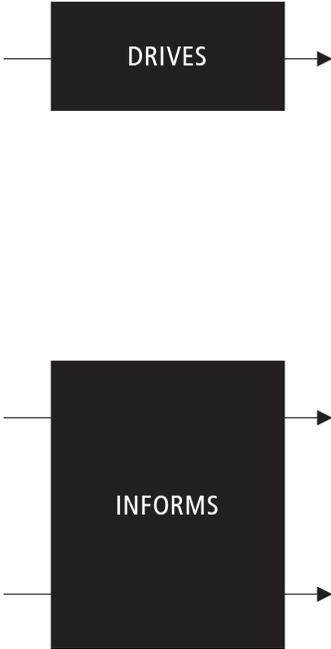
This also means that frameworks for the future – such as this Destination Management Plan – need to:

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

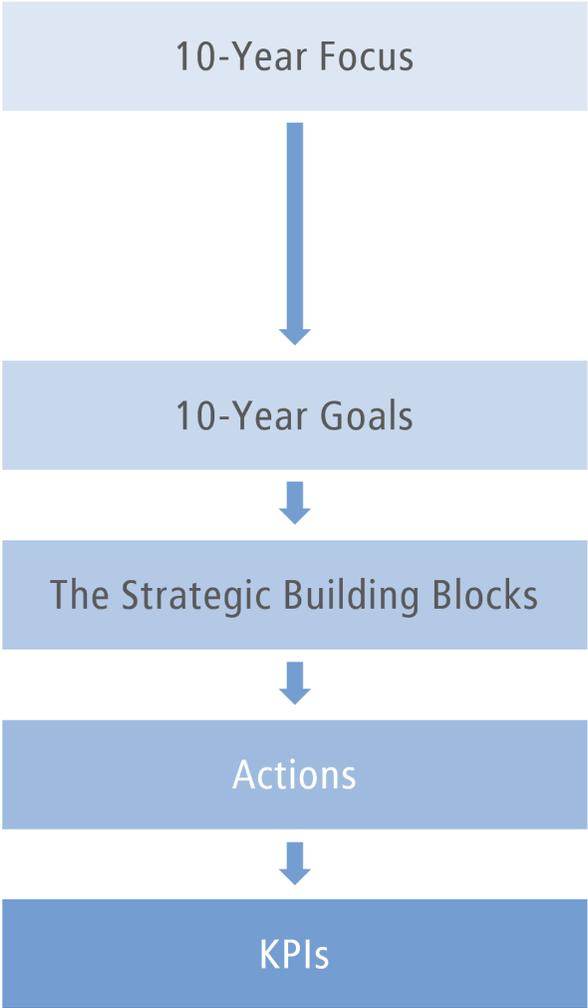
The complexity of planning in this environment is significant. That is where we believe that having both a compass and a road map can make a real difference.

# PLAN SCHEMATIC

## THE LONG-TERM STRATEGY



## THE 10-YEAR PLAN





## SECTION 2

## THE AMBITION AND THE CHALLENGE

Building blocks of the Destination Management Plan

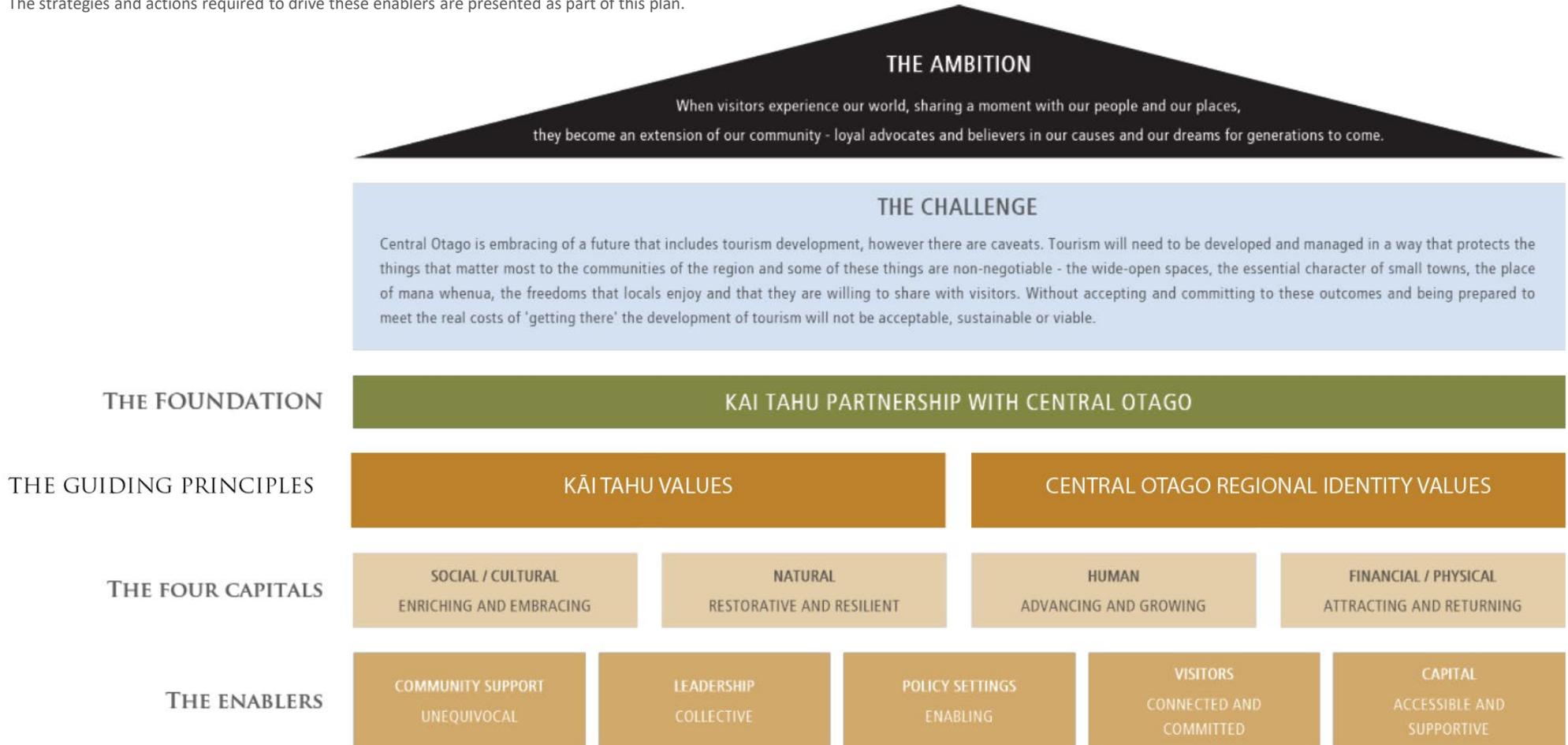
# THE AMBITION AND THE CHALLENGE

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

Each of the component's layer up to support achievement of the overarching ambition, without ignoring the core challenge that has been articulated by a range of stakeholders - that is, shaping a future that is inclusive of tourism, but not at any cost. Enabled by the partnership that has been entered into between Kāi Tahu and Central Otago District Council and motivated by enhancing the value of the four capital stocks that generate and sustain societal well-beings and living standards.

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

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



# THE BUILDING BLOCKS OF THE DMP

## THE STRATEGIES (building blocks)

INSPIRED GOVERNANCE + LEADERSHIP (BOLD + AMBITIOUS + INCLUSIVE)	<p>1. Leadership in Environmental Management</p> <ul style="list-style-type: none"> <li>- head in the clouds</li> <li>- hands in the dirt</li> </ul>	<p>2. Next Generation - Community Engagement</p> <ul style="list-style-type: none"> <li>- empowered locals</li> <li>- inspired youth</li> </ul>	<p>3. Making a difference through placemaking</p> <ul style="list-style-type: none"> <li>- exceptional places</li> <li>- fit for purpose amenities</li> <li>- inclusive for all</li> </ul>	<p>4. The Talent Lab</p> <ul style="list-style-type: none"> <li>- delivers breakthrough solutions</li> <li>- growing and advancing our workforce and people</li> </ul>	<p>5. Best in Class Branding and Customer Engagement</p> <ul style="list-style-type: none"> <li>- compelling</li> <li>- conversion driven</li> <li>- like minded visitors become kin</li> </ul>	INNOVATIVE POLICIES & STRUCTURES (ALIGNED + ENABLING + PRODUCTIVE)
	<p>6. High Performance Sector Driven Partnerships</p> <ul style="list-style-type: none"> <li>- stronger together</li> <li>- resilient and inclusive growth</li> </ul>	<p>7. High Impact Tourism Alliances</p> <ul style="list-style-type: none"> <li>- build traction</li> <li>- drive transformation                             <ul style="list-style-type: none"> <li>- national, international agencies and RTO partners</li> </ul> </li> </ul>	<p>8. Sustainable Funding and Investment</p> <ul style="list-style-type: none"> <li>- real costs</li> <li>- real prices</li> <li>- real deals</li> <li>- real returns</li> </ul>	<p>9. Digital and Transport Connectivity</p> <ul style="list-style-type: none"> <li>- innovative, cost effective, enabling</li> </ul>	<p>10. Product Development</p> <ul style="list-style-type: none"> <li>- unfakeably Central Otago</li> <li>- promoting our sectors</li> </ul>	





# SECTION 3

## ASPIRATIONS FOR THE FUTURE

# ASPIRATIONS FOR THE FUTURE

*Experience of living around different parts of Aotearoa New Zealand entrenched in me the importance of understanding our past and the richness Māori history offered us.*

*Returning to Central Otago was confronting - the early presence of mana whenua was largely invisible. A deep history that surely existed but that most of us were oblivious to, that we will all be enriched by seeking an understanding of Kai Tahu's connections with Central Otago. Like the kōwhai seeds in the parable that we have adopted, it turned out that much of our history is Kāi Tahu history, and it has been buried here for far longer than any European settlement.*

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

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

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

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

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

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

*Our tech-enabled Waitangi Day drew a wide and curious audience – more than 250 people took time out of their Waitangi Sunday to tune in and hear from Edward. That level of active interest in the region's early history has been reflected in the results of the research that was undertaken to inform the development of this plan.*

*We have been enormously encouraged by the sentiments that the communities of Central Otago expressed with 80% of people surveyed telling us that 'sharing the sites and stories of significance to mana whenua' was important to the future of tourism in the region. These results – among many other things that have emerged as part of this journey – have given us a sense of genuine optimism about shaping the future together.*

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

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

**Sanchia Jacobs, Chief Executive, Central Otago District Council**

# ASPIRATIONS FOR THE FUTURE

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

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

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

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

## The Parable that Inspired

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

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

As Megan Potiki, Kāi Tahu, explained during our first meeting, having been buried or misrepresented, for many centuries themselves, bringing Kāi Tahu history and narrative into the light, is like the kōwhai seeds – allowing Kāi Tahu narrative to germinate and flourish again. And, while these narratives are of incredible value in explaining the very special character and ways of Central Otago, to people who live in and visit the region, they also help to inform a stronger sense of pride and identity for Kāi Tahu rakatahi and the generations that will follow.

