

Review of The Catlins Te Akau Tai Toka Community Tourism Strategy (2021)

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For

**Great South
Clutha Development**

Prepared by



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Acronyms

CCI	Catlins Coast Inc
CDI	Clutha Development (Inc)
CCTS	Catlins (Te Akau Tai Toka) Community Tourism Strategy
DOC	Department of Conservation
DPL	Destination Planning Ltd
GS	Great South (previously Venture Southland)
MBIE	Ministry of Business, Innovation and Employment (which includes Tourism)
PGF	Provincial Growth Fund
RTO	Regional Tourism Organisation
SDC	Southland District Council
SILNA	South Island Landless Natives Act
TIA	Tourism Industry Aotearoa (Association)
TNZ	Tourism New Zealand
VFR	Visiting Friends and Relatives

Introduction

Background

This report provides a 2021 review of The Catlins Te Akau Tai Toka Community Tourism Strategy 2016-26, to consider implementation progress, the evolving national and regional Destination Planning context since the strategy was developed and suggest the priority projects to implement now. This has been procured jointly by Great South and Clutha Development and was requested by Catlins Coast Inc. Project status updates for 2022/23 have been added in yellow highlighting and

updates from Feb to October 2023 added in light blue.

The Review Brief seeks the following desired outcomes:

1. To have a clear understanding of priority projects and areas of focus to continue to grow the sustainable development of The Catlins as a visitor destination.
2. This will include a review of The Catlins Tourism Strategy in order to understand how it aligns with recent areas of focus of the community, central and local government and iwi.
3. To understand how priority projects align with targeting of key visitor segments and overall positioning of The Catlins as a destination.
4. To understand how to build on the collaborative partnerships to date to ensure optimum use of resources, effort and knowledge.

The Catlins Te Akau Tai Toka Community Tourism Strategy 2016-26 and the previous one in 2004, were well advanced in terms of sustainable tourism planning. They included most of the concepts that are now being presented as lead-practice, as other regions catch up with their Destination Management Planning. This includes putting priority on protecting the environment and community values rather than the primary focus being to grow visitor numbers.

Following are the key themes that are receiving stronger focus in contemporary destination management planning.

Regenerative Tourism

The concept of Regenerative Tourism is increasingly being adopted within NZ's Regional Destination Management Plans. Proponents pitch it as superior to sustainable tourism which they suggest was merely about minimising negative impacts whereas regenerative tourism seeks to go further to ensure a positive net benefit. That means tourism has actually made the destination (environment, community, economy and culture) better than it was. DPL suggests rather than repositioning "sustainable tourism" as out of vogue and not good enough, there always has been a sustainability scale depending on how high or low the impact targets are set. We are now just pushing up that scale to ensure a more positive contribution and that we are genuinely addressing negative impacts. The major challenge remains proving the net benefit. Some of the recent "Regenerative Tourism Strategies" have set admirable visions and objectives but they are not strong on identifying how they are going to robustly measure and report a net positive impact.

Genuine partnership with Tangata Whenua.

The previous strategy documents indicate there was engagement with Awarua Rūnaka but more work needs to be done on ongoing partnership in the establishment of values and priorities for the strategy; and overseeing and guiding strategy implementation. Awarua is the Papatipu Rūnaka for Ngai Tahu with a rohe extending along the coastal area of The Catlins. Hokonui Rūnaka also interest some areas of The Catlins. Ngai Tahu Iwi are the official treaty partners for government including DOC and local councils. They are also Kaitiaki for taonga species which are the subject of interest for visitors. There is also an imperative on recognising Mahinga Kai (food gathering sites), making Māori culture more physically evident through sculpture, art, interpretation, wayfinding and bilingual signage. The wider tourism sector is also aiming to support the unique value of indigenous tourism experiences (including stories) and engaging more Māori in tourism careers and business ownership.

Whanau and Hapu identifying as Wai Kouau, although not officially recognised under the treaty, have an interest in the area around Port Molyneux and have contributed valuable knowledge to date.

Large blocks of SILNA lands (South Island Landless Natives Act 1906) in The Catlins extending from Dummy's Beach up to Tautuku Bay and behind Kākā Point, are owned by multiple Māori trusts which in turn have

numerous beneficiaries. The ownership and connection for beneficiaries of this land is not directly related to official treaty of Waitangi settlement and therefore needs to be considered alongside the official Mana Whenua status of Ngai Tahu Papatihu Rūnaka through The Catlins. There are however, many beneficiaries and trustees who also have formal roles with local Rūnaka.

Establishing meaningful and enduring partnerships to determine interest and aspirations for tourism and to ensure tourism is giving back, is complex and will take time.

Awarua Rūnaka are keen to continue helping to shape tourism planning for The Catlins. They are positive about their partnership in the Tourism Masterplan process that has occurred for Motupōhue (Bluff) and see this type of model as potentially beneficial for The Catlins. They are supportive of visitors being able to do the Southern Scenic Route and experience The Catlins. There is a sense that Curio Bay reached somewhat of a peak before Covid with crowding impacts starting to affect locals' interest in visiting. Awarua Rūnaka have played a key role in much of the Māori heritage interpretation through The Catlins including the presentations in Tumu Toka Curioscape. However, some of the older signage needs more input from the Rūnaka as it is updated or replaced. Catlins Coast Inc have been investing in cultural awareness training with Awarua Rūnaka and this is a good step in ensuring that future signage, interpretation and storytelling is adequately informed by Tangata Whenua.

The appropriate mechanism for ongoing tourism planning and development partnership with Rūnaka for The Catlins is still evolving.

As with the New Zealand -Aotearoa Tourism Strategy, the following tikanga values and principles should underpin sustainable tourism growth The Catlins.

- ōhanga/whairawa (economic prosperity and wellbeing),
- Manaakitanga (shared respect, hospitality, generosity and care for others),
- Kaitiakitanga (guardianship/sustainability),
- whanaungatanga (a sense of family and belonging, relationships built on shared experiences and working together).

As the partnership with Rūnaka for The Catlins Destination Strategy evolves, these values may be augmented or adjusted based on local Rūnaka priorities.

The Masterplan process being carried out by Clutha Development with Boffa Miskell, for Tokatā Nugget Point and Kākā Point, has involved engagement by Hokonui Rūnaka in addition to approaches to Awarua Rūnaka and Te Ao Marama. Clutha Development, Great South and Catlins Coast Inc need further guidance from Rūnaka on Rohe interest areas and the best processes to use to ensure on going partnership at a strategy governance level and for individual projects.

Increased focus on Climate Change.

Destination strategies need to acknowledge the negative impacts caused by tourism, especially the unavoidable longhaul travel needed to get to New Zealand. At a local level the focus is on managing developments to be resilient in the face of sea level-rise and other climate effects. Tourism needs more sustainable transport and energy generation options; and tourism operators need to establish their base-level emissions from which to demonstrably improve. Various forms of sustainability commitments can be signed up to.

Prioritising the protection of Flora and Fauna; and heritage values.

This has been a strong theme in The Catlins tourism strategies. DOC has reinforced this within its new Heritage and Visitor Strategy released in 2021. There is a new focus on developing the means for visitors to engage and contribute to programmes which restore biodiversity.

Reducing Seasonality

Seasonality was and still is the major issue for tourism commercial viability, labour procurement, workforce investment and peak loading issues at icon destinations. Strategies which will extend visitation outside the peak summer holiday season will continue to be prioritised. This includes targeting visitor segments with flexibility on travel time (including cycle tourism), developing accommodation that is comfortable in winter, meetings and events, non-weather dependent attractions and activities.

Infrastructure Provision

Destinations and infrastructure were coming under pressure from strong visitor number growth up to 2019. There has been a lack of robust visitor count data and qualitative research on visitors. Local government and DOC have not kept up with investment in infrastructure to cope with the visitor growth, partly due to a weakness in the funding models being used for tourism. There is a need to establish better measures, debate acceptable visitor number limits for some sites and develop forecasts for planning capacity/service improvements.

Domestic Tourism

The Covid pandemic has re-awakened the NZ tourism industry to the value of domestic tourism. Destinations within a short drive of major population centres have done the best while those traditionally dominated by international visitors (like Queenstown and Fiordland) have been hardest hit. The Catlins has felt the lack of international visitors but it has always been strong in domestic and has scope to grow domestic visitor spend.

With the opening of borders, domestic tourism remains strong but it has pulled back from pandemic levels in late 2020 and 2021 as more Kiwis are able to take the postponed offshore trips. International tourism is picking up and may return to 2019 levels by the end of summer 2024.

Productivity and Career Value

There is a major strategic focus on developing tourism productivity, improving pay rates and making tourism an attractive career path. This starts with the way it has been poorly positioned in the education system and continues to industry initiatives to increase worker accommodation and skills investment. This is the priority workstream for government's new Industry Transformation Plan (ITP).

Value over Volume

There has been much talk since the pandemic hit, on re-setting tourism, not going back to unsustainable growth, focusing on visitor spend rather than visitor numbers and targeting high-spend or so-called valuable visitors. In fact, goals to grow visitor spend rather than numbers has been a platform in most NZ tourism strategies over the last decade or so; but there has been little success in changing the average visitor spend. The growth that has been achieved has been through visitor number growth.

Defining a valuable visitor is problematic. Immediate reactions tend towards cutting down on backpackers and freedom campers and increasing luxury visitors. However, the individual carbon footprint of many luxury visitors is comparatively heavy with first class international travel, high-input accommodation and fuel intensive domestic travel and activities. Budget backpackers have low daily spend but tend to stay longer, visit more regions (dispersing benefits) and do more activities that are not as carbon intensive. More work is required but we can conclude that:

- Visitor number growth will not be the priority.
- We need to better understand emissions impacts of various visitor segments.
- We can target our marketing towards visitors who will travel outside peak season as this will support year-round business viability and reduce pressure on infrastructure and management costs.
- We want visitors who will take time to stay longer and spend more on locally owned accommodation, hospitality and activities, and who will be respectful of our values, flora, fauna and heritage.

Stakeholder Engagement

DOC

DPL met with DOC representatives for Murihiku and Southern South Island operations, as well as field staff in Owaka to discuss The Catlins Tourism strategy. The new DOC Heritage and Visitor Strategy was reinforced as a good framework for The Catlins (Protect, Connect and Thrive). In simple terms DOC is keen to see the development of safe visitor experiences that don't impact our biodiversity. This doesn't necessarily mean less visitors but better managed visitors.

Enduring partnership in tourism planning for The Catlins with Papatipu Rūnaka of Ngai Tahu as treaty partners, is an essential starting point for DOC.

DOC is keen to see visitor planning reflect a stronger flavour of how visitors can better protect biodiversity, heritage and cultural values when they're visiting sites along The Catlins. They are thinking particularly about wildlife like penguins and how visitor sites (and expectations) could be managed differently to accommodate species; and making sure any important cultural values are framed to sit at the heart of this

work. This sits in the 'Protect' part of DOC's heritage strategy and aligns with the Minister of Tourism's expectation that management of visitors starts shifting to support a system where visitors have more opportunities to give back to places they visit.

DOC is placing a strong Climate Change lens over future planning and development of visitor asset upgrades and investments. This means thinking differently about how to reduce carbon cost and looking at vulnerability of assets to things like extreme weather, flooding and coastal inundation. As an example, Nugget Point is vulnerable to the effects of climate change with its low-lying road access.

DOC is supportive of an approach to undertake better research across The Catlins to inform future site planning across the whole area. There are opportunities as part of this research to test how people hope to travel in future, so planning can consider what they might need and new ways of managing sites for climate and technology.

DOC has indicated that given some of the higher-pressure locations in the Murihiku and Southern South Island regions, The Catlins has not ranked as a high priority for new project investment. DOC's investment focus is currently on making sure existing assets are safe and meet standard.

Other topics of discussion were:

- More emphasis on short walks that have proven to be in demand for the domestic market.
- The Catlins warrants a higher profile within DOC's Destination Management Framework.
- Concerns about visitor safety where tracks are opened up without appropriate standards.
- Where any new sanctioned trails are proposed by community groups or trusts, there needs to be reassurance that the asset can be managed and maintained.
- Wanting closer partnership with Clutha District Council on Freedom Camping education and enforcement.

The role of Senior Ranger, Visitor and Heritage, which has been DOC's main point of engagement for Catlins Tourism Strategy, has changed several times over the last four years. Amy Duffil-Brookes now covers this role but has not been involved in Catlins strategy previously.

The role of Meg Embleton-Muir (Senior Visitor Advisor), based in Queenstown, now covers the Destination Management Planning engagement for DOC Southern South Island Region with all the RTOs and local tourism bodies.

Rob MacIntyre of Destination Planning Ltd has met with DOC in person and on-line twice since February 2023 to discuss this project alongside the Murihiku Cycle Tourism Opportunities Assessment and the South Catlins Coastal Trail Feasibility Study. The Murihiku Operations Manager has sought to be available for as many meetings as possible and agreed to be the point of contact for the initial partnership group meeting in response to this strategy review paper.

Local Government, Southland and Clutha District Councils

Meetings were held with several senior managers from both Southland and Clutha District Councils. Many of the issues from a council perspective are covered in the report section on statutory and strategic planning. These councils have huge pressure on budgets to maintain the expansive roading network and bridges; and three-waters infrastructure. The three waters review has created uncertainty alongside a local government review which could see a significant reduction in responsibilities and scope of operation.

Southland District Council does not have a strong appetite for major cycleway development, at least until the Around The Mountains project is completed and successful. Freedom Camping has been a high profile policy issue where closer cooperation between the two councils and DOC could further improve. Waste management and recycling is being worked on and has been included as a key project in this review.

Southland District Council is more open to considering new trail opportunities and has successfully re-organised the governance and management of the Around The Mountains Cycle Trail. A new Trust for the ATMCT has been set up in 2021 to drive ATMCT through its next phases of development. The Trust's mandate is the user experience, product development and marketing and promotion with part of this administering the Official Partner programme. Southland District Council owns and maintains the trail asset including the website URL, ATMCT brand and Southland District Council directly employs the trail manager.

Clutha District Council has undertaken comprehensive community planning with its Our Place planning framework which has sequentially worked through local community areas of the overall district, rather than trying to do the whole district at once. Southland District Council's community engagement for the Catlins has not been as comprehensive and needs to be updated soon. This is particularly relevant for the Curio Bay/Waikawa area and noted as one of the priority projects in this review.

Current Vision

The current vision in The Catlins Tourism strategy is:

"The Catlins is one of New Zealand's most popular eco tourism destinations with a thriving community, wildlife and environment that are respected and cared for by all."

This vision still seems appropriate although the term "most popular" is difficult to define and therefore will be difficult to ever prove it has been achieved. Most popular could also have crowding connotations which is inconsistent with the underlying strategy to achieve manageable growth.

Current Purpose:

To encourage and enable tourism growth along with protecting and preserving The Catlins community, wildlife and environment.

Example of a Possible update:

To proactively manage tourism growth and tourism experiences to support the protection and preservation of The Catlins environment, flora and fauna and community lifestyle; while supporting new opportunities for business, employment and farm succession.

Current Goals:

The original 2004 Catlins strategy had 10 Objectives which were rationalised into six goals for the 2016 strategy. These are:

- To protect and preserve the community and environment from the negative impacts of tourism.
- To ensure efficient collaboration between all partners.
- To create economic, social and cultural returns on tourism investment.
- To improve knowledge and understanding of tourism.
- To improve tourism infrastructure.
- To effectively market and promote the area to potential visitors.

Governance for Destination Management in The Catlins

The Catlins Te Akau Tai Toka Community Tourism Strategy vision, goals and objectives remain essentially sound. Some adjustments could be made following more partner and stakeholder input.

the four focus areas identified in the strategy are:

- Product development
- Promotion and marketing
- Infrastructure
- Environment and heritage.

The main constraint on successful progress is the lack of a clear and enduring governance framework and a lack of sufficient allocated resource for project implementation.

A key reason for this review is to provide recommendations on the future of *Sustainable Catlins*. This was a selection of Catlins stakeholder organisation representatives that had begun meeting in 2020 to discuss planning issues and how the organisations work together to progress strategy implementation. Without a clear terms of reference, the discussion ended up in detail issues which led to some organisations questioning the value of attendance.

Governance and implementation is complicated for tourism in The Catlins due to the destination being straddled by two district councils and two Regional Tourism Organisations (RTOs). Wairoa and Otago Districts would be the closest other examples which sit on the margins of two RTO territories. However, they

are not as significant tourism destinations as The Catlins they each have a single district council responsible which simplifies destination management.

Prior to receiving Covid response tourism funding from MBIE in 2020 and 2021, Clutha Development was not resourced anywhere near the level of most other RTOs with roughly ½ an FTE able to focus on tourism activity. Great South is better resourced but has 11 local community groups like CCI that it has to work with. DOC Murihiku managers and Rūnaka representatives are sought at meetings for numerous Destination Strategies across the region.

