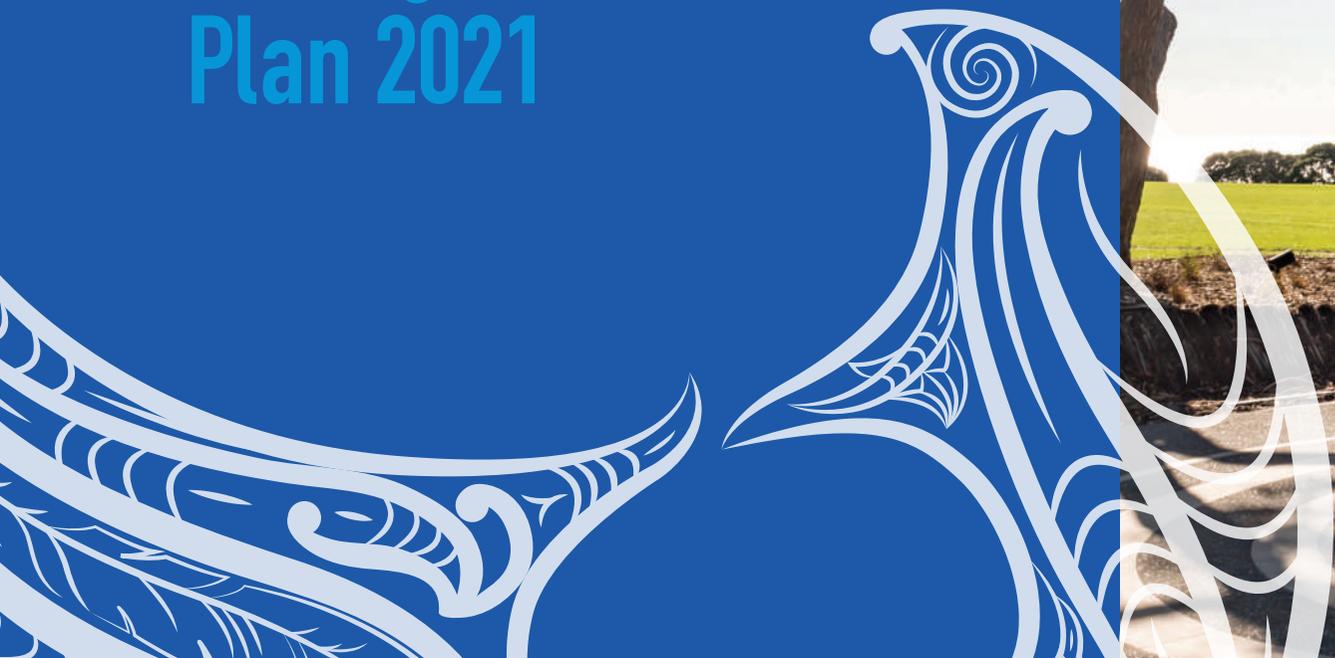


Taitokerau Northland

Destination
Management
Plan 2021





Contents

Foreword from Co-Chairs He Whakataki-ā-Hemana	3
The Partnership He Mahi Ngātahi!	4
Our Vision A Mātou Moemoea	5
Our Visitor Industry Story Kōrero Mā Ngā Manuhiri	7
The Destination Management Approach Huarahi Anga Mua	14
Our Plan and Actions Rautaki me te Whakahaere	17
Closing Remarks and Acknowledgements Kupu Whakakapi Me te Mihimihi	23
Appendices Ngā Tāpiri	25
Background and Approach to the Taitokerau Northland Destination Management Plan (TNDMP)	27
List of Tables and List of Figures	31
The Four Partners	32
Situational Analysis	33



Foreword from Co-Chairs He Whakataki-ā-Hemana

Tēnā koutou kātoa.

Taitokerau Northland is an important meeting place that has always been at the centre of Aotearoa New Zealand's story. We have had the privilege of working with a committed leadership team of industry experts and participants, leading iwi decision makers, Northland Inc decision makers and talented staff, our consultancy team from Meneth, Department of Conservation / Te Papa Atawhai, Waka Kotahi, Northland Regional Council and the district councils of Northland (Far North, Whangārei and Kaipara).

We have an outstanding destination to share, both with New Zealanders and international visitors. Through the benefits of our shared buy-in, Tourism being one, we hope to enhance the lives of those who call Taitokerau Northland home while inviting others to our beautiful whenua.

Regional partners have been discussing destination management since 2016 and this plan lays out our hopes for how we evolve going forward. While the tourism industry faces great challenges, this plan seeks to address those challenges and design proactive, productive, and actionable solutions.

We are committed to working together with a dual heritage consideration to decision-making, while also considering alignment with He Whakaputanga me Te Tiriti o Waitangi and the United Nations 17 Sustainable Development Goals. The challenge will be to implement the new Destination Management Plan, and the existing Economic Action Plan with relevance to the context of how people live and work in the region. This work will be one of several important pillars that will see Taitokerau Northland achieve vibrant success. The objective of the leadership advisory group is to enable, inspire, motivate, and deliver meaningful steps that will shape the future for us all.

Dame Jenny Shipley

Harry Burkhardt

The Partnership He Mahi Ngātahi!

In May 2020, a new partnership was formed with a Memorandum of Understanding (MOU) signed between the Te Au Mārie Sestercentennial Trust, Te Hiringa Trust & Business Promotions, Northland Inc. and Te Puni Kōkiri (TPK) Taitokerau to align the objectives of each organisation to co-create and implement a Destination Management Plan unique to Taitokerau Northland.

The Taitokerau Northland Destination Management Plan (TNDMP) is built on the value set provided by Tikanga Māori and incorporates key Te Tiriti o Waitangi principles of participation, protection, and partnership. Many aspects of the development of the plan and its ongoing implementation will reflect the Māori principles of Tino Rangatiratanga, Whanaungatanga, Kaitiakitanga, Manaakitanga and Kotahitanga.

The vision of this partnership is consistent with the TNDMP objective, which is;

To enhance the value of our visitor experiences in collaboration with iwi, hapū and stakeholders, for the benefit of our communities, businesses, the environment, and future generations.



Our Vision

A Mātou Moemoea





Taitokerau Northland has been an extraordinary meeting place over centuries. It is steeped in rich cultural history, is a place of spiritual significance and the birthplace of modern Aotearoa New Zealand. Visitors have been drawn to this region to explore and experience our people and place.

With inspired leadership and careful planning, we are confident that Taitokerau Northland will remain an inspiring and sustainable visitor destination.

This TNDMP seeks to reimagine what it will take to capture the Mauri (life force) of Taitokerau Northland, so it is positively felt by all who live and visit. We share history and communities, we have our challenges and complexities that make our welcoming nature, and our localised stories unique to Taitokerau Northland.

With an eye on 2040, that commemorates 200 years since the signing of Te Tiriti o Waitangi, this plan in 2021 signals our choice to make fundamental changes that have positive outcomes.

We will consider:

Immediate actions that support existing visitor experiences;

Identifying actions that could have a positive impact on the Visitor industry in the next five years;

How this generation reimagines for the next generation, what Taitokerau Northland should look, feel and be like by 2040;

Develop alliances that build buy-in for economic, social, cultural, and environmental benefit;

Alignment with WAI 262 and contemporary Treaty of Waitangi claims and kaupapa that impact on Māori;

Māori, hapū and iwi aspirations for the visitor industry as informed by engagement and the Taitokerau Māori Tourism Strategy 2018 - 2023;

The importance of Māori traditions, practices and knowledge already existing in a values-based destination management approach; and

Alignment with the Destination Management Guidelines 2020 released by Ministry of Business, Innovation & Employment (MBIE).

Important key values we will seek to reflect in this plan will include:

Seeking to understand the impact welcoming visitors has on our region and proactively manage those impacts;

Working collaboratively with Māori, communities, agencies, and industry to progress and develop the visitor industry, while protecting and nurturing our natural world; and

Developing our people to participate in the visitor industry.

Our Visitor Industry Story Kōrero mā Ngā Manuhiri



Taitokerau Northland's Unique Proposition

Taitokerau Northland is not only a place of astounding beauty with rugged coastlines, sweeping turquoise bays, ancient kauri forests and abundant wildlife, it is a place of deep cultural and historical significance, from the arrival of Kupe the first Polynesian explorer to Aotearoa shores to the first encounters between Māori and Pākehā peoples.

The Taitokerau Northland region covers a large geographical area including the three districts of Far North, Kaipara and Whangārei, several tribal rohe and is home to some of Aotearoa New Zealand's most recognised visitor icons and attractions such as Tāwhiti Rahi / Poor Knights Islands marine reserve, Waitangi Treaty Grounds, Motukokako / Hole in the Rock Bay of Islands, Tāne Mahuta in Waipoua Forest and Te Rerenga Wairua / Cape Reinga. And while the region remains relatively undiscovered, the product on offer and visitor experience continues to build in areas such as luxury accommodation, world class golf courses, art and cultural experiences centered around storytelling at place and walking and cycling trails.

The subtropical climate gives the region competitive advantage in the Aotearoa New Zealand (Aotearoa NZ) visitor economy with relatively long summers and mild winters making Taitokerau Northland an attractive visitor proposition year-round. The warm climate brings the perfect conditions to grow produce not found elsewhere in the country, and opportunity to showcase this from paddock or orchard to plate through the region's burgeoning food and beverage scene.

The opportunity for hapū and iwi Māori to tell their stories specific to place throughout Taitokerau Northland is one that is just beginning to be realised and part of what makes the region's visitor experience unique in its proposition.