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



# APPROACH TO DESTINATION MANAGEMENT PLANNING



## Philosophy and Principles

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

The challenge said:

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

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

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

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

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

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

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

# APPROACH TO DESTINATION MANAGEMENT PLANNING

## Values Based Tourism – The Model

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

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

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

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

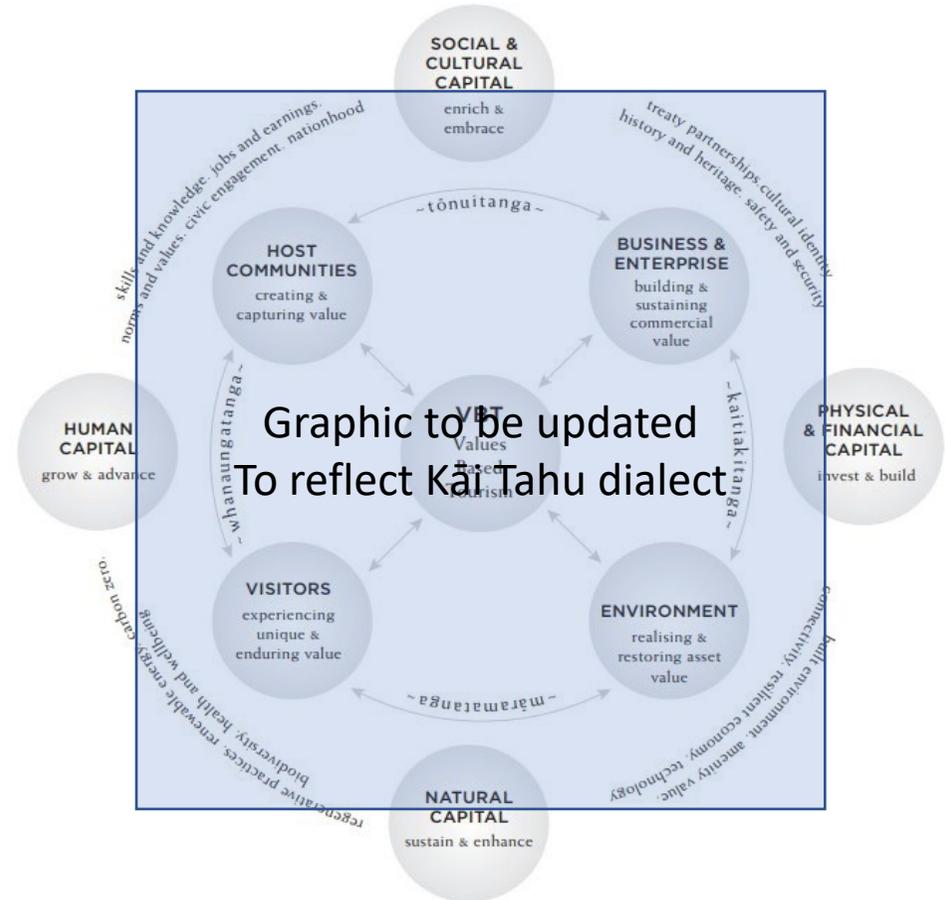
The values expressed by mana whenua and within the Central Otago Regional Identity programme are core foundations of this Destination Management Plan.

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

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

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

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





# SECTION 4

## A BRIEF HISTORY

Kāi Tahu Footprints, Landmarks, Values and Practices

Central Otago – A World of Difference Values

Early European history

Central Otago – The District

# KĀI TAHU FOOTPRINTS, VALUES AND PRACTICES

## Kāi Tahu Footprints and Landmarks

The settlement of New Zealand by the first Polynesian explorers began around 1350 and according to Māori tradition it was Rākaihautū and his son Te Rākihōuia who first explored the South Island – Te Waipounamu.

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

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

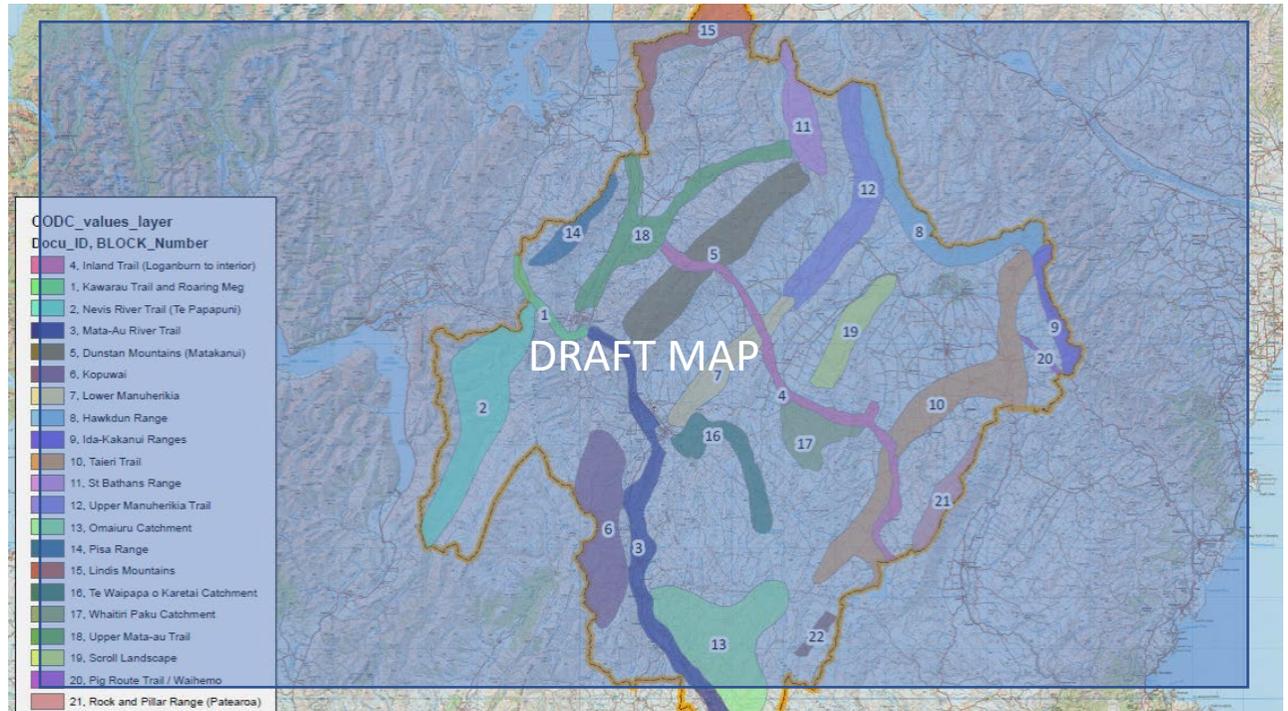
Fast forward to 13 June 1840, The Treaty of Waitangi was signed by seven of Kāi Tahu rākatira. This was followed in 1884 by the Otago Deed. It was the sale of the Otago Block that opened the way for Pakeha settlement with work on new Edinburgh (Dunedin) beginning in 1846 and the first Scottish settlers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

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

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

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

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



# KĀI TAHU FOOTPRINTS, VALUES AND PRACTICES

The development of this Destination Management Plan began by working with Kāi Tahu and their consulting arm Aukaha to look beyond the surface, back to the past and into the future to identify the underlying values that have been used to shape this Plan.

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

Kāi Tahu with Aukaha (1997) Limited have landed on the following values as part of Central Otago's DMP process.

## **The Core Values**

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

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

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

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

## **Cultural Practices**

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

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

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

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

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

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

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

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

**Utu** - with connotations of revenge, the intent is more about reciprocity, utu is "return for anything, satisfaction, reward, price, reply"

# CENTRAL OTAGO – REGIONAL IDENTITY VALUES



## A UNIQUE MARK

*As local Central Otago people we enjoy a unique world like no other.*

*To represent this and our values, the upper part of the symbol's circular form represents a solitary cloud whisked upward against a vast deep blue sky. The lower form represents both the landscape and the New Zealand native falcon, the Karearea.*

*In symbolic language, the falcon is associated with noble natured people, strength, bravery, ingenuity and high spirits, evoking freedom and pride as it soars above the golden, contoured land.*

*We too can soar here.*

We know there are few parts in the world that will leave you with a lasting sense of difference.

Central Otago is undoubtedly one of them, from its landscapes, its seasons, its people, its products and experiences. Together we must celebrate it and look after it. To help achieve this, we have based our regional identity around a set of values to help build on its uniqueness and create the kind of place we can be proud of now and into the future. We are all encouraged to embrace these values in our everyday lives.

There will be many influences that could alter this unique region, meaning it is important that we all make wise choices that last beyond our lifetime.

It's up to each one of us to protect this world of difference – a life of involvement or generations of regret.

As individuals, businesses and communities we can enhance our region by standing by our regional values: A key element in Central Otago's Regional Identity - 'A World of Difference' are a set of values that bind people and place.

## Regional Identity Values

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

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

# EARLY EUROPEAN HISTORY

## Discoverers and Explorers

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

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

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

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

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

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

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

With a strong domestic visitor base, international travel has grown in the region, driven in part by the Rail Trail as well as Central Otago's reputation as a wine growing region of international significance. The development of tourism experiences built around the wine industry (cellar door experiences and wine tours) is a relatively recent development, gathering real momentum from about 2016/17.

The addition of Highlands Motorsport Par, a multimillion dollar investment made by entrepreneur Tony Quinn in 2013 opened something that is much more than a racetrack, with onsite accommodation, conference and meeting facilities and a museum (and further development on the drawing board).

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

Today, despite COVID-19, tourism in Central Otago has held strong, with some operators reporting some of the strongest seasons on record, and Central Otago taking top spot on the tourism leader board that measures year on year growth in regional spend according to MBIE's tourism Electronic Transaction Data, year ended December 2021. Of note, 65% of the total transaction spend was on non-tourism expenditure.

However, the sector has not been totally immune to COVID-19 and securing and retaining the workforce that tourism needs to service the visitor industry is a significant challenge, as are the implications of climate change for the region.