Earlier efforts by Clutha Development's predecessor organisation to promote The Catlins caused some upset within The Catlins regarding brand sovereignty. Although there is a positive relationship between CCI and the two RTOs, there is an opportunity for CCI, Great South and Clutha Development to work much more closely to minimise overlap and leverage more value from their collective spend and resources.

Catlins Coast Inc. is the champion of The Catlins Te Akau Tai Toka Community Tourism Strategy but does not have sufficient resources or legal mandate to drive forward many of the implementation projects. CCI's constitution does not suggest a primary purpose as local destination management and marketing organisation. Implementation of the strategy is largely reliant on other public agencies. DOC is responsible for the majority of the tourism experience sites in The Catlins. Southland District Council, Clutha District Council and Waka Kotahi are responsible for most of the other land, facilities and infrastructure that make up the visitor experience in The Catlins. Iwi Māori will become more involved in destination management partnerships through the local Rūnaka. The private sector is made up of very small businesses, mainly accommodation, followed by food and beverage and shopping/galleries. There were only a handful of activity operators, some of which have closed down through the Covid pandemic with no guarantee of re-opening.

There is currently no publicly accessible DOC plan that enables a reader to quickly understand what is proposed for the sites that DOC manages. Although DOC continues to work positively with local organisations on various conservation projects, there is a perception among some of the community stakeholders that following various restructures, DOC is not as locally engaged as it was when the first Catlins Tourism Strategies were developed in 2004 and 2016. Major projects in Rakiura and Fiordland, along with managing the *Jobs for Nature* programme have created additional workload for DOC.

For DOC projects to receive internal funding, there needs to be a local manager championing a 2-stage business case to DOC's national office. This can take two or more years. With the pressure on local DOC teams to simply maintain assets and programmes as they are, there is limited capacity or appetite to tackle major new projects. Tourism site improvement projects which have progressed in other regions have often been driven in partnership with DOC by development agencies or an external consultant funded by a separate source of central government funding.

By identifying project opportunities in this Catlins strategy, the partners can support DOC and the Councils to develop business cases to attract a mix of local and external funding over the next five years.

The Catlins Destination Management Partners

Rather than being called Sustainable Catlins the suggestion is something like The Catlins Destination Management Partners, to clarify to purpose of the group. Other suggestions from Catlins Coast Inc. included "Destination Partners for/of The Catlins" or 'The Catlins Implementation Partners'. The group could comprise senior representatives from the following organisations.

Organisation	Core role
Catlins Coast Inc.	<p>The following is taken from the CCI Constitution.</p> <p>Protect the natural environment and cultural resources of The Catlins by working alongside and fostering co-operation between local authorities, relevant government departments and community groups.</p> <p>Enhance education by encouraging the provision of quality interpretation at key attractions; and promoting local and natural history educational opportunities for the community.</p>

	<p>Provide opportunities for locals, visitors, and those in business to learn about their natural, cultural and historic environment in order to respect and care for it ensuring its future;</p> <p>Be responsible for overseeing The Catlins logo and branding</p> <p>Be responsible for promoting The Catlins Care Code</p> <p>There is no reference in the CCO constitution to tourism or visitor industry. Although not specified in the Constitution, CCI also takes the roles of:</p> <p>Championing the tourism strategy, acting as a conduit to local community groups, advocacy, submissions on plans and policies.</p> <p>CCI has delivered some projects such as signage installation and promotion through map, brochure, website and social media.</p> <p>Clarity on who is responsible for promoting The Catlins still needs to be worked through; because Great South, Clutha Development and DOC all play a key role in promotion and visitor information provision.</p>
DOC Murihiku Area	Protecting flora and fauna, facilitating public engagement in conservation, managing natural and cultural heritage sites to enable safe visitation, managing tourism concessions
Clutha Development	Lead Destination Management and Marketing Organisation (and regional development agency) for Clutha District including Northern Catlins. Project Feasibility, Tourism Business capability and capacity development, events funding
Great South	Lead Destination Management Organisation (and regional development agency) for Southland Region including Southern Catlins
Clutha District Council	community engagement and planning, local roading network, core infrastructure, community facilities, environmental and land use regulation including freedom camping, waste management, community housing
Southland District Council	community engagement and planning, local roading network, core infrastructure, community facilities, environmental and land use regulation including freedom camping, waste management, community housing
Awarua Rūnaka	<p>Papatipu Rūnaka of Ngāi Tahu. Official treaty partner for government and local government entities and agencies</p> <p>Mana Whenua interest for Coastal area between Bluff and Clutha River Mouth.</p> <p>Awarua were partners in the developments at Curio Bay and particularly the interpretation in Tumu Toka.</p>
Hokonui Rūnaka	<p>Papatipu Rūnaka of Ngāi Tahu. Official treaty partner for government and local government entities and agencies</p> <p>Rohe interest for The Catlins to be clarified.</p>
Whanau identifying as Wai Kouau	Rohe interest Kākā Point, Port Molyneux to Kaitangata. Kouau is the name of the southern branch of the Clutha River. Whanau members have provided Māori heritage information for several interpretation signs and publications.

It is recommended that The Catlins Destination Management Partners meet twice per annum with any additional meetings as needed. Waka Kotahi, The Regional Councils, MBIE, YEPT and Forest & Bird would engage on an as needed basis, perhaps just annually.

The group would have the following role:

- Refine the strategy and action/implementation plan
- Provide guidance on ongoing adjustments needed for the plan
- Share information on each organisation's relevant projects
- Collaborate on strategy and joint project implementation.
- Monitor strategy implementation progress
- Support external funding proposals
- Keep the community and other stakeholders informed

In addition, a representative from each of Clutha Development and Great South should attend CCI meetings 2-4 times per annum to update on their projects which contribute to The Catlins Tourism Strategy and keep informed on CCI activity and local knowledge.

This should be supplemented by a CCI representative (the Project Coordinator as long as they are funded, otherwise a committee member) visiting Clutha Development and Great South in between these meetings, related to specific projects.

Local community and promotions groups within The Catlins

The following groups also play an important role at a local level although it does appear more fragmented than is necessary, especially given the very small amount of funding that each organisation has and the ongoing administration costs which will only increase. The argument provided for retaining so many organisations was providing more entities that can apply for charitable funding for projects. It is recommended that CCI continues to maintain the ongoing relationship with these groups and convey their interests at the partnership group meetings. At present CCI has representatives from most of these organisations on its committee anyway.

South Catlins Promotions	Originally developed brand and publications passed on to CCI. Recent project example, Tokanui skate park. (Note that the separate "Catlins Promotions" group which covered Northern Catlins has now ceased with key representatives now on CCI).
South Catlins Heritage Trust	Curio Bay area projects, Campground and built and operates Tumu Toka Curioscape, Living Forest Trail. Coordinates volunteers to manage Curio Bay visitors.
Owaka Going Forward	Owaka area projects. Developing bike route promotional material and investigating local cycle trail
Kākā Point Community Group	Kākā point projects, e.g. Events, playgrounds, paths, advocacy for facilities.
The Catlins Historical Society	Operate Owaka Museum with support from CDC customer service and visitor information staff.
Papatowai and District Community Association (PADCA)	Includes crib owners, community events. (Truby King Bridge/walk driven by Our Hut Heritage)

2022/23 Update

This document and various updates have been shared with Awarua Rūnaka but as yet a face to face meeting has not been achievable.

DOC has agreed to engage in the suggested partnership group with a meeting now likely in the first ½ of 2023.

Note that Catlins Promotions has been formally wound up with previous representatives engaging directly in Catlins Coast Inc.

Catlins Coast Executive Resource

Catlins Coast Inc. has had one part time Project Coordinator working 20 hours per week. There have been frequent periods where Lotteries funding for the coordinator has only been confirmed late in the plan cycle putting a question on any future work.

During 2021, a separate digital support person started working around 100 hours per annum. This has freed up the Project Coordinator for other responsibilities.

Key activities by the Project Coordinator, digital support person and Committee members over the last year have been:

- Writing submissions on several policies and bylaws at local and central government level, especially Freedom Camping.
- Progressing signage improvements including the replacement roadside welcome information kiosk between Balclutha and Finegand with Waka Kotahi and CDC and adding direction signage to The Catlins within Balclutha.
- Further improvements to the website and some social media activity.
- Coordinating the map and brochure publications including updating The Catlins Care Code.
- Quarterly Newsletters and Monthly summary activity reports

Options to increase human resource for tourism implementation include:

1. Providing CCI with more core funding to increase contractor/staff hours.
2. Having Catlins tourism staff employed directly by one of the RTOs and working from both locations according to day to day project delivery needs. (This is how Mackenzie Tourism is delivered through a contract with Christchurch and Canterbury Tourism.) The staff benefit from the RTO office infrastructure and connections with the rest of the team. The RTO also has better control in terms of employment contract liability. This would give CCI stakeholders a sense of loss of control though.
3. Retain the status quo structures but have the RTOs provide funding to an agreed Service Delivery Contract with CCI, with an agreed business plan, deliverables and KPIs. This would mean CCI retain control over the staff employment but it would provide the RTOs with more assurance of return on investment compared to a straight grant to CCI core funding. This model would assume that council funding for tourism projects that currently being applied for annually by CCI, would instead be administered through the RTOs. This gives the councils more assurance that the funding is being well coordinated and not used competitively or in a duplicated manner.

The logic in retaining a strong CCI organisation rather than have one of the existing RTOs assume direct delivery, is further supported by the following:

- CCI has articulated that "Community and stakeholder involvement in decision making re The Catlins" is one of their top priorities and this was a strong message from the consultation for the previous two tourism strategies.
- CCI has assumed a goal to have a strong role in direct conservation initiatives e.g. "Marine Protection". This expands CCI's scope beyond what an RTO normally does.

Implementation Projects

The following projects are in roughly prioritised order based on reviewing the existing tourism and destination strategies for The Catlins, Southland and Clutha, the current state of tourism in the context of the Covid pandemic and considering national level tourism strategy developments.

Project 1: Improved Digital and Printed Collateral Coordination

Summary

The main tourism activity that CCI directly undertakes is promotion through its website, maps and brochures. CCI is continually struggling to fund its marketing collateral including the printed fold-out map, brochure and website. While there remains much duplication of Catlins content across CCI, Clutha Development and Great South tourism collateral, it is not a simple case to rationalise them. Material that promotes Clutha District and Southland needs to include The Catlins as it is a key destination within those regions. Likewise, The Catlins warrants some standalone publications and digital channels as it already has good consumer recognition;

and the local community is highly invested in the brand and colour palette that has been developed under the previous Catlins Tourism Strategies.

Clutha Development has a membership fee that applies across tourism and other businesses. CCI charges operators for website and brochure listings as one of its income streams but this doesn't raise a lot of funding. Meanwhile, Great South offers operators free listings on their website along with other free services. While this is great for operators, they naturally question the value of CCI and Clutha Development advertising/membership. Operators are often confused about where they should put their limited advertising money and they struggle to keep the information up to date with multiple organisations. The Google Business listing for individual operators has also become one of the most important promotional media. CCI does not have the capacity to help operators maximise the value from Google Business whereas Clutha Development and Great South have been trained under official Google DMO programmes to provide this support.

The amounts of funding sought by CCI are relatively modest in the context of a typical RTO's marketing budget. Clutha Development currently has reasonable marketing budget due to the one-off MBIE STAPP and Reset & Recovery funding; but this is not guaranteed beyond 2021. Those MBIE funding programmes did not allow the RTOs to apply for core funding to hand on to local promotions groups like CCI.

Following is a summary of the key promo and visitor information initiatives delivered by CCI. (Signage and interpretation is separate and completely reliant on one-off external funding by project)

Media	2021 costs	Business Contribution	Print runs
Brochure	\$7,984.19	30 @ \$300 = \$9000	2019: 35,000 2020: 10,000 2021: 8,000
Map	\$6,709.58	42 @ \$150 = \$6,300	2019: 70,000 – 80,000 2020: 50,000 2021: 50,000
Website	\$1,271.39 Annual Fees \$2,896.28 Improvements \$3013.00 PT coordinator website management and social media Total \$7,000	52 @ \$150 Advertising (various discounts) \$7,772.50.	
Total	Approximately \$21,500 but this would increase with higher prints runs that have been needed in previous years.	~\$23,000 income from operators	

This suggests CCI made a surplus from advertiser income for 2021 FY but funding was sought from CDC and CDI. No funding as sought from SDC.

Maps (and some brochures) are distributed by CCI to local Catlins businesses and Te Anau, Riverton, Balclutha, Lawrence, Invercargill, Tokanui, Queenstown, Owaka, Tuatapere, Gore, local businesses and services (i.e. petrol stations), Dunedin etc. Market South are the main distributor for the brochure, around The Catlins and further afield.

Rather than CCI pitching for small amounts of project funding from the councils, DPL recommends that Clutha Development and Great South work with CCI to develop an agreed joint Catlins marketing plan and jointly fund CCI to deliver clearly defined sub-projects through a service contract. This is only currently a possibility because of the additional funding GS and CDI have received from MBIE. In future it would need to incremental funding by the respective councils to GS and CD.

The marketing plan could consider rationalising overlaps in publication content, improving the value of information for visitors and simplifying logistics for local operators to manage their listings. The investment by Great South and Clutha Development should be treated as a sub-project of their main marketing budgets, being delivered on contract by CCI, as is the case with agencies for other parts of their campaigns. The main opportunities for savings and rationalisation include:

- Consider whether to cease printing The Catlins brochure and enhance the map to be the key visitor information piece.

- Consider a central database for operators to manage their digital listings in one place, feeding to GS, Clutha and Catlins web channels. (Noting that identical text listings across multiple websites can negatively impact Google rankings)
- Make content on The Catlins easier to find in Cluthanz.com and provide more links to the CCI website where appropriate.

Possible Funded Service Delivery Agreement between the two RTOs and CCI

The following is simply an illustration to seed further discussion rather than a firm recommendation.

If GS and CDI provided \$14,500 each (\$29,000 combined) this would deliver the promotional material and digital content and reduce the high reliance on advertising funding. That would mean that every business could be basic-listed on the website. This would deliver a more comprehensive website and more value to the website user. CCI could still upsell enhanced listings and keep the map as voluntary pay-to-participate projects to generate extra revenue. If the two RTOs provided less funding, say \$5,000 each, this would still enable CCI to deliver these promotional and educational publications and digital resources with less pressure for operator advertising and no need to pitch for council funding each year. The exact amount would be determined as the marketing plan was developed by CCI, CDI and GS.

Note that this type of funding arrangement between the RTOs and CCI is only currently possible due to the MBIE funding which is not guaranteed long term. It could not be drawn from existing core operating budgets. Great South has 11 local groups which it has to engage with equitably. For Great South to enter into an agreement with CDI and CCI like this it would need to be supported in writing by SDC.

Critical Visitor Information, Where to Eat

One of the most basic information needs for visitors, especially in the off-season, is places to eat and their up-to-date opening hours. It is understandable that cafes have had to change their hours more frequently as we navigate a Covid affected visitor market. However, with the area being remote it can be stressful wondering if you will find food and it can ruin the overall experience if a place advertised as open, has decided to close without updating their hours.

Improving this information will mean significant work initially, keeping in touch with operators until they get in the habit of proactively doing it themselves to avoid being hassled by information centre staff. The Catlins Info Centre's dining list only has 10 places in The Catlins and nine in Balclutha so it is quite achievable to establish a more robust system with the operators to keep all information up to date including their websites, Google Business listing, Facebook pages, CCI and RTO websites and printed information used by the Visitor Centres. The responsible person can work from anywhere so it can be shared around the information centres and CCI.

It would also help to provide more prominent information on the times that Cathedral Caves is closed and likewise for other operators that close for winter but don't communicate clearly on their web channels.

1. Actions/Recommendations

- a) Continue to explore a partnership agreement or MoU to clarify the marketing responsibilities of GS, CDI and CCI.
- b) Write a brief Marketing Plan to optimise the resources each organisation can provide.

Responsibilities & Resources

GS, CDI, CCI

2022/23 Update

A proposal from GS and CDI about the management of promotional activities has been presented and discussed with CCI. CCI will discuss further options that align with their objectives and the ability to maintain The Catlins brand.

GS and CDI have developed a separate MoU between those two organisations that incorporates marketing The Catlins.

CCI chose not to take up GS and CDI's offer to fund and directly deliver the key promotion activities and tools for The Catlins, which would have meant no longer needing to approach Clutha District Council. The desire to maintain direct control of the Catlins Coast brand and advertising publications was a key part of this decision. This leaves CCI continuing to fund-raise for limited promotions activity, mainly the website and The Catlins purple map including the Care Code.