Regional Data – Visitor Spend

Figure 2: Total Visitor Spend in Northland Y/E Dec 2019

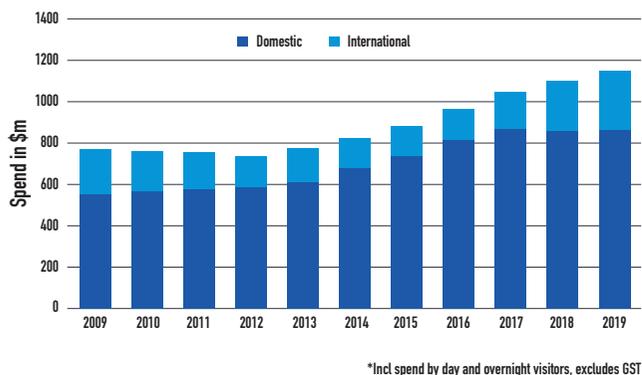


Figure 3: International Spend on Northland by Market 2019

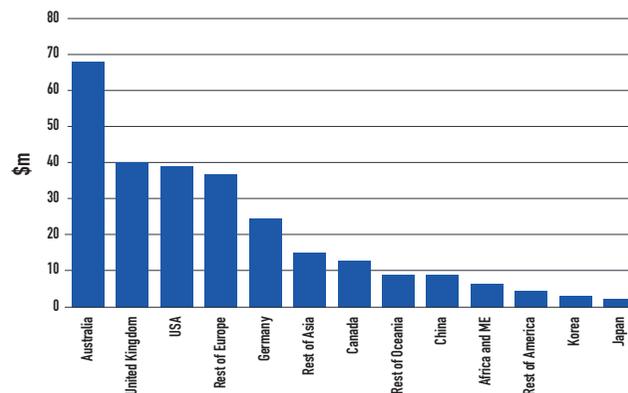
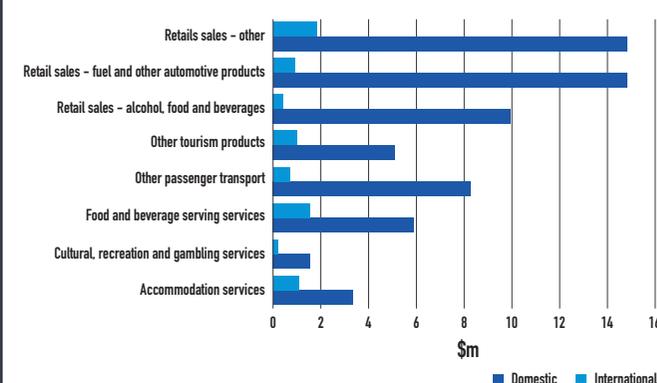


Figure 4: Taitokerau / Northland Domestic and International Visitor Spend Y/E 2019



Tourism is one of Taitokerau Northland s largest industries, made up of hundreds of businesses, many of them small to medium enterprises (SMEs) and sole proprietor operations. The industry accounts for over 10% of the region s employment and approximately 7% of the region s GDP (source: Infometrics.co.nz).

Between 2013 and 2019 Taitokerau Northland experienced strong growth in the domestic and international markets inline with the rest of Aotearoa NZ. By 2019, domestic spend was starting to flatten off and be replaced by the growth in international spend.

By 2020, tourism spending in the region accounted for \$1.12 billion (b) and fell only just below previous years (with \$1.13b in 2018). Taitokerau Northland benefitted from pent up demand for domestic travel when New Zealanders could travel again in 2020, giving the industry reason for a hopeful future

and to continue building off a strong base of investment in visitor experiences, accommodation, product, services, and workforce development.

Close proximity to New Zealand s largest city, international airport and population base, also makes Taitokerau Northland one of the most accessible destinations for Tāmaki Makaurau / Aucklanders and those arriving by air into Tāmaki Makaurau / Auckland. Prior to 2020, the domestic market had consistently contributed to the tune of 76% (\$856 million (m)) of a total \$1.12b annual spend, with the

two regions accounting for 60% of this being, Tāmaki Makaurau / Auckland (30%) and Taitokerau Northland (30%).

While Australia has traditionally been the largest international market visiting the region, contributing \$68m (26%) to annual visitor spend, the next contributing source markets of UK, USA, and Rest of Europe contribute significantly less to Taitokerau Northland s economy. Of note is the lack of Asian visitors to the region, with the largest Asian market being China in 9th place, which goes against the national trend of visitation and spend. Largely this due to their length of stay in NZ, travel style and a lack of awareness of the offering to date.

Due to this dominance of local and domestic visitation to the region, spend on traditional

tourism attractions, accommodation and dining out is comparatively small compared to general retail items, petrol, supermarket and liquor outlets.

This visitor spend profile also illustrates how Taitokerau Northland s visitor industry thrives through a regional support network of activity, driven by local people and businesses that don t necessarily fit the view of what constitutes tourism activity. From the fishermen supplying their catch to Mangōnuī Fish Shop in the Far North, the contractors working for Waka Kotahi NZ Transport Agency (Waka Kotahi) to improve road safety throughout the region, to the Four Square dairy owner in Kororāreka / Russell, everyone has their part to play in this vastly interconnected ecosystem.

Regional Data – Visitor Trends

While Taitokerau Northland achieved 1.961m annual guest nights in 2019 (source: Commercial Accommodation Monitor, September 2019, Stats NZ), accommodation type by district also paints another clear picture of domestic market dominance, with a high percentage of visitors staying in owned holiday homes or those of family or friends.

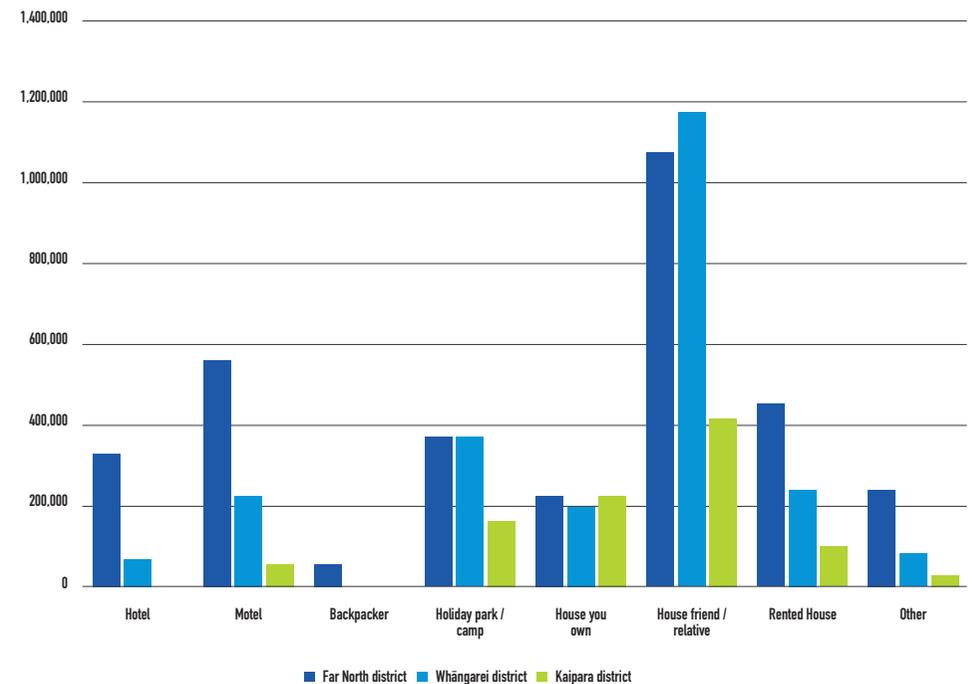
Furthermore, 53% of the visitors to Taitokerau Northland cited the reason for travel as a holiday, 38% visiting friends and relatives, only 5% on business-related travel and 4% classed as other.

Seasonality and regional dispersal are problematic in Taitokerau Northland as half of the region's visitor nights are spent in the Far North with the majority in the Bay of Islands, driven by the concentration of key attractions in this area (source: AA Traveller/Fresh Info Domestic Visitor Survey). Visitation is also further concentrated in the summer season with the peak of trade occurring across the weeks between Christmas Day and Waitangi Day. There is an identified opportunity to address seasonality somewhat by applying

effort to attract the meeting and conference market from Tāmaki Makaurau / Auckland and also the education market with the impending changes to the Aotearoa NZ history school curriculum, making Taitokerau Northland a more relevant destination than ever.

In terms of satisfaction, Taitokerau Northland rates consistently high with domestic visitors, achieving a Net Promoter Score of 44, which is significantly higher than the average across other regions in Aotearoa NZ. The July-December 2020 Tourism Industry Aotearoa (TIA) Domestic Satisfaction Survey ranked the region as the third most satisfying destination with 72% of people saying they were extremely satisfied or very satisfied.

Figure 5: Visitor Nights in Taitokerau / Northland by district and accommodation, Y/E Dec 2019



Access to the Region

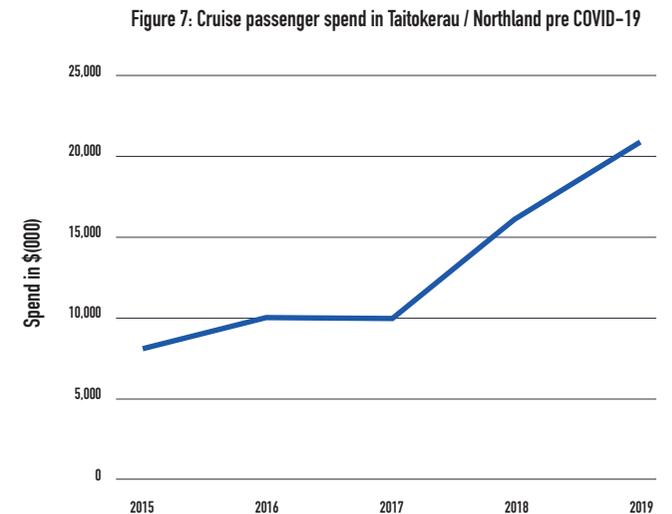


Figure 6: Twin Coast Discovery Highway Navigation Map

Taitokerau Northland is accessible for visitation by land, air and sea. There are three airports situated in Whangārei, Kerikeri and Kaitaia, and Air New Zealand services both the Whangārei and Kerikeri airports several times a day, with increased capacity through the peak summer season. Barrier Air services Kaitaia airport from Tāmaki Makaurau / Auckland twice daily.

The Twin Coast Discovery Highway is a long-established 800 kilometre (km) touring route starting and finishing in Tāmaki Makaurau / Auckland and championed by Northland Inc and Waka Kotahi to explore the best the region has to offer, and more recently a framework for infrastructure and product development through the Twin Coast Discovery Highway Revitalisation Project started in 2016. This route is now complimented by seven recommended 50-150km Northland Journeys that connect parts of the region not directly linked by the Twin Coast Discovery Highway, with further Journeys under development.