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

# CENTRAL OTAGO, THE DISTRICT

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

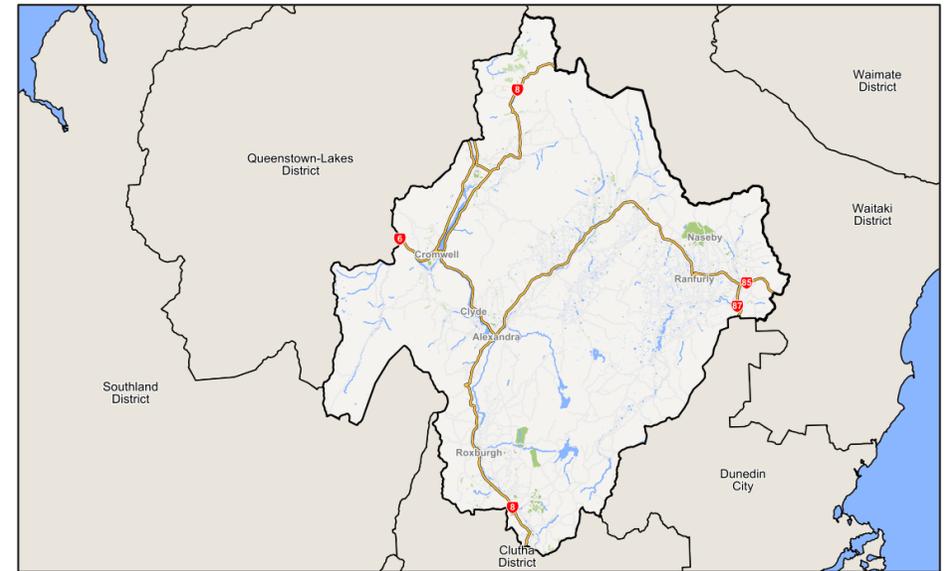
Its exceptional landscapes, climatic extremes and unique soils together create an environment or 'terroir' that supports the production of ultra-premium produce - from superfine merino, premium lamb, venison and beef, world class pinot noir, export cherries, apricots, apples, award-winning spirits and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

On that basis alone, let alone the accessibility of New Zealand's original cycle trail (The Otago Central Rail Trail) that traverses the region, it is perhaps unsurprising that Central Otago has become a highly desirable place to visit, and that a growing number of people are relocating to Central Otago to live. The resident population is expected to grow by 1.3% per annum over the next 30 years<sup>1</sup>.

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

A popular destination for regular holidaymakers, the population swells over the summer months, and layering pre-COVID-19 visitor numbers across that, at peak demand there can be upwards of 15,000 people staying in region overnight.

There are many significant challenges, water high up among them. Central Otago is asset rich when it comes to the resources required to build a thriving and resilient economy. Core and essential to that, are the region's strong, proud, quietly determined, innovative and entrepreneurial people. People who value their connections with each other, the rest of New Zealand, and the rest of the world, and, who uphold a set of values that sets Central Otago apart.





## SECTION 5

### THE CHANGING FACE OF TOURISM

Central Otago Tourism Today

The Outlook for Tomorrow's Tourism

Fit for the Future?

New Foundations – Tourism Futures Research

# THE CHANGING FACE OF TOURISM



## Central Otago Tourism Today

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

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

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

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

This 'value over volume' and more inclusive approach – along with Central Otago's market mix (which has been predominantly domestic) has placed Central Otago in a strong position as the tourism industry has been impacted by COVID-19 and markets have fallen or been forced away.

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

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

# THE CHANGING FACE OF TOURISM

## The Outlook for Tomorrow's Tourism

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

Understanding these complexities and the implications of significant shifts in policies and priorities, technology and travel, customers, and communities, demands a new way of thinking and managing. Strategic foresight and responsiveness need to be built into any plans.

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

### THE IRREFUTABLE TRUTHS

1. Partnership with mana whenua and embracing Te Ao Māori can only be a real partnership when it is based on shared understandings
2. Climate change action starts now and it has many tentacles
3. Tourism needs to be developed with reference to the community's aspirations and values
4. Managing environmental impacts and paybacks and putting a dollar value on them cannot be negotiable – balance sheets and profit and loss statements take on new meaning
5. Legislative and regulatory frameworks are changing – fast
6. Developing resilient and regenerative systems and driving sustainability initiatives are mandatory and deeds speak louder than words
7. Offering meaningful work and being in-tune with what this means to future generations is more important than ever
8. We must address the needs of changing consumer markets – understanding and responding to the motivations of tomorrow's travellers
9. The digital future has arrived. COVID-19 has done what technology has long promised - transforming the way we do things and establishing new expectations about how things are done
10. Authenticity is a must, and to own a genuine point of difference, it makes sense to build it on a destination's 'unfakeable assets'

### Fit for the Future?

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

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

# THE CHANGING FACE OF TOURISM

## **The Opportunities and the Threats**

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

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

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

## **The Benefits and Burdens**

Tourism around the world has largely been built on promoting the economic benefits of tourism, which has led to a drive for escalating growth. However, even before COVID-19 struck, there were growing concerns that the burdens associated with tourism growth were beginning to outweigh the benefits.

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

Traditional tourism metrics will also need to change as accounting for tourism contributions to capital stocks and wellbeings becomes common practice, and stakeholder capitalism replaces old capitalist models. Central Otago will not be confronting these changes alone, and this is one area where there would be benefits in developing national frameworks, measurement standards and data collection protocols.

## **Alignment with Changes in the Regulatory and Policy Environment**

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

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

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

# NEW FOUNDATIONS – THE TOURISM FUTURES RESEARCH



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

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

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

## Many voices

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

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

As foundations for this Plan, the research has

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

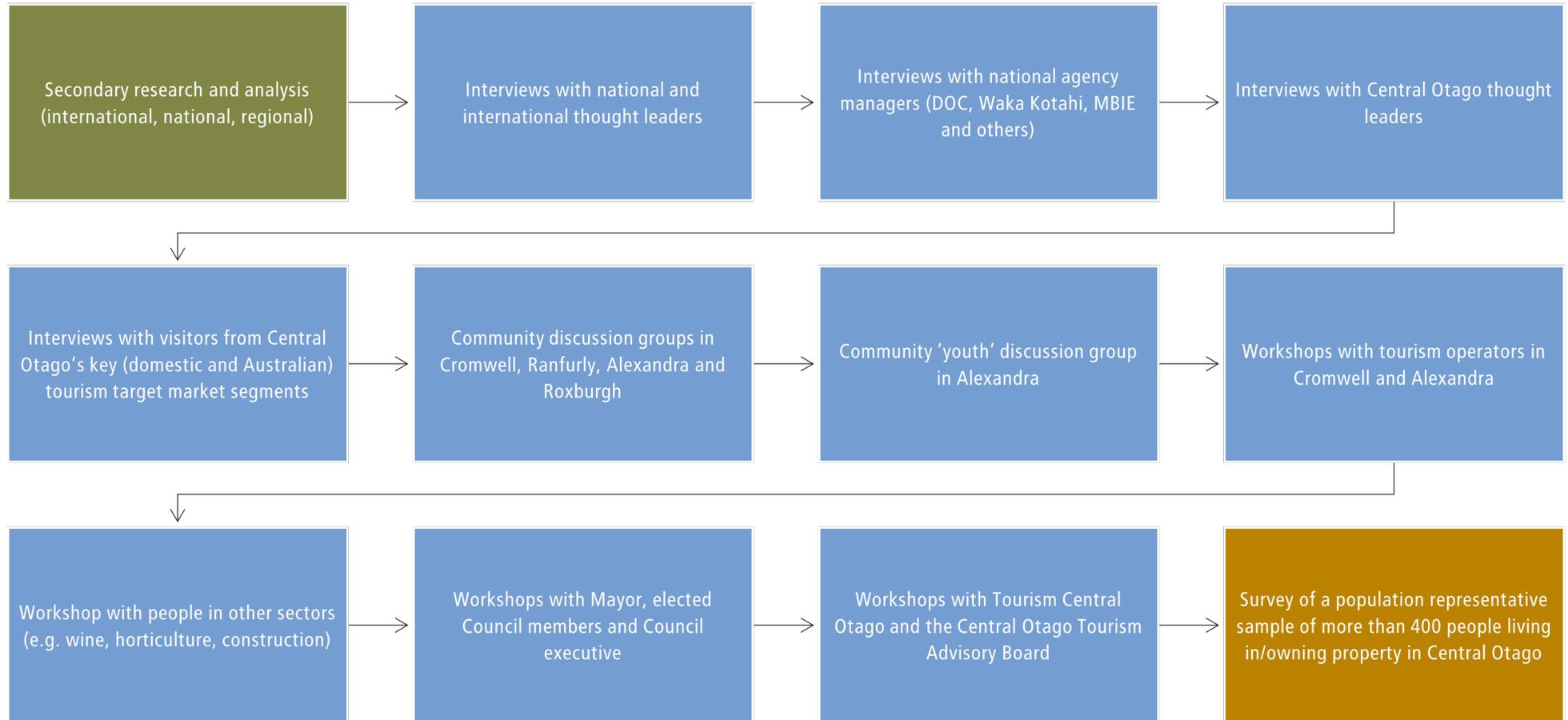
The trends observed and the voices heard have guided our thinking on the key strategic drivers: the forces that will influence Central Otago's destination management strategy and how we must respond if we are to be 'fit for the future'.

## The trends we observed

From the global/national/regional literature and inspiring conversations with a range of subject matter experts<sup>2</sup>, we distilled the key trends and disruptors that are expected to shape the future. A mix of 'mega-trends' and more recent developments brought about by COVID-19 and other global events, these suggest both opportunities and challenges for Central Otago and its tourism industry in the years ahead (continued overleaf).

# NEW FOUNDATIONS – THE TOURISM FUTURES RESEARCH

## A systematic programme of research and analysis



# NEW FOUNDATIONS – THE TOURISM FUTURES RESEARCH

Political	<ul style="list-style-type: none"> <li>• The rise of geopolitical tensions</li> <li>• Ongoing changes in border policy post-COVID-19 (affecting New Zealand and its major source markets)</li> <li>• Shifting emphasis from destination marketing to destination management (in part a response to social and environmental pressures pre- COVID-19 and growing awareness of tourism’s burdens)</li> <li>• Growing emphasis on community ‘wellbeing’ as the focus for national and regional economic development (as seen in the PRISM Regional Economies Framework, for example)</li> </ul>
Economic	<ul style="list-style-type: none"> <li>• Development of new regional funding models and access to alternative forms of finance (e.g., green finance)</li> <li>• Increasing competition for labour (adding further to the challenges of attracting, developing and retaining a skilled workforce)</li> <li>• Growing pressure on housing availability (including accommodation for the tourism workforce)</li> <li>• Upward pressure on the costs of finance for business</li> </ul>
Socio-cultural	<ul style="list-style-type: none"> <li>• Generational shifts shaping community aspirations and the expectations of our source markets (e.g., growing importance of responsible travel, sustainable tourism destinations, and authentic/meaningful travel experiences)</li> <li>• Rise of remote work, blending of work and leisure, and an increase in digital nomads</li> <li>• Balancing high tech (airline kiosks, digital room keys, mobile wallets) with high touch experiences to satisfy a fundamental need for human connection</li> <li>• Erosion of social license for tourism in response to ‘over- tourism’ and related social and environmental pressures</li> <li>• Growing emphasis on regenerative tourism (giving back communities and the environment)</li> <li>• Growing emphasis on ‘wellbeing’ as a tourism driver</li> </ul>
Technological	<ul style="list-style-type: none"> <li>• Rapid acceleration in the development and uptake of digital tech and the use of new smart/AI/VR technology (affecting how consumers book, buy and experience travel and how destinations interact with visitors – including to manage demand)</li> <li>• Growing dominance/ influence of Google and (pre-COVID-19) Online Travel Agents (OTAs) in the travel and tourism landscape (e.g., Expedia, booking.com, TripAdvisor)</li> </ul>
Legal	<ul style="list-style-type: none"> <li>• Changes in the regulatory and policy environment affecting tourism destinations and businesses: e.g., Zero Carbon Amendment Act (2019); Waka Kotahi Road to Zero Road Safety Strategy; DOC Heritage &amp; Visitor Strategy; immigration policy; Industry Transformation Plan for Tourism (prioritising ‘better work’)</li> <li>• Ongoing development in technology outstripping regulation (e.g., e-scooters, Airbnb-style accommodation and soon, VTOL aircraft and autonomous transport)</li> </ul>
Environmental	<ul style="list-style-type: none"> <li>• Climate change, adaptation, response and mitigation</li> <li>• The rise of circular economy and circular business models</li> <li>• New electric/ sustainable transport technologies (land, marine, air) and wider rollout of autonomous vehicles</li> <li>• Growing emphasis on regenerative tourism (giving back to communities and the environment)</li> </ul>