Project 2: Enduring Visitor Monitoring Programme

Summary

The starting point for effective destination management is understanding visitor numbers, peak visitation times, visitor demographics, behaviours and satisfaction with the experience. We have very little of this information. Previous surveys have been one off. The data produced by current trail counters is intermittent and difficult to glean robust metrics from. DOC rangers are stretched in their roles, so not always able to check and download data on a timely basis.

This information is needed to understand site carrying capacity, trends for developing forecasts to plan adequate visitor management such as toilets, parking, shuttles, limiting access, supervision. This is to aid in ecological protection and improving the visitor experience.

2. Actions/Recommendations

- a) Work with DOC to improve the quality of their trail counter systems and reporting. This may require new investment in hardware, mobile coverage, and ranger resource to monitor the counters and produce reports.
- b) Implement snapshot visitor surveys at key tourism sites, local accommodation and tourism services which will endure over multiple years. (This has been commenced by GS and CDI over summer 2021/22)

Responsibilities & Resources

GS, CDI, DOC,

CCI support

2022/23 Update

CD have put in place an annual visitor monitoring programme across The Catlins with the support of GS. This data will be useful in supporting implementation of relevant projects within the strategy.

There are now two summer seasons of visitor research procured by Clutha Development with support from Great South.

Project 3: Nugget Point / Tokatā and Kākā Point Integrated Destination Plan

Summary *(There is a separate more comprehensive discussion paper on this project)*

The whole Kākā Point to Nugget Point area is inter-dependent and needs an integrated planning approach. The two primary management agencies are DOC and Clutha District Council with separate planning regimes. This needs to be brought together to provide one overview of planning issues, options and a suggested way forward. Iwi, local community groups, Whaka Kotahi, ORC and various environmental NGOs would also be partners. A similar project is envisaged for Curio Bay. The overall plan would bring together issues such as parking capacity, the future need for seasonal park and ride, increasing vehicle movements and impacts through the Kākā Point settlement, community and visitor facilities, wayfinding and interpretation and recreational trails. Planning for future needs to be informed by more robust visitor monitoring systems from now. Rob MacIntyre of DPL has discussed this with DOC, CDC, Kākā Point Community Group, Awarua and Wai Kouau.

3. Actions/Recommendations

- a) An improved Visitor surveying programme has been initiated in summer season 2021-22. This needs to be refined and expanded.
- b) DOC's visitor counter systems need to be enhanced.
- c) A more detailed discussion document has been drafted for this initiative to engage the stakeholders and move towards agreement on an appropriate planning framework, process, timeframe and budget.

Responsibilities & Resources

CDI

2022/23 Update

CDI are in process of developing a detailed master plan that ensures the long-term development and management of Nugget Point/Tokatā and Kākā Point

The plan needs to ensure the natural, cultural and historic heritage is protected and enhanced; that community needs are met, and the quality of visitor experience remains high.

The aim of the master plan is to help protect the location's natural and cultural assets and provide engaging and very place specific visitor experiences to support a sustainable tourism industry and the broader regional economy.

Community workshops and stakeholder meetings have been facilitated by Boffa Miskell in mid 2023 but there was no representative from DOC. An online hui was held with representatives of Hokonui, Riki Parata and Megan Reid. Approaches to engage with Awarua Rūnaka are ongoing. Ruth Baldwin from Waikoau has also been approached. The timeframe for completion has been extended to ensure adequate Rūnaka engagement.

Project 4: Curio Bay Destination Plan

Summary

The existing document "A Vision for Curio Bay, 2013 Update" provided a masterplan for the destination including the development of Tumu Toka Curioscape. This plan now needs to be updated. Current issues are managing visitor interactions with Penguins, the petrified forest beach and Hector's dolphins. This has recently been the subject of a PhD study. Coastal erosion has compromised safe beach access into Porpoise Bay. Campground improvements are needed to address proximity of toilet and shower facilities to campsites and there is concern about managing safety of the road/vehicles passing through the campground. Iwi have interests in the land next to the campground and may want to develop some interpretation or cultural markers in this area. Wastewater capacity may need to be expanded and the Living Forest trail could be enhanced and extended. Surfacing, vehicle management and interpretation out on the headland also need to be considered.

The Tumu Toka café and visitor experience has been problematic for the Trust to manage in terms of quality of operator pre-Covid and then remaining financially viable since Covid hit. As of late spring 2021 it has had to set opening hours on a week by week basis.

SDC has \$50,000 budgeted in 2021-22 for Curio Bay – Reserve Management Plan (peer review) and \$15,000 for Campground toilet refurbishment.

4. Actions/Recommendations

- a) Update the Vision for Curio Bay (masterplan) and develop a pathway to funding its implementation.

Responsibilities & Resources

SDC, DOC, SCHAT, Awarua Rūnaka

2022/23 Update

SDC has allocated \$50k in the LTP to contract a masterplan process including Curio Bay and Waikawa, likely using Boffa-Miskell. DPL has made DOC aware of this and SDC is in discussion with Te Ao Marama regarding Tangata Whenua partnership.

Several accommodation properties have been put on the market during 2022, with a potential loss in visitor accommodation capacity.

Business at the campground and Tumu Toka has been severely impacted and the café has been difficult to keep operating. Business is gradually picking up now and Blue Cod Blues opened again at a new location at Waikawa.

The South Catlins Heritage Trust has been able to extend the living forest trail using Jobs For Nature project funding.

The potential for shared use off-road trail connecting Curio Bay and Waikawa will be important to consider within the Masterplan process; and has been explored within the larger Catlins Coastal Trail Feasibility Study.

Issues with water supply for Curio Bay during 2023 have highlighted infrastructure capacity issues to be addressed in Master planning.

Project 5: Multi-Day Coastal Walk, Feasibility

Summary

The concept of a Multi-Day coastal walk experience has been identified as an opportunity in previous strategies and remains in the existing CCTS. It was also highlighted as one of the priority projects in the Clutha Destination Strategy. An earlier 2004 Feasibility project failed, significantly due to the way landowners were engaged. Demand for such experiences remains for both the domestic and international markets. Visitors want to experience more of The Catlins Coast without driving in and out on marginal roads.

This is a staged project which will eventually consider the whole Catlins Coast and Awarua Rūnaka expressed interest in future connections towards Invercargill/Bluff. Clutha Development is currently procuring an initial investigation for the Northern Catlins. Care is being taken to engage with landowners, gauge their interest and understand any concerns before any assumptions on land access, route or operating model are made. CCI is assisting with contacts and project planning advice.

Great South has funding allocated to do a second stage of work in 2022.

5. Actions/Recommendations

- a) Complete stage 1 feasibility update for Northern Catlins. Q1 2022
- b) This may lead to full business case development or an adjusted feasibility for the Southern Catlins.

Responsibilities & Resources

Clutha Development, Stage 1

Great South, Stage 2.

Reliant on Landowners wanting to be involved.

2022/23 Update

The Northern Catlins reviews was completed in 2022. It found that:

- A shorter overnight walk might be possible between Jacks Bay and Purakaunui Bay should some of those landowners in the area work together on access and options for accommodation;
- Landowners open to this idea indicated that they would prefer to run it as a guided walk to control visitor behaviour;
- Further north, a half or one-day walk is worth exploring between Cannibal Bay and Surat Bay provided a shuttle service is available for drop-offs and pick-ups;
- Although the idea of a 'Catlins Great Walk' is not supported by landowners, the potential cost and economic benefits associated with this option are included in the final report for completeness;
- There is an option for landowners who are interested to walk the Banks Peninsula Track to see how farmers there manage access, accommodation and revenue sharing.

GS has contracted a similar study on the section Papatowai to Fortrose which is due for completion in the first half of 2023. This is considering both walk-only and bike/dual use trail. Initial discussions indicate that while there is support in the community for this type of experience to attract longer stays and more spend from visitors, many of the landowners have significant concerns about public access impacting their operations. Now targeted for October/November 2023.

Project 6: Cathedral Caves Destination Plan

Summary

Cathedral Caves is one of the most iconic attractions in The Catlins. If it weren't for the closure through winter and each day around high tides, it would be on a par with Nugget Point and Curio Bay. Many visitors envisage Cathedral caves as an important part of their Catlins trip but end up disappointed if the tides or season don't work out for them.

It is mostly a fantastic experience which is widely recommended by visitors. Its growing icon status means the reputation of The Catlins, Clutha and NZ will be impacted if increased visitation occurs without proactive management and investment. Issues with the experience include:

- The basic long-drop toilets that generate ongoing complaints (a \$200k upgrade was due Xmas 2021 but delayed to early 2022 due to building supply constraints). This was funded by the owner, Tautuku Block 10, Section 3C Trust despite large government sums being provided for toilets at various less important sites throughout NZ.
- The road is narrow and winding, with safety issues for large vehicles meeting each other.
- The gate, about 50m in from the highway, remains locked outside tidal operating hours. As visitors arrive slightly early, they end up parked in a row backed up until they are partly on the highway with no room for other vehicles to turn around safely.
- Access is closed from the end of May until spring due to rougher beach and sea-state conditions.
- A basic information leaflet is included with the charged access but there is no option for a more comprehensive learning experience.

The Trust employs staff to man the carpark and collect the access fee. The Trustees are concerned with visitor safety but also security and vandalism if the area was left as open access. The purpose of the land is to provide income and support for its owners but it is not economically viable as it is and the trust does not have a strong capital base or a high- risk investment profile conducive to developing Cathedral Caves. The trust has been in negotiation with the govt re a potential purchase of the land by the Nature Heritage Fund which would mean it became Public Conservation Land and most likely managed by DOC. However, the offer has been too low both times it has been presented over the last several years. There are several management options as outcomes, that could involve council, DOC, private entities or some a hybrid model. Some stakeholders note that Cathedral Caves had previously been managed by DOC and open year-round.

However, the ownership evolves, there are opportunities to integrate Māori tourism experiences at this site, whether it be through ownership, operation or employment.

6. Actions/Recommendations

- a) When ongoing ownership is clarified, a logical next step could be to develop a comprehensive Cathedral Caves destination development and visitor experience plan which could consider:
 - Guided tours limited to small groups to avoid crowding in the caves.
 - Improving the highway entry safety, access road, and carpark.
 - Consider Park and Ride access from a nearby point such as the Whistling Frog to handle future demand.
 - Accommodation, various options ranging from Camping/Motorhome to a mid-priced Eco Lodge to a five-star luxury lodge.
 - Trail maintenance and consideration of extending to form a loop taking in the beach that could be accessible at high tide and through winter.
 - Guided tours when the caves are inaccessible, interpreting the bush and Waipati Beach; and potentially combining with Maclean Falls and other nearby attractions.

Responsibilities & Resources

Should the Trust retain management it could be assisted to access charitable or government funding to do the feasibility/planning work. (GS & CD)

2022/23 Update

Cathedral Caves usual seasonal opening was delayed until late November in 2022. Some of the trustees who have carried the administration have other commitments and the toilet development was delayed.

At this stage any significant destination experience development project will only proceed if the trust invites it and this would likely be reliant on access to external funding.

DPL engaged with Tautuku Block 10, Section 3C Trustees again in 2023 to specifically discuss the Catlins Coastal Trail feasibility study. They are supportive of being part of a coastal trail but recognise the complexities with neighbouring blocks in the Tautuku area.

Project 7: Responsible Camping Enhancement

Freedom Camping was one of the main issues in the previous Catlins strategy and it was also one of the top issues concerning local community members during Clutha District Council's Our Place Catlins Community Plan consultation in early 2019. The Clutha Destination Strategy included significant commentary and recommendations on Freedom Camping. It noted a lack of robust information on Freedom Camper spend and whether there was actually a shortage of low-cost camping spaces that justified public investment intervention. (This is even more pertinent now that the MBIE Responsible Camping Funding programme has ceased. The Clutha Destination Strategy also recommended better promotion of the existing camping facilities (\$8 for DOC camp sites should not be too much to ask), more engagement with commercial holiday park operators and aligning the SDC and CDC Freedom Camping Policies. It also noted the key solutions were dependent on progressing the Government's Responsible Camping Working Group recommendations which included reviewing the Act, raising the Self Contained certification standards and establishing a register to simplify monitoring and enforcement.

In The Catlins, good progress has been made from 2018 on funding of rangers to educate visitors and enforce bylaws if necessary. There were some issues when rangers were taking more of a confrontational approach and when council officers were covering DOC sites where they didn't have official jurisdiction. SDC and CDC's bylaws have also been amended. The ranger programme has since fragmented with DOC and SDC running rangers in the South. Meanwhile Clutha District Council has increased ranger resource for North Catlins but they also cover the rest of Clutha District and the role is extending to cover other council service reporting such as overflowing rubbish.

There is more work needed to develop a consistent approach in some areas. For example, Cannibal Bay has no-camping CDC land and just behind it is DOC land that is not as well monitored, resulting in freedom camping and rubbish dumping. This has also upset local farmers. The rangers could also play more of a role in managing inappropriate vehicle use on beaches which are currently designated as open road. Councils are currently investigating options for Bylaws on speed control and/or restricting access which may include gazetting a speed limit.

In Clutha District the Freedom Camping Ranger has been engaging with the visitor centres and i-SITE to cross-share information and encourage a consistent approach to informing visitors.

The receipt of government TIF funding gave CDC the opportunity to carry out a \$25k trial of a new freedom camping site in Owaka, with initial business and community resistance. The Clutha Mayor had individual discussions with private campground owners to understand their concerns and explain the logic of the trial. A review of the trial found it has largely been successful with positive feedback from Owaka businesses on local spend although some believe this is more the case for NZ freedom campers and less the case for internationals.

This initiative is consistent with SDC's experience in Lumsden where there was also initial resistance and in Waikawa. It seems that successful sites have been within towns where there are immediate businesses which can benefit from camper spending. The NZMCA has a member only freedom camping site near Niagara Falls which is operating successfully and is in walking distance of the Niagara Café.

The option of Owaka becoming an Official NZMCA Motorhome Friendly Town could be explored if NZMCA is prepared to jointly invest with council.

SDC considers that campers in The Catlins part of Southland District follow the rules very well. Public complaints are low (21 in 2019-20 and 17 in 2020-21) and there were zero infringement notices handed out. The exception is Weir's Beach which suffered from over-popularity and insufficient facilities. It has been "De-promoted" including removing it from Campermate, while more enduring solutions are found. \$81k of MBIE funding was applied to ambassador salaries, surveying vehicle compliance and signage improvements working with CCI.

The Minister of Tourism called for a review on "How to make Freedom Camping in NZ more sustainable" in April 2021. MBIE is managing the process with four proposals presented for consideration, largely focused on upping the requirement for facilities in Self Contained vehicles which could be used to stay at sites without toilets. Public Submissions have been received, including from CDC, SDC and CCI and Ministers are due to announce the consultation outcome in late November/December 2021. The scope of this review did not include reviewing the Freedom Camping Act 2011 or the Camping ground regulations 1985.

Before making any further significant changes to local Freedom Camping policy and management, it is logical to assess the results of this central government initiative and understand if the previous National Responsible Camping Working Group recommendations are going to be considered by government.

7. Actions/Recommendations

The following actions are suggested pending the progress of the new government bill:

- a) Invest in research to determine Freedom Camper spend in The Catlins economy to inform ROI assumptions on which to base future public investment. (Unlikely to match the average figures from national surveys)
- b) Hold a post and pre-season meeting (2 times per annum) of DOC, SDC, CDC Freedom camping rangers and the officers responsible for Freedom Camping policy; and the Police to share issues and opportunities for improvements.
- c) Further align SDC and CDC's Freedom Camping Bylaws with the new government bill and consider whether a Responsible Camping Strategy would be beneficial for Clutha and Southland District.
- d) Improve the consistency of delivery of the Freedom Camping ranger programme and training across CDC and SDC in The Catlins
- e) Improve the print and digital camping information for visitors including the brochures/maps used by info centres and rangers, council websites, destination websites, Camping Apps and the Google Map listings.
- f) Better promote the existing paid camping opportunities (private and DOC) to improve utilisation of these assets which have cost recovery mechanisms. (e.g. Tawanui has huge capacity, is underutilised and could easily be included in a Catlins itinerary if pre-planned.)
- g) Assess the merits of Owaka becoming a NZMCA Motorhome Friendly Town. (In consultation with existing commercial camping operators)
- h) Continue to investigate the merits of a Kiwi Camping model which provides low-cost access to toilets, showers and laundry via an App, including for non-self-contained vehicles.
- i) Continue to enhance DOC's campsites including Purakaunui Bay (more family friendly, site levelling and hardening, fencing and mowing, additional toilets and shelter), Tawanui (drainage, site hardening, renovate toilets, interpretation on Timber Mill community heritage)
- j) Upgrade Fortrose waterfront (SDC budgeted \$211,356 in 2023) and Weirs Beach site].