Passenger cruise ports are in the Bay of Islands and Marsden Cove and marina berths exist throughout the region, with infrastructure concentrated again in the Bay of Islands and Whangārei areas. The Bay of Islands had experienced significant growth in the passenger cruise industry in both passenger numbers and spend from 2017 to 2019. Up to 120,000 visitors per summer cruise season were coming through the Bay of Islands before March 2020 and most of the benefit of the resulting spend was concentrated in Paihia, Kororāreka / Russell, Waitangi, and the surrounding Bay of Islands area. With the growth in number of cruise ships calling into the port and the increasing size and capacities of these



ships, the local infrastructure and social license to operate were beginning to come under pressure in the Bay of Islands.

While pressure was experienced in the north, the southern end of the region was set to welcome its first passenger cruise ships to North Port at Marsden Cove in late 2020, driven by the development of the Hundertwasser Art Centre visitor experience in Whangārei. This would assist in spreading the benefit of the cruise sector beyond the Far North District.

The passenger cruise industry is a good example of where Taitokerau Northland is for the most part a developing destination, while also requiring the application of a destination management approach in iconic areas of high visitation.

Regional Economic Development and Investment

In recent years, Taitokerau Northland has received significant central government investment through the various funds administered by the Provincial Development Unit (now known as Kānoa Regional Economic Development & Investment Unit) including the Provincial Growth Fund (PGF) and Tourism Infrastructure Fund, to the tune of \$575m spread across 156 different projects (as of 30 November 2020), including infrastructure, tourism and other sector developments.

Investment projects vary and show both the need for, and potential of, investment in the region. Examples of completed projects include Manea Footprints of Kupe Cultural Centre in the Hokianga, Te Rau Aroha Museum within the Waitangi Treaty Grounds, both opened in 2020, and wharf and airport infrastructure upgrades in the Bay of Islands. The Hundertwasser Art Centre in Whangārei is the next exciting development to open in

late 2021, further building the infrastructure and visitor experience offering for the region. Many of these visitor experience projects also require additional advice and support to ensure successful launch and sustainable business practice over time.

The visitor industry is also a key focus area in the Tai Tokerau Northland Economic Action Plan (TTNEAP). The TTNEAP recognises that the value of tourism can be lifted by encouraging development of uniquely-Northland products and services to extend seasonal visitation and widen visitor dispersal. Sector growth will require a collaborative destination management approach while considering the balance of quality over quantity and value versus volume. The projects within this workstream aim to improve sector performance through an integrated destination management and marketing approach which enhances tourism and Māori tourism experiences, and addresses accommodation and infrastructure to support the sector. Particular focus has been placed on the use of the Twin Coast Discovery Highway as a framework for development of infrastructure and experience, connecting communities and marketing.

Māori Tourism Development

Through both private and public investment, Māori tourism experiences that have story-telling of Taitokerau Northland and its people at its core are growing in number and quality.

Although capital investment has been deployed for a number of projects, notably through the Provincial Development Unit, extensive engagement informing the Taitokerau Māori Tourism Strategy 2018–2023 brought to light further work that is required to make sure Māori-owned tourism businesses are supported to realise their full potential. The support identified includes: Māori-led groups and key roles established within the industry; activity to lift knowledge and capability, and better opportunity to raise the visibility of Māori culture through various channels such as marketing material and regional positioning; while retaining hapū and iwi ownership of local narrative.

Ongoing support to bring the unique Māori way of viewing the world to the forefront is required and through this is the belief that preservation of culture, identity and the natural world must be intrinsic to the destination management approach.

A Strong and Collaborative Foundation

Despite the global events of 2020 and the effect on travel and tourism, the region has discovered that Taitokerau Northland's tourism industry is strong, resilient and well-connected, and immediately came together across various forums to support each other and create new opportunities for the region and its people.

New partnerships have been formed to support the tourism industry – the industry that is more than the temporary visitor and their experience of the region, it is about everyone – business owners, employees, residents, communities, and the environment it operates in.



The Destination Management Approach

Huarahi Anga Mua



Alignment and Engagement

New Zealand government Destination Management Guidelines 2020 provide the definition of destination management as the mechanism by which New Zealanders can ensure that tourism in their region reflects their wishes and they have an agreed way to maximise the benefits that tourism brings whilst managing any negative impacts.

This movement towards better destination management was a result of tourism globally and nationally, experiencing strong, and for some destinations unsustainable, growth over a long period of time with a primary focus on increasing the number of visitors to an area and the amount they spend.

Taitokerau Northland, however, remains relatively undiscovered by the domestic and international visitor and so has room for intentional growth in the tourism sector. This objective must be achieved through careful management of the destination consistent with local expectations and aspirations, seeking a balance across economic, cultural, social and environmental wellbeings that support our communities in a positive way while sharing it with others.

The events of 2020 and its impact on international travel has provided an opportunity to reassess how tourism is managed now and in the future. Going forward, bold new strategies and initiatives can be implemented that allow our people to treasure their culture and the local environment, while pursuing sustainable development goals alongside meaningful economic opportunity in order to thrive and regenerate.

The TNDMP has been developed and structured in a unique way for Taitokerau Northland with over 20 local, national, and international reports, plans, and strategies used to inform the recommended actions. Further, the TNDMP aligns Māori, communities, key agencies and partner strategies to ensure consistency of direction, messaging, and implementation.

The framework for the TNDMP used the Destination Management Guidelines 2020 produced by MBIE to inform process and document structure, distilling down the 16 suggested components into seven initial areas of focus.

The development of the TNDMP was overseen by a working group of the partners, and the Leadership Advisory Group (LAG). The LAG is made up of senior leaders from the region including iwi and hapū, tourism business, local and national agencies, and will be supported by an implementation working group to make the actions a reality.

A region wide consultation and engagement process over two months informed the shape of the plan. See page 28 for detailed feedback.

Key Headlines from Engagement

1. **Māori traditions, cultural identity and values** need to be at the forefront.
2. A strong appetite for greater **environmental protection (land and marine) and environmental sustainability**.
3. **Seasonality** currently prevents economic viability of many businesses and creates significant unemployment issues.
4. **Physical Infrastructure** improvements to connectivity including roading, mobile phone coverage, and high-speed broadband.
5. **Cultural Infrastructure** enhancement key to future success for community and visitor experience.
6. Emphasis on lifting the **quality of product offerings** and service levels.
7. **Social inequality** across the region was noted with a strong need to address it.
8. **Stories** have high cultural and potentially economic value and need to be told by those with the right to tell them.
9. **Signage, wayfinding and interpretation** improvements required across the region.
10. **Brand representation** for the region to be further explored.
11. **Aucklanders and locals** should be included in the primary target audiences in regional marketing.
12. Stronger and more **cohesive communication and collaboration** cohesive across the sector and region would be beneficial.
13. Acceptance to move to a variety of **user pays models** and a willingness to explore additional revenue streams.
14. People want to see **action, change, and leadership** from this plan.

Turning the Plan into Action

The working group, facilitated by the partners is in progress to collectively support the implementation of these actions.

The TNDMP is a living document, that will have regular reviews to its strategic direction and actions. It will provide a regional overview and encourage destination management at local levels of engagement.



Our Plan and Actions

Rautaki Me te Whakahaere



The following actions represent the combined insights from Māori, communities, tourism industry, desktop research, and the partners. These actions have been grouped into 7 overarching focus areas.

1. Insights

Succinct, reliable and timely data is key to informing decisions on the visitor economy. The challenge of accessing reliable and useful data in the NZ tourism sector is not new and this is amplified at a regional level. With Destination Management now being a focus there is a growing need for economic data at a more granular level while also measuring the mood of the community and understanding the wider impacts of the visitor economy.

2. Leadership

Leadership is a key component of destination management and was also an area of consistent conversation and feedback during the engagement process. There is strong support for the collective leadership approach.

3. Infrastructure

A key to success will be aligning the range of infrastructure plans and their development priorities.

4. Capability

88% of survey respondents said capability and skills development was important. A barrier in rural areas is access to transport, and the availability of physical and digital products and services. Building on programmes such as the Northland Labour Initiative, delivered by Queenstown Resort College (QRC), and Go with Tourism campaigns will support attracting people capability to the industry and developing this.

5. Product Development

Despite significant investment in recent years, there remains gaps and opportunities in the market to further develop and strengthen existing and new attractors across the region. Seasonality, story-telling content and regional dispersal are key factors for developing products and key actions. Existing plans such as the Regional Walking and Cycling Strategy, Waka Kotahi funded business cases for the Twin Coast Discovery Highway and similarly local council Long-Term Plans will build on activity to date.

6. Environmental stewardship

Sustainability and environmental stewardship a primary factor given the connection between visitors, the natural environment and social licence within our communities. Feedback through consultation aligned strongly with this sentiment and many in Taitokerau Northland recognise this significant connection and the ongoing actions and leadership required to protect and restore our natural environment.

7. Marketing

The regional marketing of Taitokerau Northland as a visitor destination will continue to be led by the partners and facilitated by Northland Inc as the Regional Tourism Organisation. The future direction of regional branding requires ongoing discussion, collaboration and cooperation of all partners to the TNDMP.

Insights

Action	Objective
Establish an annual region-wide survey of residents and businesses.	To monitor sentiment towards tourism and the impacts on communities.
Establish a bi-annual tourism operator survey.	To capture aggregated performance data, sentiment for the TNDMP implementation, and guidance for marketing activity.
Lobby MBIE and Statistics NZ (Stats NZ) to provide reliable and accurate international and domestic tourism data at a regional level.	To make fact based and data led decisions on the future management and marketing of the region.
Capture baseline and future revenue from tourism-related income through concessions, licenses, and user pays access models.	To monitor visitor contribution to environmental and cultural regeneration and seek ways to increase this.

