

Destination Nelson Tasman 2021-2026

Explore More
Care More

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Kaiteriteri Beach



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July 2021

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EXECUTIVE SUMMARY



This destination management plan has been prepared to improve the long-term well-being of our region and its residents by placing our environment and our community at the heart of visitor sector planning. Our aspirations for the sector extend beyond creating mutual benefits for both locals and visitors to rebuilding the sector as a resilient, sustainable and vital part of the Nelson Tasman community.

Our vision and pillars for this destination management plan relate closely to the long-term vision of the Te Taihū Intergenerational Strategy.

Tūpuna pono, to be good ancestors

“...to pass on the taonga of Te Taihū in a better state than when these taonga were placed in our care.”

OUR VISION

Creating a better life for the communities of Nelson Tasman by welcoming a diversity of visitors who care for the places they travel to.



Figure 1: Vision and Pillars of Destination Nelson Tasman 2021 to 2026

COMMUNITY FOCUS

Placing our communities at the heart of our visitor sector will encompass:

- Advocating for facilities of the future that underpin vibrant urban experiences and provide access to our superb natural areas
- Enabling 100,000 passionate local ambassadors as visitors and referrers to their friends and relatives
- Transitioning to sustainable higher value careers (rather than seasonal jobs)
- Encouraging visitors and locals to enjoy light carbon footprint visitor journeys within the region
- Attracting higher value visitors and repeat visitation
- Smoothing seasonality with events (including business events) and off-peak offerings relevant to locals and visitors
- Supporting visitor sector businesses to recover from the impacts of Covid-19 so they can continue delivering world-class experiences.

Stakeholder consultation is an important component of this plan. It has included two surveys of over 800 residents, consultation with all local iwi, workshops with businesses in the visitor sector and dozens of stakeholder meetings. Over 83% of Nelson Tasman residents surveyed indicated they had some contact with visitors to the region even though only 8% of respondents worked directly in the tourism sector, with another 7% involved indirectly. This high level of engagement suggests the region already benefits from a large group of locals who act as informal hosts or ambassadors.

BUILDING ON OUR STRENGTHS

There aren't many regions that can claim three national parks, one forest park, New Zealand's longest sandspit, sheltered bays and mighty mountains. This incredible diversity of stunning natural landscapes accompanied by an enviable climate, has attracted people here for hundreds of years and forms the basis of many local industries. As a visitor destination, Nelson Tasman is known for its:

- Stunning natural landscapes
- Arts and artisans
- Wellness opportunities to relax and recharge, and
- Adventures for all.

This plan seeks to build on these strengths by appealing to visitors who are more likely to appreciate what our region offers and inspiring them to "explore more and care more."

A GREENER DESTINATION THROUGH VISITORS BEING GOOD ANCESTORS TOO

Visitor sector businesses have invested significantly in building the green credentials of the region by creating world-class experiences that link to our natural areas in ways that minimise environmental impact while imparting a healthy respect for our very special corner of the world. 18 tourism businesses have been certified zero carbon at the time of writing and a cluster of certified operators is growing around the Abel Tasman National Park, particularly in Marahau. By linking these businesses into zero carbon itineraries we can show visitors how they can reduce the carbon footprint of their travel here. Many other tourism operators are undertaking a less formal approach to sustainability through their own initiatives.

While this approach is harder to measure and share, the innovative stories that result form an important part of our positioning.

Our vision builds on the Te Taihū vision of Tūpuna pono, to be good ancestors and “...to pass on the Taonga of Te Taihū in a better state than when these taonga were placed in our care.” Targeting

visitors who balance their desire to explore more with the need to care more for the places they visit is our way of ensuring the region will be well looked after for generations to come. Future visitors may be presented with a challenge to “ask not what our environment can do for you – ask what you can do for our environment.”



Figure 2: Explore More: Care More - Balancing Visitor and Environmental Needs

RECOMMENDED ACTIONS

There are 49 actions that deliver on the vision and across the four pillars of this plan. These have been grouped into eight destination management components shown in Figure 3 below.

Note that all components contain actions with an environmental focus, and these are not confined to the three environmental stewardship actions:



Figure 3: Destination Management Components and Number of Actions

PRIORITIES

Our top three priority projects for the region improve and integrate what we already offer to visitors and can be summed up across three clear categories:

- **Great Rides:** Support the completion and maintenance of the Great Taste Trail loop and Coppermine Trail, and investigate enhancing experiences on both Great Rides e.g. signage, picnic areas, food & beverage experiences, artwork, interpretation.
- **Great Experiences:** Produce special interest strategies including for food & beverage, arts & creative and other non-tourism sectors and support business cases for new and vibrant visitor activity.
- **Great Walks:** Spread use of the Abel Tasman National Park i.e. further away from the coast and further north beyond Tōtaranui. The fourth priority of this plan relates to the development and promotion of iconic day and multi-day walks in the Nelson Lakes National Park.

The top ten priority actions identified for this plan relate mainly to experience & product development to generate even greater regional appeal. Six of the top ten priorities in this plan

will involve investments to enhance attractions, events and activities that the region is already well-known for with four actions relating to new investments.

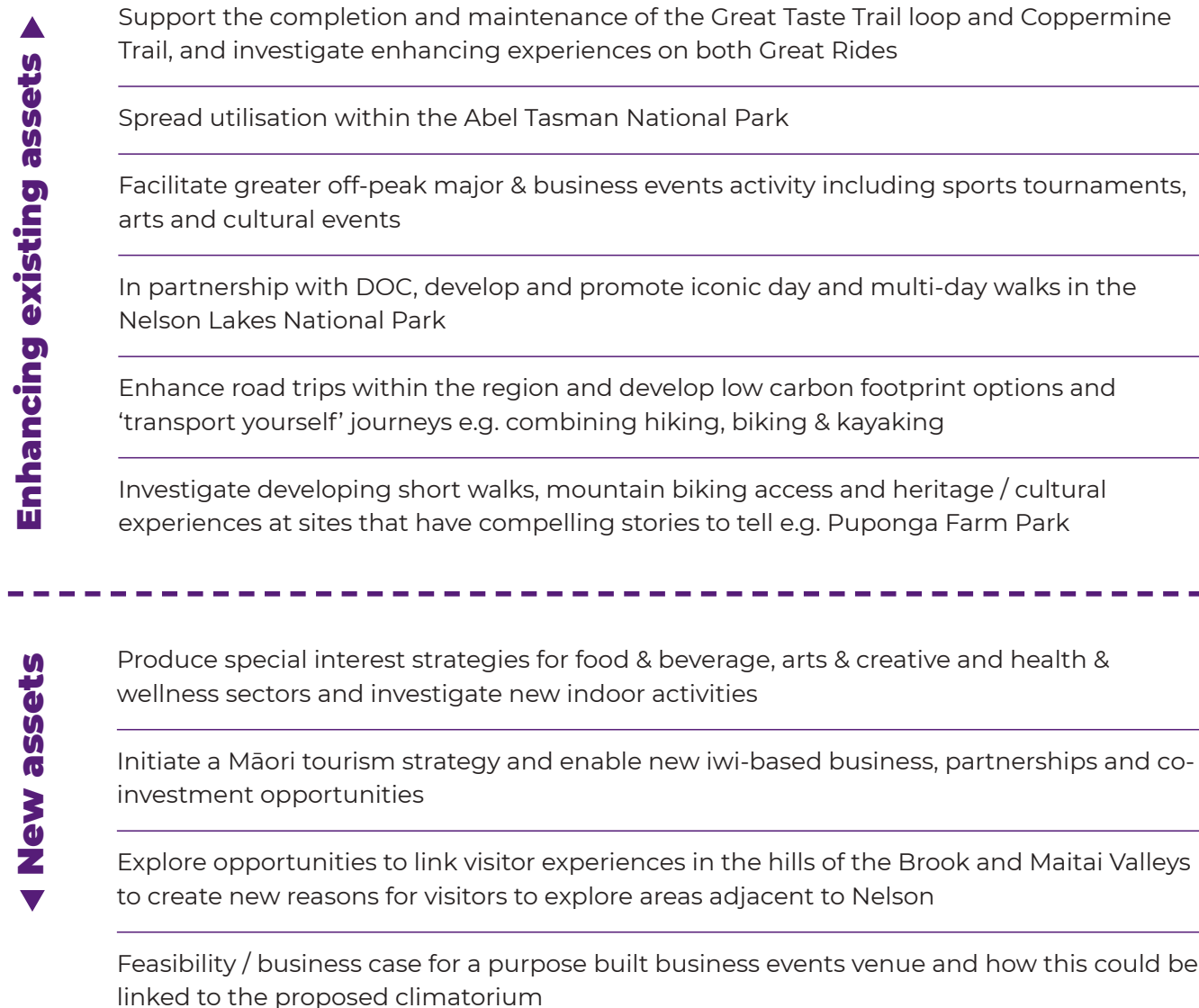


Figure 4: Top Ten Priorities

IMPLEMENTING THIS PLAN

This plan reflects the collective work that needs to be done across the region and adds a new destination management function to be picked up by an agency such as the NRDA. Funding to implement these new destination management / development actions (approximately \$1m per year for the next 5 years plus funding for capital projects) is only partly secured and is likely to require a mix of central government, local government, and private sector contributions.

Future work needs to be resourced at two levels within the lead agency:

1. Project management (to drive implementation and track results)
2. Priority projects and new initiatives that the actions set out.

Wider and ongoing community engagement will be required to inform experience and event development, plus to engage locals as passionate ambassadors for the region. An exciting new era of community involvement in the visitor sector is about to begin with locals and visitors both being asked to explore more and care more for the places being visited.

We would like to thank the Ministry for Business, Innovation and Employment for supporting the production of this destination management plan along with the many other community and visitor sector stakeholders who have provided input.



¹Regional Event Funding for the next four years has been awarded jointly to Nelson, Tasman and Marlborough.

A GLIMPSE INTO THE FUTURE



Traveling to Maitai River Precinct

Imagine the year is 2026 and a Wellington company has decided to have their annual strategic planning conference in Nelson because they want some inspiration on how to dramatically reduce their operation's environmental impact. Nelson's new Maitai River Precinct including a conference centre and Climatorium has encouraged them to not only visit the city but also to travel here without using fossil fuel.

Half of the team have chosen to ride e-bikes from their homes in Wellington to the ferry and then ride to Nelson via Havelock and a new off-road section alongside state highway 6 to Pelorus and over the upgraded Maungatapu route – just over 90km in a day. The other delegates are traveling by e-bus and they're all staying for three days.

The proximity of all accommodation and conference facilities means delegates have more

time in their day to exercise and learn. The slower pace means they have time to reflect, relax and draw inspiration from their beautiful surroundings. All catering is fresh and locally sourced with a new signature sustainable seafood dish that is gaining media attention as a must do while in Nelson. The conference itself measures its energy use so that all waste is limited.

Before leaving, delegates visit a local nature reserve where they spend time in the fresh air, pulling up weeds around the young seedlings. They share some laughs with their colleagues away from their usual life stresses. They leave feeling relaxed and inspired. And locals know this conference has generated employment, contributed to the local economy, hospitality and environment.



Image: The Maitai River Precinct in 2021. Image: Tim Cuff

A Regenerative Approach at Kaiteriteri

Kaiteriteri is a very special place. So special that it has its own Management Plan with a Minister approved set of 'instructions' to ensure that the Reserve is managed in accordance with the Reserves Act 1977, Resource Management Act 1991 and the Heritage New Zealand Pouhere Taonga Act 2014. An ongoing emphasis has remained on people, culture, responsibilities to the Treaty of Waitangi and formal partnerships with tāngata whenua and the Department of Conservation.

A new Destination-Spatial Master Plan and the Reserve Management plan signed off by the Minister of Conservation enabled the vision of Kaiteriteri 'being the best coastal recreation destination in New Zealand' to become an inspiring reality delivering across storytelling, connected landscapes, cultural, restoration, and sustainability aspects.

The Reserve adopted both sustainable and regenerative design principles. Rather than just doing less or no harm to the ecosystem, a holistic approach was taken to consider how human use and activity could drive restoration rather than consumption and degradation. The result: better visitor flows during peak season, more local stories being told, improved environmental outcomes from water quality to noise control, happier locals and visitors leaving with a greater appreciation of Kaiteriteri.

The development of the Reserve and foreshore areas improved visitor enjoyment, and it started winning awards for the work being done. New Zealand's first beach and reserve to win the Supreme Award at the New Zealand Tourism Awards.



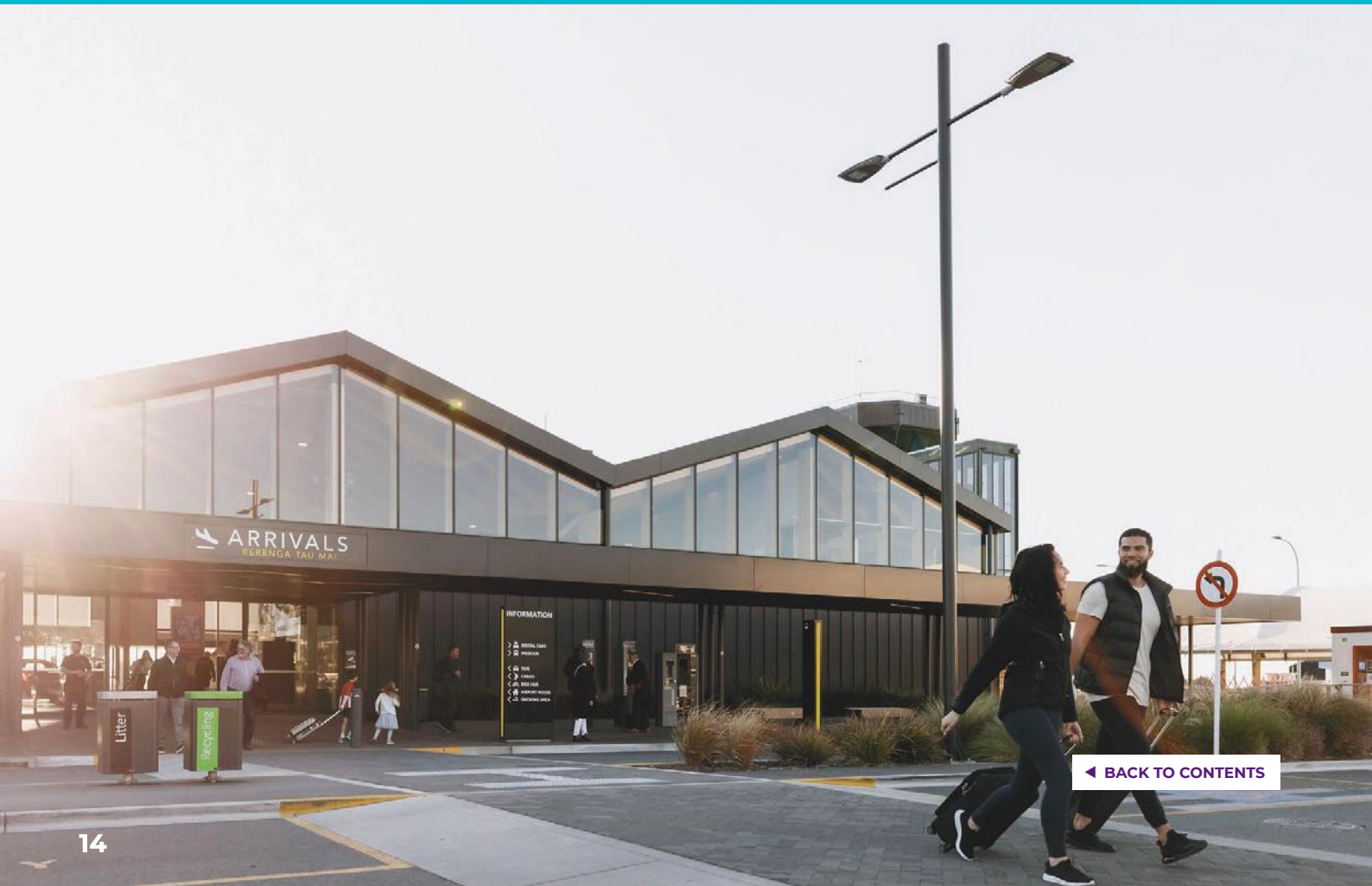
Air Connectivity in 2026

Flying to Nelson by electric plane became a viable option in 2026 after both Air New Zealand and Sounds Air started their trials of new aircraft on shorter flights in and out of Nelson. Visitors from Wellington, Palmerston North and Christchurch can now fly on an electric plane, and the longer sector to Auckland will soon become a reality thanks to new hydrogen fuel cell technology.

These low emission flights have been matched with low emission options for regular public transport (e-shuttles) between Nelson Airport and the city, and to Richmond and Motueka. Visitors can feel good about doing good by choosing to fly and shuttle in electric powered vehicles.

Light footprint transport options are available within the region and all rental car companies operating at Nelson Airport offer EV's for hire. And if that's not enough there's a hub for hiring electric bikes at the airport so visitors can start their Great Taste Trail experience, or their mountain biking adventure right there.

Visitors find it easy and enjoyable to get involved with local sustainability projects, promoted at the airport and in local accommodation. They can support sanctuaries, plant trees, contribute to sand dune restoration or other biodiversity protection projects around the region.



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WHY IS DESTINATION MANAGEMENT IMPORTANT?



Destination Management involves the management of all aspects of a destination that contribute to a visitor's experience, including the perspectives, needs and expectations of visitors, Māori/iwi/hapū, tourism industry, wider businesses, local residents, central and local government.



Figure 5: Stakeholders Involved in Destination Management (*Destination Management Guidelines 2020 (MBIE)*)

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

Adopting a Destination Management approach enables communities to respond to changing conditions and determine the type of tourism they would like to have and the benefits they would like to receive, taking an active role in managing these.

Destination Nelson Tasman 2021 – 2026 places our environment and community at its heart and will require new partnerships and ways of working together to ensure the visitor sector benefits the region socially, culturally, environmentally and economically.

This document is just the beginning of Destination Management in the region. Ongoing adaptation will be required to meet changing community and visitor needs. Our desire through all future iterations is one of balance, where all stakeholders see benefits, not just some.

HOW DESTINATION NELSON TASMAN WAS CREATED

Destination Nelson Tasman started as a sector recovery plan for the region then broadened into a full destination management plan. Our desire throughout the process has been to ensure that the community and our environment are placed at the centre of our thinking to ensure sustainable benefits are derived for both people and place.