Responsibilities & Resources

SDC, CDC, DOC

GS & CD support

2022/23 Update

This is wider than just The Catlins. CDC has maintained and extended its Freedom Camping Ranger programme to include reporting on other service delivery items. The approach remains one of education rather than enforcement and feedback is generally positive from the rangers, and what they report on camper's responses. Councils reported reduced negative feedback or complaint from residents from 2020 but updates are required for the 2022/23 season.

CDC consulted on a beach vehicle access bylaw in 2022, which saw strong opposition from local residents.

The next key step remains holding a post season debrief between the two councils, RTOs and DOC and consider the latest update on central government's Freedom Camping Bill.

Project 8 : Boutique Eco Lodge Opportunities

Summary

The Murihiku and Clutha Destination Strategies both identify a high-end lodge as an opportunity for The Catlins. The Murihiku Destination Strategy lists “Boutique Regional Accommodation (with Staff Accommodation)” in its top five High Priority Investment recommendations and Eco Lodges in Remote Locations as a further opportunity.

A lodge was being considered on private land near Purakaunui Bay but this is not currently being progressed. Catlins Mohua Park Eco Accommodation is Qualmark Silver 4 Star, has been successfully operating for several years, currently with its second owners and on the market. The individual Cottages are high standard but it is self-catered or B&B and not run as a classic luxury lodge with in-house dining. A number of boutique vacation rentals have been established using Air BnB (e.g. Beresford Heights and Tahakopa Bay Retreat). There remains the opportunity to develop a true five star lodge with full chef service and multiple ensuite rooms. This can be facilitated by developing a prospectus which profiles the market opportunity and potential sites. This can then be used by Great South and Otago inward investment promotion programmes.

8. Actions/Recommendations

- a) Develop a Luxury Lodge prospectus for The Catlins. This may be part of a wider Southland and Clutha initiative.

Responsibilities & Resources

Great South and Clutha Development

2022/23 Update

As the tourism sector recovers from closed borders, no action has been taken on a lodge prospectus yet.

Great South has run some Agri Tourism workshops.

Project 9: Winterising Holiday Park Accommodation

Summary

As with many of NZ provincial areas, much of the total accommodation capacity is in camping grounds. Much of that capacity is tent sites or camper parks with very little in the way of more modern cabins, apartments and motel units that are warm and comfortable through the winter. Extending the tourism season to get a better return on assets is a key part of our national, regional and local tourism strategies. Adding contemporary warm, built accommodation has seen many holiday parks improve their business viability and improve visitor satisfaction. A communications programme can advise existing operators on success cases and potential improved returns. Clutha Development has been in discussions with Fergus Brown, CE of Holiday Parks NZ regarding good practice developments of Holiday Parks elsewhere in NZ and surveyed local Holiday Park operators about the current state of their built accommodation, forward plans and interest in learning about development options. There is some hesitancy around new investment with the current Covid impacts on visitor numbers but this is about preparing for re-growth when borders open and there is sufficient interest to go ahead. This project also establishes better dialogue with commercial operators to engage them constructively around freedom camping management rather than them just hearing second hand about public money being invested in freedom camping facilities that can erode their business.

9. Actions/Recommendations

- a) Clutha Development facilitate visit by Holiday Parks NZ to share development knowledge with local operators.

Responsibilities & Resources

Clutha Development Destination Strategy implementation funding.

2022/23 Update

CDI facilitated a family with Holiday Parks NZ to educate and upskill campgrounds in The Catlins on opportunities to extend seasons through winterisation of accommodation.

Project 10: Increased quantity and quality farm stay and vacation rentals

Summary

The Catlins already has a good range of farmstay and self-contained rural and beachside accommodation with some recent additions of great quality. Continuing to grow this sector among local (rather than absentee) property owners will help to ensure that tourism spend stays in the local economy. This also creates opportunities for farmers to diversify income and work opportunities for family. As with camping accommodation, the priority should be in adding well-insulated and sustainably heated accommodation that will be attractive year-round, to extend the tourism season.

It is important to design policy and regulations that ensure a level playing field which does not unduly disadvantage commercial accommodation operators who are paying commercial rates and are often subject to stricter (more costly) compliance standards. The topic of a tourism targeted rate or accommodation levy is likely to come up in future as councils seek to ensure tourists are contributing towards council costs of servicing the tourism sector. Funding models should try to avoid increasing the rates burden on general ratepayers and farmers who are not directly involved in tourism. The recent case against Auckland Council highlights the need to carefully assess who benefits from any rate or levy proposed, and who exacerbates the cost which council is having to fund.

A modest tourism rate or levy is likely to be preferable to suddenly shifting small accommodation players into a commercial category that would see their rates increase out of proportion to the scale of business. The main booking platforms of AirBnB and BookaBach are set up to calculate and collect accommodation rates or taxes as it is common practice throughout the rest of the world and in several districts in NZ. Local operators have got used operating tourism accommodation businesses without any extra rate contribution so they would need time understand the rationale and adjust. This would only be sensible once tourism returns to pre-pandemic levels.

This will also be influenced by the national debate about the proportion of GST paid by tourists that gets spent back on tourism, either directly or by allocation through local government.

10. Actions/Recommendations

- a) Develop help resources for potential new accommodation providers covering regulations, health and safety, Covid Clean, pricing and marketing.
- b) Communications programme with accommodation operators on winterizing and sustainability.
- c) Provide best practice information on equitable rating models for tourism accommodation to ensure a level playing field but fair contribution by all accommodation operators.

Responsibilities & Resources

GS, CDI

2022/23 Update

GS has run some workshops with Agri Tourism covering wider agri-tourism opportunities which included farmstays, experiences and food tourism.

CDI has developed a list of resources on options for Glamping, Tiny Homes and other relocatable accommodation that farmers can consider.

Two operators in the Owaka area have added or are in the process of adding relocatable accommodation.

Project 11: Development plan for other visitor attractions (Waterfalls, Coastal Lookouts etc).

Summary

As visitor numbers build beyond the main icons, the secondary visitor attraction sites will also need management plans developed. The Catlins has been reported as having over 140 waterfalls, the majority remaining a local secret. Sustainable tourism planning will mean not trying to promote or develop all of the opportunities, rather managing enough natural visitor attractions to deliver a quality visitor experience after prioritising protection of the natural environment (flora and fauna) and keeping some secrets for the local community to enjoy without tourism. Noting there are separate specific projects for Nugget Point, Curio Bay and Cathedral Caves, following are key visitor sites and identified potential improvements:

Fortrose: There are water supply limitations here. The whole foreshore, freedom camping area and toilets need to be reviewed for enhancement opportunities. The Cliffs lookout area over the Maitava river mouth has issues including vehicle access/erosion impacts and managing safe beach access.

Slope Point: toilets, interpretation, trail hardening/benching, stock fencing and managing visitor safety down on the coastal margin. Consideration of two photo pullovers overlooking Haldane Bay near the top of the hill and looking west over the leaning trees.

Purakaunui Falls could be improved through re-design of the viewing area under the falls and extending to create a loop track with more interpretation. The carpark was already stretched pre-Covid and could be improved by re-designing the markings and layout but may also require footprint expansion.

Maclean Falls – much of the road has recently been sealed, addressing a major issue with corrugation and dust. This will require ongoing investment and extension which is somewhat complicated by the fact that while the toilets are on DOC land, much of the carpark and the road are not.

The main trail to the waterfall is exposed to rockfall or vegetation slides, currently addressed by signs informing visitors not to loiter in that section. Future options may include re-using part of an earlier track, extending to the plateau above the waterfall and creating a longer loop walk with The Tautuku Hut Track and taking in The Chute upstream. It could also connect to the tracks in the LENZ Reserve to the north. As visitor numbers increase, consideration may be needed to build safety structures in the main falls viewing area where previous structures have been removed.

Both of the Waterfall sites have some plant identification signs along the trails which will need maintenance or a complete upgrade with broader site topic interpretation.

Matai Falls, extension of the section of rail trail to make a longer ride.

11. Actions/Recommendations

- a) Partner with DOC to develop a publicly accessible plan to manage and improve the visitor attraction assets on Public Conservation Land that are not already included in Specific Site Destination Experience Plans.
- b) SDC seek partner funding for improvements at Fortrose and Slope Point.

Responsibilities & Resources

GS, CD, DOC, CCI, -

seek MBIE funding support,

support DOC to develop internal business cases

2022/23 Update

SDC has engaged Boffa Miskell to develop some settlement planning concepts for Waikawa, Wyndham and Fortrose, the latter includes new concepts for the Fortrose waterfront and freedom camping area.

Southland District Council has secured government funding for a series of Matariki-related Pou sites throughout Southland, including Slope Point. This project will hopefully progress in 2023 and include toilets and shelter at the carpark.

DOC does not have plans for any significant site or trail development.

Project 12: Enhanced Walking Trails

Summary

There are numerous suggestions and opportunities for upgraded and new walking trails. These include Multi-Day walks and short walks.

Multi-Day Walks

There are two routes which get the most mention as having potential to become aspirational inland two day, overnight walks:

- The existing Catlins River Walk & Wisp Loop taking in Rocky Lookout. This experience is somewhat compromised by including sections of forestry road and traversing Rayonier forestry blocks that are sometimes closed for works. There is also no accommodation.
- Starting again with The Catlins River Track, then turning south into the Thisbee Valley to Calliope Saddle, McLennan Hut and southeast along the MacLennan River to School Road. This would need a significant track and hut/lodge upgrade and end or start-point shuttle connection. This approximate route was proposed in the DOC CMS partial review of cycle trails and shows as “supported” by DOC.

A feasibility study could be procured once more is known about feasibility for the Coastal Track.

Short Walks

Some short walks are covered under the Project for “Other Visitor Attractions” including the path at Slope Point and the Curio Bay Living Forest track extension (see Curio Bay Destination Plan).

Waipohatu Falls Track – These trails are managed by the local Lions Club under an agreement with DOC which expired in 2018. The longest (6.5km) of the short walks can be out-return or a loop. Currently the Forest Walk is wheelchair accessible and the Falls track is of fairly rugged tramping standard. Opportunities include trail upgrades, interpretation and better promotion. This is also a camping site which can take pressure off other sites.

Koropuku Falls Trail upgrade, (un-sanctioned and built privately by volunteers). There has been discussion of turning this into a more accessible track but DOC has concerns over visitor safety due to flash flooding risks. Whaka Kotahi have concerns about visitor parking where there is no room to build extra capacity and their stance is that a connecting track would need to be built from a carpark further north on the highway. There are already anecdotal reports of cars u-turning dangerously to access the site entrance.

Truby King Bridge walk, Tahakopa. Significant heritage structure linking into the wider Truby King story. A new sign has recently been installed with support from Danone.

Old Coach Track Walkway, Tahakopa Bay Walk (Possumers Track). This would create a more resilient loop and 2-3 hour experience that is easy to access and includes quintessential Catlins coast and forest scenery. It includes a significant Moa hunting and midden site that will need protecting and is within walking distance from Papatowai accommodation. The loop back through forest crosses wet areas and requires upgrade with boardwalk sections to be flown in (~\$1M).

Kākā Point to Willsher Bay (This would sit within the larger Nuggets/Kākā Point Destination Plan)

1. Along the coastal margin. The Kākā Point Community Group is beginning to pursue this project with CDC now.
2. Extending the reserve track behind the campground to continue over the hills to Willsher Bay. This is seen as low feasibility in the short term as it would require access across multiple owner SILNA trust land)

Owaka and Surrounds tracks

- More walking and biking trails for all ages linking Pounaweia, Jack’s Bay and Catlins Lake.
- A Hilltop view walk (Jacob’s Hill just north of Newhaven, requires an interested private landowner)

12. Actions/Recommendations

- a) Develop a simple trails strategy document which fleshes out the trail options, establishes criteria for prioritisation and draft costing. 2022-23
- b) Develop business cases for the top priority projects to seek a combination of DOC, charitable and other central government funding. 2023-24

Responsibilities & Resources

GS & CDI, with specialist consultant assistance. Support from DOC and CCI. Owaka Going Forward

2022/23 Update

Owaka Going Forward are investigating trail development options that include development of an RTO produced Catlins Cycle Map. They are seeking funding from Clutha District Council for a feasibility study on their chosen priority trail option.

The Tokanui Lions Club has now renewed its concession for the Waipohatu Trails and is considering an upgrade of the longer waterfall track. DPL put the Lions Club in touch with Southern Lands so they could get a cost-estimate on upgrading the trail, which can then be used for discussions with DOC and for funding applications.

As part of the Catlins Coast Trail feasibility study, some potential new routes to the North and east of Waipohatu, within the Catlins Forest Park, including old tram lines and a viaduct. This may enable a potential walk between Curio/Waikawa and Tokanui, creating a much-needed inclusion for Tokanui, when the main tourism flows take the Haldane route.

Once the outcome of the Coastal Trail study is known (2023) this will shape decision-making on prioritisation of other inland trail options. E.G. if a Coastal Trail is not viable over private land, this would emphasise the importance of the inland options on public land as the most viable alternatives for improved trail experiences.

Project 13: Rail Trail (dual use cycleway and walk)

Summary

There is growing interest in developing cycling and Mountain biking opportunities in The Catlins. DOC's partial review of the Otago Conservation Management Strategy (CMS) saw several submitted ideas on new trails including a coastal trail and an off-road cycling route from the Tautuku Forest Cabins to the Fleming River. Most of the proposals have been opposed by DOC in its initial CMS response as the plan change drafting proceeds. The draft is due in late 2021/early 2022 and this will be the key determinant of options on Public Conservation Land.

A proposal several years ago, to establish a cycle trail on the Balclutha-Owaka-Tahakopa rail alignment, failed partly due to poorly managed communications with landowners. Significant sections of the rail route are now well-used as stock races and in places there are major structures such as stockyards right across the route. It is understandable that landowners would be upset to hear of un-consulted expectations of access across their property and potential disruption to their farming operations.

Since the proposal was shelved a lot of information has become available on growth in demand, positive economic impacts and how the issues for landowners can be overcome. There are several landowners on other trails who were initially strongly opposed, who are now strong advocates. Routes can be diverted around stockyards and other obstacles; project funds can deliver new fencing to separate stock. New accommodation has been established near the route in Owaka, Beresford Heights, Papatowai and Tahakopa Valley. A section of the route near Matai Falls has already been restored for bike access but at 2km is too short to be a major drawcard for the cycle tourism market.

The Clutha Destination Strategy noted that government will want to see successful completion and promotion of the Clutha Gold Trail which received PGF funding, before significant new trail funding would be considered. The strategy suggested developing an overarching recreational trails strategy to help to identify the full range of trail suggestions and options; and set priorities based on criteria such as delivering unique visitor experience, economic impact, cost, feasibility and consenting issues.

13. Actions/Recommendations

- a) Develop a recreation trails (cycling, walking and horse-riding) trails framework to prioritise the various opportunities, inform investment decisions and scheduling of trail development. 2022-23
- b) On completion of the Clutha Gold Trail, conduct a high-level pre-feasibility review of The Catlins Rail Trail. 2023-24

Responsibilities & Resources

CDI and GS with external funding

Owaka Going Forward

2022/23 Update

The trail group under Owaka Going Forward (mentioned under the previous project) has included The Catlins Rail Trail as one of the trail options it wants to re-assess. This group includes local farmers who have had preliminary discussion with some of the landowners along the rail alignment.

CDC has provided the group some support to progress its trail investigation.

Project 14: Southern Scenic Route, Wayfinding and Interpretation

Summary

Developing tourism site interpretation panels and lobbying for wayfinding signage has been one of the key projects that CCI has driven forward over the last decade or so. Some of the projects are delivered by Catlins Promotions and South Catlins Promotions. Introducing more Māori place names and bi-lingual signage has also been proposed.

A comprehensive "Interpretation Plan for The Catlins" was written in 2007 and is detailed further in this report under Related Sector and Government Plans. The total estimated implementation budget was \$130,500 over 10 years to install 54 kiosks and panels plus some audio interpretation 2008-2017, plus \$11,710 in maintenance costs totaling \$142,210. The plan catalogued 76 sites and used criteria to rate them with 25 high priority. Several new signs have been installed since this plan was done. Current projects are the new layby just out of Balclutha, a Fishing Camp sign near Kākā Point, updating Florence Hill panels and panels at Slope Point. The design has not been consistent across all signs through The Catlins though.

The 45 South touring drive initiative (led by the RTOs of Otago and Southland Regions) is in the process of identifying sites for scenic stops and interpretation and a signage audit is planned for the Southern Scenic Route. There is already a Catlins Coastal Heritage Trail for the branch off the Southern Scenic Route through Waikawa and the Otara-Haldane Road rejoining the SSR at Fortrose. This uses the old official Heritage Trail branding. Most heritage trails around NZ are in a state of neglect, not well promoted and being superseded by a combination of physical and digital wayfinding.