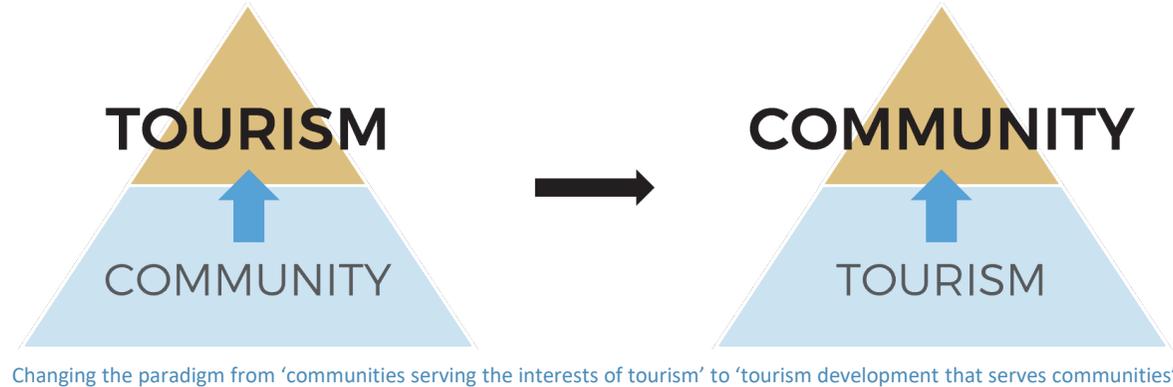
Alongside changes that can be anticipated and prepared for, there will be shocks such as those seen in recent times (natural disasters, pandemics, and war). Planning for these shocks is fundamental to resilience, and a further consideration in being fit for the future.

# NEW FOUNDATIONS – THE TOURISM FUTURES RESEARCH



## The Voices We Heard

This Plan puts community aspirations at the heart of thinking about tourism in Central Otago and is underpinned by the philosophy that tourism should serve the community (and not vice versa). Indeed (as many destinations learned pre-COVID-19), tourism will ONLY thrive if it does so.



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

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

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

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

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

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

And this is what we heard.

# NEW FOUNDATIONS – THE TOURISM FUTURES RESEARCH

## The Voice of Residents

### On living in Central Otago

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

### On tourism in Central Otago

Tourism is seen as important. But domestic tourism – the historical backbone of Central Otago’s visitor industry – is more widely supported than international tourism activity. In part this is due to negative impacts of growth observed in other regions pre-COVID-19.

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

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

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

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

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

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

### The benefits felt most widely are:

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

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

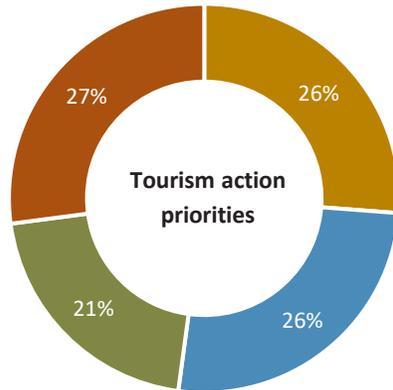
### The adverse impacts felt most widely are:

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

# NEW FOUNDATIONS – THE TOURISM FUTURES RESEARCH

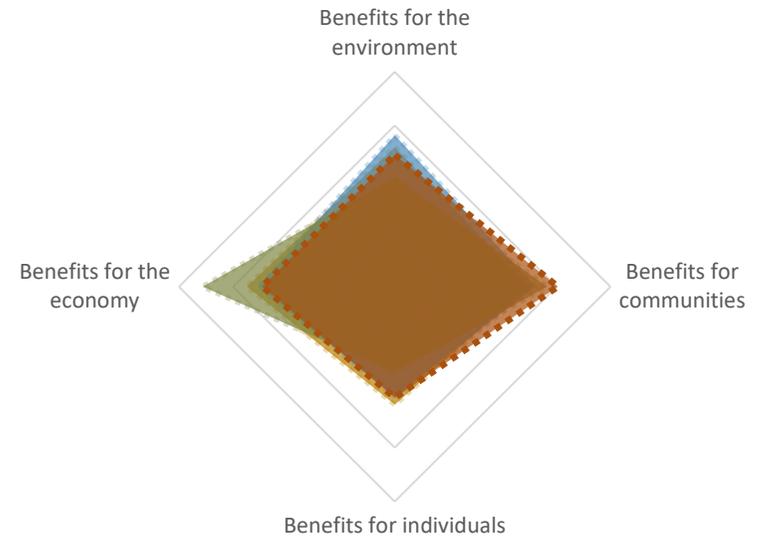
## On Central Otago’s ‘tourism future’

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



## WEIGHTING OF DESIRED TOURISM IMPACTS BY WARD

■ Vincent Ward   ■ Cromwell Ward   ■ Mānīatoto Ward   ■ Teviot Valley Ward



**A positive economic impact**

e.g. providing jobs/employment; creating opportunities for entrepreneurship and development of tourism businesses; contributing to other sectors of the local economy through visitor expenditure

**A positive impact on the environment**

e.g. building understanding and an appreciation of the natural environment; contributing funds for conservation; encouraging volunteer activity such as tree-planting; creating demand for active transport

**A positive impact on individuals**

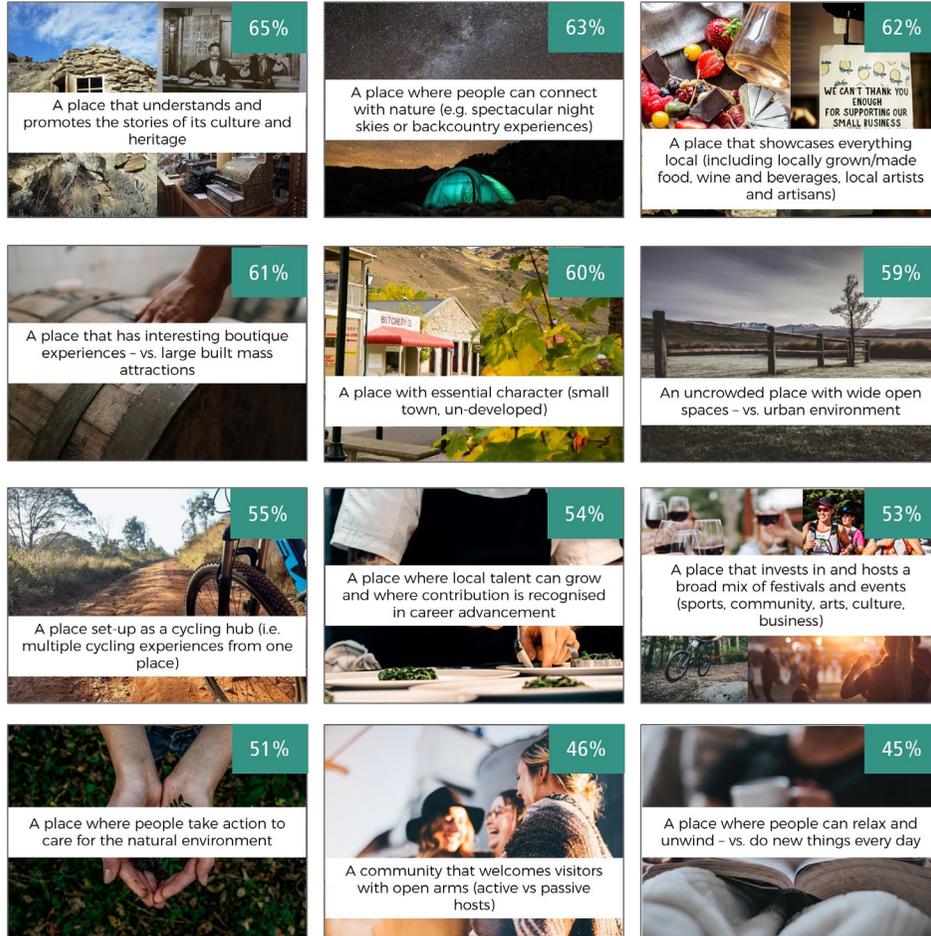
e.g. providing new and enjoyable experiences for locals and visitors; providing opportunities for recreation and physical/mental health benefits; encouraging cross-cultural exchange; providing opportunities to learn new skills

**A positive impact on communities**

e.g. creating amenities, services and events for local people to enjoy; building vibrant communities; generating local pride

# NEW FOUNDATIONS – THE TOURISM FUTURES RESEARCH

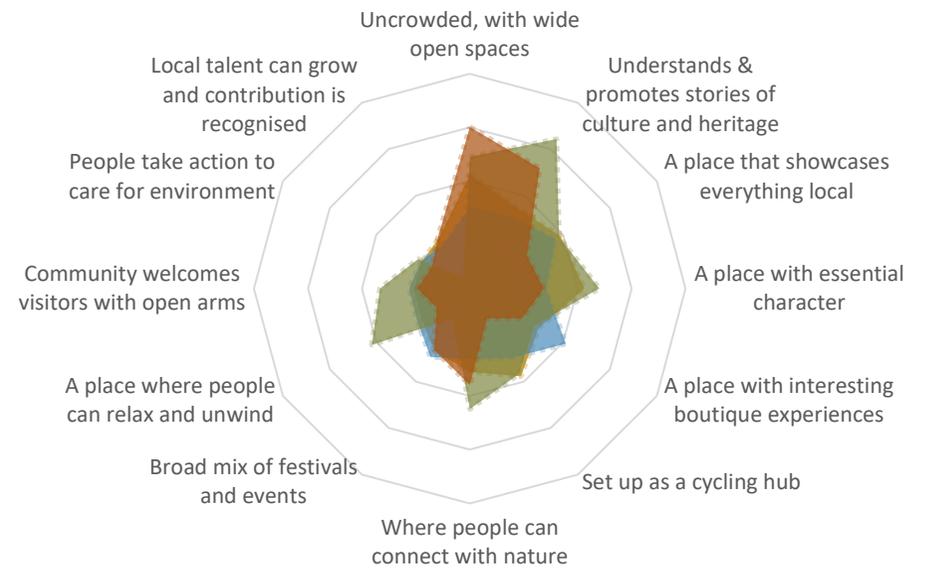
Central Otago’s communities believe this is best achieved with a destination management plan focused on the following concepts.