We have been able to draw on the vision and framework of the new Te Taihu Intergenerational (TTI) Strategy that was informed by a significant amount of community engagement⁴ <https://www.tetaihu.nz/#mihi-welcome>

The initial phases involved information gathering, analysing secondary research, and engaging the community and local businesses via to primary research to understand the key issues and opportunities.

Engagement with councils and the Department of Conservation occurred early in the process to ensure alignment with longer term plans. Then the strategies and actions were refined to reflect feedback from our advisory group and wider stakeholders before a final draft was produced.



Figure 6: Destination Nelson Tasman Production Process

⁴The engagement process for the Te Taihu Intergenerational Strategy included a series of talks were held across Nelson, Tasman and Marlborough which attracted over 1,000 participants and several thousand more through live streaming across social media.

DEFINING OUR DESTINATION

Our region offers locals and visitors a wonderful combination of experiences including lakes, rivers, ocean, forests, mountains and beaches. Renowned for its thriving natural surroundings, spectacular coastal and inland landscapes and high sunshine hours, it's no surprise that the natural environment is the underpinning feature of our destination.

When describing our region to people who have never visited us before, we use these four themes to summarise the benefits of spending time here:

Stunning Natural Landscapes

Even on an ordinary day, we live amongst extraordinary nature, with three diverse national parks right on our doorstep. The unique combination of both alpine and coastal environments makes exceptional activity combinations possible, and an array of light footprint experiences places sustainability at the heart of everything we do.

Arts and Artisans

Nelson Tasman has a palpable, creative energy, with passionate artists and artisans stretching from the city through to the bays and hinterland. Vibrant markets, a diverse calendar of events and an array of food, wine and craft beer trails showcase their exceptional creations.

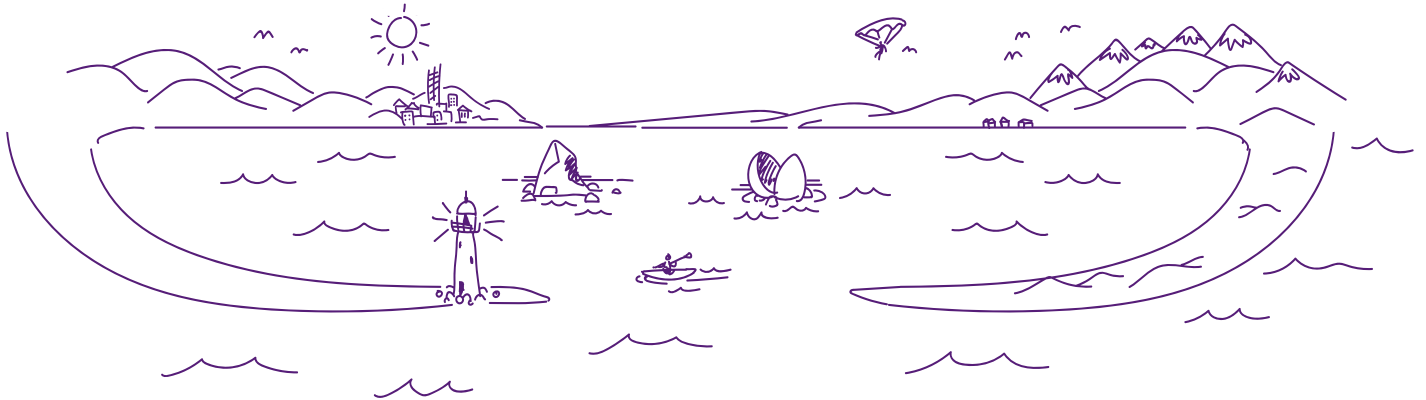
Wellness, Relaxation and Recharge

There are ample opportunities to relax and recharge in Nelson Tasman. The radiance of the sun combined with our pristine natural surroundings and fresh cuisine nourishes an environment of wellness, connection and rejuvenation.

Adventures For All

Gentle adventure such as sea kayaking, cycling, hiking and paddleboarding offer the time and space to savour your surroundings, whilst those looking for an adrenaline rush are sure to enjoy a mountain biking, canyoning, skydiving, whitewater kayaking or rafting experience.

Nelson + Tasman



= Nelson Tasman



SPECIAL FOCUS AREAS WITHIN THIS DESTINATION MANAGEMENT PLAN

Some actions in this DMP require additional explanation given the scale or nature of the opportunities to be pursued.

Sometimes the priority actions encompass large projects that will benefit the region. However, there are other examples where multiple actions combine or interrelate to create positive impacts across the region.

▶ Great Rides and other cycle routes

▶ Balancing access and protection in national parks

▶ Supporting remote parts of our region

▶ Greater focus on Māori and other cultures

▶ Visitors being good ancestors too

Great Rides and other cycle routes

The Great Taste and Coppermine Trails are both proving popular with visitors and locals. Continuing to improve and extend off-road sections (for example the GTT route down the Motueka Valley from Tapawera to Riwaka via the Baton Route and the Westbank Road) will increase the appeal of both routes, resulting in more riders being confident enough to ride all of these Great Rides instead of just sections:

There are many opportunities to extend and enhance these Great Rides for example:

- Artwork, food and beverage pop-ups along the Great Taste Trail to increase understanding and appreciation of the surrounding industries and the 'tastes' of the region.
- Linking Mapua to Upper Moutere to make exploration of wineries safer and more enjoyable.
- Linking from SH6 to the Boulder Bank and Glenduan.
- Spur trails to famous hospitality establishments e.g. the Riwaka Hotel and Seifried Estate.
- Shelters and shade sails with toilet facilities.
- Start and finish/entry points.
- Developing the cultural narrative and telling more of our stories along the route.
- Upgrading the Rocks Road and Whakatu Drive sections of the GTT to link more safely with the Nelson city centre.

Additional opportunities exist for linking trails – especially Heartland Rides e.g.

- Tapawera to Murchison using the railway corridor via Tadmores Valley and next to SH6 from Glenhope.
- Havelock to Pelorus Bridge and upgrading the Maungatapu Track to be more cycle-friendly and provide a safe route between Havelock (and Wellington/Picton) and Nelson.
- Linking the Coppermine with the Maungatapu.
- Tōtaranui to Pohara, and Takaka to the Heaphy Track via Collingwood, linking the Great Taste Trail to the Heaphy Track (combining use of water taxis in the Abel Tasman National Park).
- Assessing the potential of a new cycle trail through the Abel Tasman National Park.

Balancing access and protection in national parks

In a region blessed with three national parks, one forest park and many protected natural areas we have the added responsibility of ensuring visitors and locals respect these areas when they visit. Popular journeys like the Abel Tasman Coastal Track have less well-known sections and less popular National Parks have tracks that could welcome more visitors if resources were available to improve infrastructure.

It is possible to balance visitation and protection if visitors understand the need to tread lightly and leave these parts of the region better than they found them e.g. by supporting plant regeneration.

Three actions in this plan relate to public conservation land. Two actions focus on existing track use and the third on places that have remarkable stories to tell and new reasons to visit remote parts of the region e.g. the Puponga Farm Park.



Supporting remote parts of our region

Golden Bay, St Arnaud and Murchison are popular as destinations in their own right or places for visitors to stop on their journey. These more remote areas and smaller towns tend to have a greater reliance on visitor spend as part of their overall economic activity so feel the effects of declining or changing visitor spend more acutely e.g. less spend to support visitor attractions and more spend on hospitality and retail.

These areas tend to see less spend on infrastructure enjoyed by locals and visitors such as cycleways, footpaths, playgrounds given their lower population base. The need for projects such as road upgrades and cycle trails are evident but there is less infrastructure funding available due to the smaller population base. Combining low population with a relatively short peak season for visitation makes it difficult for large infrastructure projects to compete with other parts of the region and New Zealand. The resulting 'Catch-22' means that special projects need more attention in these remote corners of our region and potentially even a new approach to justifying investment.

Greater focus on Māori and other cultures

There are many actions around Māori tourism in this plan – from strategy creation to supporting new businesses and authentic story telling. These actions require a new focus and will benefit from a local dedicated role to support iwi and Māori business owners as they develop their offerings. This support can extend to how we tell the heritage and cultural stories of our region accurately, respectfully and confidently.

Visitors being good ancestors too

Our desire is for visitors to join locals as ancestors who look after this region. This will require both education and inspiration. Imagine if locals have an 'Ambassador Pack' that shows how they can contribute to the region and invite their visitors to do the same. This could be reinforced at a centre for light footprint travel where visitors can select to support a project from a long list of good environmental causes within the region.

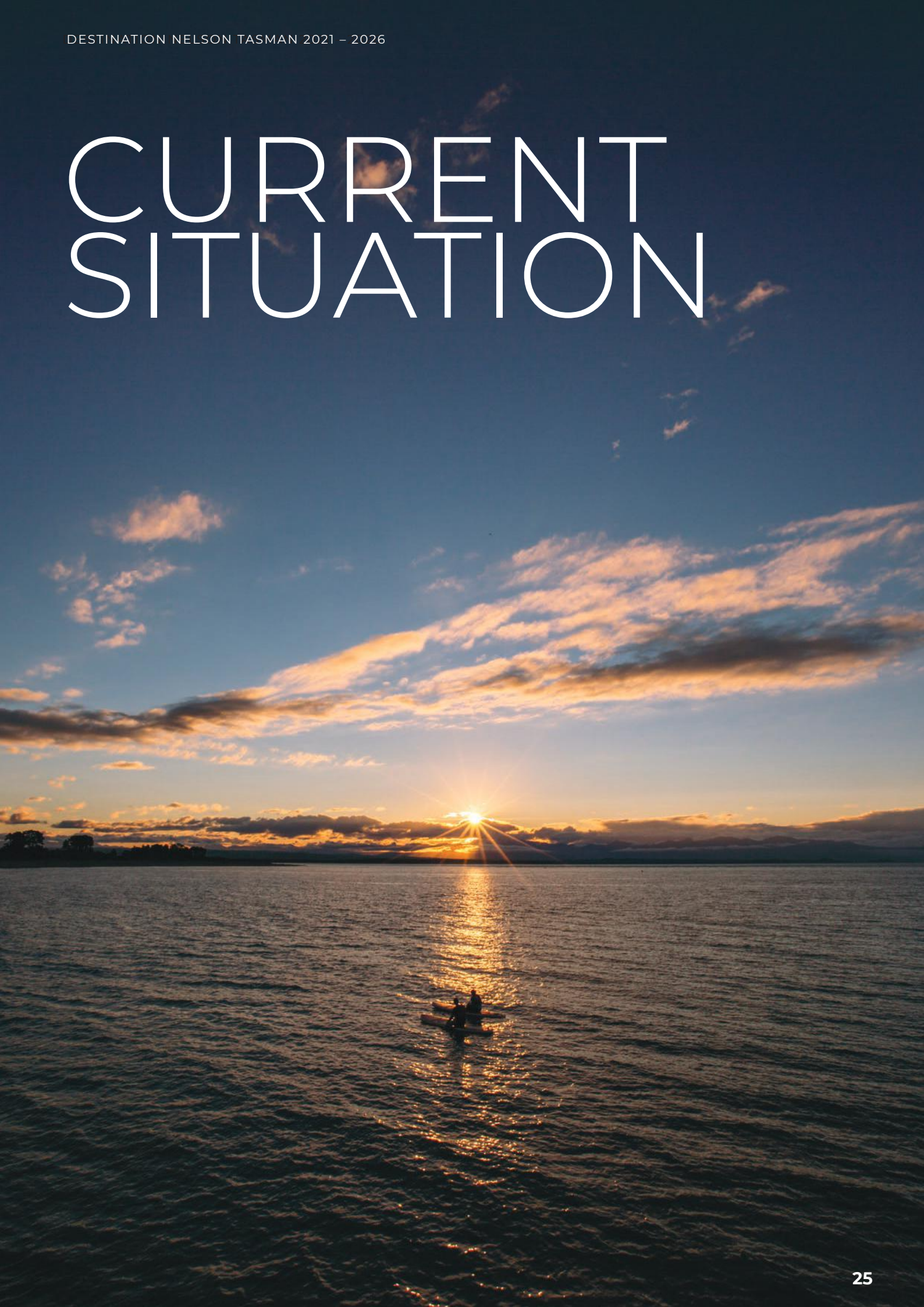
Future visitors will be presented with a challenge to "ask not what our environment can do for you – ask what you can do for our environment."





Figure 7: Explore More: Care More - Balancing Visitor and Environmental Needs

CURRENT SITUATION



The rapidly changing nature of visitor flows and spend since March 2020 means that we are in uncharted territory where domestic visitation is the mainstay of the sector. As a result, there has been more focus on the needs of domestic visitors

who, for Nelson Tasman, have been the greatest source of visitor spend (60%+) over the past decade. We have used a range of data sources to inform this destination management plan as shown in Figure 7 below.



Figure 8: Sources of Information

UNDERSTANDING CHANGING VISITOR FLOWS

We have assessed existing and potential visitor flows² to provide clarity on opportunities to leverage existing visitors flows, manage peaks and stimulate new travel when our region and residents want it. Over 100 visitor flows have been identified and include business flows, leisure flows, event

flows, and 'temporary resident' flows e.g. seasonal workers. Assessing the portfolio of visitor flows can inform different decision-making processes and can be used to increase visitation when it's appropriate to do so. Some of these visitor flows have been halted due to Covid-19 and the resulting border closures. It is unclear what will happen to many of these flows once borders reopen.

²The visitor flows assessment completed by Destination Capacity uses a methodology developed by the University of St Gallen in Switzerland.

This focus on visitor flows has helped compensate for a lack of reliable measures of visitor sector performance. Visitor travel patterns are changing along with visitor spend levels making nationwide and regional statistics less reliable. However, we now know that Nelson Tasman has a broad set of visitor flows from new to mature, with 22 of the identified flows (excluding events) focused on nature, sport, or active reasons for travel e.g. Abel Tasman Coastal Track hikers. This reinforces that the region is a magnet for active and outdoor visitors.

We know that leaders or influencers of visitors flows rely on businesses to provide the transport, accommodation, food & beverage and other retail products visitors need. The variety of visitor flows at different stages, in different parts of the region, and at different times of the year make Nelson Tasman a more resilient destination than other places that have less variety. Approximately 20% of the visitor flows identified require some form of coordination or management and there is an opportunity to leverage scheduled events to extend stays and/or spread visitor spend more widely across the region.

One overarching issue impacting visitor flows across the region is the road access. The winding roads from Marlborough to Nelson intimidates some drivers (especially international visitors in campervans) and recent speed reductions on the same road may frustrate domestic travellers due to increased travelling time. Road access to Golden Bay was also highlighted as an ongoing issue with the Takaka Hill road still one lane in parts and becoming very busy, especially during the peaks. Having only one main road accessing the region makes the region particularly vulnerable to being completely cut off.

Our desire is to better understand visitor flows so that we can identify key opportunities and issues. This involves looking at the development stages, successes and challenges, solutions and targeted research, key operators and market influencers per flow (see table 1). The analysis captures daytrips, which are often left out of tourism statistics. Based on this analysis we can determine which flows NRDA can start, lead, support, or leave. For each visitor flow the following data was recorded:

Development stage	Future, new, developing, mature, declining, on hold due to Covid-19
Duration	Day or overnight
Successes	What went/goes well in this flow
Challenges	Before Covid-19 or current
Solutions	Potential solutions for improving the flow
Research needed	What more do we want to know about this flow?
Key operators	Clearly defined or vague
Market influencers	Do we know how to encourage this market to visit?

Table 1: Visitor Flow Development Stages

Each flow comes with its own seasonality and allows relevant businesses to tap into those that are counter seasonal flows to increase annual business. The region already has a good portfolio

of flows from early development (7), mid stage (28) through to mature flows (26) and two future flows. The remaining 40+ visitor flows assessed to date relate to event activity.

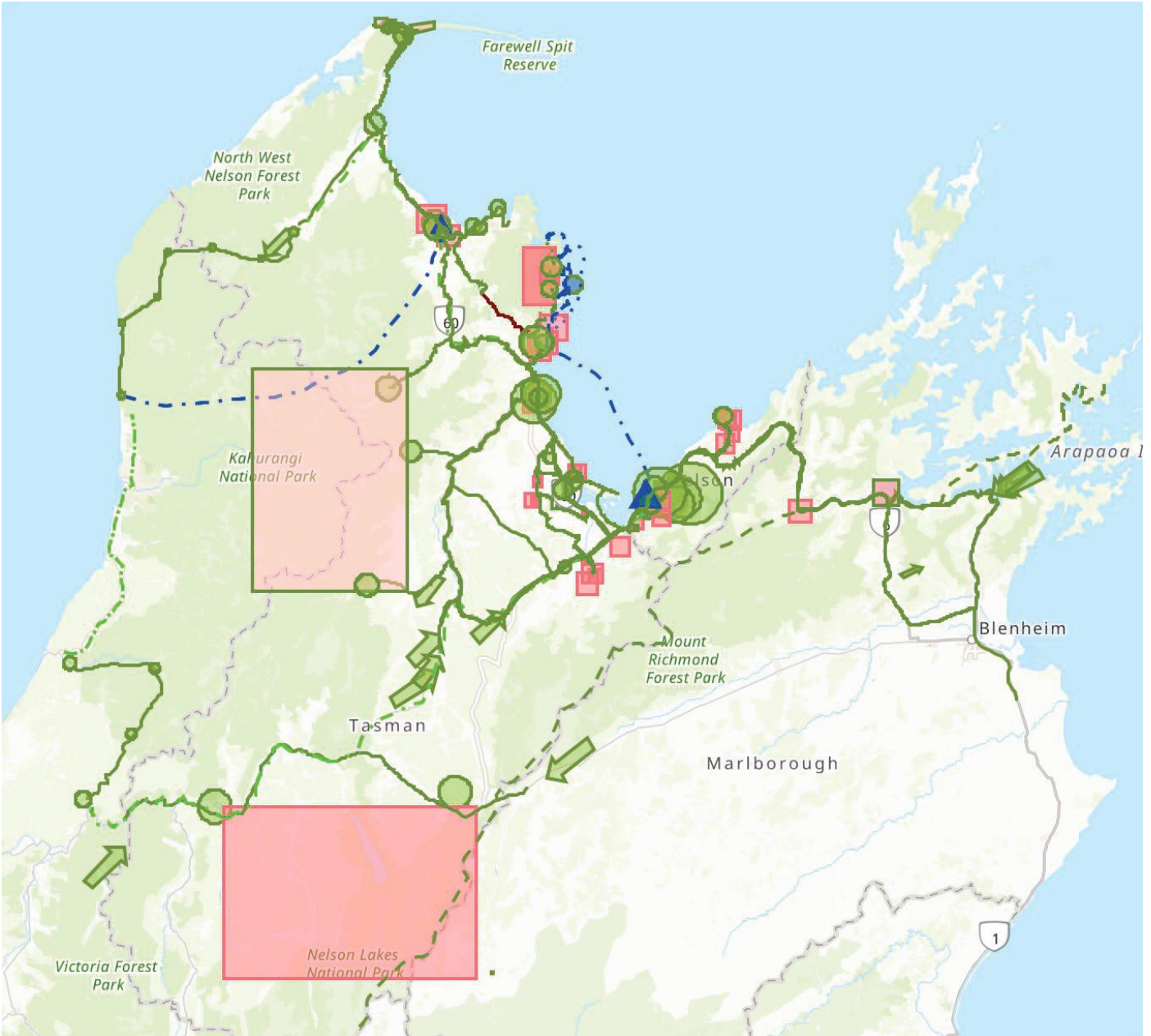


Figure 9: Map of Visitor Flows in Nelson Tasman

The overview map above shows all the visitor flows recorded during the stakeholder workshops, including daytrips and overnight stays. While accommodation seems to centre in the city and towns around the region, the activity areas are mostly around the national parks and other attraction areas³.