Leadership

Action	Objective
Establish and strengthen a Leadership Advisory Group including government agencies, iwi and hapū, councils and tourism businesses.	To have oversight of the actions in this plan and generate support and buy-in from a range of stakeholders.
Establish long-term sustainable funding for the implementation of the TNDMP	To enable future cost-proof facilitation and implementation of the TNDMP.
Establish an independent Taitokerau Māori Partnership Group.	To facilitate connectivity, visibility, participation, and product development for Māori tourism operators and increase shared learnings. To ensure ongoing focused communication, development, and facilitation of Māori tourism products in the region and optimal synergy between the Māori Partnership Group, Northland Inc and other parties as identified.
Assess a variety of visitor user-pays models across the region to access certain sites of environmental or cultural significance.	To create additional sources of income, better manage visitor flows, and generate revenue for further environmental and cultural protection, developing better experiences, and funding infrastructure.
Develop localised Destination Management Plans for areas surrounding iconic attractions.	To research and develop concise action-orientated plans for each of the high visitation areas of Bay of Islands, Tutukaka, Tawhiti Rahi / Poor Knights, Waipoua Forest and Te Rerenga Wairua / Cape Reinga.

Infrastructure

Action	Objective
Create physical and digital story-telling platforms across the region utilising existing council, iwi, hapū, and government owned assets.	To educate visitors on the history and culture of the region, encouraging them to spend more time experiencing and learning about Taitokerau Northland.
Support the Implementation of the range of infrastructure projects already set out in the TTNEAP.	To work with stakeholders and assist with tourism sector productivity, access, visitor flow, and safety, ensuring successful implementation of projects.
Actively seek private sector investment in accommodation, and attractions that create new jobs, appeal to a domestic and international audience, and support regional dispersal.	To improve the economic viability of the region and its smaller communities.

Capability

Action	Objective
Create cultural storytelling content and capability.	To promote and market authentic storylines of people and place, requiring a commitment from all partners to buy-in to a regional approach to how we share the narratives in the region.
Encourage and support tourism businesses to attain Qualmark accreditation.	To lift quality and service levels across the region leading to a better regional reputation and net promoter score.
Explore with education partners opportunities to run seasonal and pop-up tourism/business programs in smaller towns.	To promote opportunities in our smaller towns for skills and employment opportunities.
Create a tourism business feasibility framework and support network to guide new business start-up development.	To increase the likelihood of creating financially sustainable tourism businesses and generate employment for local people.
Establish a sustainable practical tourism skills development program or apprentice-style system in partnership with local education providers and industry.	To attract new people into the industry, and up skill and maintain existing workforce during off peak season. To provide opportunities to those without formal qualifications.
Create a register of tools and resources available to assist existing operators.	Document tools available and build pool of resources to support existing operators whether through further product development, capability building, funding resources, coaching and mentoring.

Product development

Action	Objective
Education Develop education-based itineraries and products that meet the learning needs and budget of schools from across NZ.	Taitokerau Northland is positioned well to be a centre for school curriculum that supports the history of our nation and a destination rich in historical and cultural knowledge. Experience is aimed at applied learning outcomes.
Cultural Identify and support iwi, hapū, or Māori-led businesses to develop products that attract a domestic audience.	To support the development of an exclusive range of Taitokerau Northland products positioned for the domestic audience.
Cycling Build new cycleways and trails to appeal to a range of audiences, leveraging the current cycling boom and creation of the Pou Herenga Tai: Twin Coast Trail.	To attract families and less serious cyclists, appealing to locals and over-night and day trippers from Tāmaki Makaurau / Auckland that are easily accessible and safe. To strengthen opportunities for marae and community collaboration offerings
Arts and Creative Support the work of Creative Northland (CN) and increase opportunities for local creatives and artists to be part of tourism product development and events.	To generate off season demand for arts and creative sector attractions and events, increase employment opportunities, and preserve cultural arts and craft skills.
Produce Paddock to Plate Create a food and beverage tourism strategy for Taitokerau Northland to add value and build the profile of local fresh produce.	To build on the work of Savour! Northland to address seasonality by creating demand for food and beverage-based products and events, assisting with regional dispersal, and generating incremental revenue opportunities for producers.

Events Develop a Taitokerau Northland events strategy and secure funding for implementation.	To address seasonality and regional dispersal by creating locally owned events that attract people from across the region and Tāmaki Makaurau / Auckland for multiple days, are non-weather dependent, and create demand off-season increasing employment opportunities and business viability.
Walking Create a Great Walk for Taitokerau Northland that would be the closest and most accessible great walk from Tāmaki Makaurau / Auckland.	To create a new reason to visit and spend longer in the region, appealing to a range of audiences that is user-friendly, accessible and creates opportunities to add commercial value through services along or associated with the walk. This will create jobs in construction and in new product opportunities.
Twin Coast Discovery Highway Secure resources to continue to develop this touring route asset as a platform for marketing, new product development, and building communities	To better focus resources for development along the Twin Coast Discovery Highway. To encourage regional dispersal, repeat visitation, new product development, the telling of Taitokerau Northland stories, and to give consumers an easy-to-understand way to explore the region. Development and visitation will build and connect communities across the region.

Environmental Stewardship

Action	Objective
Develop a consistent, region-wide plan to manage freedom camping.	To take a region wide position on freedom camping, aligning policy and policing across the district councils and Northland Regional Council (NRC), learn from existing local and national initiatives already in place, and support with adequate infrastructure.
Regenerate Taitokerau Northland's coastal and marine environment.	To preserve and replenish the marine environment through significantly increased use of rāhui, mātaimai, taiapure and marine reserves, leading to a healthy ecosystem.
Accelerate plans for predator free reserves across Taitokerau Northland.	To protect and support the regeneration of native flora and fauna and create revenue-generating educational and tourism attractions that create employment and revenue back into conservation.
Develop a climate action framework for Tourism operators in Taitokerau Northland.	Keeping in line with the climate action plans of the regional and district councils in Taitokerau Northland and leveraging the TIA Sustainability Commitment, develop a climate action framework that Taitokerau Northland tourism businesses can apply to their operations.
Encourage and support tourism businesses to adopt the TIA Sustainability Commitment and Tiaki Promise ethos.	To encourage operators, not yet on the sustainability journey to commit to sustainability, making a positive contribution to New Zealand so that tourism gives back more than it takes.

Marketing

Action	Objective
Develop and implement a Marketing and Public Relations (PR) strategy for Taitokerau Northland with focus on the domestic and Australian markets.	To provide clear direction and market segmentation to activate targeted campaigns that will seek to address seasonality and regional dispersal.
Investigate the feasibility, and assess the benefits of developing the regional brand.	To address the feedback that Taitokerau Northland needs a stronger brand proposition, assess viability and the cost benefit to achieve this.
Execute year-round marketing and PR campaigns with focus on the domestic and Australian markets.	To create awareness and preference for Taitokerau Northland as a destination, supporting regional dispersal and seasonality.
Create a communication strategy to positively position Taitokerau Northland, reinforce the region's brand value and grow a positive reputation.	Actively and accurately depict, and where necessary defend, Taitokerau Northland's reputation through a shared key messages communication approach.

Closing Remarks and Acknowledgements

**Kupu whakakapi
Me te Mihimihi**



The TNDMP was established on a basis of partnering for goodwill to raise the profile of those who live in the Taitokerau Northland region.

Collectively we have worked to research, consult and engage with others in designing a set of actions to support the tourism sector and visitor industry. It is important that 2040 belongs to the future generation and is why their participation in this plan will be significant.

The TNDMP lays out specific actions that will impact on the visitor economy, and we expect it to be a catalyst for the way in which we think and make decisions for our people and place in Taitokerau Northland.

The Leadership Advisory Group



Dame Jenny Shipley, Co-Chair
Independent



Harry Burkhardt, Co-Chair
Te Kahu O Taonui Taitokerau Iwi Chairs
Forum



Shaun Clarke
Far North District Council



Riki Kinnaird
The Duke of Marlborough



Sue Reed-Thomas
Department of Conservation / Te Papa Atawhai



Hinurewa te Hau
Creative Northland



Greg McManus
Waitangi Treaty Grounds



Snow Tane
Te Roroa Development Group



Te Warihi Hetaraka
Kaumatua



Steve Mutton
Waka Kotahi



Wane Wharerau
Te Rūnanga-A-Iwi-O-Ngāpuhi



Jeroen Jongejans
Dive! Tutukaka



Murray Reade
Northland Inc

Appendices

Ngā Tāpiri



Taitokerau Northland – Geography, Population & Employment Overview

Taitokerau Northland is situated north of Tāmaki Makaurau / Auckland and its southern boundary cuts through the middle of the Kaipara Harbour, across north of Te Hana, and through to the east coast just south of Mangawhai. The region is bordered by Te Moana Nui a Kiwa / Pacific Ocean on the east and Te Tai o Rēhua / Tasman Sea to the west, and stretches north all the way to Te Rerenga Wairua / Cape Reinga, Aotearoa NZ's northern most point.

Local government administration is carried out by the NRC and three territorial district councils Kaipara, Whangārei, and Far North District Councils.

Taitokerau Northland is home to 179,000 people, with 2.63% of New Zealand's population, with the majority (51%) living in the Whangarei District (2018 Census).

Taitokerau Northland iwi include Ngāpuhi, Ngāti Whātua, Ngāti Whātua ki Kaipara, Te Roroa, Ngātiwai, Ngāti Hine, Te Aupōuri, Ngāti Kahu, Ngāti Kuri, Te Rarawa, Ngāi Takoto and Te Uri o Hau amongst others. Ngāpuhi is recognised as New Zealand's largest iwi.

Taitokerau Northland has one of the most socio-economically deprived populations in the country with personal and household income well below the national average. High levels of deprivation are associated with adverse impacts on health, education and employment outcomes.

The combination of high unemployment and under-skilled workers results in a lost economic opportunity for Taitokerau Northland and increasing visitor spend is one way to create new jobs, close the income gap,

and improve the economic performance of Taitokerau Northland in general.

Pre COVID-19, tourism was the third largest employer industry in Taitokerau Northland employing 8,200 people or 11% of the workforce but is only the 6th ranked industry in terms of contribution to Gross Domestic Product (GDP) at 7.6%, and 10th in terms of GDP contribution per job. Despite tourism productivity increasing slightly in the last four years it still performs poorly in comparison to other industries.