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

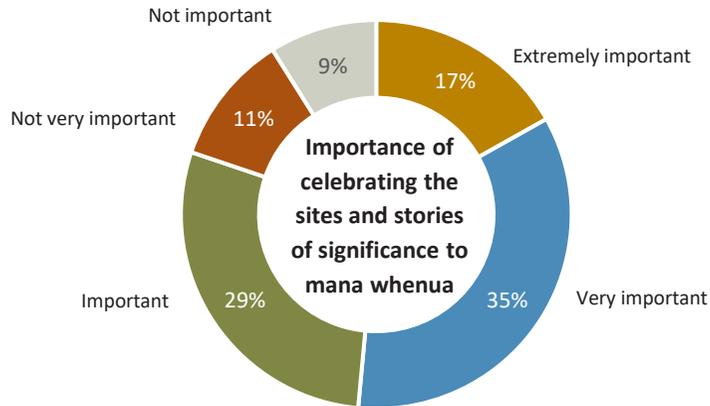
## TOURISM FUTURES: TOP 5 CONCEPTS BY WARD

■ Vincent Ward ■ Cromwell Ward ■ Māniatoto Ward ■ Teviot Valley Ward



# NEW FOUNDATIONS – THE TOURISM FUTURES RESEARCH

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

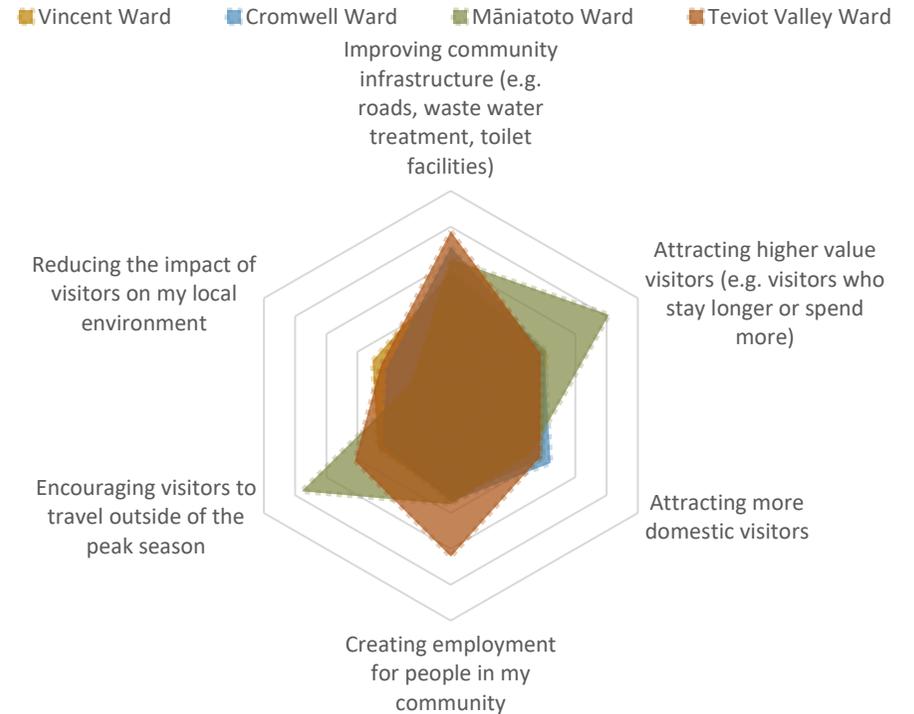


Considering the potentially adverse effects of tourism, residents were asked to identify what they saw as the greatest risks in future development of tourism in Central Otago. These ranged from over-development (loss of natural landscape, damage to the natural environment), to the crowding out of local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

The community would like to see Central Otago’s tourism industry prioritise:

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

## PRIORITIES FOR LOCAL TOURISM INDUSTRY BY WARD



# NEW FOUNDATIONS – THE TOURISM FUTURES RESEARCH

## The Voice of Tourism in Central Otago

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

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

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

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

### The Challenges

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

### The Opportunities

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

# NEW FOUNDATIONS – THE TOURISM FUTURES RESEARCH

## The Voice of Related Sectors

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

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

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

## The Voice of Central Otago’s Visitors

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

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

The market has changed significantly since 2017, not least as a result of COVID-19 and the closing of New Zealand’s international border. However, both anecdote and evidence suggest that Central Otago has avoided the worst of the market turmoil in recent years; not least due to its historical strength in the domestic market and the market pull of its cycle tourism offering (including the new Lake Dunstan Trail). Central Otago saw 19.3% growth in visitor expenditure in 2021 (compared with 2020) – topping 31 regions and well ahead of the national average of +4%.

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

## What differentiates Central Otago from other destinations



An uncrowded place with wide open spaces  
(rather than an urban environment)



A place that celebrates the seasons



A place set-up to encourage active transport  
(e.g. cycling as a means of travel between areas)



A place that has interesting boutique experiences  
(rather than large built mass attractions)



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



A place where you can relax and unwind  
(rather than doing new things every day)



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



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



# NEW FOUNDATIONS – THE TOURISM FUTURES RESEARCH

## Our visitors

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

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

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

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



# SECTION 6

## THE LONG-TERM DESTINATION MANAGEMENT PLAN

The Ambition and the Future States

The Challenge

The Overarching Strategies

The Big Picture KPIs

# THE LONG-TERM DESTINATION MANAGEMENT PLAN

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

## The Ambition

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

We know this as whanaukataka\* - or kinship - and we believe that it is by creating this strong sense of connection and common purpose that tourism can make a lasting difference (\* whanaukataka - relationship, kinship, sense of family connection, a relationship developed through shared experiences and working together which provides people with a sense of belonging. It develops as a result of kinship rights and obligations, which also serve to strengthen each member of the kin group. It also extends to others to whom one develops a close familial, friendship or reciprocal relationship with.)

## The Challenge

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

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

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

## The Future States we Aspire to

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

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

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

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

# THE LONG-TERM DESTINATION MANAGEMENT PLAN

## Future States (Long-Term Goals)

... in relation to the Four Capitals/Wellbeings

Social and cultural capital	<ul style="list-style-type: none"> <li>• The stories of Central Otago's culture and heritage are widely understood and shared</li> <li>• Kāi Tahu's values are embedded in place and embraced by all people (including whakapapa, mana and tapu)</li> <li>• Communities are vibrant, welcoming, diverse and inclusive</li> <li>• Arts and creativity are valued and nurtured</li> <li>• Youth are empowered to make a difference</li> <li>• The essential character of Central Otago's small towns and rural areas is maintained and new developments respect this</li> <li>• Visitor expenditure is supporting facilities, services and amenities valued by Central Otago's communities</li> <li>• Visitor experiences are enriching and enduring</li> <li>• <i>Whakapapa – layers of generations are connected, mana whenua and celestial life are linked, and kinship – pivotal to identity – is acknowledged</i></li> <li>• <i>Mana – is earned through deeds and behaviours, bringing with it 'ownership and responsibilities' that need to be upheld</i></li> <li>• <i>Tapu is understood not only in relation to sacred sites, but as part of daily life and the protection of people</i></li> </ul>
Natural capital	<ul style="list-style-type: none"> <li>• Central Otago has achieved net-zero carbon status</li> <li>• 100% of Central Otago's energy requirements are being met by renewable energy sources</li> <li>• Opportunities abound for people to connect with, and be enriched by, Central Otago's unique natural environment (earth, water, sky)</li> <li>• Communities play an active role in the conservation and regeneration of Central Otago's ecosystems</li> <li>• Important natural areas are protected from development</li> <li>• Biodiversity is improved</li> <li>• <i>Mauri – the life force of all things – is respected and it is understood that it can be disrupted (e.g. pollution of rivers) and restored</i></li> <li>• <i>Ka hua o te tau – the seasons of the year are a critical aspect of life in Central Otago – and call for Whakariteka – preparedness with harvesting and travelling</i></li> </ul>
Human capital	<ul style="list-style-type: none"> <li>• Visitor expenditure is enabling ongoing investment in workforce development across all sectors of the economy</li> <li>• Opportunities abound to grow local talent through education, rewarding employment, entrepreneurship and enterprise development and the ongoing acquisition of skills and knowledge</li> <li>• Accessible recreational opportunities support healthy communities</li> <li>• <i>Matauraka – adaptive knowledge is shared and grown</i></li> <li>• <i>Maumaharataka – recollections of the past are shared in authentic and immersive ways</i></li> <li>• <i>Whakamanuhiritaka – the responsibilities of welcoming and hosting visitors are understood as are the responsibilities of visitors in these exchanges</i></li> </ul>
Physical and financial capital	<ul style="list-style-type: none"> <li>• Connectivity and infrastructure are state-of-the-art and fit for the needs of communities and visitors</li> <li>• Visitors meet their real costs and contribute willingly to the costs of maintaining and restoring the special character of Central Otago</li> <li>• Tourism provides a 'shop window' for other export industries and sectors of the economy (including inward investment and migration)</li> <li>• The stock of housing in Central Otago is sufficient for the needs of its communities, long- and short-stay visitors and seasonal workforce</li> <li>• <i>Mana (second meaning) – mana also refers to the longstanding occupation and Ngāi Tahu's tribal authority across the large area of Te Waipounamu that goes well beyond modern day boundaries and Marae</i></li> <li>• <i>Utu – beyond a common understanding of utu as revenge, utu is understood to mean reciprocity – return, reward, price, satisfaction</i></li> </ul>
Critical enablers	
Community support	<ul style="list-style-type: none"> <li>• Central Otago's communities actively welcome and embrace visitors and are supportive of tourism activity in the region</li> <li>• Communities are championing new initiatives and setting the standards to which we expect visitors to conform</li> </ul>
Leadership	<ul style="list-style-type: none"> <li>• Leadership of destination management drives collaboration (within and beyond the region) and supports the attainment of long-term goals</li> <li>• All of the key stakeholders are around the table and co-investing</li> <li>• <i>Whakawhanaukataka – the wide-ranging relationships and interrelationships that have evolved within the Central Otago region are appreciated and respected</i></li> </ul>
Policy settings	National and regional policy settings support Central Otago's ambition and long-term goals
Visitor engagement	Visitors in key target markets are inspired by their experience of Central Otago and feel a deep sense of connection to the region
Access to capital	Smart funding/financing and circular investment models are in place to support a regenerative tourism system in Central Otago

*As italicised above:* The values and cultural practices that have been developed by Kāi Tahu for inclusion in this plan are recognised in the definition of these future states. Further work is required to translate them into appropriate long-term strategies with agreed KPIs. This will be a priority in the programme of work that is covered in the 10-Year Plan.