This destination management plan signals two important changes to the way visitors to the region are to be understood and targeted:

1. The focus will increasingly be on locals as visitors within their own region and ambassadors / hosts to their friends and relatives.
2. Applying a more granular approach to move beyond broad target markets or audiences by assessing visitor flows to and through the region.

Initial findings from the visitor flows assessment highlighted difficulties in road access to the region from Canterbury and Marlborough, plus issues within the region such as the Takaka Hill Road and difficult public access to national parks.

Most of the leisure flows are around nature or adventure activities, which makes sense with the region’s three national parks and cycling facilities.

Events are another attraction that bring visitors to the region temporarily or entice locals to partake as well. Nelson has a large portfolio of different events throughout the year, including music and cultural events and sports teams playing in national or international competition. These events are predictable and offer an opportunity to offer additional services to both participants and spectators.

KEY CHALLENGES AND OPPORTUNITIES ACROSS FLOWS

Both challenges and opportunities are apparent in a variety of flows and solving them

Horizon	Challenges	Potential Solutions
Pre-Covid-19 and now	Transport and accessibility – especially to Golden Bay	Shuttle services or park & ride, boat connections across the Bay.
	Lack of public transport in and around the region	Alignment of public transport across regions, charging / increasing parking fees at National Park entrances
	Access to product information across operators	Coordinate information per flow, for example mountain biking.
Current	New booking patterns for Kiwi travelers – shorter lead times, longer stays, less paid activities	Flexible workforce to allow operators to adjust, communication along the supply chain (operator/transport), provide last minute booking services to fill empty operator capacity.
	Different experience preferences for Kiwi travelers – more self-service	Utilise staff elsewhere, if not needed (even in other sectors, for example fruit picking and processing).
	Planning uncertainty due to lack of experience with new flows	Set up operator exchange groups, facilitated by NRDA, to help operators draw lessons from the current season and prepare for the future.

Table 2: Challenges Across Visitor Flows

Horizon	Opportunities	Potential activities
Current	Better communication of service offering at entry points	Identify where flows look for information and provide information, for example Nelson activity maps on the Interislander ferry or last-minute booking apps for activities.
	Collaborate with other regions (Top of the South)	For multi-region flows, coordinate with surrounding regions to create service packages. The Marlborough visitor flow assessment will yield information to look for common flows and how to service them better.
	Work on 'off-season' flows	Use flows that always happen in the off or shoulder season to increase business outside the peak, without cannibalising the season. For example, grow Heaphy track mountain biking or school camps.
Longer-term	Create more connections and trails between bike parks/areas	Biking is an ever more popular activity but out of region visitors need more information to connect across the region and extend their stay or return for another trip.
	Link visitor sector more closely with other sectors	Education and food are closely related sectors. For example, work and study programmes can drive students (domestic and international) to stay in the region.
	Attracting temporary and permanent residents to the city	Coordinate with other sectors to seek opportunities for people to relocate to Nelson permanently or temporarily for work or study, ensuring Nelson is a great place to live will also enhance its appeal as a place to visit.

Table 3: Opportunities across Visitor Flows

Covid-19 -related border closures have stopped many flows for now, but these will return in future. The current pause allows our region to plan better to reduce future negative impacts and increase community benefits and participation in the

visitor sector – in line with our local focus and creating 100,000 ambassadors within the region. Examples of visitor flows where the NRDA could take a supporting or leading role are shown in table 4 below.

Operator Led (6)	NRDA Supported (82)			NRDA Led (14)
Operator/ business-driven – does not need support	New / Growing – growth support and connection	Mature flow – opportunity to increase benefits / address challenges	Currently on hold - Support required to restart and create positive impact	Lead - opportunity to coordinate/ direct
Day trips to Kaiteriteri	Great Taste Trail multi day riders	Abel Tasman Coastal Track hikers	International visitor flows	Sports training camps
Business trips to Nelson		Locals to Golden Bay/ Farewell Spit		
Heaphy track bikers	Business events / conferences		International visitors on sea kayaking day trips	Te Araroa Trail and Tour Aotearoa– full and part
Kiwi bach owners	Boomers in campers	Food festivals		Business events / conferences Corporate retreats
Christchurch regulars in summer	Heritage tours in Nelson	Responsible campers (domestic for now)	International students studying English	School camps

Table 4: Options for Supporting Visitor Flows

CHANGES TO VISITOR SPEND

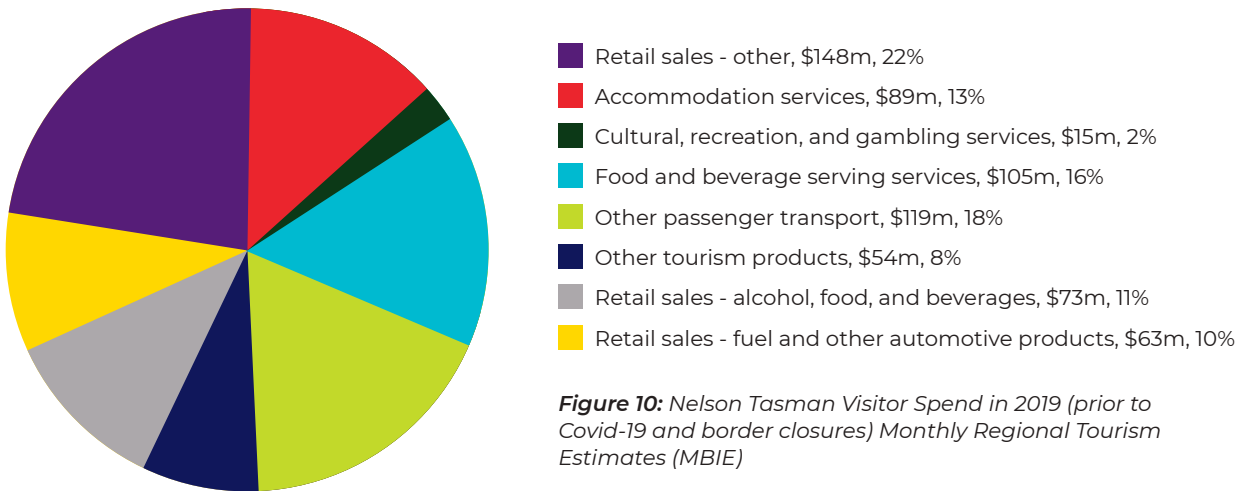
Visitor spend in Nelson Tasman was estimated as \$667m for the year ending December 2019. The way this spend was shared across sectors of the economy is:

- Domestic visitors generated 60% of this spend and international 40%
- Retail attracted 43% of visitor spend (the most in Nelson Tasman)

- Core tourism businesses received 33% of spend (i.e. accommodation, activities and transport)
- Food and beverage attracted 16% of visitor spend.

Covid-19 changed these patterns and for the year ending December 2020. While domestic visitor spend has been tracking reasonably well and replacing some of the lost international spend, the distribution has been uneven with segments such as retail doing better than others e.g. passenger transport and other tourism products.

Nelson Tasman Estimated Visitor Spend for the Year Ended December 2019



Total, Domestic & International Visitor Spend in Nelson Tasman \$m

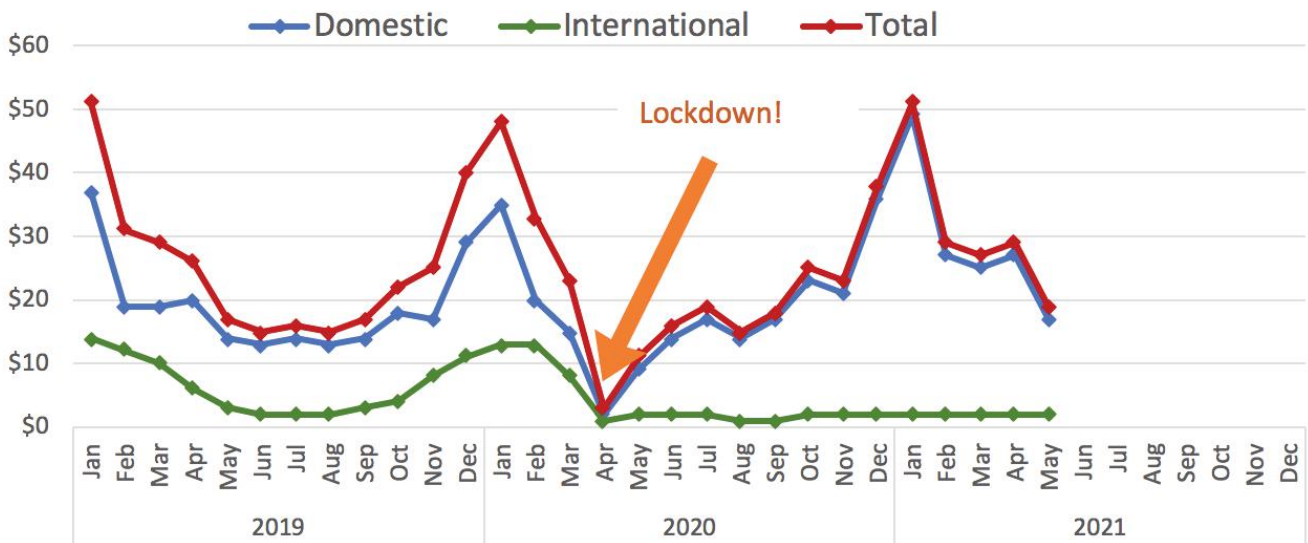


Figure 11: Nelson Tasman Domestic & International Visitor Spend, Tourism Electronic Card Transactions (MBIE)

It has been encouraging to see visitor spend in January and April 2021 tracking positively compared to the same months in 2019.

OUR VISION

Creating a better life for the communities of Nelson Tasman by welcoming a diversity of visitors who care for the places they travel to.



Figure 12: Vision and Pillars of Destination Nelson Tasman 2021 to 2026

Our vision and pillars for this destination management plan relate closely to the long-term vision of the Te Taihu Intergenerational Strategy.

Tūpuna pono, to be good ancestors

“...to pass on the taonga of Te Taihu in a better state than when these taonga were placed in our care.”

Our future starts with the care we take to balance how people visit and look after our special places. This balance applies to both the care for our environment as we travel from place to place and the desire to engage the supply side (visitor sector businesses) and demand side (visitors themselves) of the visitor economy.

Our vision is for visitors to see themselves as temporary residents and we ask them to be

good ancestors during their stay ensuring both locals and visitors to cherish and care for our environment.

Engaging both the supply side and demand side of the visitor economy means that visitors and locals can co-create a better future for the region. We ask both visitors and locals travelling in the region to 'explore more and to care more.'



Figure 13: Explore More: Care More - Balancing Visitor and Environmental Needs

OUR STRATEGIES

This destination management plan is informed by, and aligns with, regional documents:

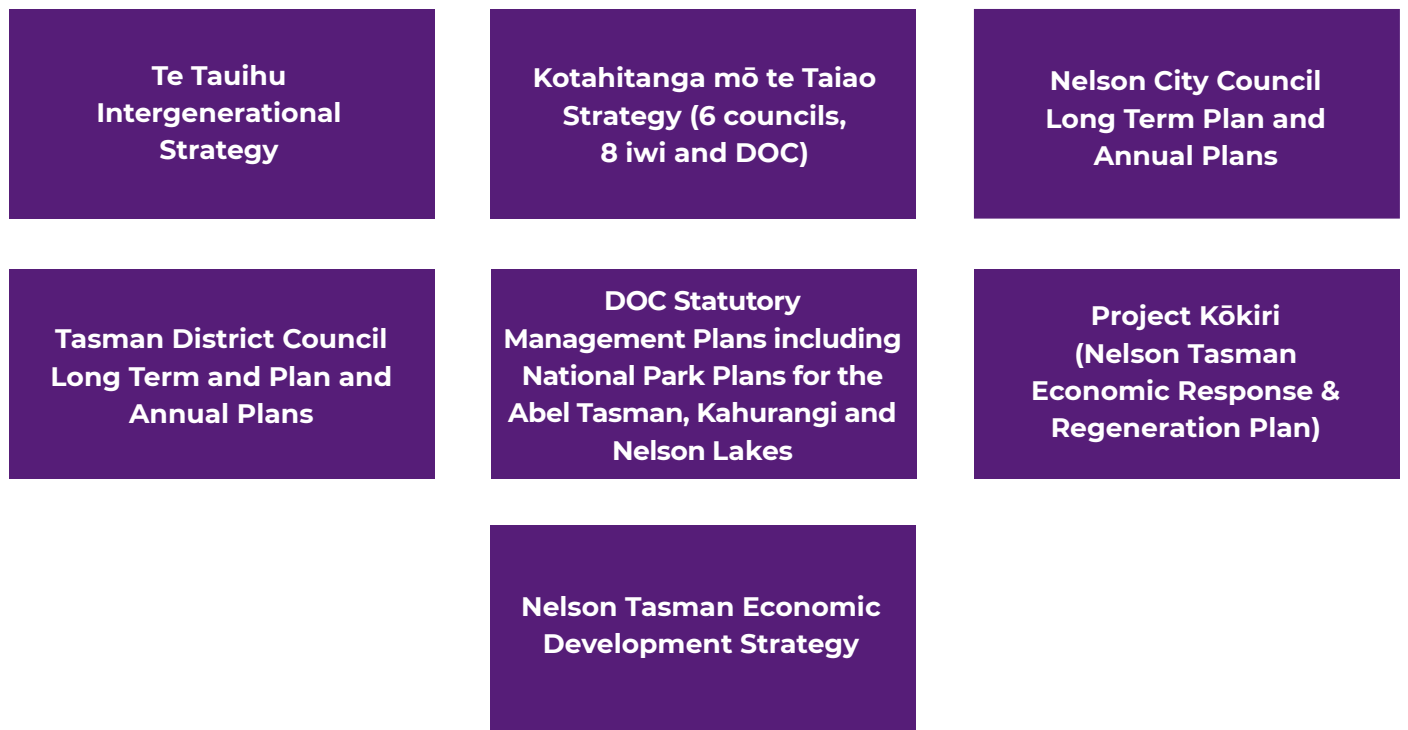


Figure 14: Regional Plans that have Informed This Destination Management Plan

See Appendix 1 for detail on how this DMP has been informed by and fits within other nationwide strategies and frameworks for sustainable tourism development.

LINKING WITH TE TAUIHU INTERGENERATIONAL STRATEGY 2020

The Te Taihu Intergenerational Strategy 2020 provides us with a clear and compelling vision to be good ancestors and leave this region better than we found it.

Te Whakakitenga: Our vision Tūpuna pono, To be good ancestors

The Vision for the Strategy is: Tūpuna Pono, To Be Good Ancestors. At the heart of the Strategy is the wellbeing of the people and places in Te Taihu (Oranga Te Taihu), with a particular focus on the wellbeing of current and future generations and the responsibility we have, as the current generation, to pass on the taonga of Te Taihu in a better state than when these taonga were placed in our care.

NGĀ UARATANGA: OUR VALUES

Our values draw on the values developed for the Te Taihu Intergenerational Strategy:

- Whanaungatanga – connecting, friendships, valuing relationships, working together with mana whenua as partners
- Auahatanga – entrepreneurship and development of innovation services and products
- Manaakitanga – hospitality and the service culture
- Kaitiakitanga - our collective role in protecting and looking after Taiao (the environment).

To be **Tūpuna Pono**, Good Ancestors, it is necessary to effectively manage a wide range of different cultural, economic, environmental and social outcomes. Eight intergenerational wellbeing outcomes have been identified .



Eight Intergenerational Outcomes



Te Taiao
The Natural World



Te Rōkau Taumata
Place



Pūtea
Economy



Papa Whenua
Infrastructure



Te Taihūtanga
Identity



Rangatiratanga
Leadership



Tangata
People and Communities



Mātauranga
Knowledge

Ngā Mahi Matua: Our Actions

Te Taiao - The Natural World:

- Zero Carbon Economy
- Zero Waste Circular Economy
- Water Stewardship & Protection
- Regenerative Practices

Pūtea - Economy:

- Oceans Economy Strategy
- Building and Innovation Ecosystem and knowledge Economy
- Regional Impact Investment Fund
- Review and Reset of NGO Sector

Te Taihūtanga - Identity:

- Te Reo Māori Strategy for Te Taihu
- Telling and Preserving our Local Stories
- Regional Provenance and Appellations

Tangata - People and Communities:

- Improved Equity and Service Provision for Health and Mental Health, Education, Employment and Participation in Society, Corrections and Rehabilitation, Local Facilities for the Vulnerable
- Regional Resilience Task Force
- Workforce Retraining, Redeployment Lifelong Learning Initiatives

Te Rōkau Taumata - Place:

- Smart Affordable Housing Solutions

Rangatiratanga - Leadership:

- Leadership Forum for Ongoing Collaboration and Custodian of Strategy

Papa Whenua - Infrastructure:

- Regional Local Resilience Plan for Digital Connectivity, Water Management, Clean Energy and Clean Transport

Figure 15: Te Taihu Intergenerational Strategy Outcomes and Actions

LINKING WITH THE DEPARTMENT OF CONSERVATION: VISITOR PRIORITIES

Treaty Partnerships have been established with 9 iwi within the region. New ways of enabling or enhancing DOC's ability to actively engage and work with iwi as kaitiaki within the region are being explored. The current focus is on:

- capability and capacity to enable co-design of and planning together
- partnering for cultural heritage mapping and supporting reassessment of cultural heritage management tools to reflect iwi cultural heritage.