Table 1: Taitokerau Northland demographic overview

	Northland	New Zealand
Number of people	179,076	4,699,755
Median age	42.6 years	37.4 years
Number of Māori	64,458 (36.0%)	775,836 (16.5%)
Employed full-time	42.7%	50.1%
Unemployed	5.2%	4.0%
Median income	\$24,800	\$31,800
Over \$70,000	11.5%	17.2%

APPENDIX 1

Background and Approach to the Taitokerau Northland Destination Management Plan (TNDMP)

Desktop Research and Situational Analysis

Desktop research was undertaken to acknowledge and understand the wider context from which this plan was developed. This involved capturing insights from a range of national and regional strategies that informed the framework for this TNDMP and ensured alignment of direction. A full situational analysis can be found in Appendix 3. There are numerous plans in place and excellent work underway already nationally and locally to address a range of issues and opportunities by multiple agencies, organisations, iwi and hapū, and the private sector in the region. A list and summary of some of the most relevant documents can be found in Appendix 5.

Engagement and Feedback Process

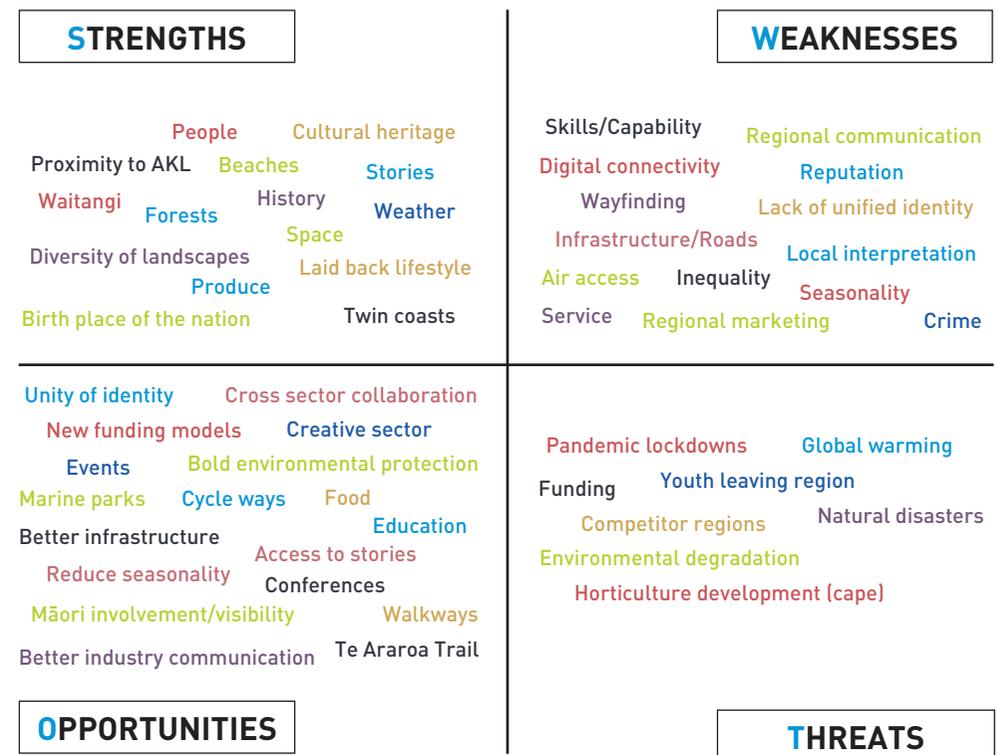
Using the combined resources and databases of the funding partners, a wide-ranging database of industry businesses, stakeholders, iwi and hapū contacts of over 4,000 was set up. This listing was used to invite people to a series of regional workshops and an online survey, with an engagement rate across both of 11.7%.

Regional Workshops

14 workshops were held in October 2020 across Taitokerau Northland in Dargaville, Mangawhai, Waipu, Whangarei (x2), Kawakawa, Paihia (x2), Kerikeri, Ōmāpere, Kaikohe, Mangōnui, Kaitaia, and Pukenui with 298 people responding to the workshop invitations. The workshops covered a range of topics and sought feedback on a number of key issues and opportunities for tourism in the region. Attendees were representative of a good cross section of local tourism businesses, iwi and hapū, council and government agencies, not for profits, and resident associations.

When asked about the Strengths, Weaknesses, Opportunities, and Threats (SWOT) of the region the next diagram represents the collective feedback. There was a strong sense of pride coming through but also an honest realisation of the challenges and areas for improvement. Many of the opportunities tended to be the opposites of weaknesses and will require substantial investment to realise. What is clear is that there is a remarkable cultural, environmental, historical, and knowledge asset base to start from.

Figure 8: Feedback from engagement hui. Northland SWOT



When asked what is important for the future of the region, there were clear views on focusing on elements fundamental to destination management, such as managing impacts of tourism on local communities, with 90% of respondents seeing this as important or very important, and 87% seeing a focus on local history as important or very important.

There appears to be a clear mandate amongst those who engaged in the survey to:

forge a new path and do things differently;

place more resource and emphasis on managing negative **impacts on the environment**;

give **Māori greater input, influence, visibility, and opportunity** at all levels of the industry;

develop **skills and capability** within the region to work in tourism businesses;

develop new and diverse **demand drivers** that tell the **history and stories** of the region whilst also addressing seasonality (more to see and do); and

to review current tourism-related **funding models** to include more user pays models.

Table 2: Online Survey Responses. Importance of impacts on tourism.

How important do you think the following are for the future of tourism in Taitokerau Northland?

	Not at all important	Somewhat important	Moderately important	Important	Very important	
The focus on local history	1.2%	1.2%	10.4%	25.2%	62%	87.2%
Providing more things to see and do	6.1%	8.6%	10.4%	38%	36.8%	74.8%
Managing the impacts of tourism on local communities	1.8%	2.5%	5.5%	19.6%	70.6%	90.2%
Managing the impacts of tourism on the environment	1.2%	1.8%	3.1%	11.0%	82.8%	93.8%
Forming effective partnerships with iwi	4.3%	5.5%	6.1%	28.2%	55.8%	84.0%
Focusing on value rather than volume	3.7%	6.1%	12.3%	24.5%	53.4%	77.9%
Extracting more value from free attractions /activities	20.2%	12.9%	21.5%	24.5%	20.9%	
Increasing capacity, skills, and capability across the sector	2.5%	3.1%	6.7%	33.1%	54.6%	87.8%
Moving to more of a user pays model to fund destination management and promotion	12.3%	11.0%	28.8%	36.2%	11.7%	65.0%

Table 3: Online Survey Responses: What is important for the future of the region?

	Not at all important	Somewhat important	Moderately important	Important	Very important	
Making sure locals are aware of what is available in the region to recommend to others	1.8%	1.8%	8.6%	36.2%	51.5%	87.7%
Making sure people outside of the region are aware of what is available to see and do via marketing campaigns	2.5%	2.5%	7.4%	28.8%	58.9%	87.7%

One-on-One Stakeholder interviews

45 interviews were undertaken with stakeholders who were unable to attend the workshops, those who requested a one-on-one format, and those that the partners requested be interviewed, given their importance and influence in the future of destination management in the region. This included iwi and hapū representatives, private business owners, the Bay of Islands Marketing Group, Northland INC, Te Au Mārie Sestercentennial Trust, Te Hiringa Trust & Business Promotions, government agencies including DOC, Waka Kotahi, council management, Te Puni Kōkiri (TPK), Ministry of Social Development (MSD), Ministry of Primary Industries (MPI), and NZ Police.

Feedback

There was a genuine sense of appreciation from all interviewees for the opportunity to be involved and consulted on this plan, and for the leadership being shown by the partners in making the conversation about tourism more collaborative and inclusive. For a number of entities and people it was their first opportunity to engage and learn about destination management, what it is trying to achieve, and how they can support and benefit from it.

The tourism operators were incredibly concerned about the impact of the pandemic, closed borders, restricted visitor movements and the short-term viability of their businesses. In general, the operators understood and support the direction of destination management and sustainability. They are seeking strong leadership and support from Northland Inc and other agencies to assist with generating short-term domestic demand to ensure their survival during 2021. With reliance on the domestic market likely for most of 2021, and a slow recovery of international visitors potentially over 3-4 years, they are focused on destination marketing, new product development, and events to drive short-term demand and ease the constant challenge of seasonality. A number of operators also expressed strong concerns around environmental management and are seeking greater protection of the marine environment, specifically, as it is one of the key drawcards for Taitokerau Northland. Tourism operators expressed a strong desire to see Northland Inc's funding substantially increased and secured for the future in order to operate in areas where there is private sector market failure.

Iwi / hapū representatives reiterated concerns over ongoing lack of involvement in policy decision-making, opportunities to tell their stories, visibility of Māori culture in the region and in marketing material, a lack of focus on environmental protection including the management of the marine environment, and ongoing support required to develop business and tourism capability.

The WAI 262 treaty claim was often raised, and the impact that the new whole-of-government approach to responding to this claim might have. The findings of the Waitangi Tribunal's inquiry published in its report *Ko Aotearoa Tēnei* (This is Aotearoa). The claimants sought to preserve their culture and identity, and the relationships that derive from this, and differs fundamentally to previous claims.

New Zealand, the Tribunal says, is beginning a transition to a new and unique national identity. But for this transition to succeed, 'Over the next decade or so, the Crown Māori relationship, still currently fixed on Māori grievances, must shift to a less negative and more future focused relationship at all levels .

Waka Kotahi have a number of major roading projects planned and underway that will help with current congestion and safety issues that were raised in the engagement process. They noted that change takes time and causes disruption, and their primary focus is on road safety. They continue to be very supportive of the Twin Coast Discovery Highway and are keen to remain engaged and support the TNDMP.

DOC engaged in a number of ways during the engagement process and are supportive of the direction of the TNDMP and the alignment it has with their own Heritage and Visitor Strategy recently released.

MPI was interested to learn more about what the tourism sector is doing and how they can be more involved in creating opportunities for producers and farmers in the region leading to cross sector collaboration and leveraging resources and funding. The idea of new food and produce-based events, especially in the shoulder season was discussed and is certainly a new area of opportunity to be explored.