These projects all need to be coordinated under one interpretation plan. Resource needs to be allocated to ensuring Iwi are fully involved from the outset and that pre-European heritage is adequately covered.

14. Actions/Recommendations

- a) Develop an updated Interpretation plan for The Catlins including an asset register of existing signs, age condition, need for information update.
- b) Conduct an audit of The Catlins section of Southern Scenic Route signage and interest points as part of their wider review of the whole route. This would include the Heritage Trail branch route through the southern Catlins.
- c) Engage with SDC, CDC and Whaka Kotahi on a planned evolution to Bi-lingual signs.

Responsibilities & Resources

CCI or a contractor with funding support assistance via GS, CD.

Support, Waka Kotahi, CDC, SDC

Implementation budget will require council and external funding applications.

2022/23 Update

Clutha Development contracted a provider to review visitor wayfinding and interpretation signage for the Clutha District, particularly The Catlins, and develop a plan for additions and improvements.

This has included site visits and assessments, a database with photos and a review of the previous 2007 plan. While this was not a comprehensive audit of the SSR, it did consider SSR issues and opportunities in the area covered.

CDI is considering the recommended actions from this review before re-engaging with CCI, councils, Waka Kotahi on projects to implement.

The Southern Way touring network (formerly 45 SOUTH) was launched earlier this year. A brand identity and website has been developed to promote this network which represents a partnership between the 8 RTOs of Otago and Southland.

Website link - [Experience Aotearoa](#) | [Travel Further](#) | [Discover](#) | [Southern Way](#)

Project 15: Sustainable visitor wildlife encounter programme (Commercial)

Summary

The idea of encountering wildlife such as Penguins, Sea Lions and Hector's Dolphins is one of the key attractions for The Catlins. However, it is becoming increasingly less likely that visitors will actually get to do so, especially at the higher-profile sites like Roaring Bay and Curio Bay. This has key implications including, negative impacts on wildlife and their habitat, under-delivering on visitor experience expectations and visitor safety risks around wildlife distance keeping. Resolving this is a key action in the Clutha Destination Strategy.

There are specific projects planned to improve the icon sites for casual visitors but one of the better options would be to develop a managed wildlife experience with expert guides. Existing small-group tour operators are also looking for local guides who can be contracted for a wildlife experience as part of a wider itinerary.

Catlins Eco Tours is one of the only existing operators with a DOC concession for this type of operation and this business was on the market at the time of writing this report. Earthlore has recently developed new tours including Bat Tours at night, a three day give back to nature experience and a 5 hour nature tour. It is difficult testing and developing these products with only a covid-impacted domestic market available. Whistling Frog Resort is offering photography tours that will include wildlife.

Supporting, promoting and growing this type of operation can be facilitated using various business support services that Great South and Clutha Development can access and by them working closely with DOC.

15. Actions/Recommendations

- a) Advocate for and support the development of existing and new tourism operations that provide sanctioned wildlife encounter experiences.

Responsibilities & Resources

CD, GS business support and promotion.

CCI promotion and contacts.

DOC facilitating appropriate concessions

2022/23 Update

Catlins Tours has refreshed its brand and marketing and is showing good uptake from a range of western international markets during the 2022/23 season.

Unfortunately, Catlins Sea Kayaking ceased operating during the pandemic so this has left a gap in any marine based experience.

The RTOs have ongoing programmes to support these and any new operators.

Earthlore is now offering give-back tours, bat observation and a new offering of Eco-Action.

Both of these companies have received promotional exposure through CDI media projects.

Project 16: Engaging visitors in Ecological restoration projects

Summary

Restoration programmes are one of the key mechanisms for visitors to genuinely contribute environmentally within a region; and for them to also have a more authentic experience. Voluntourism is one term for this activity. There were Voluntourism experiences developed several years ago in The Catlins but they were not actively promoted and did not gather momentum.

CCI is advocating for a true Predator Free effort in The Catlins which they believe will require a well-resourced and coordinated body to link up the existing predator control operators/groups which includes Doc, Awarua Rūnaka, South Otago Forest and Bird, Yellow-eyed Penguin Trust, Papatowai Forest Heritage Trust, Tautuku Peninsula crib owners, local Farmers and other relevant bodies.

There are several fantastic restoration projects throughout The Catlins. The challenge is coordinating logistics so that visitors can access a project during their trip. YEPT has ongoing programmes of planting and unlike many areas of NZ, can continue planting close to Christmas. Clearing weeds is one of the less popular projects so there needs to be some creativity to include this in a tourism experience. Trap monitoring requires some training and Health and Safety risk so is only likely to work for visitors staying for longer periods. Other programmes include Planting around Curio Bay coordinated by the SCHT, Lenz Reserve Projects, Forest & Bird Te Rere Reserve Penguin Habitat, Clean-up Days, Otago Catchment Community Projects which help to showcase positive activities by farmers; and Bat Monitoring could become a relatively unique option for The Catlins.

Recent Jobs For Nature funding has been secured for the Tautuku Restoration project which will boost activity over the next three years. Earthlore has received funding support to help establish a new visitor experience that includes restoration activity.

The notion of an Eco-Pass that would give visitors various benefits has been included in the last two Catlins tourism strategies. This is not recommended now as there are still mainly free attractions and administration of such passes across multiple operators often outweighs the revenue that would be generated. Also promoting a discount goes against the notion of attracting high value visitors who want to contribute and are prepared to pay a fair price.

16. Actions/Recommendations

- a) Actively highlight Earthlore and any other tourism operators providing this sort of experience.
- b) Establish a database of restoration programmes and schedule of events that visitors could join.
- c) Facilitate training for activity leaders to provide quality visitor experience.
- d) Design a streamlined web interface for visitors to book and participate.
- e) Target measurable increase in restoration outcomes from visitor contributions. (get more done because of the visitor resource)
- f) Take the Eco pass off the project/action list.

Responsibilities & Resources

CCI assist in populating the database, promoting opportunities

GS & CDI, promotion and visitor experience development support

2022/23 Update

CDI has been promoting restoration-related tours (among other features) in its domestic marketing campaign using video and social media during both the 2021/22 and 2022/23 summer.

Initial discussions regarding developing the suggested database have been held with CCI and Owaka Visitor Centre but it is yet to be properly implemented.

Project 17: Tourism business product (visitor experience), capability and capacity development

Summary

Great South and Clutha Development are both facilitating programmes to support tourism businesses in developing their capability and capacity. Assistance is needed with Sustainability Accreditation (including Carbon Zero), Business Planning and Marketing, Digital capability, Health and Safety, Visitor Experience Development, Tikanga Māori, Tourism Export Readiness including pricing and commission structures. These programmes are generally backed by government funding. Most of these programmes will be run outside The Catlins in bigger centres to provide sufficient participants but many programmes are now run online.

With respect to product and visitor experience development, examples of niche visitor experiences which would complement The Catlins, are outlined later in this document in the section, "Tourism Market and Experience Development Trends." (e.g. Dark Sky Tourism, Photography Tours).

17. Actions/Recommendations

- a) CCI work with GS and CDI to encourage businesses to engage in training and development opportunities.

Responsibilities & Resources

GS and CDI

2022/23 Update

A small selection of Catlins operators have so far participated in programmes run by Great South and Clutha Development which have included, Digital Capability and Agri Tourism.

GS has been running sustainability workshops elsewhere in Southland which can be refined and offered for Catlins businesses.

Project 18: DOC Summer Ranger Programme

Summary

Establishing additional DOC summer rangers would assist with ensuring visitors behave appropriately around wildlife and have a fulfilling learning experience at key sites of interest, especially Roaring Bay, Nugget Point and Curio Bay/Porpoise Bay. With continuing closed borders this would be best implemented for the 2022-23 summer season, roughly early December to End-April.

While the focus of this project is environmental impacts and site interpretation, it may be logical to align and possibly integrate this with the Freedom Camping Ranger/Ambassador programme.

18. Actions/Recommendations

- a) Develop a proposal for Summer Rangers.

Responsibilities & Resources

DOC, supported by CDC, SDC and Rūnaka.

This expense has a logical connection to the international visitor levy. i.e. if visitors know their levy is contributing to rangers they are likely to feel positive about it.

2022/23 Update

The Clutha Freedom Camping Officers have sought to coordinate more with DOC regarding visitor engagements around DOC sites.

The concept of more rangers has been discussed with DOC Murihiku operations managers, particularly the increasing workload for volunteers trying to manage visitors at Curio Bay. Local budgets don't currently allow this. This would likely need to be a nationwide programme for DOC to resource extra rangers, although there could be an approach to fund a local pilot programme alongside the visitor research programme to measure positive outcomes from extra ranger-visitor engagement.

Project 19: Catlins Care Code

Summary

The Catlins Care Code was well ahead of its time in NZ when established and helps to support the positioning as a genuine eco-tourism destination. There can be confusion created by inconsistencies in some of the signs and printed materials around the appropriate distances to keep away from various species. It is not only The Catlins where visitors need to understand sensitivities around sea lions and penguins for example. There is a risk of cluttered messaging nationally with the emergence of the Tiaki Promise which is proposed to become more prominent in i-SITES and Tourism New Zealand campaigns; as well as DOC's specific campaign on caring for the environment and wildlife. These are all positive initiatives but the question is how many different codes, brochures and digital messages visitors can be expected to keep in mind. Some recent research on visitor interactions with wildlife around Curio and Porpoise Bays may mean new guidelines are required in future.

19. Actions/Recommendations

- a) Continue producing The Catlins Care Code with ongoing refinement.
- b) Identify and lobby for improvements in any signs or old publications which are confusing on wildlife distancing.
- c) Work with DOC on producing video which shows visitors what appropriate wildlife distancing looks like in various circumstances.

Responsibilities & Resources

CCI with support from CD, GS, DOC

2022/23 Update

CCI continues to produce the Map and website with the care code and apply it to new sign opportunities such as the layby south of Balclutha. The brochure is being re-considered for 2023.

Project 20: Waste and Recycling

Summary

Following a successful initiative to remove rubbish bins at sites along the Milford Road in Fiordland, DOC did the same in The Catlins where it had been costing around \$15,000 per annum to pay contractors to manage waste. Efforts are made to educate visitors to take their rubbish out with them and find an official refuse receptacle. DOC considers the policy has been a success in terms of people removing their own rubbish from DOC sites.

However, the policy change has resulted in wider impacts including some community resentment and reports of people offloading rubbish at various Catlins businesses. This emphasises the need to ensure that creators of these costs are paying for them (i.e. visitors are funding the cost of their waste management). It supports the concept of building realistic waste management costs into camping fees and places a question mark on the merits of providing zero cost camping. This cannot all be blamed on visitors though. There are anecdotal reports of locals dumping fish-waste in the bins provided at Papatowai store creating an odour nuisance and over-filled bins. Community managed wheelie bins have been used with some success. These need to be emptied every 2-3 days in summer.

Within Clutha District, part of the role of the Freedom Camping Ranger is formally monitoring and reporting service issues including waste so this will be an improvement. Southland District camping ambassadors have been removing small amounts of rubbish when encountered, on the assumption that this reduces dumping in the same site.

The Catlins Care Code brochure lists Rubbish disposal points at Kākā Point, Owaka, Papatowai and Tokanui. Recycling is also available at Owaka and Tokanui. However, it doesn't give opening hours.

A key part of the problem is insufficient open hours of the public waste transfer stations where visitors want to do the right thing but are unable to plan around the open hours. There is a Transfer Station for waste and recycling 3km out of Papatowai near MacLennan but only open Saturdays for 2 hours so not useable by most visitors.

The apparently leading edge waste and recycling receptacles at Kākā Point were being commented on as a good solution but they were not in fact being serviced for recycling. New recycling options, especially for soft plastic, is a national dilemma. The Catlins portrayal as an eco-tourism destination is at imminent risk of backfire as visitors find out what is actually happening to waste and that our recycling is inferior to what many of them are used to at home.

Coin operated bins were trialled but they malfunctioned and the operator company disappeared. Taranaki District Council in the North Island is trialling Self compacting solar-powered bins in some remote sites such as Akitio Beach. While funding may be found for new waste bins and stations, the ongoing operating cost is a key concern for the councils. The distances that contractors have to cover to service The Catlins and take waste back out to landfill pushes the ongoing operating cost up.

In the context of some large grants that have been provided from government to councils to support and manage freedom camping, \$15,000 is not a big sum. In Southland District's case, the targeted rate for a business to have rubbish bin collection is \$173.32 per annum and same amount for recycling. This suggests that a few more rubbish and recycling site options throughout The Catlins should be affordable even if they had to be serviced more frequently than the standard resident ratepayer option.

20. Actions/Recommendations

- a) Continue educating visitors to take waste out from the more remote campsites.
- b) Increase the open hours of Waste Transfer stations and consider if one is needed at Waikawa.
- c) Seek TIF funding for increased waste servicing frequency across other waste receptacles.
- d) Investigate options for automated waste bins that are being trialed in other regions.
- e) Improve The Catlins web and map info on rubbish sites and open hours.
- f) Work with Google Maps to activate listings for all categories of public rubbish and recycling stations (currently only the transfer stations at MacLennan and Owaka are listed).

- g) Establish consistent Freedom Camping Ranger/Ambassador role in service reporting and whether they should be clearing small rubbish deposits.
- h) Proactively engage in nationwide initiatives to improve recycling options.

Responsibilities & Resources

CDC and SDC lead and deliver waste management

DOC, CCI, CD, GS support visitor education and information resources

2022/23 Update

Rob MacIntyre of DPL discussed this strategy with the Clutha District Council project coordinator for Waste Management. CDC has extended the hours of the MacLennan Transfer station. No major issues have been reported by Southland DC for The Catlins.

Improved recycling options still need to be tackled at a wider regional or national level.

Project 21: Spatial and Development Planning Owaka and Surrounds

Summary

Owaka is the main residential and commercial centre for The Catlins. Understanding where further residential and commercial development is best enabled was explored during the Our Place Catlins community planning. There was a strong preference to limit further development of the coast, especially untouched parts and to concentrate investment in residential development and the necessary supporting infrastructure in Owaka. There was also little appetite for increased development around Papatowai and Tahakopa. Global Warming and sea-level rise is also resulting in councils limiting coastal margin development or require relocatable buildings. Insurance companies are signaling increasing risk for coastal and flood-risk property owners.



Kākā Point is addressed under a separate proposal for an Integrated Plan for Nugget Point Tokatā / Kākā Point. Following replacement of the RMA, the District Plan reviews for both Clutha and Southland Districts will be the key planning mechanism to address this including, zoning, subdivision sizes, and building footprint and heights. However, there may need to be a more detailed creative piece of work on Town revitalisation, where commercial accommodation and hospitality is most appropriately located, streetscape improvements, recreation spaces and pathways to encourage more active transport.

In the Southern Catlins this depth of community town planning is yet to be carried out although there are budget allocations for some reserve and facility improvements in the current LTP. Timeframes are also likely to revolve around the RMA replacement. Tokanui has seen the skate park developed by South Catlins Promotions. Fortrose and Waikawa will also likely see demand for more development.

21. Actions/Recommendations

- a) Engage with CDC on a focused town planning project for Owaka.
- b) Facilitate comprehensive community and tourism sector input about tourism in Southland District Council's future community planning exercises.
- c) Facilitate focused tourism sector input to SDC and CDC District Plan renewal.

Responsibilities & Resources

CDC, SDC

2022/23 Update

CDI is discussing this with CDC in the context of when the Our Place Catlins Community Plan is updated and the next LTP which will be developed during the 2023/24 financial year. Specific trail projects for Owaka are covered under separate project headings in this document.

SDC has been working with Boffa Miskell during 2022/23 on settlement concept plans for Waikawa, Wyndham and Fortrose and is about to contract a Masterplan for Curio Bay-Waikawa area.

District Plan reviews have been postponed around the RMA replacement legislation process.

Project 22: Mobile Coverage and UFB

Coverage has been improved, particularly in the South Catlins but there is still a large gap from Chaslands through Papatowai. UFB is now available in Owaka.

Despite the merits of saying The Catlins is Off-Grid and therefore a great place to relax and disconnect, mobile broadband will help in delivering visitor information, navigation, on-site interpretation without the need for expensive signs and structures. It will also support visitor safety and SAR operations.

22. Actions/Recommendations

- a) Continue to lobby for national and regional development programmes to improve mobile coverage through the main tourism sites in The Catlins

Responsibilities & Resources

CCI, CD, GS, SDC, CDC

2022/23 Update

CCI have indicated that they will lead this project in 2023. CCI also reported an additional cell tower is due to be installed in the next few months at Chaslands.