Several of the region's key **system enablers** – Nelson/Marlborough Conservation Management Strategy and National Parks Management Plans have not been updated for many years. Updating these will provide an opportunity elevate the Treaty Partnership and signal community aspirations including:

- working with regulatory system to complete review of conservation management strategy and national parks management plans
- identifying options for supporting cycle trail development, where appropriate –including access and land tenure

An ongoing challenge is to maintain the **core network** to appropriate standards and focus on future opportunities:

- identify places not strongly aligned to regional proposition and work with Treaty Partners and/or others to pursue different delivery / management approaches (i.e. Backcountry Trust, local government, regional tourism organisations, heritage groups etc)
- as part of the above process, consider places where divestment might be a feasible option as assets near end of life or smaller scale replacement (rather than like for like) might be an option

- identify options for supporting local government and other landowners who provide access to popular places on Public Conservation Land
- consider options to increase revenue optimisation, in particular existing huts and the Te Araroa Trail substitution

Explore ways to better integrate multiple experiences as part of a **destination approach**. Northern South Island has places where there may be opportunities to undertake regional planning or experience design investment framework approaches. Explore these opportunities at:

- Abel Tasman National Park with focus on the northern section of the Park,
- Nelson Lakes National Park with focus on the Travers Sabine track and St Arnaud front country sites

Consider **experience design** or investment plans for: Puponga Farm Park/Farewell Spit, and Kahurangi Gateways sites providing access into the park (Cobb/Mt Arthur / Wangapeka / Heaphy) and backcountry multi day trips (Heaphy/ Karamea–Leslie and Wangapeka tracks)

Several **heritage sites** including those of importance to iwi require longer-term planning and maintenance including: planning for potential Tohu Whenua sites such as Abel Tasman 1642 Memorial and Te Waikoropupū Springs.

Finally, the coastal environment that supports several of the key visitor experiences and heritage sites is likely to face pressure from changing climate patterns. There is a need to improve the resilience of current and future investment and enable adaptive management over time. Implementation of DOC's **climate change adaptation action** plan will have identified heritage and visitor sites at risk and confirmed management options to mitigate loss, in particular Abel Tasman Coastal Track.

DESTINATION NELSON TASMAN STRATEGIES

There are 15 strategies that make up this plan – each relating to the four pillars of our vision. Aligned with these strategies are 49 actions.

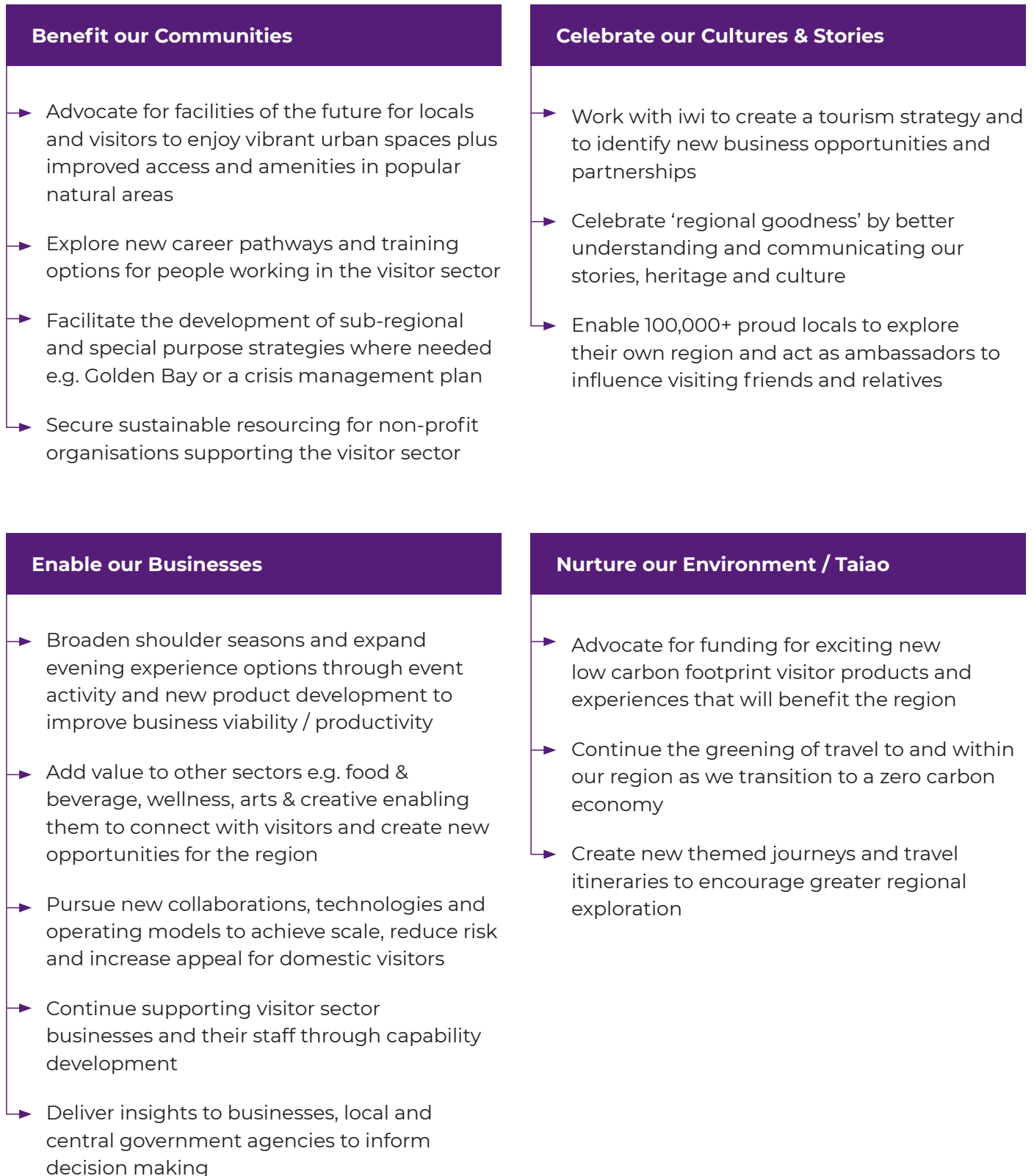


Figure 16: Destination Nelson Tasman Pillars and Strategies

DESTINATION MANAGEMENT COMPONENTS AND ACTIONS SUMMARY



The 49 actions of this destination management plan have been split across the eight destination management components shown below.





Figure 17: Destination Management Components and Number of Actions



DMP Component	Action No.	Action
Environmental stewardship 	A.1	Encourage greening of visitor flows to and within the region including greening of rental vehicles and coach fleets
	A.2	Continue growing the recognition of businesses zero carbon and other sustainability achievements by sharing stories and best practice ideas
	A.3	Develop a ‘visitors supporting environment’ programme identifying a list of causes to support, good eco travel habits and helpful hints
Community, attitudes & stories 	B.1	Adapt Nelson i-SITE into a centre for low carbon travel and regional showcase or hub for local products including food & beverage and the arts
	B.2	Communications programme to improve local understanding of the benefits of the visitor sector
	B.3	Deliver a local ambassador programme to generate local visitation and referrals particularly when locals host their visitors.
	B.4	Activations for locals and domestic visitors to explore more of the region and share their experiences (including expanding our consumer database)
	B.5	Revalidate, further distill and share our regional stories locally, nationally and internationally. Support iwi to tell their own stories. Coordinate and host domestic media visits to the region
Access 	C.1	Advocate for continued improvement of roads to, and within, the region including improvements to road user safety and network resilience
	C.2	Collaborate with airlines to ensure cost-effective and energy efficient air connectivity is further developed including trialling electric or hydrogen powered aircraft. Advocate for energy efficient public transport to major centres in the region
	C.3	Further develop and promote the region’s range of accessible and inclusive travel options enabling visitors with disabilities to access our built and natural environment
	C.4	Facilitate more ‘code sharing’ of land transport services within the region to cope with peaks & off-peak
	C.5	Carefully manage arrivals of smaller high-end cruise ships (when they can return safely) ensuring they align with community aspirations and visitor sector capacity
Amenities, services and infrastructure 	D.1	Support the completion of the Great Taste Trail (GTT) loop and Coppermine off-road and enhance trail experiences on both
	D.2	Spread utilisation of the Abel Tasman National Park i.e. further away from the coast and further north beyond Tōtaranui
	D.3	Support extending the regional “Heartland Rides” from Picton to Nelson via Maungatapu and linking the GTT to the Heaphy Track from Tōtaranui to Pohara and Takaka to the Heaphy via Collingwood

	D.4	Leverage the success of the region's mountain bike parks and IMBA gold rating by supporting track enhancement, product development and events to build the region's profile as a compelling mountain biking destination
	D.5	In partnership with DOC develop and promote iconic day and multi-day walks in the Nelson Lakes National Park
	D.6	Investigate developing short walks, mountain biking access and heritage / cultural experiences at sites / locations that have compelling stories to tell e.g. Puponga Farm Park
	D.7	Produce a feasibility study / business case for a purpose-built business events venue and how this could be linked to the proposed climatorium
Capability & development 	E.1	Pilot new ways for staff to work for more than one business in order to create year-round and higher value employment
	E.2	Continue to align education and training opportunities to employer needs
	E.3	Create a Māori advisor role within NRDA to engage with and support iwi and businesses
	E.4	Provide businesses with authentic and accurate story telling resources relating to the region
	E.5	Facilitate training in, and uptake of, improved environmental, social and cultural sustainability practices
	E.6	Trial new collaborative and cooperative operating models to improve sector resilience and productivity e.g. combined retail and experience hubs, staff sharing, collective marketing, packaged products / itineraries
	E.7	Educate businesses of market / regulatory changes, local supply chains and future trends especially health and safety
	E.8	Pilot adoption of new technologies e.g. virtual reality and augmented reality to enhance visitor experiences
	E.9	Provide additional digital marketing advice / mentoring for businesses
Experience & product development 	F.1	Initiate a Māori tourism strategy and facilitate / enable new iwi-based business, partnerships and co-investment opportunities
	F.2	Research and educate the local visitor sector around the accuracy and appropriate delivery of Māori stories
	F.3	Enable industry to create and promote trade ready (commissionable) products and experiences that will appeal in shoulder seasons and offer evening experience options
	F.4	Facilitate and leverage greater off-peak major and business events activity including sports tournaments, arts and cultural events

	F.5	Produce special interest strategies including for food & beverage, arts & creative and other non-tourism sectors and support the development of business cases for new and vibrant visitor experiences
	F.6	Explore opportunities to link visitor experiences in the hills surrounding Nelson City to create more compelling reasons for visitors to explore areas close to the city and add to our critical mass as a destination
	F.7	Investigate the feasibility of attracting a major hotel brand
	F.8	Within the region: Enhance road trips within the region and develop low carbon footprint options and 'transport yourself' journeys e.g. combining hiking, biking & kayaking
	F.9	Connecting Regions: Develop road journeys / touring routes across multiple regions with Marlborough, West Coast, Kaikoura, Hurunui etc
Marketing & promotion 	G.1	Identify visitor and temporary resident flows (e.g. international students) that present opportunities for visitor sector businesses to build off-peak visitation and prioritise those that can be influenced to travel
	G.2	Leverage scheduled events via a programme encouraging inclusion of more activities and extended stays
	G.3	Help secure more business events that align well with our regional offering
	G.4	Continue to build regional profile by managing the region's collective online presence i.e. website and social plus coordinating domestic media visits
	G.5	Resume international travel trade and media training (prioritise niche markets and segments as borders are planned to reopen - Australia focus first). Collaborate with other regions where this strengthens the regional proposition
	G.6	Investigate how film production projects can be best supported and how we can raise the profile of the region as a diverse, user-friendly location for film projects
Leadership, structures & insights 	H.1	Provide planning support for sub-regions where needed e.g. a Golden Bay Visitor Experience Development Plan
	H.2	Foster strong regional partnerships between the local visitor sector and national organisations e.g. DOC, MPI, Air NZ, TNZ, EECA, Waka Kotahi etc
	H.3	Secure long-term support and resourcing for the NRDA to lead the region's destination development and marketing
	H.4	Provide quarterly qualitative and quantitative insights to the visitor sector local and central government to inform decision making
	H.5	Review crisis management planning to involve visitor sector businesses

ACTIONS





As well as three national parks and one forest park managed by DOC, the region has community support for environmental projects like sanctuaries, tree planting, use of electric vehicles and conservation of freshwater.

Businesses in the Nelson Tasman visitor sector lead the way with their adoption of Zero Carbon certification and the wide support for ecological restoration. A recent survey of Nelson Tasman tourism operators showed that 87% are interested in reducing the carbon footprint of their business.

The vision of this destination management plan will ideally become a call to action in itself for visitors to 'explore more and care more' and to leave the environment in a better condition

after visiting a place. The final action item below expands beyond the current behaviour of businesses giving back to the environment via various projects to visitors giving back or even paying it forward. Ecological restoration projects could be supported by visitors as well as individual business led initiatives. There are many other actions that support environmental stewardship e.g. low carbon footprint 'transport yourself' multi-interest journeys e.g. combining hiking, biking, kayaking (refer Experience & product development) and facilitating training in, and uptake of improved environmental, social and cultural sustainability practices.

Action No.	Action	Priority	Lead
A.1	Encourage greening of visitor flows to and within the region including the exploration of business cases or funding opportunities for fleet greening of rental vehicles and coach fleets e.g. a coordinated application to EECA's contestable fund	Ongoing	NRDA
A.2	Continue growing the recognition of businesses zero carbon and other sustainability achievements by sharing stories and best practice ideas - to support behaviour change (e.g. sourcing local)	1	Businesses
A.3	Develop a 'visitors supporting environment' programme identifying a list of causes to support, good eco travel habits and helpful hints on how they can help improve our region. This may include an incentive for contributing	1	NRDA



Community, Attitudes and Stories

Local stakeholder consultation included two surveys of over 800 residents each, a separate survey of businesses in the visitor sector, and a series of stakeholder interviews and meetings including 60 participants at three visitor flows workshops.

Most residents in Nelson Tasman (97% in May 2020 and July 2021)⁵ feel that tourism brought some benefits to the region with 82% citing the benefits of the sector supporting hospitality, 80% agreeing tourism is good for the economy as a whole and 74% saying the sector provides employment opportunities.

Pressure on the environment (69% of respondents in May 2020 and 56% in July 2021), freedom camping presence (55% in July 2021) and traffic and parking congestion (55%) were the most commonly shared concerns.

Nelson Tasman's 104,000 residents are a source of visitation to the region with estimates of 16.3% of potential domestic trips to the region being generated by locals⁶. This compares favourably to other similar sized regions but is significantly less than larger regions like Canterbury where over half of their potential trips (54%) are generated from local residents. Nelson Tasman residents could form a greater proportion of potential travellers in future with the right information and motivation being provided to them. Visitor flow assessments have also highlighted the importance of locals in stimulating demand during off-peak travel periods as they are close by, know the area and understand the benefits of visitation to job creation and the economy.

TRANSFORMING THE NELSON i-SITE FOR LOCALS AND VISITORS

Nelson i-SITE serves a valuable purpose as a provider of personal and relevant information to visitors who have already decided to visit Nelson Tasman. Staff can provide advice that meets clients' needs in a much more targeted way than online information is currently able to do. This enhances the visitor experience of the region and in many cases encourages them to stay longer. There is potential to increase the relevance of the i-SITE to locals as well.

Furthermore, the i-SITE provides an essential public service particularly in times of a natural disaster. In recent years, the region has experienced flooding, fires, cyclones and the impacts of earthquakes. Visitors turn to the i-SITE for help and advice in such times of need when they would otherwise have nowhere to go.

However, the funding model of the i-SITE is currently not fit for purpose and foot traffic is declining – visitors value good advice but have no need for assistance with making bookings.

To ensure the sustainability and relevance of the Nelson i-SITE we recommend:

- Combining services with DOC, so customers can get all the information they need from one place
- Pursuing a leading concept highlighted in our draft Food & Beverage Tourism Strategy to bring authentic, local F&B experiences to the i-SITE. A fresh Nelson Tasman themed market-style destination with dedicated space for F&B consumption, social interactive spaces and live performances and classes. Local arts and crafts could also be incorporated within this. The vision is to support both small and large F&B producers to work alongside the tour/experience

⁵Nelson Tasman Resident Perceptions of the Visitor Sector Survey (May 2020 and July 2021)

⁶Domestic Travellers Potential Trips to Nelson Tasman by Primary and Secondary Markets who can get there easily (DGIT, 2016)

operators, and the arts sector to differentiate from competing regions. This will generate a new revenue channel and brand ambassadors through the direct interaction with visitors and the local community. F&B exhibitors, tourism operators and DOC will benefit from collaboration and cross selling to encourage further engagement with visitors and the local community.

- Investigating augmented reality technology to create immersive and interactive visitor experiences in the i-SITE itself. This would focus on sharing the stories of the region and could focus on the visitor activities, the flora and fauna, the history and cultures of

the region, or linking in more closely with the F&B stories and personalities.

An opportunity may also exist to reposition the Nelson i-SITE to amplify the region’s positioning as an eco-tourism destination by adopting a greater focus on environmental sustainability and offering services such as a new Centre for Low Carbon Travel. This could provide new services for locals and businesses as well as for visitors to the region.

Visitor sector businesses could also benefit from access to shared services such as marketing and reservations and potentially also experienced contractors.



Figure 18: Proposed Services Available from a Centre for Low Carbon Travel

COMMUNITY ACTIONS

There is one specific action regarding tracking local attitudes, another for adapting the i-SITE to be more relevant for locals and two marketing actions relating to the local community. One further action relating to brand positioning is detailed within the 'Brand Positioning' strategy .