APPENDIX 2

List of Tables

Table 1: Taitokerau Northland demographic overview	26
Table 2: Online Survey responses. Importance of impacts on tourism	29
Table 3: Online Survey Responses: What is important for the future of the region?	30
Table 4: Strategies, reports and documents relevant to the development of the TNDMP	39

List of Figures

Figure 1: Map of Taitokerau Northland	8
Figure 2: Total Visitor Spend in Northland Y/E Dec 2019	9
Figure 3: International Spend on Northland by Market 2019	9
Figure 4: Northland Domestic and International Visitor Spend Y/E 2019	9
Figure 5: Visitor Nights in Northland by district and accommodation, Y/E Dec 2019.	10
Figure 6: Twin Coast Discovery Highway Navigation Map	11
Figure 7: Cruise passenger spend in Northland pre Covid	11
Figure 8: Feedback from engagement hui. Northland SWOT	27
Figure 9: Online Survey responses.	28
Figure 10: Online survey responses on Tourism.	28
Figure 11: Online survey responses. Impacts of Tourism	28
Figure 12: International Tourist Arrivals, World (UNWTO)	33
Figure 13: UNWTO Expected Time to See a Recovery in pre Covid levels.	33
Figure 14: UNWTO Expected Time to See a Recovery	33
Figure 15: Growth in Arrivals to NZ 1922-2019	34
Figure 16: Arrivals by Key Markets to NZ in 2019	34
Figure 17: Monthly NZ Visitor Arrivals to Nov 2020.	34
Figure 18: Export Earnings by Sector Y/E March	35
Figure 19: Perceptions that current number of visitors is too high.	35
Figure 20: Top 5 ways tourism applies pressure	35
Figure 21: Is International Tourism Good for NZ?.	36
Figure 22: Westpac forecast of opening of NZ borders	36
Figure 23: Destination Management (MBIE)	37



APPENDIX 3

The Four Partners

The shared vision of the four partners (below) for the TNDMP is: A new collaborative beginning where we work together to realise the region's potential and build a legacy for future generations.

Te Au Mārie Sestercentennial Trust (TAMST)

A charitable trust established in 2015 to commemorate, celebrate and share the diverse histories of voyaging and encounters in Taitokerau since Captain Cook and the Polynesian navigator Tupaia entered Aotearoa waters. 2019 was 250 years since this encounter took place.

The aims of TAMST are:

- a. To commemorate the first historic meetings of Māori and Europeans on and off our coast, especially the 250th anniversary of the voyage of the Endeavour captained by Lieutenant James Cook;
- b. To commemorate the discovery and exploration of our coast by peoples who had arrived long before from the Pacific;
- c. To promote and educate the national and international significance of these histories and ensuing relationships; and
- d. To enhance our economic, cultural, ecological and social wellbeing by establishing legacies for the future with a sense of pride and ownership.

Te Hiringa Business Promotions Limited (THBP)

THBP was formed on 22 October 2009 and is the trading and transactions arm of Te Hiringa Charitable Trust (THCT).

Te Hiringa supports opportunities to lift and support Māori SMEs and Māori owners of collective assets and favour a proactive approach of engagement with Māori business owners, industry sectors and regional economic interests by hosting three products: the biennial Tai Tokerau Māori Business Awards, Matariki Future Makers program, and Destination Taitokerau.

The objectives of THCT are:

- a. To promote Tai Tokerau Māori Businesses Excellence;
- b. To promote the advancement of education of the Tai Tokerau community on matters relating to Māori Business Best Practices through wānanga, publications, hui, conferences, and others such means as the Trustees deem appropriate;
- c. To be beneficial to the Tai Tokerau community by promoting whanaungatanga, manaakitanga and kotahitanga within its Māori Business communities; and
- d. To undertake such other projects as are generally ancillary to or associated with those objects.

Te Puni Kōkiri (TPK)

Established under the Māori Development Act 1991, TPK is a government agency with a range of responsibilities that are very broad from te reo Māori and culture through many social and economic issues, to the environment and natural resources. The objectives of TPK are to promote increases in the levels of achievement attained by Māori in a number of key sectors.

The Ministry's strong connections within Māori communities through whānau, hapū and iwi networks, as well as other government agencies helps to generate trusted partnerships and flows of information. This approach enables a shared focus on issues important to Māori.

Northland Inc

Northland Inc is the combined Economic Development Agency (EDA) and Regional Tourism Organisation (RTO) for the region, is a registered company, and owned by the Northland Regional Council (NRC), Kaipara District and Far North District Councils. It is defined as a council-controlled organisation (CCO) under Section 6 of the Local Government Act 2002 and was established by the NRC as their preferred method of delivering economic development services to the region.

Northland Inc works towards the following:

Tirohanga ki Mua Vision

An economy that supports a prosperous and thriving Te Tai Tokerau Northland that respects all people, past, present and future, and cares for the environment we all share.

Te Aronui Mission

To identify and focus on those activities and relationships that will strengthen, diversify, and grow Te Tai Tokerau Northland economy to help achieve equity and environmental sustainability.

Rautaki Strategy

Effective partnership through a limited number of impactful activities to achieve economic development that supports wellbeing and equity, and sustains and improves the environment.

Northland Inc has developed six key Pou as the organisational objectives:

- Pou Tahi:** Māori Economic Development
- Pou Rua:** Environmental Sustainability
- Pou Toru:** Regional Investment
- Pou Whā:** Destination Management
- Pou Rima:** Profile and Advocacy of Economic Development
- Pou Ono:** Organisational Culture

APPENDIX 4

Situational Analysis

Global Pre COVID-19

According to the United Nations World Tourism Organisation (UNWTO) international travel arrivals globally had been growing at an average of 5.1% a year since 2010, reaching 1.5b arrivals internationally in 2019. Despite a global economic slowdown, uncertainty about the withdrawal of the United Kingdom from the European Union (Brexit), and the failure of a number of low-cost carriers and Thomas Cook in 2019, arrivals still grew 4%, an estimated increase of 54m arrivals over 2018.

The tourism industry was continuing to grow almost exponentially and had overcome terror attacks, severe acute respiratory syndrome (SARS), and the global economic crisis in recent times and was proving incredibly resilient. New brands and technology were changing the face of tourism, Air BnB had just become worth more than the largest hotel chain in the world, and the growth was creating a worker shortage in the industry as growth and demand for travel was continuously fuelled by the growing middle

classes of China, India, South East Asia, and South America. That all changed on March 11th 2020 with the World Health Organisation's (WHO) announcement of the Covid-19 Pandemic.

Global Post COVID-19

Global tourism suffered its worst year on record in 2020, with international arrivals dropping by 74% according to data from the UNWTO in January 2021. Destinations worldwide welcomed 1b fewer international arrivals in 2020 than in the previous year, due to an unprecedented fall in demand and widespread travel restrictions. This compares

with the 4% decline recorded during the 2009 global economic crisis and the collapse in international travel represents an estimated loss of USD 1.3 trillion (t) in export revenues more than 11 times the loss recorded during the 2009 global economic crisis. The crisis has put between 100m and 120m direct tourism jobs at risk, many of them in SMEs.

The graphs below show the expectations of a UNWTO panel of experts' survey conducted in January 2021 showing when they expect a recovery to begin, and when we might expect a return to pre COVID-19 levels, with 81% of them expecting a full recovery in 2023 or 2024.

Figure 12: International Tourist Arrivals, World (UNWTO)

Source: World Tourism Organization (UNWTO) ©

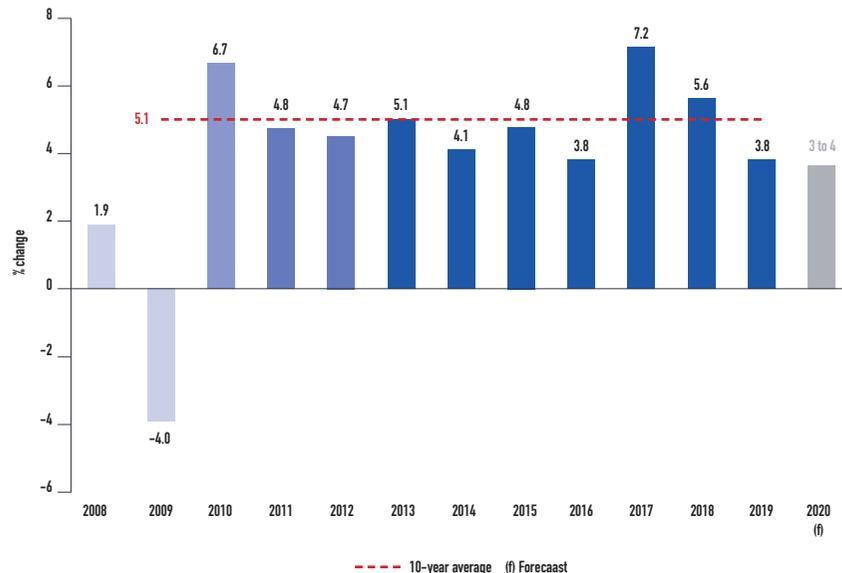


Figure 13: UNWTO Expected Time to See a Recovery in pre COVID-19 levels

UNWTO Panel of Tourism Experts Jan 2021

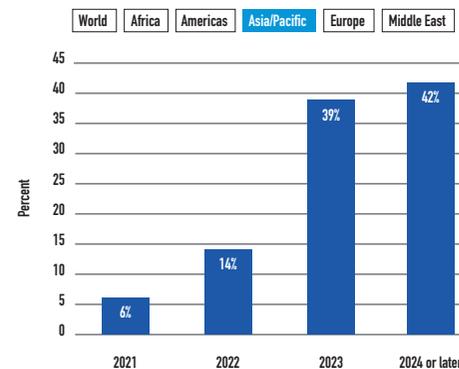
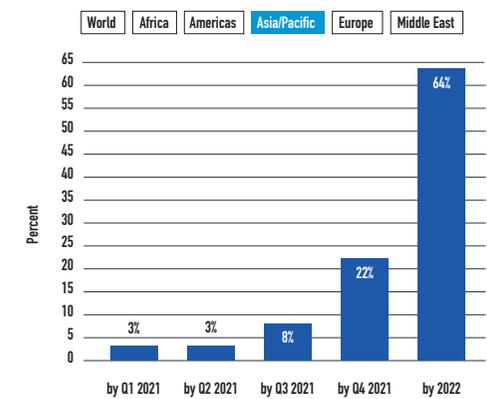


Figure 14: UNWTO Expected Time to See a Recovery

UNWTO Panel of Tourism Experts Jan 2021



UNWTO conducted a global survey among its UNWTO Panel of Tourism Experts on the impact of COVID-19 on tourism and the expected time of recovery. Data as collected by UNWTO, January 2021. Published: 26/01/2021.