# THE LONG-TERM DESTINATION MANAGEMENT PLAN

## Ambition + Challenge = The Overarching Strategies

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

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

# THE LONG-TERM DESTINATION MANAGEMENT PLAN

## STRATEGY 4: THE TALENT LAB

<p><b>The Strategy</b></p> <p>Central Otago will pilot the development of a 'talent lab' - an integrated system by which local talent can be grown and external talent can be attracted, to create a talent pipeline that is continuously, upskilled and renewed, establishing pay scales that incentivise great performance (for which customers will be happy to pay).</p>	<p><b>The Rationale</b></p> <p>Developing Central Otago's tourism workforce has always had its challenges, and in that, Central Otago has not been alone. COVID-19 has exacerbated the workforce shortages that have been a persistent challenge for tourism for years, and as a consequence there are both long term and immediate issues to be addressed (refer 10-Year Plan for short term responses).</p> <p>As digital functionality replaces human functionality the demand for human contact and shared experiences will increase. This suggests a future that will be both high touch and high tech. A level of digital competency will be a foundation skill, and delivering immersive and transformative experiences will become a skill to be mastered.</p> <p>The development of the talent lab should include school visits, work experiences, great on-boarding and mentoring experiences, the development of micro-quals and providing people with coaching in business management and entrepreneurship to develop the next generation of owner-operators and managers. The Talent Lab will need to include solutions to worker housing.</p>	<p><b>Actions</b></p> <p>Pilot projects with educational institutes to develop short courses/micro qualifications</p> <p>Develop and support programmes with primary and secondary schools</p>
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## STRATEGY 5: BEST IN CLASS BRANDING AND CUSTOMER ENGAGEMENT

<p><b>The Strategy</b></p> <p>We will connect with our target audiences in ways that show a strong empathy with the end-to-end customer journey and post visit loyalty, establishing a lifelong connection with Central Otago. Engagement will be based on a genuine appreciation both of what it is that visitors are seeking and how Central Otago can deliver on those needs unlike anywhere else. As part of building this relationship, visitors will be invited to share in what Central Otago has to offer and to contemplate what they can offer Central Otago in return.</p>	<p><b>The Rationale</b></p> <p>Central Otago was early to adopt persona research as a way of understanding the motivations of travellers and how to connect with those segments of the market that were a 'best fit' with Central Otago's visitor offering - well beyond 'people considering a holiday in the next 12 months'.</p> <p>Customer engagement models also means identifying and actively managing the touchpoints throughout the customer journey, and collecting insights that will help to build out the understanding of Central Otago's personas and extending digital capabilities to inform how to target and engage - pre-travel, in-region and post trip.</p> <p>Digital and mobile technologies can also be used to influence behaviours and manage peak demand - e.g. Campermate-like tools.</p> <p>At least for the foreseeable future Central Otago will continue to embrace lighthouse and challenger brand thinking - projecting Central Otago's values, beliefs and core purpose as points of connection with like-minded people.</p> <p>This approach along with the Values Based Tourism model led to the positioning "Find Yourself but not too many others - Central Otago". - a values versus volume based proposition, and a way of differentiating Central Otago from some of its neighbours.</p> <p>Challenger thinking was developed 'eatbigfish' a global strategic brand agency as a means of helping to establish a strong point of difference in highly competitive markets. e.g. growth in the craft beer movement, which is another classic example of a value over volume approach.</p> <p>"The cultural distrust of Big, they argued, created a renewed romance with Small. The touchstone of the craft beer movement is that it is the ideological opposite of Big Beer; the product, (we are invited to believe) has been made with love by real people for the pleasure of its drinkers, rather than financially engineered for the efficiency of the corporation and the primacy of shareholder returns".</p>	<p><b>Actions</b></p> <p>Development of a sophisticated customer engagement model</p> <p>Leverage the Tiaki Promise and investigate a Central Otago Code of Conduct/Pledge</p>
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# THE LONG-TERM DESTINATION MANAGEMENT PLAN

## STRATEGY 6: HIGH PERFORMANCE SECTOR-DRIVEN PARTNERSHIPS

### The Strategy

We will pursue the development of brilliant cross sector models and partnerships that amplify the ripple effects of tourism across other sectors of the economy (and vice versa) as one means of improving the resilience of the Central Otago economy and optimising the contributions that are made to regional wellbeing. This approach will extend to joined-up problem solving - meeting the challenges of climate change, worker housing and more.

### The Rationale

COVID-19 has left many sectors exposed and responding to the challenges of climate change will deliver another round of pain and adjustment. Without in any way diminishing the scale of the challenge, these existential threats have encouraged better integrated thinking and stronger partnerships across the different sectors of regional economies. This has become a new reality and it holds significant opportunities.

There are also opportunities to be developed, including with food and beverage, biotech, arts and other sectors.

However, collaboration doesn't happen by accident, it must be deliberately engineered into product design and development, and region-wide responses to change. It should be closely aligned with economic development strategies and investment cases and reflected in policies and regulation.

### Actions

Use events to drive demand for the region's products and services, e.g. tourism and wine, tourism and natural fibres, tourism and film

On the supply side, access to affordable housing/worker accommodation is not an issue for tourism alone.

## STRATEGY 7: HIGH-IMPACT TOURISM ALLIANCES

### The Strategy

We will imagine and initiate a range of tourism partnerships with like-minded destinations and other partners, introducing new thinking and new models that will drive transformational change, contribute reciprocal benefits and enable new standards of performance

In-region, we will strengthen our business relationships with operators and industry stakeholders collaborating with them to bring visitors to the region and, as part of the reinvention of tourism, equipping them with the tools, knowledge and inspiration required to drive business success in an operating environment that will deliver new challenges at an unrelenting pace.

### The Rationale

In addition to cross-sector partnerships, there are tourism relationships that can be leveraged to encourage visitation on the demand side and resolve issues on the supply side.

Central Otago neighbours and works with six other RTOs and there are already opportunities that have been developed to add to the broader region's product offering. These include the Central Otago Touring Route and the extension of the cycle trail network, and the development of new events.

However, geographic proximity should not be the only precondition for these working relationships and they don't need to be based on complicated fixed partnerships but should be flexible and fleet of foot with super-fast "time to market".

They might be local, national or international (including complementary regions in NZ and internationally). Most importantly, they should be ambitious and well targeted.

Within Central Otago how are stronger relationships between the public and private sectors being forged?

### Actions

An operator WOF test to understand baseline preparedness; collaboration with other RTOs and national tourism bodies to advocate for new industry benchmarks/measures of performance.

# THE LONG-TERM DESTINATION MANAGEMENT PLAN

## STRATEGY 8: FUNDING AND INVESTMENT

### The Strategy

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

### The Rationale

Current funding and investment models – pricing and other commercial signals are not necessarily reflective of the true cost of sales, money is not necessarily reinvested where it is earned, and funds are not always directed to the areas of greatest need. There are many instances where, if properly accounted for, the burdens associated with tourism have not been balanced by the apparent benefits. It is communities rather than consumers that are left to shoulder the costs. In short, the economics of tourism need to be revisited and as part of that new funding and investment models need to be explored.

As an extension of this, the ways in which the contributions and costs of tourism are measured need to be reinvented to reflect a balanced scorecard approach. New models like City Deals (and regional deals), commonplace in Australia and the UK and designed to direct infrastructure spending to projects that boost productivity, employment, and economic growth, need to be explored and adapted to Central Otago (potentially as a test case for New Zealand). Governance models that are reflective of new economic thinking and stakeholder capitalism also need to be investigated and established.

### Actions

Integrate thinking about wider social issues – e.g. affordable/ working housing as part of wider infrastructure or development investments – leverage the Corporate Social Responsibility Commitments of others

## STRATEGY 9: TRANSPORT AND DIGITAL CONNECTIVITY

### The Strategy

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

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

### The Rationale

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

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

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

### Actions

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

## STRATEGY 10: NEW PRODUCT DEVELOPMENT

### The Strategy

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

### The Rationale

Staying true to Central Otago's' unfakeable assets is non-negotiable and sits well with the fact that both today's and tomorrow's consumers are seeking authentic and more meaningful visitor experiences.

And, there are any number of drivers to suggest that having a portfolio of ideas for new product development (including upgrades and extensions) makes sense. Resilience is one thing (diversifying the range of visitor experiences that are available), seasonality is another (developing year-round attractions), as is changing customer expectations (including sustainability, 'voluntourism' and more), creating or securing new events and so on.

In Central Otago's case, there are also some exceptional development opportunities to activate based on the certification and acquisition of assets that offer the potential for new visitor experiences. The partnership that has been developed with Kāi Tahu and the opportunity to share their narratives and values in everything that we do across the region, both transcends and grounds all of these opportunities.

### Actions

The EHCO Experience  
Night Sky Tourism  
Central Otago product development review (including trails, motorsport, arts, food and beverage).

# THE LONG-TERM DESTINATION MANAGEMENT PLAN

## The Big Picture Key Performance Indicators (KPIs)

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

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

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

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

	Future States (Long-Term Goals)	High-level KPIs (measuring progress towards long-term goals)
Four capitals/wellbeings		
Social and cultural capital	<ul style="list-style-type: none"> <li>The stories of Central Otago's culture and heritage are widely understood and shared</li> <li>Kāi Tahu's values are embedded in 'place' and embraced by all people</li> <li>Communities are vibrant, welcoming, diverse and inclusive</li> <li>Arts and creativity are valued and nurtured</li> <li>Youth are empowered to make a difference</li> <li>The essential character of Central Otago's small towns and rural areas is maintained and new developments respect this</li> <li>Visitor expenditure is supporting facilities, services and amenities valued by Central Otago's communities</li> <li>Visitor experiences are enriching and enduring</li> </ul>	<ul style="list-style-type: none"> <li>Central Otago's communities feel a deep sense of connection with the culture and heritage of the region and a strong sense of 'pride in place'</li> <li>Central Otago's communities believe that tourism is a net contributor to quality of life in the region</li> <li>Youth have a clear and apparent voice in decision-making on issues that will affect the region's 'tourism future'</li> <li>Tourism's growing contribution is inclusive of all people in Central Otago</li> <li>Visitors are enriched by their experience of Central Otago and leave with a deep sense of connection</li> </ul>
Natural capital	<ul style="list-style-type: none"> <li>Central Otago has achieved net-zero carbon status</li> <li>100% of Central Otago's energy requirements are being met by renewable energy sources</li> <li>Opportunities abound for people to connect with, and be enriched by, Central Otago's unique natural environment (earth, water, sky)</li> <li>Communities play an active role in the conservation and regeneration of Central Otago's ecosystems</li> <li>Important natural areas are protected from development</li> <li>Biodiversity is improved</li> </ul>	<ul style="list-style-type: none"> <li>Tourism's direct, indirect and induced carbon emissions are reducing</li> <li>There are a wider range of low-impact opportunities for people to experience Central Otago's natural environment</li> <li>There is growing support for the restoration of Central Otago's ecosystems and protection of important natural areas</li> </ul>
Human capital	<ul style="list-style-type: none"> <li>Visitor expenditure is enabling ongoing investment in workforce development across all sectors of the economy</li> <li>Opportunities abound to grow local talent through education, rewarding employment, entrepreneurship and enterprise development and the ongoing acquisition of skills and knowledge</li> <li>Accessible recreational opportunities support healthy communities</li> </ul>	<ul style="list-style-type: none"> <li>There is quantifiable evidence that tourism is supporting employment and opportunities for business growth across all sectors of the economy</li> <li>There are viable and attractive career pathways for all people</li> </ul>
Physical and financial capital	<ul style="list-style-type: none"> <li>Connectivity and infrastructure are state-of-the-art and fit for the needs of communities and visitors</li> <li>Visitors meet their real costs and contribute willingly to the costs of maintaining and restoring the special character of Central Otago</li> <li>Tourism provides a 'shop window' for other export industries and sectors of the economy (including inward investment and migration)</li> <li>The stock of housing in Central Otago is sufficient for the needs of its communities, long- and short-stay visitors and seasonal workforce</li> </ul>	<ul style="list-style-type: none"> <li>Connectivity and infrastructure – meet the needs of Central Otago's communities and visitors in the region's key target markets</li> <li>Infrastructure supports the delivery of exceptional visitor experiences; and helps to maximise the benefits of tourism while minimising the burdens</li> <li>There is sufficient housing to support long and short-stay visitors and seasonal workers, without impacting other community requirements</li> </ul>