Refer to the environmental stewardship section for an example of how visitors may be willing to support local causes such as providing funding for ecosystem restoration work via the region's various sanctuary and restoration projects.

Action No.	Community Attitudes	Priority	Lead
B.1	Adapt Nelson i-SITE into a centre for low carbon travel and regional showcase or hub for local products including food & beverage and the arts	2	NRDA
B.2	Communications programme to improve local understanding of the benefits of the visitor sector	1	NRDA
Local Marketing & Promotion			
B.3	Deliver a local ambassador programme to generate local visitation and referrals particularly when locals host their visitors. This will include an information pack, calls to action and rewards or incentives to drive repeat visitation, referrals and sharing of experiences	1	NRDA
B.4	Activations for locals and domestic visitors to explore more of the region and share their experiences (including expanding a locals database)	Ongoing	NRDA

BRAND POSITIONING AND STORIES

Regional identity research in 2016 highlighted that the majority of New Zealanders (7 in 10) were unfamiliar with the Nelson region, with a fifth saying they knew nothing at all about the region. And although the region enjoys strong preference as a potential visitor destination, visitors may not be clear about what makes the region distinctive.

It is timely to re-consider the current brand pillars relative destination positioning. This will lead to strengthening the regional point of difference and provide a clearer proposition for potential visitors to understand.

One important consideration when implementing this plan is the motivations of travel organisers at an individual visitor flow level e.g. families coming

to Kaiteriteri to camp in summer or business travellers attending a conference. The regional identity may apply to only some of these visitor flows.

Communicating to a variety of visitor types via many different channels reinforces the importance of businesses and other agencies articulating our regional point of difference in a compelling and consistent way. Refining a unique selling proposition for the region, along with regional story guidelines for third party use, will ensure messages are clearer and more consistent.

Other destinations in the competitor set, both in NZ and abroad, are listed below. It may be possible to benchmark against, or even share information with, these regions.

New Zealand	International
<ul style="list-style-type: none"> • Northland • Coromandel • Bay of Plenty • Hawke's Bay • Wairarapa • Marlborough • Queenstown / Central Otago 	<ul style="list-style-type: none"> • North Coast, NSW, Australia • Southwest WA, Australia • Oregon Coast, USA

Table 5: Nelson Tasman's Competitive Set

Action No.	Brand Identity Action	Priority	Lead
B.5	Revalidate, further distill and share our regional stories locally, nationally and internationally. Support iwi to tell their own stories. Coordinate and host domestic media visits to the region	1	NRDA



Access

Nelson Tasman enjoys very good air connectivity via a modern airport and road access is generally good. Some challenges exist in terms of public transport availability and ongoing road works plus reduced speed limits for long stretches e.g. the Takaka Hill Road.

Transport to and from the region's national parks is only possible in a personal car (owned or rented) or through a shuttle service and it is difficult to move around the region without driving a car. This leads to peak traffic congestion on the roads and parking space shortages at the access points to the national parks and at other attractions. New

Zealanders are more likely to travel by car, than bus, so the current domestic market situation is likely to increase these issues.

The table below shows the main transport modes used by domestic leisure visitors interested in visiting Nelson Tasman. We are well placed to meet the needs of visitors who prefer to travel by air e.g. the majority of domestic visitors from Auckland and Wellington. However, visitors from Canterbury are more likely to drive here and the majority of Nelson Tasman locals prefer to drive to locations within their own region.

Potential Trips by Domestic Leisure Travellers interested in Nelson Tasman (excludes business travel)					
	New Zealand	Canterbury	Wellington	Auckland	Nelson Tasman
Potential Trips (per annum)	2,676,666	576,045	197,168	506,171	374,902
Fly	50%	22%	56%	84%	2%
Road	50%	78%	44%	16%	98%

Table 6: Transport Modes Used by Domestic Leisure Travellers Interests in Nelson Tasman (DGI.t.nz)

Before Covid-19 there were 5 to 10 high-end cruise ship arrivals to the region per annum. These smaller vessels generated land-based flows for tours and activities, generally during the peak season. No resumption dates have been set.

Alternative low carbon footprint access to the region is increasingly being used e.g. the Tour Aotearoa cycling route via the Maungatapu Road and the Te Araroa Trail across the Richmond Ranges.

The increased likelihood of adverse natural events may mean greater disruption to our roading network resulting in the need for improved communications regarding road closures.

There are five proposed actions relating specifically to access. However, there are experience and product development actions such as new road journeys across Te Taihu and around the top half of the South Island. These should assist in generating more appeal for the drive market ex Christchurch and other South Island locations.

Action No.	Access Actions	Priority	Lead
C.1	Advocate for continued improvement of roads to, and within, the region including improvements to road user safety and network resilience	Ongoing	NRDA
C.2	Collaborate with airlines to ensure cost-effective and energy efficient air connectivity is further developed including trialling electric or hydrogen powered aircraft. The airport will also advocate for energy efficient seamless public transport connections from the airport to major centres in the region	3	Nelson Airport
C.3	Further develop and promote the region's range of accessible and inclusive travel options enabling visitors with disabilities to access our built and natural environment	Ongoing	NRDA/DOC
C.4	Facilitate more 'code sharing' of land transport services within the region to cope with peaks & off-peak	1	Businesses
C.5	Carefully manage arrivals of smaller high-end cruise ships (when they can return safely and adhere to all government regulations and cruise sector requirements) ensuring they align with community aspirations and visitor sector hosting capacity	Ongoing	Port Nelson



Amenities, Services & Infrastructure

Nelson Tasman ranks 13th in terms of visitor spend in New Zealand⁷. As a result, the region offers a comprehensive portfolio of amenities and infrastructure relevant to both visitors and locals.

Regional infrastructure investments over the past decade that have generated new visitor demand and economic impact include:

- Nelson Airport
- Two Great Rides (Tasman's Great Taste Trail and The Coppermine Trail)
- New accommodation, retail and food and beverage investments at the Kaiteriteri Recreation Reserve
- The Suter Gallery upgrade

⁷According to the Tourism Electronic Card Transactions (TECTs) for the year ended November 2020, Ministry of Business, Innovation and Employment

- Completion of the South Island’s largest fenced sanctuary at the Brook Waimarama Sanctuary
- Various new high quality mountain bike parks – Nelson, Wairoa Gorge, Kaiteriteri and Silvan Forest
- Mapua waterfront
- The Theatre Royal.

Infrastructure is good for sporting events, especially school team sports e.g. Saxton Field. However larger indoor event spaces and business events breakout rooms are limited compared to other similar sized regions.

The Nelson Infrastructure Strategy 2018 to 2048 contains four objectives:

- Increase resilience to natural hazards
- Maintain and renew existing assets
- Provide infrastructure to enable growth and development
- Maintain or improve environmental outcomes.

There are seven actions in this area.

Action No.	Amenities, Services and Infrastructure Actions	Priority	Lead
D.1	Support the completion and maintenance of the Great Taste Trail loop and Coppermine and investigate enhancing trail experiences on both Great Rides e.g. signage, picnic areas, food & beverage experiences, artwork, interpretation	2	NTCTT
D.2	Spread utilisation of the Abel Tasman National Park i.e. further away from the coast and further north beyond Tōtaranui	2	NRDA / DOC
D.3	Support extending the regional “Heartland Ride” network e.g. Picton to Nelson via Maungatapu and Tōtaranui to Pohara and Takaka to the Heaphy via Collingwood, linking the GTT to the Heaphy	2	NTCTT
D.4	Leverage the success of the region’s mountain bike parks and IMBA gold rating by supporting track enhancement, product development and events to build the region’s profile as a compelling mountain biking destination	2	MTB Clubs / NRDA
D.5	In partnership with DOC develop and promote iconic day and multi-day walks in the Nelson Lakes National Park e.g. the Mt Robert Circuit or Travers Sabine – this may include completing a feasibility study or business case	2	NRDA / DOC
D.6	Investigate developing short walks, mountain biking access and heritage / cultural experiences at sites / locations that have compelling stories to tell e.g. Puponga Farm Park – this may include completing a feasibility study or business case	2	NRDA / DOC
D.7	Produce a feasibility / business case for a purpose-built business events venue and how this could be linked to the proposed climatorium	2	NCC / NRDA



The NRDA offers capability development support and, through its involvement with the Chamber of Commerce and NMIT, can align this support with industry need and strategic focus. NRDA will want to enable relevant destination management capability building activities. It will also be important to ensure the NRDA has the organisational capacity and capability to be the lead agency for implementing actions of this destination management plan.

WORKFORCE AND SKILLS DEVELOPMENT

NRDA will work with the Regional Skills Leadership Group to develop a Regional Workforce Development Plan that identifies targeted programmes to align with region’s labour force and skills needs. Programmes may include youth transition (e.g. Education to Employment brokerage), intern, graduate and work placements,

targeted initiatives (e.g. 2021 Pick Nelson job campaign) and potential older demographic workforce initiatives.

Ongoing business advisory services will continue under the Regional Business Partner Programme with services tailored to tourism as well as other sectors of the economy.

AUTHENTICITY

The Te Tauihu Intergenerational Strategy highlighted the need for increasing cultural connectedness to improve our narrative, our regional provenance and appellations including stories of all migrations.

Capability and development actions are designed to enhance how businesses receive and can utilise updated and accurate story telling resource.

Action No.	Capability & Development Actions	Priority	Lead
E.1	Pilot new ways for staff to work for more than one business in order to create year round and higher value employment	1	NRDA
E.2	Continue to align education and training opportunities to employer needs	Ongoing	NRDA/ Education sector
E.3	Create a Māori advisor role within NRDA to engage with and support iwi and businesses	2	NRDA
E.4	Provide businesses with authentic and accurate story telling resources relating to the region (proof points re environmental, cultural, heritage stories)	1	NRDA
E.5	Facilitate training in, and uptake of, improved environmental, social and cultural sustainability practices	1	NRDA
E.6	Trial new collaborative and cooperative operating models to improve sector resilience and productivity e.g. combined retail and experience hubs, staff sharing, collective marketing, packaged products / itineraries	2	Businesses
E.7	Educate businesses of market / regulatory changes, local supply chains and future trends especially health and safety	Ongoing	NRDA

E.8	Pilot adoption of new technologies e.g. virtual reality and augmented reality to enhance visitor experiences	2	NRDA
E.9	Provide additional digital marketing advice / mentoring for businesses	1	NRDA



Experience & Product Development

Experience and product development activities span existing operations and natural areas through to new attractions and events. It is heartening that many of the actions enhance what the region already offers – Great Walks, Great Rides and great experiences including

major events. There are only two actions that centre on greenfield development where larger investment will be required. Other actions, such as the development of road journeys, will require a collaborative approach to create future interest and demand.

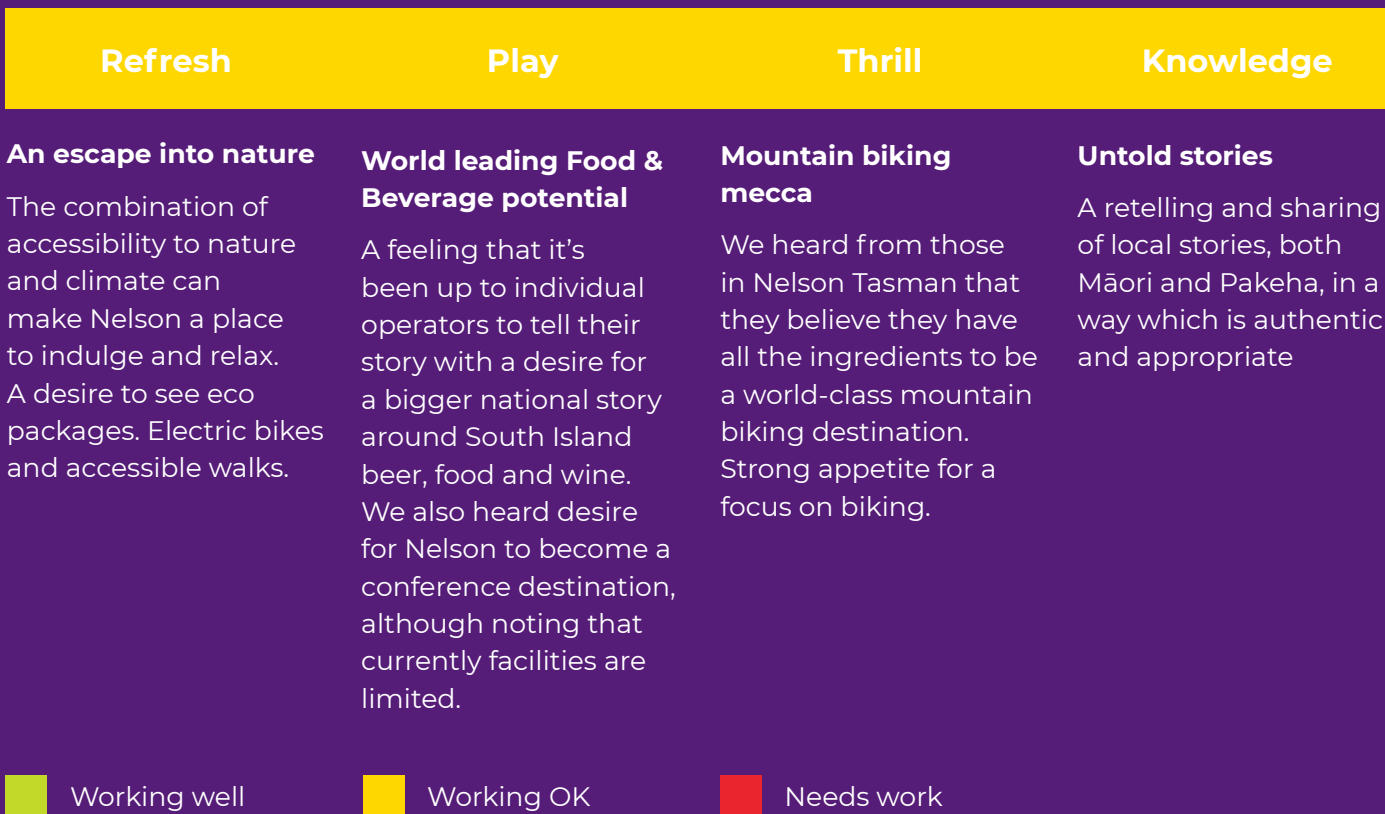


Figure 19: Experience & Product Development Types

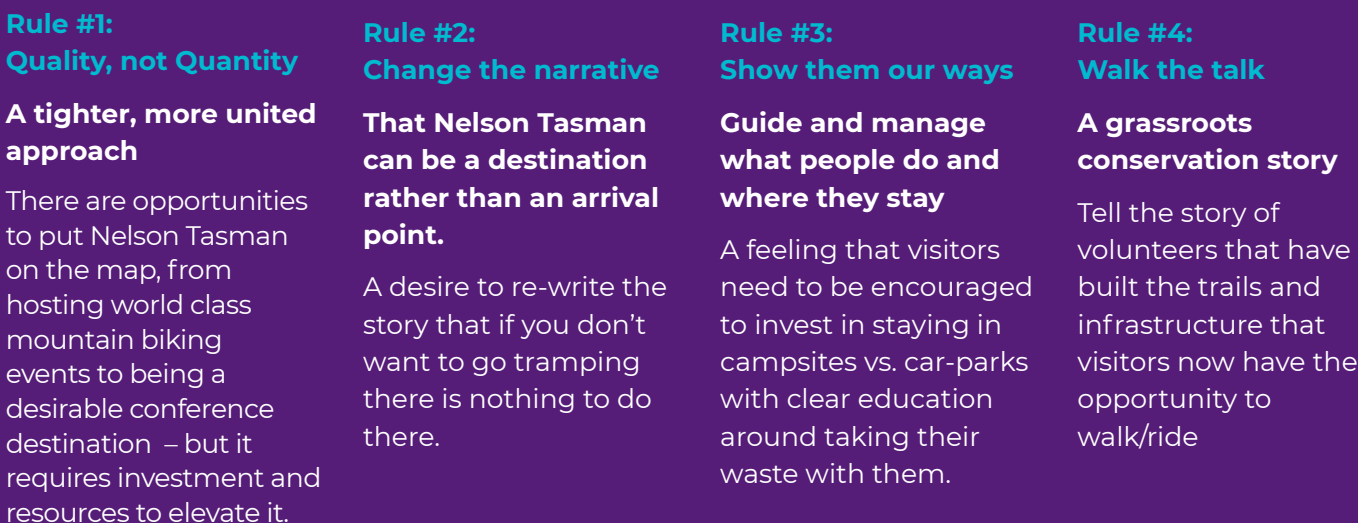
Tourism New Zealand’s ‘Unlocking Future Tourism’ research in late 2020 offered regional perspectives on what could be done to develop experiences to meet the needs of future visitors. This research

highlighted that while Nelson’s offering was ‘working OK’, there are many opportunities for improvement.

Meeting the Domestic needs



Rules for International Tourism in Order of Importance



So: there is a theme of untapped opportunity for Nelson with a desire to elevate what it can offer to the domestic market, and in turn be more than just a gateway to the great walks.

Figure 20: ‘Unlocking Future Tourism’ Nelson qualitative research by Tourism New Zealand

Action No.	Experience & Product Development Actions	Priority	Lead
F.1	Initiate a Māori tourism strategy and facilitate / enable new iwi-based business, partnerships and co-investment opportunities including hosting an annual korero with Iwi and Māori businesses	1	NRDA
F.2	Research and educate the local visitor sector around the accuracy and appropriate delivery of Māori stories	2	NRDA
F.3	Enable industry to create and promote trade ready (commissionable) products and experiences that will appeal in shoulder seasons and offer evening experience options	1	NRDA
F.4	Facilitate and leverage greater off-peak major and business events activity including sports tournaments, arts and cultural events <ul style="list-style-type: none"> - accelerator programme - capability building - expansion of existing events - leverage local industry strengths 	1	NRDA
F.5	Produce special interest strategies including for food & beverage, arts & creative and other non-tourism sectors and support the development of business cases for new and vibrant visitor experiences	1	NRDA
F.6	Explore opportunities to link visitor experiences in the hills surrounding Nelson City to create more compelling reasons for visitors to explore areas close to the city and add to our critical mass as a destination	2	NRDA
F.7	Investigate the feasibility of attracting a major hotel brand	3	NRDA
F.8	Within the region: Enhance road trips within the region and develop low carbon footprint options and 'transport yourself' journeys e.g. combining hiking, biking & kayaking	1	NRDA
F.9	Connecting Regions: Develop road journeys / touring routes across multiple regions with Marlborough, West Coast, Kaikoura, Hurunui etc	2	NRDA/Other regional tourism organisations



Marketing & Promotion (including Target Audiences)

Placing locals at the heart of our visitor sector will require a better understanding of local visitor flows as well as domestic visitor flows to the region. We need to understand visitor wants, needs and motivations.