New Zealand was the first country in the world to actively promote itself as a destination to visit for a holiday, founding the predecessor to Tourism NZ in 1901, but it wasn't until the 1960s that we saw real growth in international arrivals. Since then, and barring global events that caused minor blips, we have experienced strong year-on-year growth right through to 2019 when we welcomed 3.89m international guests to Aotearoa NZ.

There was especially high growth between 2010 and 2019, equating to 56% increase in 10 years, with an increase in air routes and growth from China being the primary drivers.

Our largest international market has always been Australia which has seen modest but steady growth over recent years, but China overtook USA to be our second largest market by volume in recent years with the UK and Germany rounding out our top 5 in 2019.

Figure 17 shows international visitor arrivals by month to November 2020 and shows the devastating impact on our tourism sector with arrivals effectively dropping to zero from April 2020. It also highlights the seasonal nature of international arrivals with the majority coming over our summer months.

Figure 15: Growth in Arrivals to NZ 1922-2019

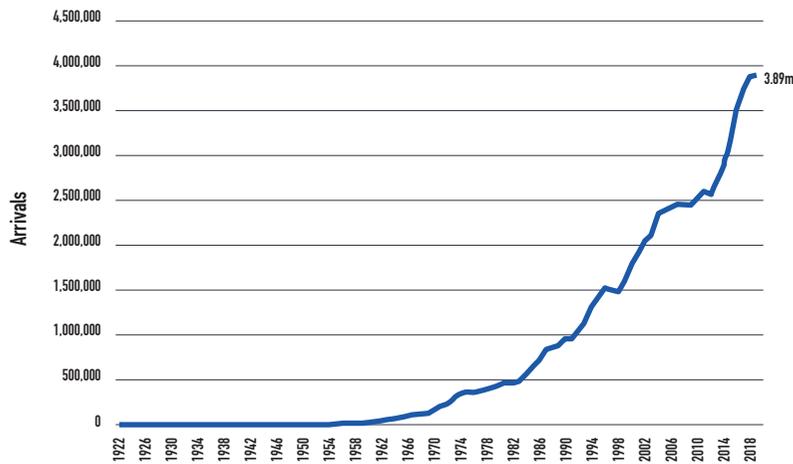


Figure 16: Arrivals by Key Markets to NZ in 2019

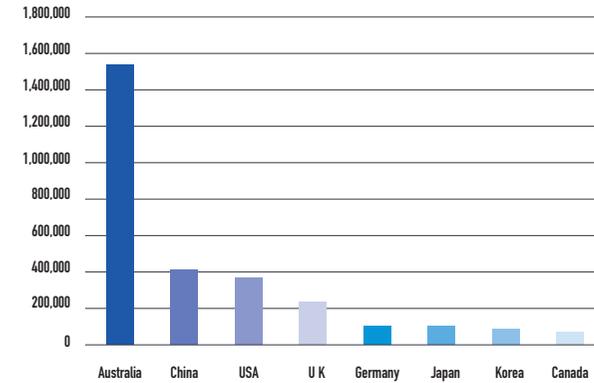
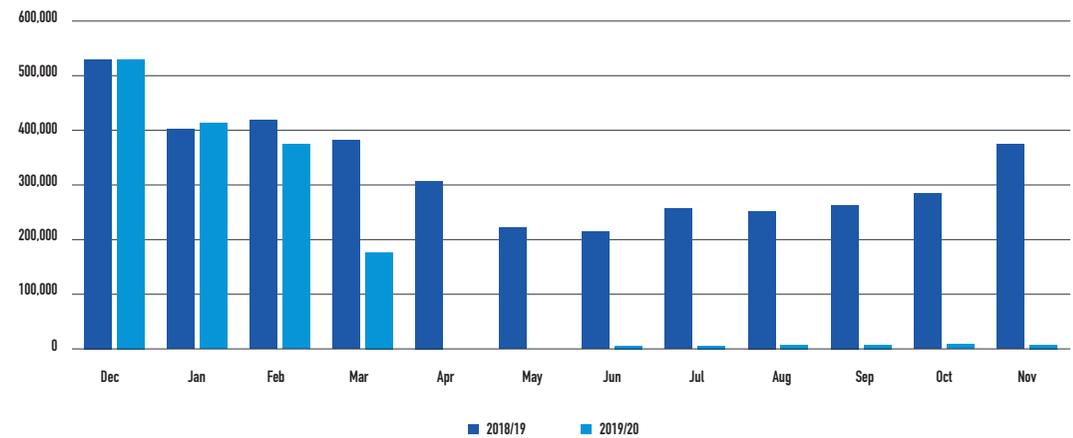


Figure 17: Monthly NZ Visitor Arrivals to Nov 2020

Source: Stats NZ



As at year end (Y/E) March 2020, international tourism was still New Zealand's leading export earner, while total tourism value-add (GDP), including direct and indirect expenditure, accounted for 9.8% of total national GDP and totalling \$7.5b.

Growing Pains

Like many parts of the world, New Zealand struggled to keep up with infrastructure investment to cater for the ever-growing numbers of visitors and has started to have a detrimental impact on local infrastructure, the environment, and the lives of local residents.

Tourism NZ and TIA have been running a Mood of the Nation online survey to capture New Zealanders' perceptions of international visitors. As can be seen from this graph (Figure 19) the number of people in Aotearoa NZ who think the current number of visitors is too high has doubled in the last five years.

There has also been a doubling of the percentage of people who think tourists put too much pressure on New Zealand, from 18% in 2015 to over 40% by 2019.

The five areas that people perceive the most pressure being applied can be seen in Figure 20 here.

Figure 18: Export Earnings by Sector Y/E March

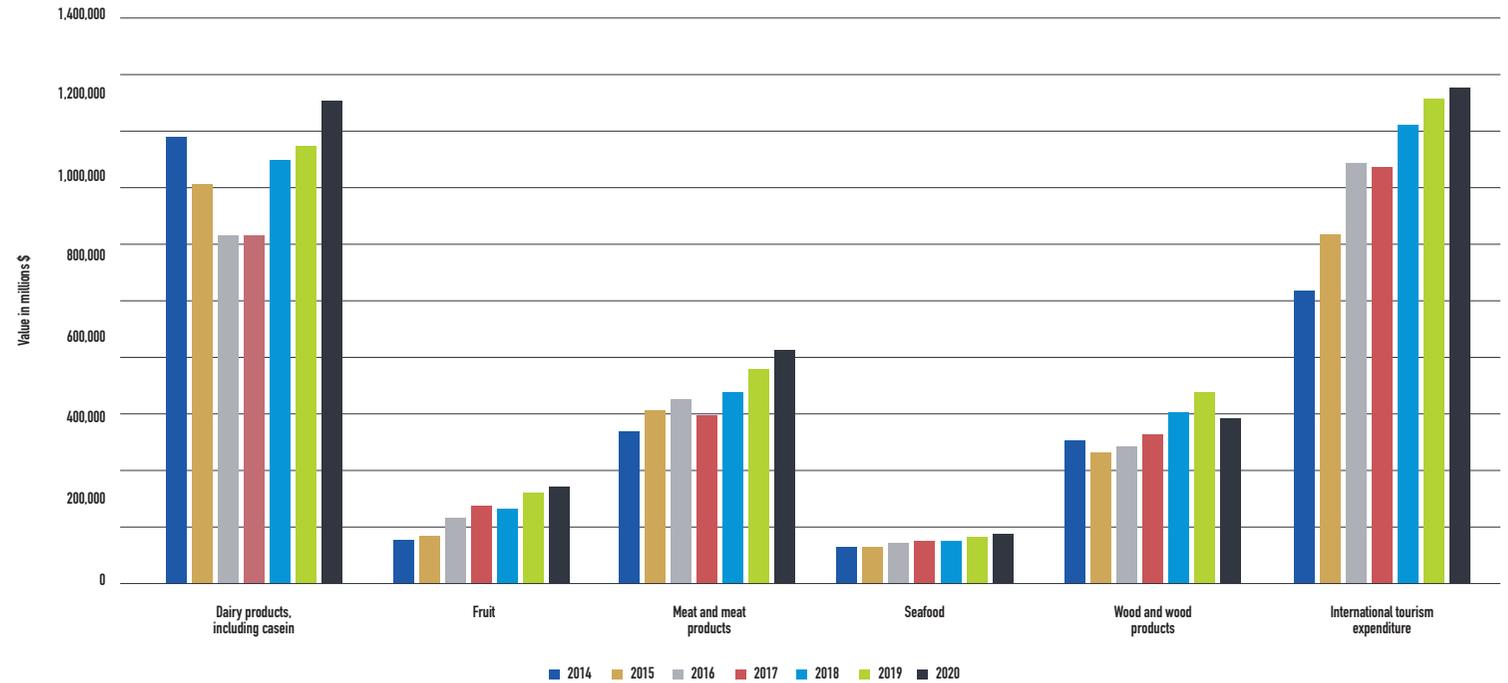


Figure 19: Perceptions that current number of visitors is too high

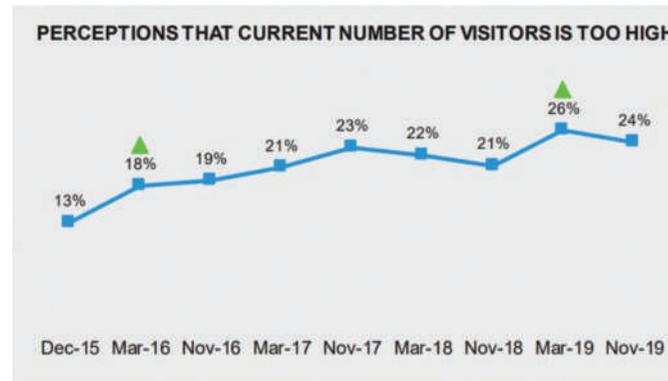
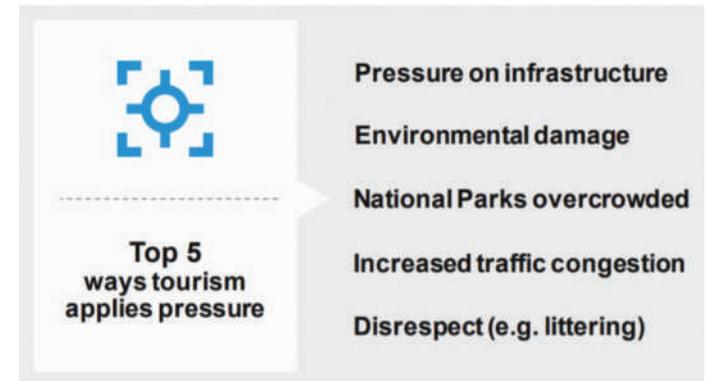


Figure 20: Top 5 ways tourism applies pressure



The Tongariro Crossing, Roy s Peak Queenstown, Cathedral Cove, and Milford Sound are all examples of places impacted by over-tourism , while issues such as Freedom Camping are notable for intrusion on public amenity.