Project 23 : Roothing, Public Transport, Active Transport and EV Charging

Several sections of road have been improved since 2016 including The Nuggets Road, Karoro Creek Road, Hina Hina Road and Bridge, Jacks Point (hill sections) and the Heritage Trail Route, Fortrose, Otara, Haldane, Curio Bay (with the exception of a small section across the Haldane estuary). The branch roads to Waipapa Point and Slope Point, are also sealed. Most of the routes connecting the State Highway to Purakaunui Falls and Maclean Falls have also been sealed.

The main road that the community continues to lobby for sealing is Owaka Valley and this does get used by some visitors coming from Fiordland. However, at this stage, within CDC's budgets, sealing is not considered feasible and affordable. Purakaunui Bay and Tawanui Campground would also be beneficial from a tourism experience perspective. However, as with all the more remote coastal sites there is a balance needed between improving safety and experience; and opening up too much, resulting in over-crowding or too much pressure on facilities.

EV charging is available in several sites. More will be required as EV's become more ubiquitous and rental companies increase their EV inventories. The technology is moving quickly so care will be needed to ensure longevity of the infrastructure that is installed.

Public Transport was limited to the Bottom Bus pre-Covid and will be limited even more now. It is not a district council responsibility and is unlikely to be viable until significant demand growth occurs. However, with a goal of Low-Emissions Tourism, longer term sustainable energy public transport should be on the agenda. This is equally important for residents and making The Catlins an attractive place to live and set up businesses as it is for the tourism market.

Cycle Touring through The Catlins already occurs but apart from relatively low traffic volumes, the state highway and the few optional side-road by-passes are not particularly safe for cyclists. Therefore, any opportunity to improve this by shoulder widening or creating off-road alternatives should be pursued. Compared with other parts of New Zealand, traffic volumes are low so despite constrained road space, Cycle Tourists can still have an enjoyable experience that is worth promoting.

23. Actions/Recommendations

- a) Revisit tourism roading priorities and build business cases
- b) Continue to lobby for central government funding for strategic tourism roading improvements and EV stations.

Responsibilities & Resources

CDC, SDC with support from CD, GS and CCI

2022/23 Update

Since the HinaHina bridge renewal, no other significant roading upgrades have occurred.

Project 24: Events

CCI became involved in several events with a previous coordinator having specific skills in that area. There were some good successes including running events but they became a significant burden for committee members, didn't return significant money and participation waned. CCI does not intend to run events but supports them through promotion and facilitation within the community.

Great South and Clutha Development have event support strategies, the funding for which is temporarily boosted by the Covid response Regional Events Fund. This saw Great South provide funding support for the recent successful Coastal Ultra running event in April. CCI's role includes proposing event concepts for others to run, facilitating local contacts for event organisers and promoting events through The Catlins website.

Currently events are difficult to plan and several throughout NZ have had to be cancelled or postponed due to pandemic travel uncertainty and gathering size restrictions. With limited accommodation available it only makes sense to develop new events outside the peak season otherwise they are likely to displace leisure visitors who would already be coming. Notwithstanding the value events create by profiling the region in external media, a very modest increase in visitation over a year is worth far more than several significant events that only impact one to two days of the calendar each.

24. Actions/Recommendations

- a) Develop event concept opportunities that can be promoted through GS and CD's events strategy programmes. Priority for support would include events:
 - outside peak summer season
 - likely to attract overnight stay participants
 - likely to attract positive visual media exposure for The Catlins
 - build profile for The Catlins destination attributes (connection to outdoors, heritage, rainforest, stunning coast, environmental protection etc)

Responsibilities & Resources

CCI some facilitation

CD, GS facilitate MBIE Event funding in the near-term; and promotion

2022/23 Update

Local events like the Niagara Blues are re-starting.

The most significant new event in recent years was The Coastal Ultra which was supported by Great South and used Curio Bay as a base. Unfortunately, the Christchurch based event management company upset some of the landowners by poor communication of their staff movements and not cleaning up post-event as promised. That company has also since gone into receivership due to another unrelated event failing.

These types of events still have potential but could perhaps be managed more directly by local groups with some outside assistance where needed.

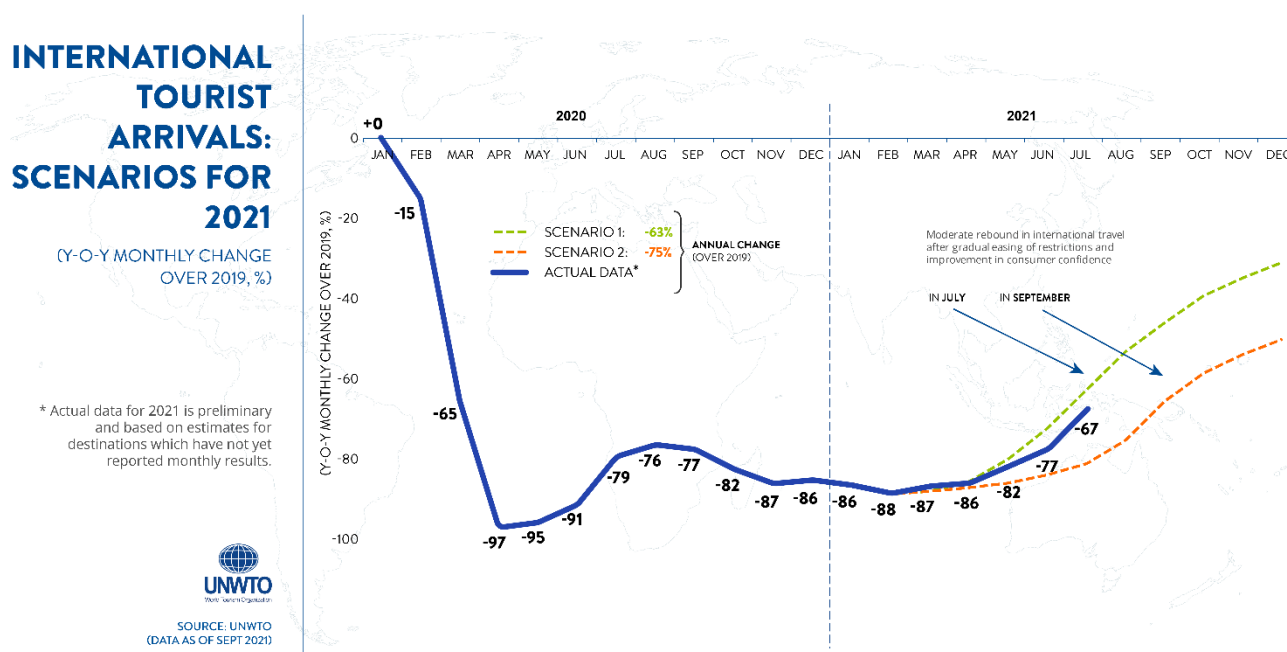
Tourism Sector Trends and Recovery Timeframes

In the two years prior to Covid, The Catlins area was seeing growth including Tumu Toka Curioscape surpassing its five-year visitor targets inside the first year to late 2019. Clutha District was seeing a flattening of visitor spend and loss of national market share of visitor spend but it is not possible to isolate The Catlins share of that.

Tourism for the whole of New Zealand saw spectacular growth from 2014. By 2018 there were signs that growth was slowing and NZ TIA was predicting growth to flatline sometime during 2020. Surveys of New Zealander's sentiment towards tourism was deteriorating prior to 2020.

The Covid pandemic hit NZ with borders closing in March 2020 so that brought inbound tourism to a standstill. There were however some internationals in NZ at that time, who decided to stay on and continue to travel within NZ during 2020.

The following UN World Tourism Organisation chart shows the impact of Covid since January 2020 along with scenarios for regrowth which are now out of date.



A September 2021 UNWTO survey of their Panel of Tourism Experts indicated that the majority still believed tourism would not reach 2019 levels until 2023 or later with 45% in fact suggesting 2024 or later. For the Asia/Pacific Region in which NZ sits, the timeframe is longer with 34% of the experts believing 2019 tourism levels will be reached in 2023 and 58% saying 2024 or later.

As of January 2022, tourism is picking up in Western Europe and North America despite a further surge of Covid and the Omicron variant.

Booking.com, Expedia and Airbnb, the three largest Online Travel Agents, have released earnings reports that outpace their both earlier guidance and external analyst expectations. Much of this is north American market domestic travel but they have also benefited from growth in the UK and Europe. Airbnb's 3rd quarter of 2021 is already 36% higher than the same quarter in pre-pandemic 2019.

The Tourism Export Council NZ also believes 2024 is when NZ will reach 2019 tourism levels again.

Within NZ during 2020 and early 2021, the impacts of Covid saw strong domestic tourism once we came out of the first lockdown. Those regions within a short trip from major metropolitan centres received the most visitors and spend. Examples were Wairarapa, Northland and Hanmer Springs. Those regions which

traditionally see a majority of international visitors and further from NZ population centres were hit the hardest including Westland District, Queenstown and Fiordland.

Within this context The Catlins saw good levels of visitors through latter 2020 and the first quarter of 2021 as many Kiwi's had it on their to-do list and took the opportunity. The Museum in Owaka saw good growth in visitors over that period.

Domestic digital marketing campaigns by Great South and Destination Clutha also boosted the profile of the area. The Papatowai campground exceeded DOC's revenue target. Stewart Island saw a similar pattern in strong domestic tourism demand over this period but at a higher level than The Catlins.

However, after a strong April, going into late Autumn and Winter 2021 the pent-up domestic demand was not as evident and apart from school holidays, a lot of people appear to have held off on travel plans. Reasons could include, more people skiing, uncertainty about the risk of more lockdowns and holding off for Pacific, Australia or further afield travel.

Unfortunately, two activity operators, Catlins Sea Kayaks and Papatowai Kayak Hire have both closed during 2021 and Tumu Toka Curioscape has struggled to operate sustainably through 2021. The Auckland lockdown in Spring 2021 slowed momentum again. After reasonable travel levels through the summer school holiday period the traffic light setting has put most people off travel until Omicron outbreak gets through its peak, possibly late autumn 2022.

Tourism New Zealand research by Kantar for October 2021 showed that 69% of New Zealanders are planning to take a holiday in the next 12 months. There was a significant increase in Empty Nesters planning to spend their holiday budgets domestically. Tourism from there will depend on how many Kiwis venture offshore instead. Auckland is still a significant market due simply to its share of the NZ population.

The NZ hospitality sector has been hit not only by lockdowns constraining customer revenue but also by other sectors increasing pay rates meaning staff and managers are leaving hospitality for better pay. This is likely to increase costs for hospitality operators and therefore customers. If immigration remains constrained, as business picks up there will continue to be difficulty finding qualified staff. In terms of long-term sustainability of the tourism sector, increasing pay rates will be positive as historically poor pay rates have created a bad perception of the industry as a long term career prospect and the community also increasingly views the sector as low-value.

Government has recently released a rough timeline for borders gradually opening starting with returning Kiwis, then Australians and then UK and North America. A 10-day home isolation period will however not be conducive to leisure tourism. A best case scenario might see Australians coming in for the 2022 ski season and other international markets starting to build again for summer 2022/23.

Tourism Market and Experience Development Trends

Carbon Zero and other Sustainable Travel Options

The investment in and uptake of EVs has accelerated in the last couple of years with shifts in government policy and COP26 elevating the emphasis on reducing emissions. Visitors will increasingly expect the option of low or zero emissions vehicles for hire and seeing them being used by local tourism operators. Although the biggest issue for NZ inbound tourism is the unavoidable carbon use in longhaul flights, local operators will need to demonstrate genuine sustainability practices with respect to emissions, waste minimization and other environmental impacts. Buying local supplies and employing locals is a key part of this. Establishing a current carbon emissions benchmark for each business to improve from is a first step.

Work from Anywhere

Airbnb has noted that while it has benefited from the travel rebound, it has also benefitted from the technological trends that have emerged as a result of the pandemic. "Technologies like Zoom make it possible to work from home. Airbnb makes it possible to work from any home." They have recently added the ability to search for properties with verified internet speed and up to a year in advance. This is to help customers find longer term stays, with 28 day stays being the fastest growing category of stay length.

This creates opportunities for properties in The Catlins that have good internet to promote the off-season as a place to take a work-from home break away from home.

Experiential Travel to Transformative Travel

Following a period of increasing experiential travel where people value travel experiences over ticking boxes of sightseeing icons and resorts, there is a shift to "transformative travel". This is where the travel experience is so moving, it changes the traveller (self-evolution) and opens them to new ways of seeing their lives and understanding the world.

Adventure Tourism Changes

More people are prepared to stay away from traditional resorts. People are looking for more ways to disconnect and be offline. Older people are healthier and fitter and looking for more adventurous activities. Two other big trends in adventure travel are **women traveling solo** and **multi-generational family adventure** trips. Within the backpacker market, more young Asian visitors have the confidence to travel independently.

Wellness Tourism

Wellness tourism is expected to continue recent growth. Health Spa Resorts are central to this sector but inclusion of Wellness elements across all accommodation types is increasing, as is the integration with adventure activities and culinary tourism. For example, many surf holidays include yoga sessions and small accommodation operators organise external providers to offer massage and other treatments.

Bleisure Tourism

This is where business and conference visitors add on a leisure component to their trip whether it is doing an activity mid itinerary or adding on a few days with or without their partner. The Dunedin, Queenstown and Invercargill conference and business traveller markets offer a good opportunity for The Catlins.

Dark Sky Tourism

There is increasing appreciation of DarkSky areas (with minimal light pollution). This provides an opportunity to tell a different southern hemisphere story while the low level of development in The Catlins is an advantage. In addition to major facilities such as the development at Tekapo, other regions are developing content and working with specialist guides and tour companies. A good example which is Good Heavens Dark Sky Experiences on Great Barrier Island. <https://goodheavens.co.nz>

Photography Tours

Several companies specialise in photography courses and group tours while many enthusiasts will follow their own itinerary if they are helped with information on good sites. The Catlins' wildlife, coastal wilderness, forest, waterfalls and rural scenes are perfect for this market. These visitors are more likely to stay longer and respect the destination and care codes than mainstream Instagrammers.

Cycle Tourism Growth, spurred on by E-Bikes

Since 2016, the vast investment in new cycle trails has challenged the concept of what is possible in terms of sustainable trail construction through challenging terrain and the market is transforming through the uptake of E-bikes. These enable less fit people to cope easily with longer distances, steeper inclines and headwinds. There is an increasingly older cycle trails market with more leisure time, willingness to travel outside peak season and higher spending power. This widens the options for a potential off-road cycle trail in The Catlins. Road cycle-touring remains a valid segment but will be constrained by the cost of making The Catlins roads safe for cyclists.

Inclusivity

this is a focus on experience development and marketing to minimise groups feeling left out or alienated, whether it be gender, religion, ethnic groups and catering for accessible tourism (mobility). Destination Queenstown has taken a proactive approach to this recently.

Virtual Tours Growth through Covid

More tour operators are selling virtual tours including live discussion and walks around a tourism site with paying viewers live around the globe. <https://www.onlineexperiences.co.nz/about-us>

Target Market Segments and Destination Perceptions

Destination Clutha's domestic marketing campaign determined the following target segmentation using Nielsen's Consumer Media Insight (CMI) data in the 'Explore Nature' category. This was promoting all of Clutha but The Catlins was a key feature. The primary bespoke audience identified for this campaign, were called 'Outdoor Explorers'. They were:

- Living in NZ
- Men and women aged 18+
- Young adult couples
- Families with young children
- Retirees
- People who travelled off the beaten track and participated in outdoor activities – cycling, walking, tramping.

There were 341,000 New Zealanders in this audience set, which represented 10% of the population.

For ease of access, with a limited budget, Outdoor Explorers were targeted in the following regions:

- Clutha and neighbouring regions
- Canterbury
- Wellington and Auckland – who could easily access flights to the region.

Great South, Angus & Associates Southland Market Research

Great South had Angus & Associates conduct consumer and trade research on the Australian and Domestic markets on the Southland Region and its sub-regions.

SOUTHLAND'S UNIQUE POINTS OF DIFFERENCE AS A DESTINATION








The most critical future opportunities for the region from a consumer and trade perspective include:

1. Improving access/perceptions of access (direct into Invercargill, via Dunedin and via Queenstown)
2. Addressing limitations/pain points around core tourism products and services (accommodation, quality/variety, wet weather and commissionable product, food and beverage options)

The best known parts of Southland were Stewart Island – Rakiura, Fiordland and The Catlins.

The target visitor segments are shown below. For The Catlins, Empty Nesters, Solo Travellers and Special Interest Travellers would have the strongest match. However, Busy Professionals can also be a key market, potentially travelling as couples or as part of a family.