# THE LONG-TERM DESTINATION MANAGEMENT PLAN

Future States (Long-Term Goals)		High-level KPIs (measuring progress towards long-term goals)
Enablers		
Community support	<ul style="list-style-type: none"> <li>Central Otago’s communities actively welcome and embrace visitors and are supportive of tourism activity in the region</li> <li>Communities are championing new initiatives and setting the standards to which we expect visitors to conform</li> </ul>	Social licence is maintained or strengthened More benefits of tourism are reported, and fewer adverse impacts
Leadership	<ul style="list-style-type: none"> <li>Leadership of destination management drives collaboration (within and beyond the region) and supports the attainment of long-term goals</li> <li>All of the key stakeholders are around the table and co-investing</li> </ul>	Collaborative leadership structures and practices are in place to support destination management goals
Policy settings	National and regional policy settings support Central Otago’s ambition and long-term goals	Policy settings support initiatives aligned with long-term goals Policy settings discourage initiatives not aligned with long-term goals
Visitor engagement	Visitors in key target markets are inspired by their experience of Central Otago and feel a deep sense of connection to the region	Visitors are motivated to purchase Central Otago product, to return on future visits, and to recommend Central Otago to friends and whānau Visitors are respectful, and contribute willingly to initiatives that protect the unique character and environment of the region
Access to capital	Smart funding/financing and circular investment models are in place to support a regenerative tourism system in Central Otago	Destination managers and tourism operators have sufficient access to capital to support activities that contribute to other long-term goals

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



# SECTION 7

## THE 10-YEAR PLAN

Building the Foundations for the Future

The KPIs

# THE 10-YEAR PLAN

## Introduction

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

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

## Building the Foundations for the Future

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

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

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

### 1. LEADERSHIP IN ENVIRONMENTAL MANAGEMENT

#### Objective

Our immediate objective is to activate a project that will enable tourism to take the immediate steps required to reduce the environmental footprint of visitors to Central Otago, underpinned by a commitment to achieving continuous improvement in reducing negative impacts

In later years we will build this out alongside other sectors of the Central Otago economy to contribute to the mitigation of other impacts on the environment.

#### Actions

- Our immediate action is to partner with mana whenua, DOC and local organisations to supercharge 'Project Gold' and the restoration of our ecosystems.
- We will partner with local and national organisations to understand the impacts of climate change on Central Otago - dealing not only with the direct footprint of tourism in Central Otago but accounting for the indirect and induced impacts.

### 2. NEXT GENERATION COMMUNITY ENGAGEMENT

#### Objective

To build a strong sense of ownership and pride in the DMP across the communities of Central Otago, customising some of our approaches to reflect the different needs and aspirations of the different communities that make up our region, and to motivate members of these communities to start making a difference themselves - i.e., can we ask visitors to live by certain values if our communities aren't living by them - e.g. littering, recycling.

#### Actions

- Our first step in the ongoing process of community engagement will be roadshow to launch the DMP and highlight our ambition and 10-year plans.
- We are considering a community activation as part of the roll out that would be based on making small packets of eco-sourced Kōwhai seed available to all households and that, once cultivated, will be planted together at an agreed site as a shared reserve. We hope to do this in partnership with mana whenua and DOC.
- As part of the 10-year plan we will also be exploring 'next gen' community engagement models. While we can use traditional measures and means for monitoring community sentiment, we would like to develop ways of securing real time feedback and problem solving.

# THE 10-YEAR PLAN

## 3. MAKING A DIFFERENCE WITH PLACEMAKING

### Objective

There are already a number of community supported projects underway as part of Central Otago's Long Term Plan. These will enhance the visitor experience, and we would suggest that each of those projects is considered within the context of this DMP.

Our immediate objective in this area is to engage the region's communities in the cultural mapping and Whenua Pou project that has been discussed with Mana Whenua. We see this as a transformational project that will be prioritised.

### Actions

- To get the cultural mapping project underway, we need to agree the brief with Kāi Tahu and scope the process, deliverables, budget and funding. In addition to the cultural mapping, whenua Pou and Rākaihautū monument project, there are enormous opportunities to engage with Kāi Tahu in a range of other projects and developments, from Central Otago's food and beverage strategy to night sky tourism and workforce development initiatives. All of these initiatives will need to be scoped with, and considered by, Kāi Tahu and the Central Otago District Council.
- Alongside these initiatives, we will also look to extend the Tohu Whenua programme in Central Otago, in partnership with DOC.

## 4. THE TALENT LAB

### Objective

Growing and attracting the talent required to service the visitor industry and other partner sectors of the economy in Central Otago is a priority and the marketplace is complex and highly competitive.

Our objective is to do things a bit differently and create a 'Talent Lab' for tourism and partner sectors in Central Otago.

This will need to be a joined-up approach across all stages in the education cycle and include work experience, mentoring and professional development and upskilling programmes. Again, we see Mana Whenua as partners in this.

### Actions

- Kickstart a scoping exercise to identify/confirm the components of the Talent Lab Project (e.g. it could include access to worker accommodation and some kind of 'getting started' welcome to Central Otago kit), identify and canvas the idea with the partners we would need to engage in collaborating in this venture.
- Aim to run pilot programmes within the first two years of the Plan.

## 5. BEST IN CLASS BRANDING AND CUSTOMER ENGAGEMENT

### Objective

Largely an in-house project, the aim is to recalibrate Tourism Central Otago's approaches to branding, marketing and customer engagement so that they are closely aligned with the aspirations of the DMP.

This project should also include smart data capture to advance understanding of consumers, their motivations and behaviours and what the various trigger points are e.g., does pushing tips, deals or ideas to visitors while they are 'in-region' deliver good levels of conversion?

### Actions

- While this could be managed as part of a business as usual approach, it may warrant additional brand and customer journey research to inform future direction and work programmes.
- Step one could be to undertake an initial 'audit' internally and then consider the Terms of Reference for additional research and development.
- Smart data capture processes should also be explored.

# THE 10-YEAR PLAN

## 6. HIGH PERFORMANCE SECTOR-DRIVEN PARTNERSHIPS

### Objective

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

### Actions

- At a tactical level workshoping the DMP with leaders and stakeholders from other key sectors should be advanced with the objective of identifying opportunities to strengthen the visitor offering and the achievement of the long-term ambition, for the betterment of all.
- Events and the development of new visitor products/experiences might be one way of activating these opportunities.
- As outlined in the long-term plan, collaboration with these sectors should eventually build out to include carbon-zero initiatives, transport and infrastructure planning and spatial planning that accommodates different land uses and access to necessary and scarce resources.

## 7. HIGH-IMPACT TOURISM ALLIANCES

### Objective

Meeting the challenges and realising the ambition outlined in this DMP will require much stronger collaboration with operators within Central Otago and with tourism industry partners outside the region. Current engagement and partnership models are not as effective as they could be, and while COVID-19 has been a factor in that, more effective and joined up models need to be put in place. The shifts and challenges in the operating environment are too big to go it alone.

In pushing the boat out with tourism partnerships, timing will be critical. Although Central Otago has fared incredibly well through COVID-19, there are still a number of pain points to be addressed and the phasing-in of new models or ways of doing business will need to accommodate this.

### Actions

- Investigate new and improved partnership models with partner Regional Tourism Organisations (RTOS) and national entities. Develop shared project plans and assign responsibilities.
- Deliver programmes that will support business transformation and consider carrot and stick approaches to shifting performance and confronting issues that need to be resolved.
- Nothing will change unless structures and processes also change e.g. funding models, certification processes, data collection etc.

## 8. FUNDING AND INVESTMENT

### Objective

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

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

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

Note that people hours should be included as part of estimating implementation costs.

### Actions

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

# THE 10-YEAR PLAN

## 9. TRANSPORT AND DIGITAL CONNECTIVITY

### Objective

To scope the infrastructure requirements required to support the development of tourism in Central Otago in the next 10- 20 years, and to model these requirements using different growth scenarios and flow models (including pressure points).

### Actions

- This might be something that can be achieved by working across councils, partner RTOs and Waka Kotahi, or it might be another example of a project that needs to be driven at a national level and that reflects phased recovery in visitor numbers.

## 10. NEW PRODUCT DEVELOPMENT

### Objective

To ensure that Central Otago's visitor offering is 'fit for the future'.

### Actions

- Update the product stocktake undertaken as part of the development of the Central Otago Tourism Strategy.
- Identify both gaps and opportunities, in Central Otago's current product offering that, if filled and developed would contribute to the achievement of the region's long-term ambition, and scope the nature of new product development opportunities that could be activated.
- Model what tourism might look like if the gaps were filled and opportunities developed (reference point 9 above)
- Eden Hore Central Otago, night sky tourism and other core projects e.g. walking tracks, should be contenders as transformational projects.