A consideration in growing local visitation and referral is whether tourism businesses can undertake their own local marketing activity, or whether it's better to have coordinated messages via an agency such as the NRDA. The latter approach could provide greater impact with less advertising clutter.

As tourism businesses become more attuned to tracking sales performance via various direct

and indirect channels to market, NRDA may need to become a sales champion as well as a marketing leader.

The first action listed below will require new ways for businesses to work together to understand then influence visitor flows. For example, it may be possible for a group of attractions and activity providers to present offers to visitors planning a trip to the region for a sports tournament or training camp. It will be important to present relevant and compelling information to event organisers and participants to make future visitors aware of options to do more while in the region.

Action No.	Target Audiences Action	Priority	Lead
G.1	Identify visitor and temporary resident flows (e.g. international students) that present opportunities for visitor sector businesses to build off-peak visitation and prioritise those that can be influenced to travel within the region. Coordinate activity around experience availability and temporary closures (of attractions / experiences / services) in off-peak months	1	NRDA + businesses
Marketing and Promotion Action			
G.2	Leverage scheduled events via a programme encouraging inclusion of more activities and extended stays	1	NRDA
G.3	Help secure more business events that align well with our regional offering	Ongoing	NRDA
G.4	Continue to build regional profile by managing the region's collective online presence i.e. website and social plus coordinating domestic media visits	Ongoing	NRDA
G.5	Resume international travel trade and media training (prioritise niche markets and segments as borders are planned to reopen - Australia focus first). Collaborate with other regions where this strengthens the regional proposition	Ongoing	NRDA
G.6	Investigate how film production projects can be best supported and how we can raise the profile of the region as a diverse, user-friendly location for film projects	2	NRDA

Please also refer to the two local marketing actions in the Community, attitudes and stories section.



Leadership, Structures & Insights

The visitor sector in Nelson Tasman is served in many ways at a local level e.g. tourism operator associations, promotions groups, and the NRDA leading regional visitor sector initiatives.

Tourism businesses have previously contributed significant funds to NRDA's marketing activities. However, the disruptions caused by Covid-19 and the likely drop in business revenues could impact

the ability for businesses to pay for future activities. This may result in changes to the services provided by the NRDA.

Given the dramatic changes to the visitor sector in New Zealand and around the world, it is likely that new plans, new collaborations, new funding sources and new insights to adapt and respond quickly will be required.

Action No.	Leadership, Structures & Insights Actions	Priority	Lead
H.1	Provide planning support for sub-regions where needed e.g. a Golden Bay Visitor Experience Development Plan	1	NRDA
H.2	Foster strong regional partnerships between the local visitor sector and national organisations e.g. DOC, MPI, Air NZ, TNZ, EECA, Waka Kotahi etc	Ongoing	NRDA
H.3	Secure long-term support and resourcing for the NRDA to lead the region's destination development and marketing	Ongoing	NRDA
H.4	Provide quarterly qualitative and quantitative insights to the visitor sector e.g. visitor flows, event impact, local sentiment and forward bookings or travel intentions. Also provide regular updates to local and central government to inform their decision making	Ongoing	NRDA

RISK & CRISIS MANAGEMENT

Nelson Tasman has had to contend with a number of adverse climate related events over the past five years and these have impacted the visitor sector e.g. forest fires and cyclones. These events have tested crisis management plans for the region and we must continue to consider the needs of visitors as these are updated.

Tourism businesses would benefit from ongoing guidance on best practice in managing financial as well as operational risk – especially in the face of the disruptions being caused by Covid-19.

Action No.	Risk & Crisis Management Action	Priority	Lead
H.5	Review crisis management planning to involve visitor sector businesses	Ongoing	NRDA

PRIORITIES

A photograph of two cyclists riding through the Spooners Rail Tunnel. The tunnel is a large, arched structure with a rough, textured interior. The cyclists are wearing helmets and jackets, and their bikes have front lights on. The scene is dimly lit, with the cyclists' lights illuminating the path ahead. The tunnel is surrounded by lush greenery and trees.

SPOONERS RAIL TUNNEL
BUILT 1891 – 93
LENGTH 1352 m
THIS IS THE LONGEST DISUSED
RAIL TUNNEL IN NEW ZEALAND
BUILDER: MR ALAN FIGURE FROM WELLINGTON
CLOSED 22 SEPT 1955 FOR INFO PH 544 8500

The top three priorities for the region revolve around improving and integrating what we already offer to visitors and span three categories:

- **Great Rides:** Support the completion and maintenance of the Great Taste Trail loop and Coppermine Trail and investigate enhancing trail experiences on both Great Rides e.g. signage, picnic areas, food & beverage experiences, artwork, interpretation.
- **Great Experiences:** Produce special interest strategies including for food & beverage, arts & creative and other non-tourism sectors and support business cases for new and vibrant visitor experiences.
- **Great Walks:** Spread use of the Abel Tasman National Park i.e. further away from the coast and further north beyond Tōtaranui. The fourth priority of this plan is the development and promotion of iconic day and multi-day walks in the Nelson Lakes National Park.

These priorities have been determined using criteria adapted from those used in the region's economic development planning:

Alignment with Te Tauihu Intergenerational Strategy wellbeing criteria:

- Environmental sustainability
- Socially responsible outcomes
- Equity
- Culturally responsible outcomes.

Contribution to regional competitive advantage:

- Productivity (improvement in wages, relative output to input)
- Innovation
- Resilience / diversity
- Workforce development
- Building regional profile / distinctiveness.

Contribution to economic priorities:

- Employment (No. of jobs created or retained directly and/or indirectly, and value of jobs)
- Regional export revenue
- Impact across local supply chains and flow-on effects.

Ease of implementation:

- Deliverability
- Timeframes.



The top ten priority actions identified for this plan relate mainly to experience & product development to generate even greater regional appeal. Six of the top ten priorities in this plan

relate to investments to enhance attractions, events and activities that the region is already well-known for with four actions relating to new investments.

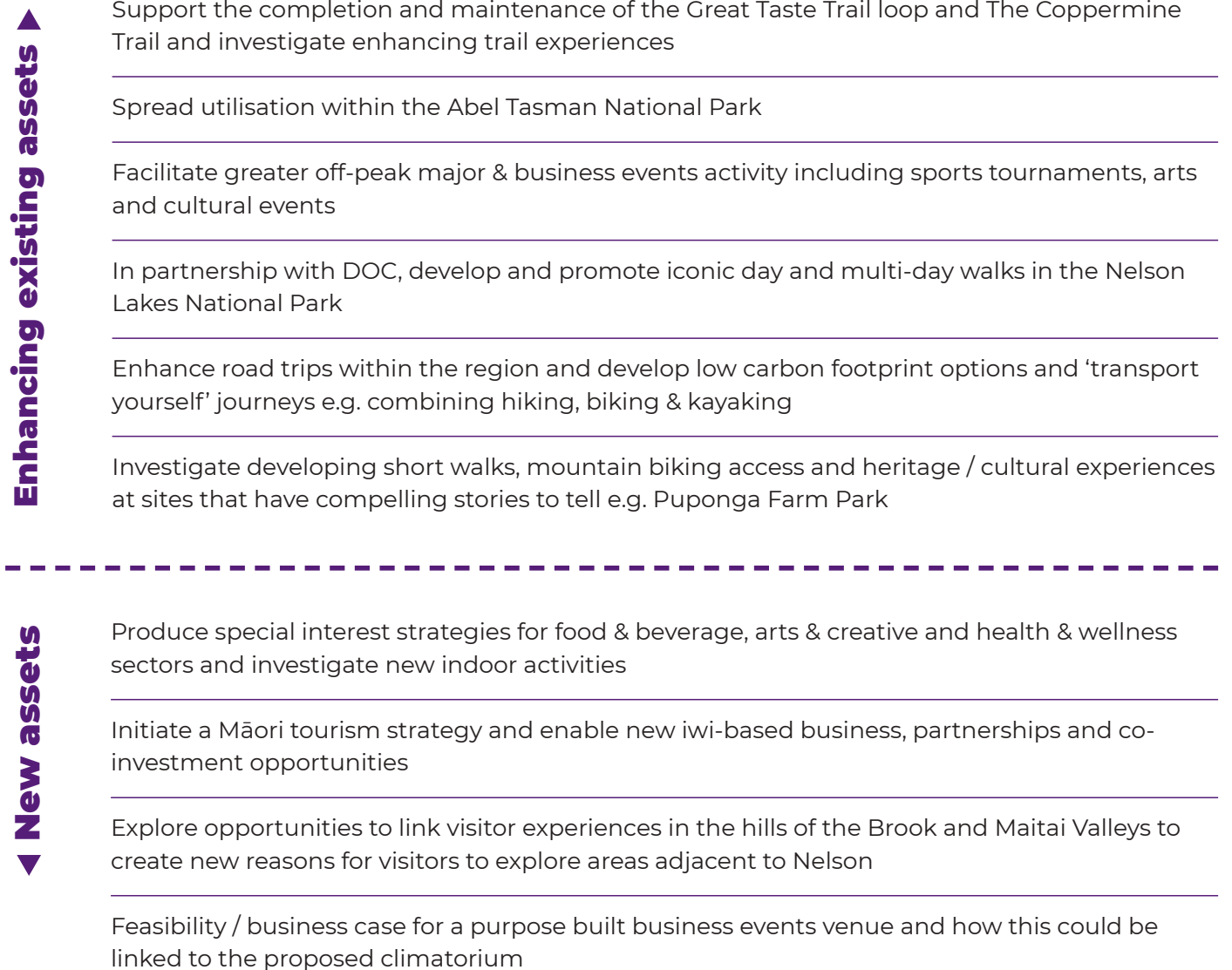


Figure 21: Top Ten Priorities

IMPLEMENTATION

A person is performing a bicycle stunt in a skatepark at sunset. The person is upside down, holding the handlebars, with the bicycle wheel pointing towards the top of the frame. The background is a dramatic sky with orange and blue hues, and silhouettes of trees and a skatepark ramp are visible at the bottom.

This plan represents a significant change to the collective work needed across the region. A new destination development function needs to be picked up by a regional agency such as the NRDA.

BUDGET ESTIMATES

Funding to implement these destination management actions (approximately \$1m per year for the next 5 years plus funding for capital projects and core lead agency staffing) is only

partly secured⁸ and is likely to require a mix of central government, local government, and private sector contributions. The total project funding required for implementation the 49 actions of this plan is estimated to be \$5.34m over five years⁹.



Figure 22: Estimated Five Year Budget by DMP Component

ONGOING COMMUNITY ENGAGEMENT

Wider and ongoing community engagement will be required to inform experience and event development plus engage locals to act as ambassadors. An exciting new era of community involvement in the visitor sector is about to begin with locals and visitors being asked to explore more of our region and care more for the places being visited.

A process for ongoing community engagement based on two-way dialogue will be key to the

successful implementation of this plan. It is envisaged that ‘grassroots groups’ of local tourism associations and business groups will, along with the NRDA, communicate with wider community groups ideally at least every six months.

There will be a growing database of local ambassadors being presented with ideas for travelling locally, hosting friends and relatives in the region and providing feedback on new products, events and how visitors are behaving while in the region.

⁸Regional Event Funding for the next four years has been awarded jointly to Nelson, Tasman and Marlborough.

⁹Excluding capital development projects such as infrastructure upgrades or construction of new attractions.



Figure 23: Destination Nelson Tasman Community Engagement Process

PARTNERSHIPS

Destination management is a new function for New Zealand regions and involves stakeholder groups outside the visitor sector:

- Visitors
- Māori/iwi/hapū
- Tourism industry
- Wider businesses
- Local residents
- Central and local government.

Communication with local communities will be an underpinning success factor for this destination

management plan. Local engagement will be required to gather insights, inspire locals to travel locally and host visitors, support events and inform decisions on facilities and experiences of the future. This engagement will require sensible management to ensure local stakeholders are not overburdened.

An informal regional steering group is proposed to coordinate communications and activities relating to this destination management plan and to explore opportunities to generate further synergies. The Nelson Regional Development Agency could become the secretariat for this steering group in the first instance.



Figure 24: Destination Management Plan - Management and Reporting Structure

THE ROLE OF THE NELSON REGIONAL DEVELOPMENT AGENCY

The Nelson Regional Development Agency (NRDA) is the logical lead agency for the implementation of this plan. Future work will need to be resourced at two levels within the lead agency:

1. Project management resourcing (to drive implementation and track results)
2. Funding for the priority projects and new initiatives that the action plans set out.

Delivering the actions of this plan is likely to require an additional three full time equivalent staff to facilitate projects and drive workstreams, as well as measure and track progress over five years. Most of the additional staff resource will be needed for projects relating to destination development underpinned by ongoing community engagement.

An expanded destination management role for the NRDA will broaden its focus well beyond the current destination marketing and capability building functions to encompass:

- Coordination of the sector to drive plan implementation and results tracking

- Advocating for funding for priority development projects and new initiatives set out in the action plans within this DMP
- Supporting the visitor sector via capability development and sharing of relevant and timely insights
- Communicating with the community and community groups to inform product and event development and inspire locals to act as ambassadors.

Destination Nelson Tasman will provide the strategic framework over the next five years that can then be translated into annual plans by the NRDA that will contribute to the goals of the destination management plan.

The NRDA is well placed to report on progress of this plan firstly to their own management and board then to wider regional stakeholders via either the Kotahitanga mō te Taiao Alliance or Project Kōkiri. Progress reporting is likely to be on a 6 monthly basis with a more regular i.e. quarterly meetings of the regional steering group able to align and further leverage regional activities.

MEASURING SUCCESS

These success measures will be tracked during the five-year term of this plan.

Overarching Goals by 2026



Figure 25: Overarching Goals of Destination Nelson Tasman 2026¹⁰

Once confirmed, progress towards these goals will be tracked on an annual basis – as shown in Table 7 over the page.

¹⁰*The tourism industry employed an average of 5,146 people in Nelson-Tasman in 2020. (Infometrics Annual Economic Profile for Nelson-Tasman, 2020)

Indicator	Baseline 2021/22	2022/23	2024/25	2023/24	2025/26
Benefit our Communities					
Proportion of the community that agrees the visitor sector delivers benefits to the region	80% t.b.c.	Target t.b.c.	Target t.b.c.	Target t.b.c.	Target t.b.c.
Perceptions and satisfaction of walking and cycling experiences, infrastructure and wayfinding ¹¹	Overall trail conditions 4.4 / 5.0	4.4	4.5	4.5	4.6
Residents have signed up as ambassadors to promote the region	Currently various databases	Central database of 10,000	Database of 15,000	Database of 20,000	Database of 25,000
Proportion of full time jobs in the visitor sector	(baseline and targets t.b.c.)	Target t.b.c.	Target t.b.c.	Target t.b.c.	Target t.b.c.
Celebrate our cultures					
Regional stories and destination themes in media perceived positively by locals and visitors	(baseline and targets t.b.c.)	e.g. 90% positive perception	e.g. 90% positive perception	e.g. 90% positive perception	e.g. 90% positive perception
Growing number of businesses offering Māori experiences ¹²	(baseline and targets t.b.c.)	4	6	8	10
Positive perceptions and satisfaction of visitors	(baseline and targets t.b.c.)	e.g. 90% satisfaction	e.g. 90% satisfaction	e.g. 91% satisfaction	e.g. 92% satisfaction
Enable our businesses					
Visitor sector returns to growth in visitor spend from 2023	Baseline to be June 2021	+5%	+5%	+2%	+2%
Spend on business events, major events and visitor activities outgrows overall sector spend	Subset of TECTs above	+6%	+8%	+5%	+5%
Visitor sector returns to employing more than 5,000 people by 2024 ¹⁴	4,340		5,000	5,050	5,100

Indicator	Baseline 2021/22	2022/23	2024/25	2023/24	2025/26
Nurture Taiao, our environment					
Perception of the region as a leader in light footprint travel (in domestic media) by 2025	(baseline and targets t.b.c.)	Top 5 in NZ regions	Top 5 in NZ regions	Top 3 in NZ regions	Top 3 in NZ regions
Growing proportion of visitors to the region who walk or cycle (or travel without a car)	(baseline and targets t.b.c.)	Target t.b.c.	Target t.b.c.	Target t.b.c.	Target t.b.c.
Number of businesses certified as carbon zero or positive doubles by 2025	17 businesses accredited	25 businesses accredited	30 businesses accredited	35 businesses accredited	40 businesses accredited
Percentage of visitors to the region participating in a carbon or waste reduction initiative by 2026	(baseline and targets t.b.c.)	Target t.b.c.	Target t.b.c.	Target t.b.c.	Target t.b.c.

Table 7: Key Performance Indicators (KPIs) Summary Table

¹¹Drawing results from council Department of Conservation and New Zealand Cycle Trail Inc. surveys

¹²Number of businesses featured in a new cultural section of the NRDA website.

¹³Tourism Electronic Card Transactions (TECTs), Ministry of Business Innovation & Employment

¹⁴Monthly filled jobs in Tourism for Nelson Tasman, Statistics New Zealand Covid-19 Data Portal.

APPENDICES

Appendix 1: International and National Strategic Alignment

UNWTO SUSTAINABLE DEVELOPMENT GOALS

In 2015 New Zealand committed to supporting the United Nations 2030 Agenda for Sustainable Development by addressing the 17 SDGs¹⁵. New Zealand's first voluntary national review on the SDGs in 2019 mentions tourism as one of the industries that will help to achieve goal 8 – Decent Work and Economic Growth¹⁶.

Tourism is specifically mentioned in three of the SDGs but in 2017 the UNWTO commissioned a comprehensive report¹⁷ that showed that tourism could positively contribute to all 17 SDGs. Therefore, aligning our DMP with the SDGs and working towards them will support New Zealand's overall achievement.