 <p>BUSY PROFESSIONALS</p> <p>Busy, structured, time-poor (corporate or self-employed)</p> <p>Struggle to find work/life balance (difficult to find time to unwind between work and other commitments)</p>	 <p>EMPTY NESTERS/ RETIREES</p> <p>Older with children no longer living at home, no longer working, frequent travellers</p>	 <p>SOLO TRAVELLERS</p> <p>May have gone through recent traumatic life event (e.g. break-up or midlife crisis)</p> <p>Drive markets particularly important</p>	 <p>PASTURE-TO-PLATE FOODIES</p> <p>Interested in how the food they eat is grown/produced</p> <p>Auckland market particularly important</p>	 <p>SPECIAL INTEREST TRAVELLERS</p> <p>Fishing, hunting, diving, surfing, 4WD, motorsports enthusiasts</p>
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The following graphic shows the top-of-mind associations for The Catlins.



THE CATLINS

- Extraordinary
- Rugged
- Coastline
- Beaches
- Photography rich
- Lighthouse
- Bad weather
- Green landscapes
- Drive through
- Petrified forest
- Nice bush country
- Unspoilt
- Off-the-beaten-track
- Nothing to do
- Gravel roads
- Adventure

And the types of visitor that Angus & Associates suggested were most suited to Southland.

MOST SUITED TO SOUTHLAND

- People looking for a slower pace, peaceful/quiet/relaxing break (less tourists)
- Outdoorsy people – hiking, hunting, fishing, surfing
- People interested in nature and wildlife (seals, penguins)
- Self-sufficient/independent travellers
- People who like exploring
- People with family connections in the region
- Road trippers/Campervan travellers (beautiful scenery)
- Bucket-listers (tick the bottom of the country off the list)
- Country music enthusiasts – annual Gold Guitars awards
- Motorbike/car enthusiasts
- Seafood lovers (oysters, paua etc)
- Active/Outdoorsy Families
- People looking for something different (like digger driving in Invercargill)
- Fiordland – high end international tourists bussing in/out from Queenstown, generally trying to see the NZ icons in limited time

Southern Scenic Route Target Audiences

Some recent work by the SSR RTO group to improve marketing of the touring route has identified the following Target Audiences:

- Primary (Domestic):
 - o Empty Nesters
 - Male & Female 55-64yrs, children have left home
 - HHI over \$100k +
 - o Families, with school aged children
 - Females 25-54yrs
 - HHI over \$100k +
 - o History of travelling domestically every year
 - o History indicates as travel internationally every year
- Secondary:
 - o Those travellers that end up on the route by mistake
 - o International
 - Australian visitors – Dunedin, Invercargill and Queenstown

- European
- South American
- o Car rental companies
- o Backpackers exploring
- o SINK/DINK
 - Male & Female 25-49yrs, no children
 - HHI over \$100k +
- o New Migrants
 - Indian, Asian
- o Soft Adrenaline seekers

Segments that we don't want to grow significantly: (Not from Angus & Associates)

Tourists in a hurry, trying to do The Catlins in a day, exploiting free attractions and leaving negligible spend.

Lots of large buses passing through in a day, we don't have sufficient site parking or accommodation to cater, it will result in sudden visitor crowding effects at natural attractions, incompatible with minimizing wildlife disturbance. They do generate income for a few shops and eateries though.

Lots of low-budget freedom campers in non-self-contained vehicles who are not prepared to pay an \$8 camping fee for a basic campground with toilets.

Visitors who do not respect the environment or community, who litter, camp illegally and disturb wildlife.

Unsafe drivers.

An arena-type commercial wildlife experience. The Catlins is better to remain differentiated from the likes of Oamaru.

Related Sector and Government Plans

The following table provides a summary of some of the most relevant local government, central government and tourism sector plans and strategies which have an impact on implementing The Catlins Te Akau Tai Toka Community Tourism Strategy. In some cases, it will be important to provide specific input on tourism issues and opportunities as these plans and strategies are updated.

Plan	Overview
Clutha Destination Strategy 2020	<p>This strategy was developed during 2019 and coincided with the extensive community consultation carried out for Clutha District Council's Our Place Catlins Community Plan. It was therefore strongly informed by the CCTS and seeks to maintain momentum on implementing the CCTS. As with the CCTS, The Clutha Destination Strategy uses the term "Respect" in the Vision statement as a mutual sentiment sought between visitors and the community. <i>"Managed growth of a respectful visitor sector has helped Clutha District become a better place to visit, live, work, do business, invest and study. Our visitors are respectful of our destinations, communities, flora and fauna. Our residents are respectful and welcoming of visitors."</i> Pre-Covid, various growth scenarios were tested with stakeholders; with "moderate" growth of 4% per annum targeted. This should become valid again when borders open.</p> <p>A key aim of Clutha Destination Strategy is to shift visitor perceptions of Clutha & The Catlins from a 1-day pass-through destination of free attractions, to a 2-3 day+ stay. This can be achieved by improving the visitor experiences and better communicating the breath of attractions and time needed to enjoy them. The key destinations within Clutha District are:</p> <ul style="list-style-type: none"> • The Catlins • Lawrence/Gabriel's Gully and the Clutha Gold Trail. <p>The Strategy suggests that within The Catlins there are 3-4 Level 1 Icons that are already and will continue to be the main visitor magnets</p> <ul style="list-style-type: none"> • Nugget Point/Roaring Bay • Cathedral Caves • Curio Bay (Southland District) <p>Purakaunui Falls is the possible fourth icon providing back-up when Cathedral Caves is closed. Florence Hill lookout is an iconic image experienced easily without venturing off the highway.</p> <p>These level 1 icons need to be proactively planned and managed, starting with gaining a better understanding of current visitation and future sustainable carrying capacities. It will not be affordable to make large scale investments across all of the attractions that Clutha District offers in the near term. Concentrating investment and managing growth at these top-tier sites will help to contain impacts elsewhere.</p> <p>Several secondary and tertiary attractions and experiences can create longer itineraries, disperse visitors and encourage more overnight stays.</p> <p>Level 2: These include examples like Owaka (Museum and Visitor Centre), Surat Bay, Jacks Blowhole, Matai Falls, Papatowai (Lost Gypsy and walks), Tautuku Beach, Lake Wilkie, Maclean Falls</p> <p>Level 3: e.g. Catlins River/Whisp Trail, Tautuku Estuary Boardwalk, other waterfalls and walks.</p>

Plan	Overview
	<p>Southland District Level 2 and 3 destinations such as Slope Point, Waipapa Point and Fortrose would be added.</p> <p>The Strategic action plan proposes establishing comprehensive planning and investment frameworks for the various destinations prioritising Level 1 Icons receiving the most visitor pressure. This is needed to manage environmental and wildlife impacts, community impacts, visitor safety and enjoyment. These plans also need to consider opportunities for income to be generated to help cover the costs.</p> <p>The Clutha Destination Strategy also included significant detail on Freedom Camping. It suggested that alongside increased investment in Freedom Camping education through rangers, that more effort was made to promote and better utilise existing affordable camping facilities and holiday parks before major ratepayer investment was made to subsidise freedom camping. The Government TIF funding enabled the relatively low-cost trial in Owaka which, despite some initial local business resistance, has been seen as largely successful.</p> <p>The strategy also includes initiatives for tourism operator capability development, destination marketing, sustainable wildlife viewing experiences, visitor engagement in restoration projects. It recommends more formalised engagement between Clutha Development local promotions groups, especially CCI.</p> <p>This is the strategy that is primarily shaping Clutha Development's work around tourism for The Catlins and aligns closely with the CCTS. This was a key reason why MBIE provided significant funding support for implementation. Clutha District Council has also adopted this strategy.</p>
Southland Murihiku Destination Strategy 2019 – 2029 (and 12-month review)	<p>This strategy refers to the CCTS and states that Community feedback indicates a stronger desire for more controlled tourism through infrastructure and management and greater care to ensure the ratio of tourists to locals is not too high to retain the feeling of isolation that The Catlins offer. Whether tourism infrastructure is concentrated on the coast or directed inland to minimise impacts on the coastal environment has been debated but no decision made.</p> <p>Overall, The Catlins community want to retain control over the direction of how the visitor economy is developed. The desire for a community-driven outcome, therefore, is seen as far stronger than most other parts of Southland. The challenge for The Catlins is that to deliver a higher yielding visitor market, necessitates offering amenities and facilities of a standard which can attract greater visitor spend. The more free experiences on offer, the harder it is likely to be to achieve the community's aspirations.</p> <p>The Southland Murihiku DMP also notes the following issues for The Catlins:</p> <p>A lack of export-ready commissionable tourism experiences that will encourage travel trade to include the region in the itineraries and marketing materials.</p> <p>A shortage of five star Luxury lodges</p> <p>The 12 Month Review of this DMP notes the impact of Covid, reliance on domestic tourism in the near-term and a focus on the following projects which are relevant to The Catlins:</p> <p>Food Tourism, Agritourism including farmstay accreditation, Inter-regional touring routes, low emission tourism (Catlins Experience Cluster, walking, cycling and Dark Sky tourism)</p>

Plan	Overview
	<p>Perhaps because The Catlins already had a solid tourism strategy, this Murihiku DMP does not have a lot of detail on The Catlins. Issues in Fiordland, Rakiura and Invercargill/Bluff were centre-stage when the plan was developed. However, the overall vision, objectives and many of the proposed actions will support continued progress on the CCTS. Examples include the events strategy, tourism business capability and capacity development, project feasibility funding, tourism insights, destination marketing and sustainability initiatives.</p>
45 South	<p>45 South is a placeholder name for a joint initiative across the 8 RTOs in the Otago and Southland Regions. The original concept was to emulate Switzerland's Grand Tour initiative which promotes a driving route around Switzerland taking in highlights with a variety of itineraries for different audiences. It further evolved into a Great Train Tour option. https://www.myswitzerland.com/en-nz/experiences/experience-tour/grand-tour-of-switzerland/</p> <p>Some initial work has been done on a range of driving routes with key scenic viewing points and photo opportunities. The Southern Scenic Route is already well established and would continue to form part of the new wider trail network including the Central Otago Touring Route opened in 2020. 45 South's strategy, governance and executive model is still being developed with a more recent focus on demonstrating cooperation across the 8 RTOs and identifying other projects and programmes where it is logical to work as a macro-region. 45 South had a \$400k budget available as of early November 2021, including contributions from Clutha Development and Great South that were funded by the MBIE tourism reset funding allocation to RTOs.</p> <p>The main touring route (SSR) already traverses The Catlins and is planned to be enhanced including wayfinding and interpretation signage, and promotion. The larger 45 South joint initiative has potential to increase the resources going into marketing the touring opportunities in Otago/Southland including through The Catlins. The Catlins Heritage Trail route can also be promoted within this initiative.</p>
An Interpretation Plan for The Catlins New Zealand (2007 to 2017). Gemma Graeve, Fergus Sutherland, Mary Sutherland and Kim Dodds	<p>This is a very comprehensive plan for consistent interpretation signage through The Catlins. The total estimated implementation budget was \$130,500 over 10 years to install 54 kiosks and panels plus some audio interpretation 2008-2017, plus \$11,710 in maintenance costs totaling \$142,210. The plan catalogued 76 sites and used criteria to rate them with 25 high priority. At the time there were 15 sites with interpretation or planning underway for panels.</p> <p>Several new signs have been installed since this plan was done. Current projects are the new layby just out of Balclutha, a Fishing Camp sign near Kākā Point, updating Florence Hill panels and panels at Slope Point.</p> <p>The design has not been consistent across all signs through The Catlins though. The 45 South touring drive initiative is in the process of identifying sites for scenic stops and interpretation and a signage audit is planned for the Southern Scenic Route. These projects all need to be coordinated under one interpretation plan with more partnership with Iwi to ensure that pre-European heritage is adequately covered.</p>
Our Place, Catlins Community Plan. (Clutha District Council)	<p>Clutha District Council has developed a series of Our Place Community Plans on a rolling basis, to identify what the local community sees as priorities to make their part of Clutha a great place to live, work and play. Although many of the projects will be driven by council, many will be community-led or may be led by another agency with council playing a support role. The aim is to align and integrate council's activities with the other players. This was developed through 2019 with a series of local workshops and surveys. Specific questions about tourism were included. Clutha Development also</p>

Plan	Overview
	<p>did some visitor surveying at key sites. This occurred as the Clutha Destination Strategy was being developed and was used as an input to shape that plan.</p> <p>Key issues were:</p> <p>Protecting natural resources, wildlife and the environment</p> <p>better managing freedom camping (without the ratepayer having to fund it) including more encouragement of use of existing campgrounds, More and better public toilets in key locations</p> <p>Developing walking and cycling trails (several individual submitters mentioned the Coastal Walking Trail)</p> <p>Community facilities including playgrounds</p> <p>traffic management, road sealing, bridge upgrades. Roading includes investigating a park and ride option for the Nuggets from Willsher Bay</p> <p>Improving waste and recycling opportunities</p> <p>Mobile coverage and broadband</p> <p>Climate change, coastal erosion, low-lying areas and roads.</p> <p>All of these issues and proposed projects are consistent with the CCTS.</p> <p>Specific projects that Clutha District Council has funded are listed with the LTP.</p> <p>This is the primary piece of comprehensive community engagement on tourism in the last few years. The issues and proposed projects align closely with the existing Catlins Tourism Strategy and reinforce that the community is supportive of tourism provided it is well managed. Freedom camping was testing their patience but management of it has improved.</p>
Catlins Reserve Management Plan (Clutha District Council)	<p>GOAL The vision for Council's reserves, playgrounds and open spaces in The Catlins is: "To provide a variety of passive and active recreational spaces that enable the local community and visitors to experience and enjoy the unique natural environment of The Catlins."</p> <p>OBJECTIVES The objectives sought from the plan are as follows:</p> <ol style="list-style-type: none"> 1. The unique character of The Catlins environment is reflected in the development, design, maintenance, and management of reserves 2. Provide a selection of reserves to meet a range of visitor and community needs for passive and active recreation 3. Retain a high level of unrestricted access to reserves and encourage improved cycling and walking opportunities 4. Identify opportunities to enhance the facilities in the reserves for the enjoyment of the wider community and for those who visit The Catlins. <p>Various Playground and recreation reserves in Kākā Point, Willsher Bay, Owaka, Pounawea and Papatowai will definitely be impacted by tourism in future and have potential to be developed to better cater to and manage tourism at the same time as improving lifestyle opportunities for locals. Many opportunities will depend on integrating with neighbouring DOC</p>

Plan	Overview
	<p>and private land. Council also has an opportunity to influence quality and commercial viability of the campgrounds in Kākā Point and Pounawea.</p> <p>Several of the reserves are highly relevant for improving the visitor experience. More could have been done in this plan to identify tourism opportunities but it does provide a good framework under which new tourism related projects can be proposed and driven forward by the community. Willsher Bay Reserve</p>
Southland and Clutha District Plans	<p>The updating of these plans has been postponed to align with the RMA replacement timeframe. They will both involve comprehensive community consultation. As this occurs it will be important to consider and submit on the following for The Catlins:</p> <p>In addition to protecting the environment, biodiversity and other community values, how can improved tourism opportunities be better enabled? what is the strategy for hosted accommodation / Air BnB, in the towns, as well as lifestyle blocks and farms? Is the district plan making it impractical to develop cafes, dining, hospitality businesses? Are there any changes needed in relation to reserves, parking, walking access. Are changes needed to enable improved signage for wayfinding and visitor education?</p>
Southland District Long Term Plan 2021-2031	<p>This is the main document setting activity budgets over a 10 year period. Tourism does not tend to get much specific mention in council LTPs. SDC's main tourism investment relevant to The Catlins is in Great South and then some small allocations to Catlins Coast inc. In the appendices under forecasting assumptions there is a mention that tourism growth may necessitate accelerated investment in infrastructure. The LTP does cover waste management, open spaces, reserve management (including trails). A key issue in this plan is the limited funding available for roading which represents 70% of the council's infrastructure spend as it has the largest roading network of any council in NZ. Whaka Kotahi did not approve the amount sought by SDC so despite an increased allocation by council itself, this is largely for maintaining the existing standard of the network and starting on a large long-term bridge renewal project. This will constrain road improvements in The Catlins.</p> <p>Fortrose: Investigation Project (\$20,000 2021-22), Toilet Renewal (\$211,356 in 2022-24), Coastal Protection (\$91,355 2024-25)</p> <p>Tokanui: Toilets water source (\$40,000 2021-22). Renewal (\$216,851 2024-25) Rata Park Playground - Equipment Renewal (\$48,348 2023-24, and \$54,814 2028-29)</p> <p>Waikawa: Toilet refurbishment (\$100,000 2021-22)</p> <p>Curio Bay - Reserve Management Plan (\$50,000 2021-22)</p> <p>If The Catlins community wants more funding for tourism initiatives it needs to start preparing its input for the next LTP 2024.</p>
Southland District Natural Features and Landscapes Review	<p>SDC is currently reviewing the Natural Features and Landscapes section of the District Plan. This is at the early surveying and engagement stage. It is programmed to complete in 2022-23. This will affect how The Catlins natural features and landscapes are protected.</p>