# THE 10-YEAR PLAN

## The KPIs

	Future States (Long-Term Goals)	10-Year Goals	KPIs
Four capitals/wellbeings			
Social and cultural capital	<ul style="list-style-type: none"> <li>The stories of Central Otago's culture and heritage are widely understood and shared</li> <li>Kāi Tahu's values are embedded in 'place' and embraced by all people</li> <li>Communities are vibrant, welcoming, diverse and inclusive</li> <li>Arts and creativity are valued and nurtured</li> <li>Youth are empowered to make a difference</li> <li>The essential character of Central Otago's small towns and rural areas is maintained and new developments respect this</li> <li>Visitor expenditure is supporting facilities, services and amenities valued by Central Otago's communities</li> <li>Visitor experiences are enriching and enduring</li> </ul>	<ul style="list-style-type: none"> <li>Tourism is contributing increasingly to the facilities, services and amenities valued by the communities of Central Otago</li> <li>Tourism is a partner in key community initiatives (such as the redevelopment of the memorial hall/museum) and is adding a 'visitor lens' to enhance these developments and drive new revenue flows</li> <li>Plans for the creation of a Raikahautu have been kickstarted</li> <li>Cultural mapping - key project milestones have been met</li> </ul>	<ul style="list-style-type: none"> <li>The sites and stories of significance to mana whenua are prominent in new community facilities and public wayfinding/signage</li> <li>There is quantifiable evidence of visitors' contribution to social and cultural capital/wellbeing in Central Otago</li> <li>Tourism product development needs have been fully scoped, and key initiatives advanced</li> </ul>
Natural capital	<ul style="list-style-type: none"> <li>Central Otago has achieved net-zero carbon status</li> <li>100% of Central Otago's energy requirements are being met by renewable energy sources</li> <li>Opportunities abound for people to connect with, and be enriched by, Central Otago's unique natural environment (earth, water, sky)</li> <li>Communities play an active role in the conservation and regeneration of Central Otago's ecosystems</li> <li>Important natural areas are protected from development</li> <li>Biodiversity is improved</li> </ul>	<ul style="list-style-type: none"> <li>The direct, indirect and induced carbon footprint of tourism in Central Otago have been measured and a monitoring programme is in place</li> <li>All entities involved in tourism are equipped with tools to measure their carbon footprint</li> <li>The restoration of targeted areas has been advanced with native plantings improving the region's biodiversity, restoring native habitats and adding to carbon sinks</li> <li>New opportunities have been created for communities and visitors to connect with, and to appreciate, the natural environment (and the narratives of mana whenua)</li> </ul>	<ul style="list-style-type: none"> <li>A baseline measure of the direct, indirect and induced carbon footprint of tourism in Central Otago has been established and targets set for the following 10-year period</li> <li>The number of kōwhai and other native species planted by the communities of Central Otago is increasing year on year</li> <li>The engagement of visitors in Project Gold is increasing (e.g. funds raised for gathering seeds, growing seedlings are increasing year on year)</li> <li>There is quantifiable evidence of visitors' contribution to natural capital/wellbeing of Central Otago</li> </ul>
Human capital	<ul style="list-style-type: none"> <li>Visitor expenditure is enabling ongoing investment in workforce development across all sectors of the economy</li> <li>Opportunities abound to grow local talent through education, rewarding employment, entrepreneurship and enterprise development and the ongoing acquisition of skills and knowledge</li> <li>Accessible recreational opportunities support healthy communities</li> </ul>	<ul style="list-style-type: none"> <li>Visitor expenditure is making an increasing contribution to employment opportunities and business activity across all sectors of the Central Otago economy</li> <li>The 'Talent Lab' is fully scoped and plans developed to attract and grow the talent required to service the visitor industry in Central Otago have been trialed</li> </ul>	<ul style="list-style-type: none"> <li>There is quantifiable evidence that visitor activity (in-region and post-visit) is contributing to the revenues of organisations in other sectors</li> <li>New high-performance partnerships are in place with industry sectors</li> <li>An initial set of courses has been developed and piloted in association with Talent Lab partners</li> <li>There is quantifiable evidence of visitors' contribution to human capital/wellbeing of Central Otago</li> </ul>
Physical and financial capital	<ul style="list-style-type: none"> <li>Connectivity and infrastructure are state-of-the-art and fit for the needs of communities and visitors</li> <li>Visitors meet their real costs and contribute willingly to the costs of maintaining and restoring the special character of Central Otago</li> <li>Tourism provides a 'shop window' for other export industries and sectors of the economy (including inward investment and migration)</li> <li>The stock of housing in Central Otago is sufficient for the needs of its communities, long- and short-stay visitors and seasonal workforce</li> </ul>	<ul style="list-style-type: none"> <li>Connectivity and infrastructure requirements have been scoped and costed</li> <li>Innovative solutions to house the tourism workforce (including seasonal workers) have been developed</li> </ul>	<ul style="list-style-type: none"> <li>Core infrastructure projects are underway and future projects scoped</li> <li>There is quantifiable evidence of visitors' contribution to physical and financial capital/wellbeing of Central Otago</li> <li>A low-cost fit-for-purpose prototype for worker accommodation is in place and is being assessed for wider use</li> </ul>

# THE 10-YEAR PLAN

Future States (Long-Term Goals)		10-Year Goals	KPIs
Enablers			
Community support	<ul style="list-style-type: none"> <li>Central Otago's communities actively welcome and embrace visitors and are supportive of tourism activity in the region</li> <li>Communities are championing new initiatives and setting the standards to which expect visitors to conform</li> </ul>	<ul style="list-style-type: none"> <li>Central Otago's communities welcome visitors and are supportive of tourism activity in the region</li> <li>Central Otago's communities are taking an active interest in how they can contribute to the betterment of visitor experiences</li> <li>Systems are in place to capture community feedback in real-time and to monitor community sentiment</li> </ul>	<ul style="list-style-type: none"> <li>Social licence is maintained or strengthened</li> <li>More benefits of tourism are reported, and fewer adverse impacts</li> <li>Airbnb-style visitor experiences are growing</li> </ul>
Leadership	<ul style="list-style-type: none"> <li>Leadership of destination management drives collaboration (within and beyond the region) and supports the attainment of long-term goals</li> <li>All of the key stakeholders are around the table and co-investing</li> </ul>	Leadership of destination management drives collaboration (within and beyond the region) and supports the attainment of the 10-year goals	<ul style="list-style-type: none"> <li>Collaborative leadership structures and practices have been embedded to drive and support the implementation of Central Otago's Destination Management Plan</li> </ul>
Policy settings	National and regional policy settings support Central Otago's ambition and long-term goals	Regional policy settings support Central Otago's ambition and 10-year goals	<ul style="list-style-type: none"> <li>An audit of policy settings has been completed and any opportunities to strengthen policy settings have been identified</li> <li>Work has commenced on strengthening policy settings to support Central Otago's ambition and long-term goals</li> </ul>
Visitor engagement	Visitors in key target markets are inspired by their experience of Central Otago and feel a deep sense of connection to the region	Visitors in key target markets are inspired by their experience of Central Otago and feel a deep sense of connection to the region	<ul style="list-style-type: none"> <li>Visitor satisfaction is maintained or strengthened</li> <li>Propensity to recommend Central Otago is maintained or strengthened</li> <li>Visitor engagement in key community/environmental initiatives is increasing</li> <li>Average visitor expenditure is increasing (across the region, across all sectors of the economy, during and post-visit)</li> </ul>
Access to capital	Smart funding/financing and circular investment models are in place to support a regenerative tourism system in Central Otago	Smart funding/financing and circular investment models are in place to support a regenerative tourism system in Central Otago	<ul style="list-style-type: none"> <li>Destination managers and tourism operators have sufficient access to capital to support activities that contribute to other long-term goals</li> <li>A first 'regional deal' is up and running</li> </ul>



# SECTION 8

## THE 12-MONTH PLAN

# THE 12-MONTH PLAN

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

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

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

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

This process will be designed to:

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

Actions	Social and Cultural Capital Enriching an Embracing	Natural Capital Restorative and Resilient	Human Capital Advancing and Growing	Financial and Physical Capital Attracting and Returning
<b>Strategy 1 – Leadership in Environmental Management</b>				
<ul style="list-style-type: none"> <li>• pursue discussions with Bodeker Scientific, Tourism Industry Aotearoa and other organisations about climate change initiatives (measurement and mitigation of carbon footprints)</li> <li>• scope opportunities to super-charge Project Gold with key partners</li> <li>• activate an anti-litter crusade</li> </ul>	✓	✓	✓	✓
<b>Strategy 2 – Next Generation Community Engagement</b>				
<ul style="list-style-type: none"> <li>• a series of workshops to explore how community groups, mana whenua, special interest groups, younger generations and new immigrants would like to be engaged in thinking about tourism - could be as high touch as community open days or as high tech as a smart app</li> <li>• also note values project in strategy 3 below</li> </ul>	✓		✓	
<b>Strategy 3 – Making a Difference with Placemaking</b>				
<ul style="list-style-type: none"> <li>• confirm scope and secure funding for Cultural Mapping project in partnerships with Kāi Tahu</li> <li>• initiate review of Central Otago's A World of Difference values to confirm contemporary expressions of those values e.g. what does embracing of diversity look like in 2022</li> </ul>	✓		✓	

# THE 12-MONTH PLAN

Actions	Social and Cultural Capital Enriching and Embracing	Natural Capital Restorative and Resilient	Human Capital Advancing and Growing	Financial and Physical Capital Attracting and Returning
<p><b>Strategy 4 -The Talent Lab</b></p> <ul style="list-style-type: none"> <li>investigate opportunities to extend current youth employment schemes to include tourism</li> <li>explore development of tourism micro-qualifications with education providers</li> <li>initiate discussions re-creating a Talent Lab Village</li> </ul>			✓	✓
<p><b>Strategy 5 – Best in Class Branding and Customer Engagement</b></p> <ul style="list-style-type: none"> <li>overhaul marketing strategies to reflect the ambition of the DMP (visitors become kin)</li> <li>update customer journey mapping and review effective of Tourism Central Otago 'touch points'</li> <li>review effectiveness of brand communications - lighthouse thinking and connection with like-minded audiences</li> </ul>	✓	✓	✓	
<p><b>Strategy 6 – High Performance Sector-Driven Partnerships</b></p> <ul style="list-style-type: none"> <li>encourage participation from other economic sectors that interface with tourism to identify opportunities for developing stronger shared work programmes - including marketing, event development and issues resolution - e.g. workforce development and upskilling, worker accommodation</li> <li>commence development of suite of sector partnership plans – food and beverage, arts, heritage, film and incorporating the Cultural Mapping project with Kāi Tahu</li> </ul>			✓	✓
<p><b>Strategy 7 High-Impact Tourism Alliances</b></p> <ul style="list-style-type: none"> <li>review opportunities for regional collaboration based on points of intersection in Destination Management Plans</li> <li>advocate for development of new performance metrics and partnership funding models</li> </ul>				✓
<p><b>Strategy 8 – Funding and Investment</b></p> <ul style="list-style-type: none"> <li>detailed scoping of costs to implement key DMP initiatives and identification of funding/investment partners</li> <li>assessment of tourism's investment needs - e.g. cycle trail maintenance and upgrades</li> <li>commission report on adapting City/Regional Deals model for Central Otago (mindful of local government. reform)</li> </ul>		✓	✓	✓
<p><b>Strategy 9 – Transport and Digital Connectivity</b></p> <ul style="list-style-type: none"> <li>explore transport flow modelling and adaptations required – EV vehicle and cycle charging, fleet conversion, short hop electric air etc</li> <li>advance and support development of digital shopfronts e.g. digital wine cluster initiative to leverage visitor loyalty</li> </ul>		✓	✓	✓
<p><b>Strategy 10 – New Product Development</b></p> <ul style="list-style-type: none"> <li>commission product development master plan for Central Otago - including Eden Hore Central Otago, cycle and walking trails, night sky tourism and more</li> <li>consider needs of new and changing markets, build accessibility considerations and programmes into the plan</li> <li>identify commercial partners</li> </ul>	✓	✓		✓



## SECTION 9

## ACKNOWLEDGEMENTS & ATTACHMENTS

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## **Acknowledgements of those who contributed to the development of this plan**

- Megan Potiki, Paulette Tamati-Elliffe, Caron Ward Kāi Tahu / Aukaha Ltd
- Dr Rod Carr, He Pou a Rangi Climate Change Commission
- Simon Upton, Parliamentary Commissioner for the Environment
- Adrian Wimmers, KPMG
- Rod Drury
- Ludo Campbell-Reid
- Trent Yeo
- Ian Duncan, Waka Kotahi
- Iain Cossar, Ministry of Business, Innovation and Employment
- Dr Susanne Becken, Department of Conservation
- Rene de Monchy, Tourism New Zealand
- Reuben Levermore, Air New Zealand
- Jim Harland, Waka Kotahi
- Grant Webster, Tourism Futures Taskforce
- Kiri Goulter, Regional Tourism New Zealand

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