Figure 26: UNWTO Sustainable Development Goals The 2030 Journey

¹⁵<https://www.mfat.govt.nz/en/peace-rights-and-security/work-with-the-un-and-other-partners/new-zealand-and-the-sustainable-development-goals-sdgs/>

¹⁶<https://www.mfat.govt.nz/assets/Peace-Rights-and-Security/Our-work-with-the-UN/Sustainable-Development-Goals/New-Zealand-Voluntary-National-Review-2019-Final.pdf>

¹⁷<https://www.e-unwto.org/doi/book/10.18111/9789284419340>

AOTEAROA-NEW ZEALAND GOVERNMENT TOURISM STRATEGY

The New Zealand-Aotearoa Government Tourism Strategy sets out a more deliberate and active role for government in tourism; te puāwai tonu o Aotearoa i te tupu tonu o te ao tāpoi – to enrich New Zealand-Aotearoa through sustainable tourism growth.

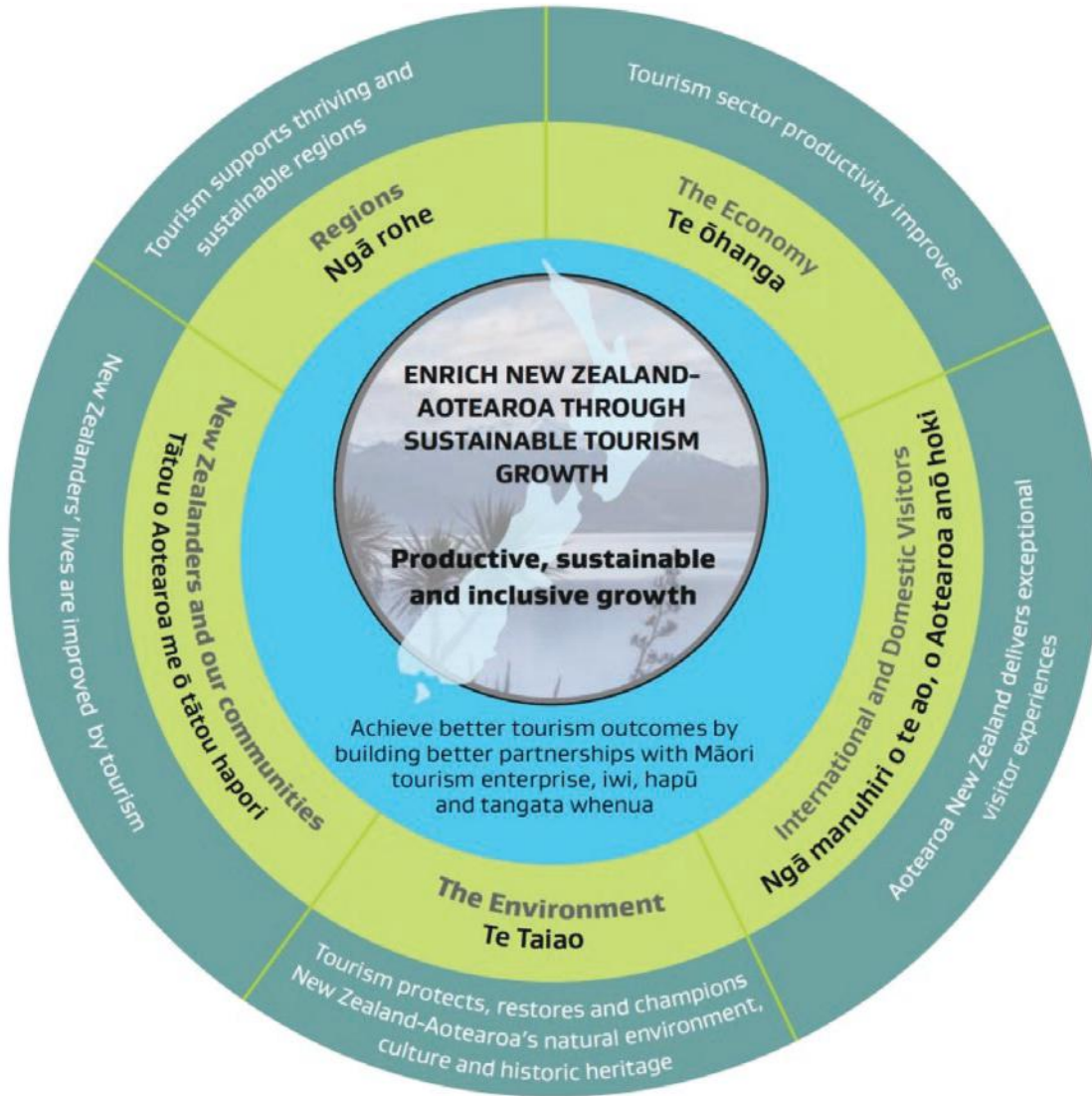


Figure 27: Aotearoa-New Zealand Government Tourism Strategy (2019), Ministry of Business, Innovation and Employment

The government wants New Zealand’s tourism growth to be productive, sustainable and inclusive. This is to help grow New Zealand-Aotearoa for all, improve the wellbeing of New Zealanders and to protect and restore our natural environment.

This Tourism Strategy draws on tikanga values that underpin sustainable tourism growth in New Zealand-Aotearoa, they are:

- **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).

To support its role as both **steward** and **actor** in the tourism system, the government has developed an investment framework for tourism to

coordinate activity and enable government to make choices about how, when and where it intervenes or invests to support the outcomes of the strategy – both at a national and a regional level.

At a regional level, there are five key areas of focus to support well-functioning regional visitor destinations:

- **Attractions** – visitors need things to do and see – this influences how long they stay and how much they spend.
- **Awareness** – visitors need to know what’s on offer – this will drive visitor numbers and spend across the year.

- **Access** – visitors need to be able to get to where they want to visit safely in a timely way for an appropriate cost. This includes air, road, rail, sea, trails and cycleways.
- **Amenities** – visitors need accommodation, retail and hospitality, drinking and waste water and other infrastructure.
- **Attitudes** – communities need to want to welcome visitors to their region.

DEPARTMENT OF CONSERVATION HERITAGE AND VISITOR STRATEGY

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 three goals of the Strategy are:

- **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.

- **Connect** – Visitors are enriched and better connected to New Zealand’s natural, cultural and historic heritage.
- **Thrive** – Tangata whenua, regions and communities benefit from protecting and connecting visitors with their natural, cultural and historic heritage.

TOURISM INDUSTRY AOTEAROA SUSTAINABLE GROWTH FRAMEWORK

Tourism Industry Aotearoa (TIA), the independent association that represents the tourism industry,

has developed Kaupapa Whakapakari Tāpoi/ A Sustainable Growth Framework.



Figure 28: Tourism 2025 Framework, Tourism Industry Aotearoa

This provides a pathway to grow a sustainable tourism industry that benefits New Zealanders by 2025.

This has the values of:

- Whanaungatanga: A sense of family and belonging – relationships built on shared experiences and working together
- Kaitiakitanga: Guardianship and protection of our natural, built and cultural resources for the benefit of current and future generations
- Manaakitanga: Showing respect, hospitality, generosity and care for others.

It has the goals of:

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.

There are also ten top actions, including:

1. Embedding sustainability
2. Growing and shaping demand
3. Managing destinations
4. Embracing tikanga Māori
5. Living the Tiaki promise
6. Engaging the community
7. Measuring and managing industry carbon use
8. Investing in infrastructure and amenities
9. Fostering domestic tourism
10. Investing to deliver quality tourism data and research.

Appendix 2. Nelson Tasman Resident Perception of the Visitor Sector

SURVEY SUMMARY

May 2020

- 832 Responses
- 58% from Nelson, 39% from Tasman
- 52% aged over 55 years
- 73% females (tend to book more holidays)
- 73% not employed in tourism sector (so not naturally biased towards tourism)

July 2021

- 871 responses received via Facebook
- 58% live in Nelson, 42% in Tasman
- About 50% aged 55 years or older
- Nearly 80% female
- 84% not directly employed in tourism sector

COMPARISONS BETWEEN MAY 2020 AND JULY 2021

- Those employed directly or indirectly in the visitor sector have dropped markedly from 26.5% to only 16%.
- Despite this drop in employment levels, 97% of respondents in both surveys thought tourism brings some benefits to the region – with “more hospitality options” and “good for the economy as a whole” being cited as the top two benefits in both surveys.
- The challenges with tourism also remained in the same order although the top concern “increased pressure on the environment” dropped from 69% to 56% in the second survey. The presence of freedom campers was the second most cited concern, but again the number mentioning this dropped from 64% to 55%.
- Freedom camping is mentioned a lot – in both positive and negative contexts.
- There were fewer comments complaining about the cost of tourism activities in this year’s survey.
- In both surveys about half are unaware of the positive environmental and community projects which tourism operators support.
- The surveys indicate that many people understand and value tourism in the region although this is difficult to quantify.
- Last year Golden Bay was cited as the most preferred place to visit for leisure or a holiday (70%). This dropped to fourth place, but 68% still cited it.
- No change to the preferred activities which residents would be prepared to pay for (dining out, staying in commercial accommodation, scenic tour, wine and food tour were the top four in both surveys)
- Preferred accommodation – Motels and Private rentals swapped positions
- Very similar responses about where people prefer to get their information from (internet and friends & family)
- Respondents still commenting on the need for locals rates – ‘tourist prices’ not always affordable.

BENEFITS OF THE VISITOR SECTOR

- 97% feel tourism brought some benefits to the region
- The most commonly cited benefits were supporting hospitality (82%), good for the economy as a whole (80%) and providing employment opportunities (74%)

- Other strongly supported benefits were enabling a variety of events (74%), improved infrastructure (65%) and more retail opportunities (53%).



CHALLENGES HIGHLIGHTED

- Pressure on the environment (56%), freedom camping presence (55%) and traffic and parking congestion (55%) are the most commonly shared concerns

- Other common concerns include overcrowding in favourite spots (48%) and pressure on infrastructure (45%)



ENVIRONMENTAL SUSTAINABILITY

- Pressure on the environment was the most commonly cited concern
- 49% unaware that tourism operators support environmental & community projects
 - we need to get this message out to locals and New Zealanders!
- 82% believe Nelson Tasman should offer low-carbon holiday options



OTHER INSIGHTS

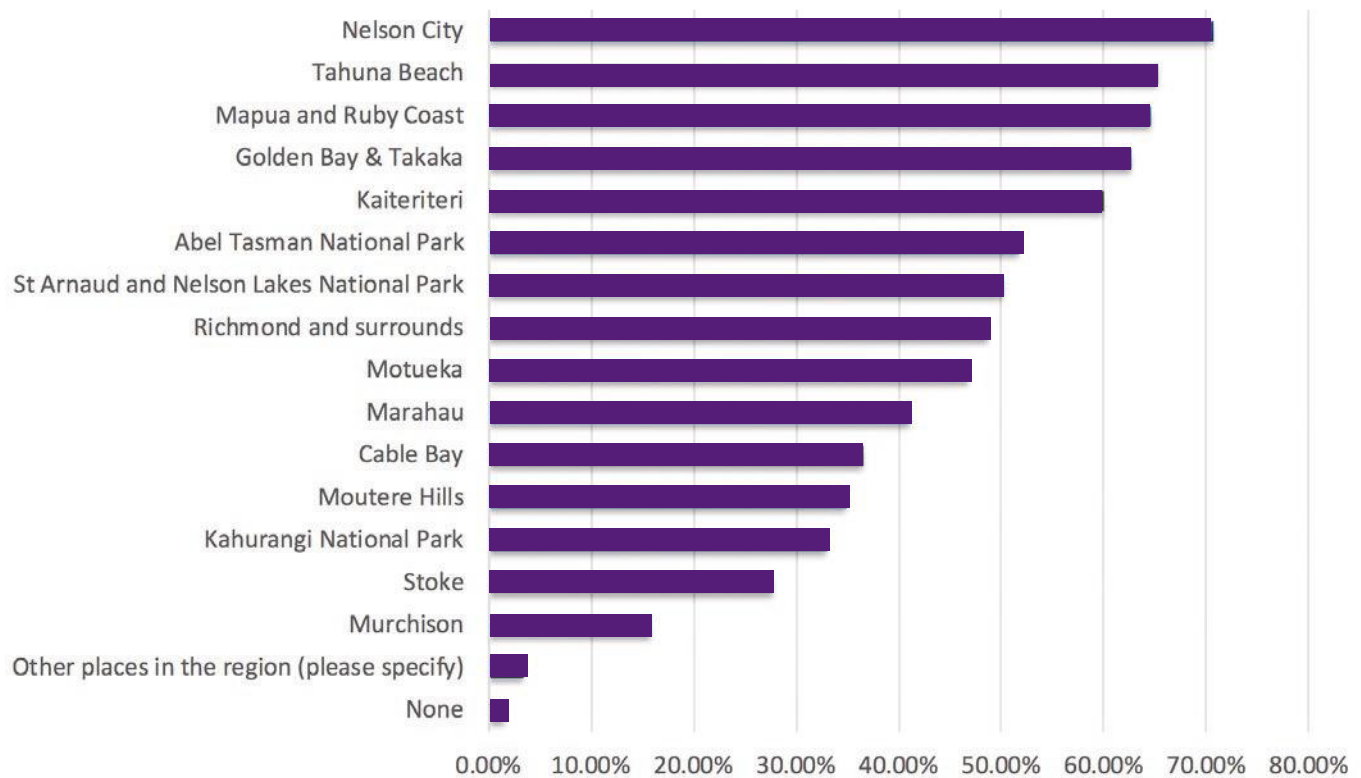
- 85% felt ideal visitors to the region are visiting friends and relatives, 82% favoured self-driving visitors staying in commercial accommodation and 70% felt favourable to campervans staying in campgrounds.
- Only 39% felt favourable to cruise passengers
- 68% have a little or some contact with visitors to the region and reported a majority of positive interactions



Appendix 3. Nelson Tasman Residents' Interest in Local Travel

- There is reasonably strong interest in local travel although the survey didn't specify whether this is for a day or overnight trip.
- Last year Golden Bay was cited as the most preferred place to visit for leisure or a holiday (70%). This dropped to fourth place, but 68% still cited it.

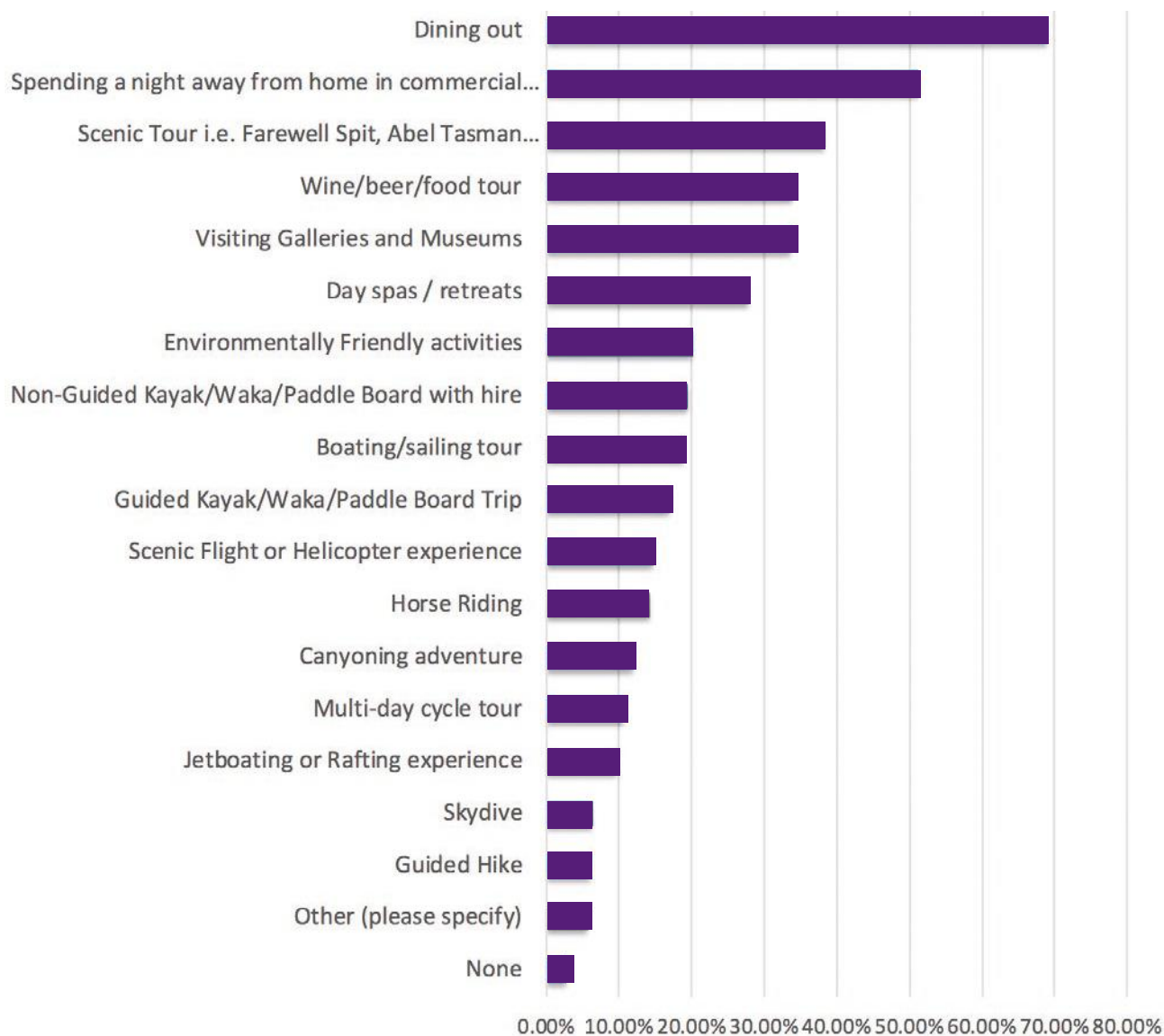
What places do you plan to visit for recreation in coming months? (check all that apply)



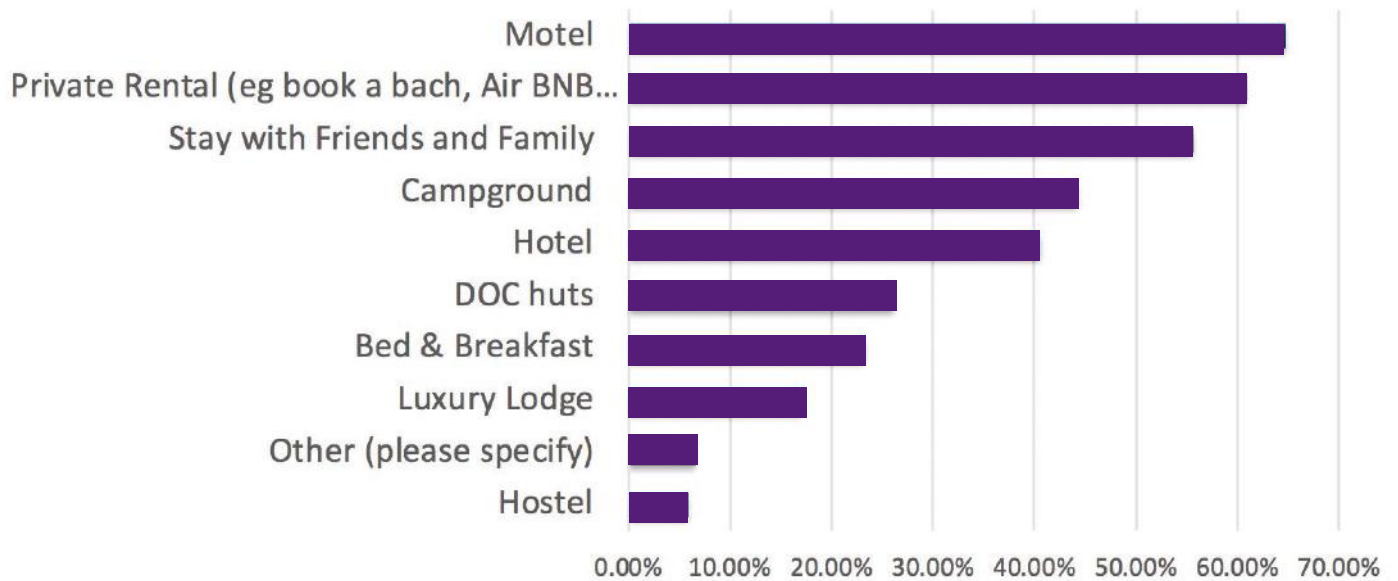
- No change to the preferred activities which residents would be prepared to pay for (dining out, staying in commercial accommodation, scenic tour, wine and food tour were the top four in both surveys)
- Preferred accommodation – Motels and Private rentals swapped positions
- Very similar responses about where people prefer to get their information from (internet and friends & family)
- Freedom camping was still very topical with many mentioning the pros and cons
- Respondents still commenting on the need for locals rates – ‘tourist prices’ not always affordable.