Plan	Overview
	<p>From a tourism perspective this is positive as these features and landscapes are the key attractions. However, there needs to be community input to ensure that valuable tourism opportunities are not being unduly restricted where the plan's objectives can still be met.</p>
<p>Waihopai Toetoe Community Plan</p>	<p>Waihopai Toetoe is the name of SDC's community area that includes The Catlins, Wyndham and Edendale. This plan was derived from community workshops in 2019.</p> <p>The overall outcome sought is to ensure Waihopai-Toetoe is attractive, healthy and safe area to live with good access to quality facilities, amenities and services.</p> <p>Developing cycleway networks, beautification plans for each area, improving cell phone and internet coverage and retaining health services were suggestions on how to achieve this.</p> <p>To form and strengthen relationships with iwi. Ensure that there are no adverse effects on the environment from freedom camping. Develop environmental management plans for each area to manage and protect our environment. To celebrate and acknowledge their heritage and history and how that contributes to their distinctive identity. To tell their whakapapa (history) in an honest way. Redevelop heritage sites within WT area that tell the Māori and European story (in Curio Bay and Waituna), also a heritage trail. Activities that engage youth.</p> <p>The current Catlins Sustainable Tourism Strategy aligns very well with this community plan. Care will be needed to integrate projects such as cycleways, heritage trails and interpretation with the other trail and wayfinding/signage projects that span both North and South Catlins.</p>
<p>Southland District Reserves and Open Spaces Strategy</p>	<p>SDC is currently getting input with the existing strategy being seven years old (2014-2024) and the Parks and Reserves Policy (2016). This considers how council manages and maintains parks, reserves, playgrounds, domains and recreational trails on council land. This also includes toilets on these reserves.</p>
<p>Clutha District Plan Review and Outstanding Natural Landscapes Review</p>	<p>CDC Outstanding Natural Landscapes Review has been delayed to align with the District Plan Review, which in turn has been postponed while the RMA is replaced. IN general CDC consider that the Clutha District Plan is relatively permissive and should not be creating significant bottlenecks for tourism businesses.</p>
<p>Clutha District Council LTP 2021-2021</p>	<p>Council approved a permanent Ranger position totaling \$64,000 per annum to be funded out of rates.</p> <p>Council approved \$45,000 in the Pounawea Camping Ground Capital budget for the renewal of a seawall and to be funded from lease income.</p> <p>Council approved funding of \$170K to allow for The Catlins Community Plan and Reserve Management Plan projects, to be funded by investment returns:</p>

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	<p>a) An improved level of service for existing playground reserves after engagement with Community, Pounaweia 22/23 \$20K for 50% share of new play equipment. Kākā Point (Tarata St) 23/24 \$20K for 50% share of new play equipment.</p> <p>b) Replacement/ Refurbishment of some play equipment at Kākā Point (Esplanade) playground after engagement with Community, 22/23 \$50K for 50% share of new play equipment.</p> <p>c) Council decided not to investigate or consult further with the community on potential future options and facilities at the Willsher Bay, Hina Hina and Pounaweia Domain reserves.</p> <p>d) To investigate and consult with the community on potential options and facilities at the Papatowai Picnic Area Reserve. Options for this reserve which is currently bare land (beside Papatowai store) that were highlighted during the Our Place and Reserve Management Plan consultations include public toilets, playground, picnic area and rubbish bins. 21/22 \$20K for 50% share of equipment after Community engagement.</p> <p>Kākā Point foreshore public toilets and change rooms, this is not an identified Community Plan project but there is a high level of community desire for this to be progressed, hence its inclusion. 22/23 \$20K to conduct options analysis/create project plan, funded from Depreciation Reserve, no rates impact.</p> <p>Council approved Kākā Point Surf Lifesaving's request of an increase of funding by \$5,863 to \$25,000 per annum in 2021/22, 2022/23 and 2023/24, noting their intent to submit annually with regard to inflation, wage and cost increases during this period to be funded by rates.</p> <p>Council agreed to an increase in levels of service at the Owaka Service Centre (extra staff enabling longer opening hours). This to be funded via rates with a budgeted increase level of service cost of \$79,200.</p> <p>\$195K for Owaka Swimming Baths improvements to be funded from discretionary investment returns.</p> <p>An increased operating grant to the Owaka Swimming Baths Committee to \$10,200 per annum for the next three years with this increase to be funded from rates. This is an inflationary adjustment from current \$9,700.</p> <p>confirmed funding of \$1,500 per annum to Catlins Coast Inc towards the continued review and development of the Care Code for 2021/2022</p> <p>\$3,000 per annum to Catlins Coast Inc towards the printing of the Tear Off Map for 2021/2022, investment surpluses.</p> <p>Council approved funding of \$2,000 in 2021/22 towards further enhancements on The Catlins Coast Inc website funded via investment surpluses.</p> <p>Council did not approve funding of \$2,000 per annum to Catlins Coast Inc towards the printing of the Visitor Guide.</p> <p>The LTP included additional funding of \$180k for Clutha Development to continue implementation of the Clutha Destination Strategy which is significantly focused on The Catlins and aligns with the CCTP. This funding was also to leverage the opportunity of STAPP funding from MBIE for Clutha Development.</p>
Kākā Point Community Group submission on CDC LTP	more appropriate/clear road warning signage should be installed along the road when coming into Kākā Point and heading along the Nuggets Road, for both the safety and convenience of motorists, pedestrians and wildlife i.e., a sign

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	<p>notifying motorists of turning vehicles ahead, as there are many visitors (particularly International) who turn and stop to take photos unexpectedly, while travelling along the road/s.</p> <p>The signage should also include speed signage along the Nuggets road and KPCG would like to see a review of the speed along this road, which is currently 100kmph.</p> <p>the current state of the toilets/changing rooms are not of a good standard to accommodate the growing number of visitors.</p> <p>board walk(walkway) along the foreshore from the Kākā Point surf club to the Willsher Bay domain. The development of a walkway would offer a safe link from the KP township to the domain for Community and visitor use i.e., bikes, prams, wheelchairs etc and would also give an opportunity to fully utilize the Domain (as currently deemed as underutilized).</p> <p>The walkway would not only be a practical addition to the township it would also enhance the foreshore. The current pathway to the Domain (if on foot), is via the road or beach, which is limiting i.e., tidal permitting or health and safety risk on the road.</p> <p>The bridge at Willsher bay would be part of the 'walkway', but it is not currently safe to cross on foot given the narrowness of the bridge and with passing vehicles both ways, therefore believe it would need to be widened as part of the development of the walkway.</p> <p>upgrade/replacement of the Esplanade playground. The intention is to work towards making the playground a 'destination playground' for community and visitor use.</p> <p>CDC to look into a feasibility study to convert the Kākā Point (KP) town from a restricted to a 'on demand' water supply i.e., one large reservoir. This in turn will offer an option for those who wish to opt into remove their tank and electric pump, resulting in efficiency and for Fire/Health and Safety when there are power outages. The feasibility report should also include the initial costs per property.</p>
TIANZ Strategy, Tourism 2025 & Beyond	<p>Released in 2019, this was an update of a 2014 TIANZ strategy that was primarily private sector driven and growth focused. Compared with its 2007 and 2001 predecessor national tourism strategies, the concept of sustainability was watered down. Not enough emphasis was placed on engaging local government in planning for tourism, and what followed was chronic underinvestment in infrastructure for tourism.</p> <p>The updated 2025 version sought to address these weaknesses with the following goals:</p> <ul style="list-style-type: none"> Visitor - Deliver outstanding visitor experiences Community - New Zealanders are welcoming hosts Environment - Aotearoa is enhanced by tourism Economic - Grow tourism's contribution to New Zealand's economy <p>One of the key projects was the TIA tourism sustainability commitment for operators to sign up to.</p> <p>Most of the positive elements of this plan are addressed in the current strategies for Southland Murihiku, Clutha and The Catlins.</p>
MBIE Destination Management Guidelines	<p>MBIE's tourism unit developed Destination Management Guidelines drawn from a range of examples in NZ and overseas. These guidelines were largely followed when the Clutha Destination Strategy and Southland Murihiku DMP were written in 2019.</p>

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	<p>The guidelines propose 16 components of destination management planning.</p> <p>Most of the 16 components are addressed in the CCTS. Weaknesses include a lack of robust visitor data for monitoring and forward planning, need for more Rūnaka partnership, implementation resources and structures and risk and crisis management. The latter will largely be managed at a district and regional level with the local the SARs service for The Catlins.</p>
<p>NZ Government Tourism Strategy</p>	<p>The New Zealand-Aotearoa Government Tourism Strategy was released in May 2019.</p> <p>The benefits and challenges of the tourism sector are articulated as follows:</p> <p>Tourism creates inclusive growth by distributing economic opportunities and bringing social benefits across our regions, cities and communities. It allows us to celebrate our unique Māori culture. International visitors buy our products and services, which contributes to the success of other export sectors and grows our reputation internationally. Tourism provides a pathway for many to enter the workforce, gaining important skills. We also want people working in tourism to transition into high-value jobs and improve the productivity of the sector.</p> <p>The recent pace and scale of visitor growth has effectively outstripped the capacity of our system to respond in some areas. This means that the economic and other opportunities afforded by this growth are not being fully realised, and the pressures created are not always adequately managed.</p> <p>We want our tourism growth to be productive, sustainable and inclusive. This is to help us grow New Zealand-Aotearoa for all, improve the wellbeing of New Zealanders and to protect and restore our natural environment. To make sure of that, we are taking a more active, deliberate and coordinated approach to tourism.</p> <p>TIKANGA VALUES: As with previous national tourism strategies developed in 2001 and 2007, this government Tourism Strategy draws on tikanga values that underpin sustainable tourism growth in New Zealand -Aotearoa.</p> <ul style="list-style-type: none"> • ōhanga/whairawa (economic prosperity and wellbeing), • manaakitanga (shared respect, hospitality, generosity and care for others), • kaitiakitanga (guardianship/sustainability), • whanaungatanga (a sense of family and belonging, relationships built on shared experiences and working together).

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DOC Heritage and Visitor Strategy	<p>The three goals of this strategy are Protect, Connect and Thrive.</p> <p>Protect – New Zealand's natural, cultural and historic resources are protected and restored to maintain biodiversity, cultural and historic values, ecosystem health, landscapes and natural quiet.</p> <p>Connect – Visitors are enriched and better connected to New Zealand's natural, cultural and historic heritage.</p> <p>Thrive – Tangata whenua, regions and communities benefit from protecting and connecting visitors with their natural, cultural and historic heritage.</p>

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	<p>The Purpose of DOC's Heritage and Visitor Strategy is to Sustainably manage visitors to protect and enhance the value of New Zealand's natural, cultural and historic heritage. The purpose reflects DOC's responsibility to protect and restore natural, cultural and historic heritage, biodiversity and the ecological health of natural areas and to manage visitors so their connection to this heritage is sustainable.</p> <p>Sustainable visitor management means managing the protection, recreational use and development of natural, cultural and historic heritage to engage the visitors of today while also safeguarding options for future generations.</p> <p>This strongly aligns with the CCTS. The plan makes it even clearer that tourism and commercial opportunities will only progress if they can demonstrate protection and even enhancement of the identified resources and values.</p>
DOC Otago and Southland Murihiku CMSs	<p>The Conservation Management Strategies provide the main parameters for destination management on conservation lands in The Catlins. They outline the values, objectives and policies for each "Place". Any tourism development needs to be consistent with the values and the policies clarify where particular activities are allowed or can potentially be considered. The partial review of the Otago CMS has allowed for biking to be considered in some new areas but largely ruled out the main coastal blocks. The Southland Murihiku CMS is dated 2016 and due for updating but there is no timeframe on this occurring. In general the Catlins Tourism Strategy was consistent with these plans.</p>
Tourism New Zealand	<p>TNZ's new strategy for 2021-22 has six key focus areas;</p> <ol style="list-style-type: none"> 1. Boldly grow brand desire to make New Zealand irresistible to visitors that will enrich Aotearoa. 2. Drive domestic demand and lay the foundation for long-term value. 3. Accelerate the recovery by scaling up high-value conversion across markets and priority audiences as borders re-open. 4. Embed te ao Māori into Tourism New Zealand's strategy, work, and ways of working. 5. Support industry to deliver quality visitor experiences that enrich New Zealand for both domestic and international visitors. 6. Actively inform and contribute to all-of-Government programmes for tourism recovery and transition. <p>TNZ's boosting of the Domestic market including increased investment in research to better understand the market is valuable for The Catlins.</p> <p>Their marketing programmes make it more important for operators to actively manage their TNZ business listing and offer packages for TNZ campaigns to increase exposure.</p> <p>TNZ, through Qualmark can offer support for small local businesses to improve their visitor experience and digital capacity. The Covid-Clean Approved certification is something local operators can work towards.</p> <p>This supports the objective to develop stronger partnerships in interpretation and Māori tourism business opportunities.</p>

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Climate Change, National Adaptation Plan (NAP)	<p>Government is required to publish a National Adaptation Plan (NAP) at least every six years to set out its policies and strategies that respond to climate risks. The first NAP is currently under development across government agencies and will be publicly consulted on next year before it is completed by August 2022. MBIE co-leads the Economy component of the NAP with Treasury. One of the objectives of the Economic component is supporting businesses, sectors and local economies to adapt to a changing climate. MBIE needs to have identified actions to respond to climate risks by early September.</p> <p>Further emphasis is needed on addressing climate change in The Catlins Tourism Strategy.</p>
Parliamentary Commissioner for the Environment's Report on Tourism "Not 100% – but four steps closer to sustainable tourism" February 2021	<p>One of the most significant pieces of work that is shaping forward planning for NZ tourism is a series of two reports on tourism from the Parliamentary Commissioner for the Environment, Simon Upton. This has suggested that tourism in NZ was on an unsustainable path and recommended some fairly radical new policy directions on charging tourists for use of our tourism assets and their carbon use travelling to and from NZ. There were also recommendations around tightening up freedom camping regulations.</p> <p>This has brought the carbon impacts of tourism which have previously been paid lip-service into the spotlight. It is likely to shape future funding models for tourism. It has given impetus to government policy change around freedom camping.</p>
Tourism Futures Taskforce Report	<p>Through late 2020 a Tourism Futures Taskforce was appointed to develop a long-term view of resetting the tourism sector post-pandemic. The Taskforce sought to ensure the tourism sector does not return to unsustainable growth levels that were accompanied by insufficient planning, community engagement and infrastructure investment. The Taskforce produced a draft report with a strong focus on regenerative tourism, where the visitor economy gives back more than it takes in terms of community, culture and environment. https://www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-recovery/tourism-futures-taskforce/</p> <p>The Taskforce was expecting to be engaged to undertake more analysis to produce a final plan. Instead, the Minister of Tourism has thanked them for their work and said government's focus will move to a new Tourism Industry Transformation Plan (ITP).</p>
Tourism & Hospitality Industry Transformation Plan (ITP)	<p>The Tourism & Hospitality ITP will be a government partnership with tourism businesses and members of the tourism workforce, iwi, researchers and independent advisers. It will build on recent work by the Parliamentary Commissioner for the Environment, Tourism Futures Taskforce and Climate Change Commission, among others, to transform tourism in New Zealand to a more sustainable model. The first stage of the plan will focus on developing the tourism workforce, including investing more in people, deepening the talent pool, and lifting skill levels. It is notable that one of the three co-chairs alongside TIA and MBIE is from Unite Union. This highlights the objective to improve work conditions and career opportunities in the hotels and hospitality sector. The first draft of the plan is due in the second quarter of 2022.</p> <p>This project may leverage the opportunity with the current labour shortage and immigration re-set to ensure tourism doesn't continue to under-value staff and exploit temporary holiday-visa labour to keep rates down. It recognises the above plans noting tourism will never be sustainable when it is seen as a low productivity, low-paid sector with unattractive career prospects.</p>

Potential Criteria for Prioritising Projects

As this draft review document is further considered by The Catlins Destination Partnership Group, projects can be re-prioritised and refined with timeframes set.

(The following criteria are taken from the Southland Murihiku Destination Management Plan)

- position the region as a stronger destination in its own right;
- generate significant investment (private and public) into the region;
- introduce new, commissionable (paid) product into the region;
- attract a higher yielding visitor market to the region; and
- generate new and ongoing employment opportunities for locals.

Others suggested as part of this review of the CCTS:

- Strengthen the profile of Tangata Whenua in the visitor experience
- Consistent with protecting Catlins flora and fauna and Strengthens The Catlins identity as an Eco-Destination
- Supports off-season visitor growth
- Opportunities for visitors to make net-positive contribution to local community, ecology and economy
- Supports DOC's Heritage and Visitor Strategy to Protect, Connect and Thrive Aligns with The Catlins heritage story,
- Positive profiling of the local farming culture and economy