Which activities would you be interested in doing and prepared to pay for?

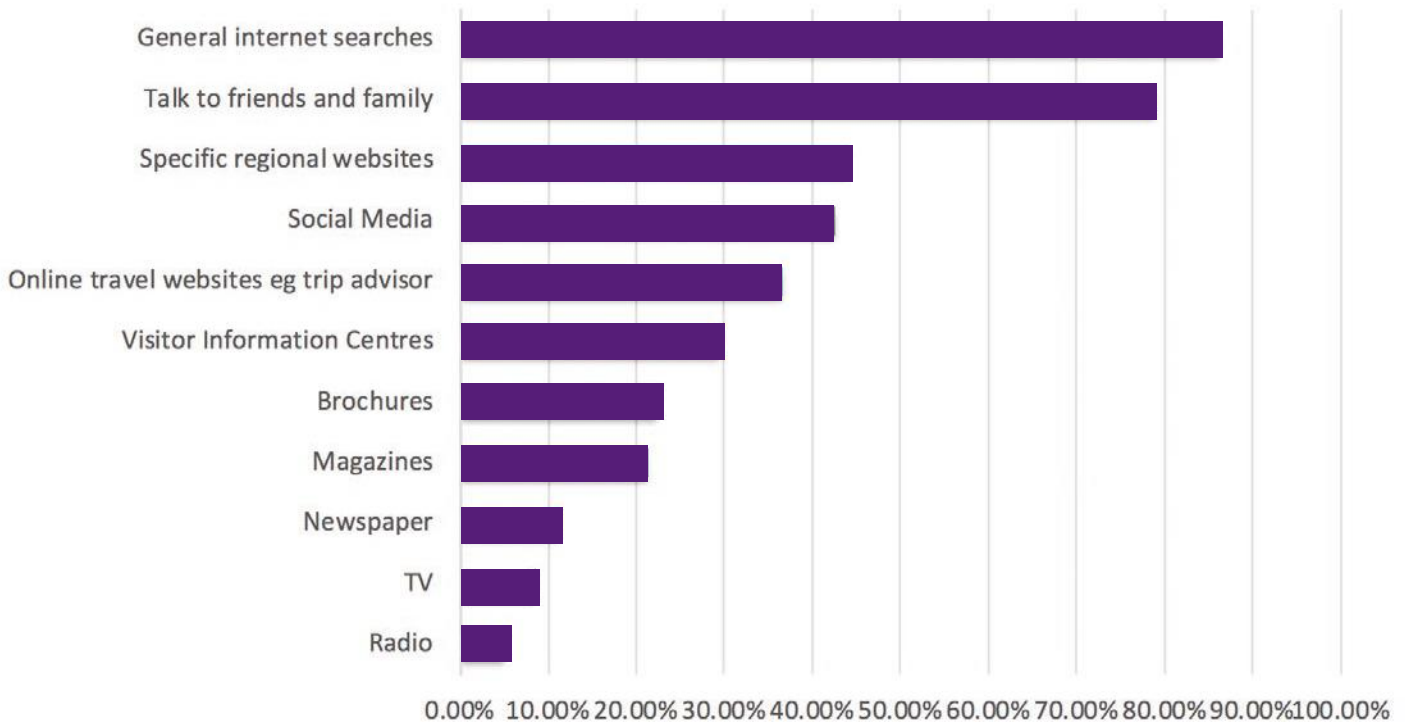
Select a maximum of 5 activities that would be your preference.



What accommodation do you prefer to use for holidays in NZ?
(select all that apply)



Where do you get information from to plan holidays in NZ?
(check all that apply)

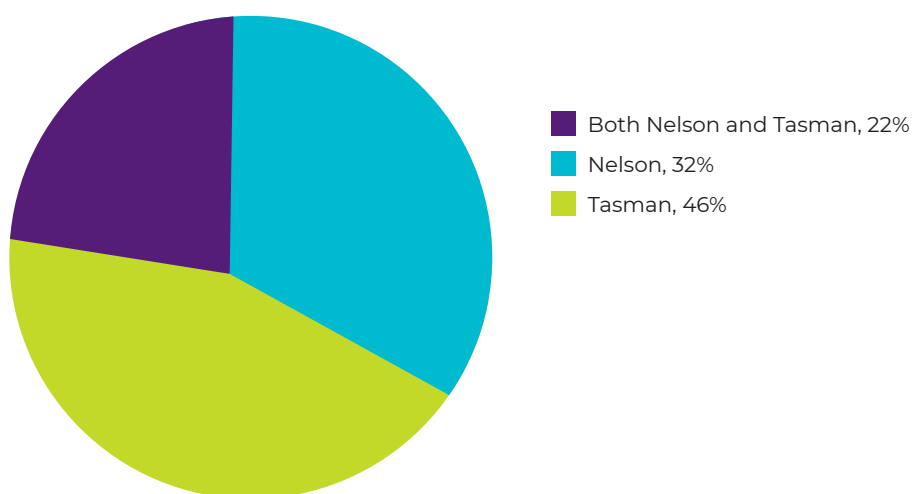


Appendix 4. Nelson Tasman Tourism Business Survey

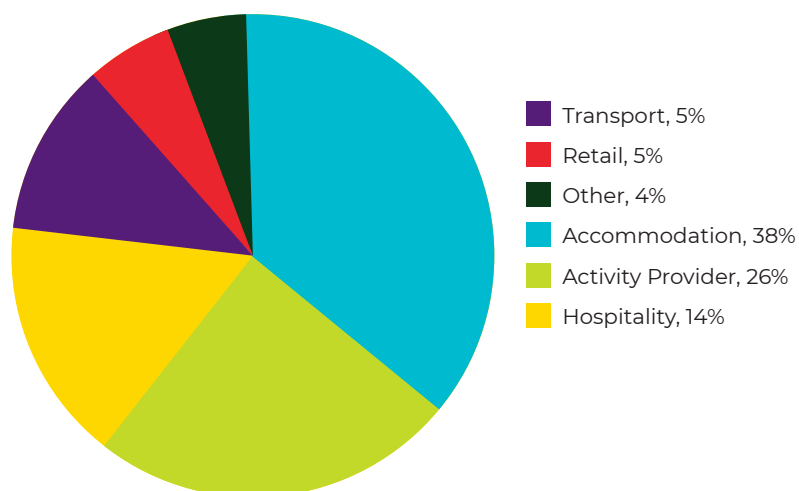
- Conducted 4 – 10 May 2020
- 78 responses from local tourism businesses

1. BUSINESS DESCRIPTION

What Region Are You Based In?



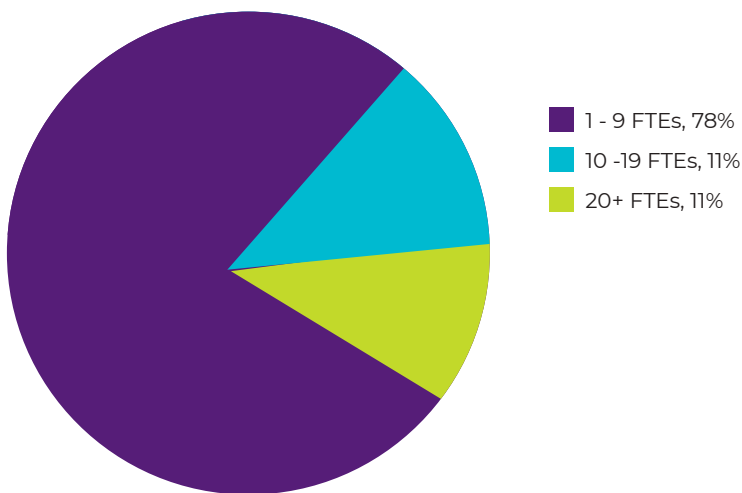
What Sector(s) Are You Involved In?



2. STAFF

- Tourism operators in Nelson Tasman are generally small businesses with 78% employing fewer than 10 staff
- 78% were able to retain ALL their staff immediately post-Covid, due to the wage subsidy received
- 19% made between 1 -9 FTEs redundant post-Covid
- 48% expect to make 1-9 FTEs redundant in the next 6 months
- 47% are hoping to make no staff redundant in the next 6 months

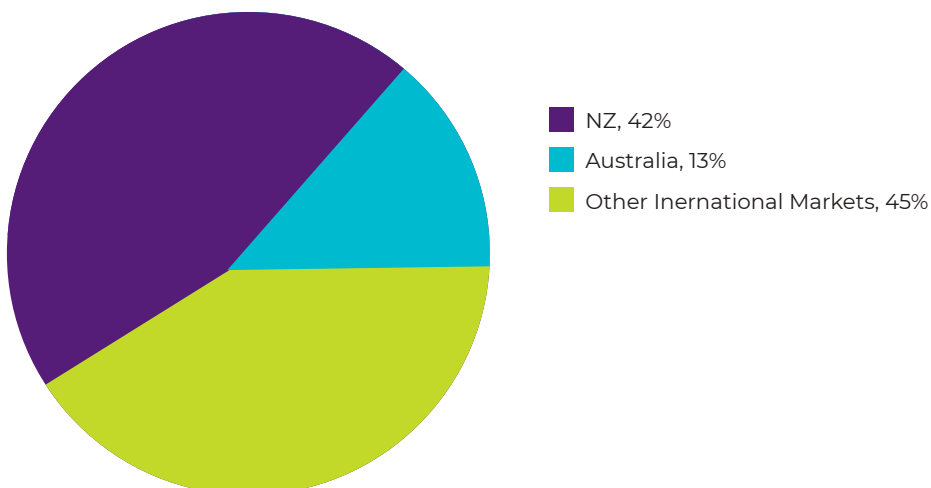
Number of Staff Employed by Tourism Businesses, FTEs, Pre-Covid



3. SOURCE MARKETS OF VISITOR SPEND

- Visitor spend in Nelson Tasman comes from domestic (42%) and international customers, including 13% Australians
- 45% of visitor spend is from other international markets which are unlikely to re-open in the near future
- Some local businesses were 100% dependent on international markets, putting them in a very vulnerable position now.
- However the region has a good base of domestic visitors who will be relied on for income in future month

In The Year Pre-Covid, What Was The Source Of Your Income?



4. FUTURE SURVIVAL

- Only 28% of tourism businesses feel that they have a good chance of surviving the next year if they only have NZ visitors.

“We will have to cut overheads, down scale and shed staff to try and reduce how much overdraft we go into before next summer.”

‘We can survive on local and domestic markets but it will be with 30 - 40 % less turnover (or greater decrease) and staff numbers reduced accordingly.’

“We are in the fortunate position of being well established, have a good local market and own our own premises - all components of a strong foundation to continue.”

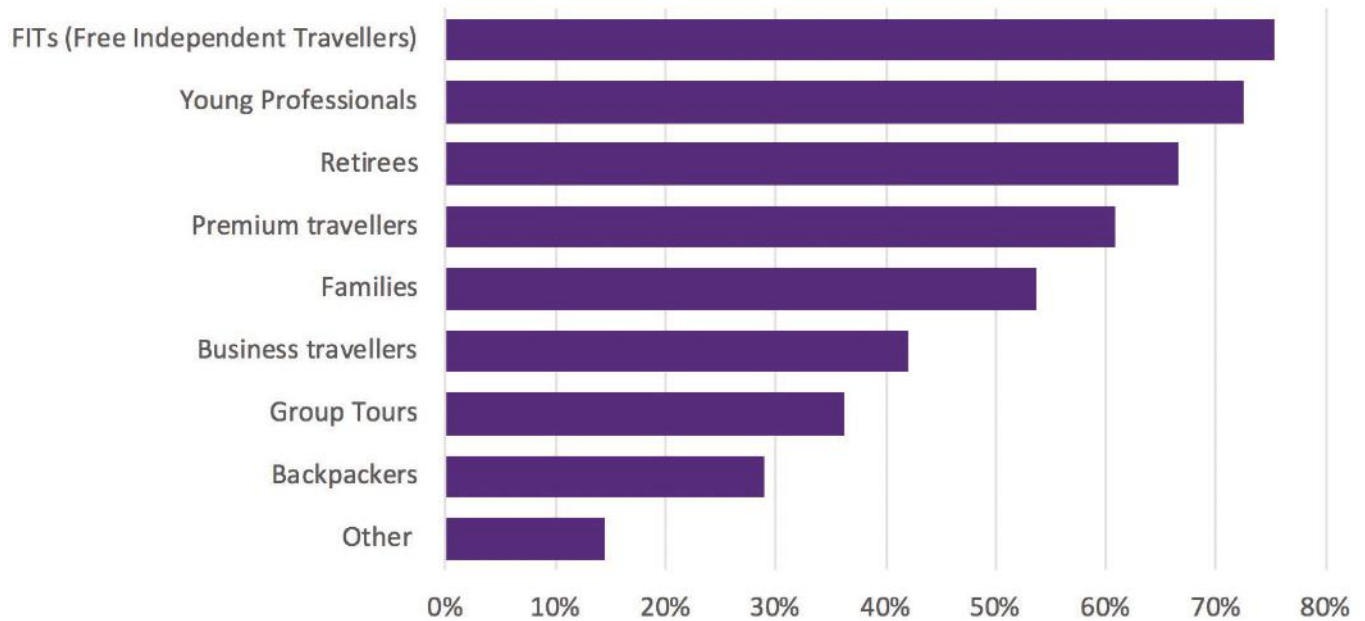
“I have a home office and contract out to independent providers. Our B&B however might fail and we could lose our home.”

5. VISITOR SEGMENT

- Free Independent Travellers are the most favoured visitor segment amongst tourism operators (75%), followed by Young Professionals (72%), Retirees (67%), Premium Travellers (61%) and Families (54%)

“We have a cross section of visitors from high flying Europeans and USA to the young ones having their trip of a life-time.”

Preferred Visitor Segment



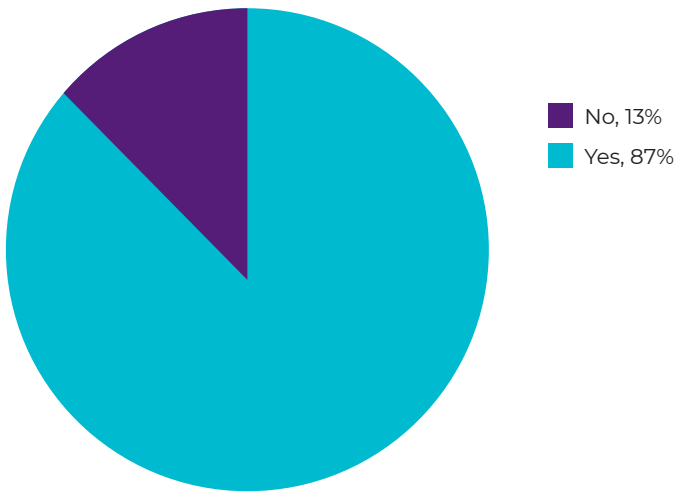
6. ENVIRONMENTAL IMPACT

- 87% of local tourism operators are interested in reducing the carbon footprint of their business. This is perceived to be good business practice and good for marketing as well as good for the environment

“We have been in the process becoming carbon positive but have put this on hold at present. We believe that the Abel Tasman community can make a real statement by all become carbon neutral.”

“We have just recently started the process to become a carbon positive company.”

Are you interested in reducing the carbon footprint of your business?



7. HOW SHOULD THE SUCCESS OF THE VISITOR SECTOR BE MEASURED?

- Key themes emerged when local businesses defined how success of their sector should be measured: financial viability, social licence, and economic impacts.

“Visitor sector success should be a function of how well it integrates into and enhances the environment and community, whilst at the same time providing financial return.”

“How much they bring financially to the country, but how much they contribute to sustainability e.g. it’s no good having 20 billion dollars if it’s damaging our precious resources for future generations. The 2 need to work together.”



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