High volume tourism was also adding equivalent population onto local infrastructure that was not designed for the loads that a booming visitor sector placed on it. Small ratepayer bases in small towns and cities were simply not able to fund infrastructure upgrades.

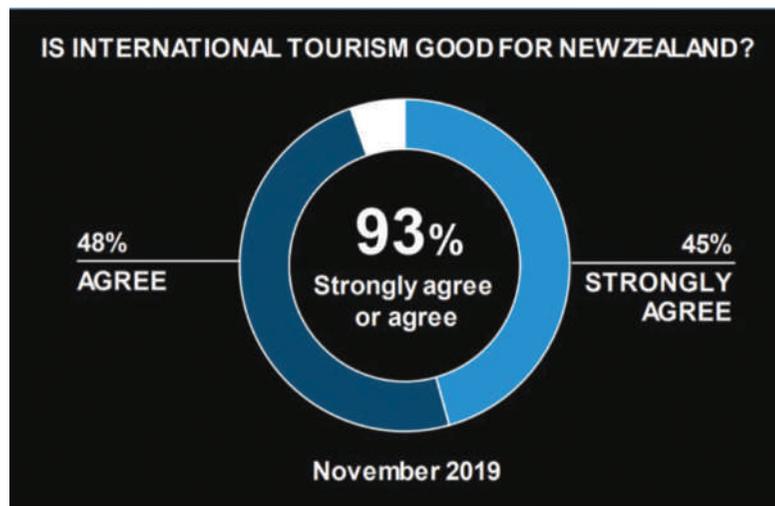
For decades both Tourism NZ and RTOs have been trying to disperse high season visitors away from areas most impacted, and to move visitors away from high season and into the spring and autumn shoulder seasons, but these attempts have had little, if any, effect. The seasonality of the visitor sector also

impacts investment decisions and makes it difficult for tourism to compete with sectors such as bio technology, information technology (IT) and manufacturing for new investment.

The tourism sector is characterised by a large number of small enterprises that tend to get into it for the lifestyle rather than achieving strong commercial returns. These businesses are generally under-capitalised and often family businesses that are vulnerable to shocks such as pandemics or major global economic downturns.

Interestingly though, 93% of the population agree or strongly agree that international tourism is good for Aotearoa NZ and understand the economic and employment benefits that it brings.

Figure 21: Is International Tourism Good for NZ?

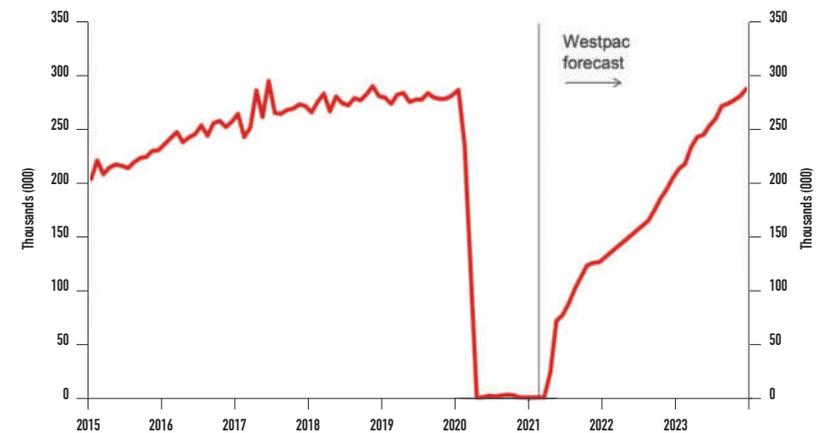


Post COVID-19 Recovery

Whilst it is very difficult to predict the recovery, according to Westpac in its February 2021 Economic Review, it forecast a return of international visitors to Aotearoa NZ will start with a travel bubble with Australia in the second half of 2021, with a wider opening of borders from early 2022, growing slowly back to pre COVID-19 levels during 2024/25 as seen in the graph here (Figure 22). This view aligns with those of international experts from the UNWTO for the Asia Pacific region.

Figure 22: Westpac forecast of opening of NZ borders

Source: Stats NZ, Westpac



APPENDIX 5

What is destination management?

Figure 23: Destination Management (MBIE)



Visitors today are seeking greater connection and meaning from their travel experiences, wanting to immerse themselves more in communities and landscapes that encompass the tourism ecosystem. Destination Management is a coordinated management of all the elements that make up a tourism destination, according to UNWTO. The ultimate aim being the assurance of the sustainability of the tourism destination.

MBIE collated insights from New Zealand and around the world and formulated a set of guidelines to assist regions across New Zealand to develop their own individual DMPs.

MBIE strongly recommend bringing together key groups and stakeholders in the visitor economy as seen in the diagram (Figure 23) on the left.

The MBIE guidelines were released in early 2020 and came up with the following definition of destination management.

The mechanism by which New Zealanders can ensure that tourism in their region reflects their wishes and they have an agreed way to maximise the benefits that tourism brings whilst managing any negative impacts.

It helps give greater certainty to the private sector that enables long term investment as well as confidence to the public sector about the facilities and services they need to provide."

APPENDIX 6

Overview of National Strategies of Relevance

New Zealand Aotearoa Government Tourism Strategy

Released in May 2019 the New Zealand Aotearoa Government Tourism Strategy (NZAGTS) is very focused on Destination Management and is a joint strategy between MBIE and DOC with the goal to enrich New Zealand-Aotearoa through sustainable tourism growth. <https://www.mbie.govt.nz/dmsdocument/5482-2019-new-zealand-aotearoa-government-tourism-strategy-pdf>

The NZAGTS sets out five integrated outcomes with corresponding areas of focus and success factors as well as outlining four top priorities for Government, which are:

1. Coordination across the tourism system,
2. Long-term Sustainable Funding mechanisms,
3. Destination Management and Planning, and
4. Better Data and insights.

DOC Heritage and Visitor Strategy

Released in February 2021 it provides a framework to proactively navigate a changing context for visitors and realise potential benefits for conservation and all New Zealanders. DOC's Heritage and Visitor Strategy (HVS) purpose is to sustainably manage visitors to protect and enhance the value of New Zealand's natural, cultural and historic heritage. Aligning with the 2019 New

Zealand- Aotearoa Government Tourism Strategy, the three goals, or key pillars, of the HVS are:

1. Protect New Zealand's natural, cultural, and historic resources are preserved and protected to maintain (and where possible enhance) biodiversity, cultural and historic values, ecosystem health, landscapes and natural quiet
2. Connect People are enriched by, and better connected to, New Zealand's natural, cultural and historic heritage.
3. Thrive Tangata whenua, regions and communities benefit from protecting, and connecting visitors with, their natural, cultural, and historic heritage.

The rationale is that this protection and enhanced visitor connection will create opportunities to improve wellbeing and support thriving communities, which is at the heart of Destination Management. Through the engagement process and follow-up meetings it was noted that there are numerous projects planned and underway in Taitokerau Northland including working with various iwi and hapū partners, (noting that there are a number of Treaty of Waitangi settlements yet to be finalised) to create new attractions and ways to connect with the DOC estate including Ruapekapeka and Rākau Rangatira amongst numerous others. They are also exploring new revenue opportunities

for themselves and partners, including optimising revenue from campgrounds and other sites and experiences.

The prime focus is on protection, implementing climate change measures, biosecurity risks such as kauri dieback and myrtle rust, protection of significant cultural heritage places through the Tohu Whenua Programme, supporting existing Heritage Parks such as Kororipo and Rangihoua and telling authentic stories at place.

Along with a significant increase in New Zealanders visiting conservation areas, there has been rapid growth and fluctuation in the numbers of international visitors, as well as changes in how people want to get into nature and connect with New Zealand's heritage.

The full document can be found here: <https://www.doc.govt.nz/about-us/our-role/managing-conservation/recreation-management/heritage-and-visitor-strategy/>

Tourism Task Force

In June 2020 the Tourism Minister appointed a Tourism Futures Taskforce made up of people from the private and public sector and was seen as an opportunity to reimagine tourism during the COVID-19 enforced downturn. The purpose of the Taskforce was to advise on what changes New Zealand can make to the tourism system, so that tourism enriches both New Zealand and the wellbeing of New Zealanders.

The Taskforce made recommendations to the minister in December 2020 to address the long-standing productivity, inclusivity, and sustainability (environmental, social and economic) issues present in some parts of the tourism sector, with a final report and recommendations released in April 2021.

It is likely that Regenerative Tourism, with a heavy focus on carbon targets, will be a strong theme within the final report as the concept goes beyond sustainability and focuses on making a positive contribution to the environment and society, leaving it better than before. This will lead to the introduction of new funding models leaning towards more user pays. The recommendations and their implementation have the potential to substantially impact the region in a positive way.

<https://www.mbie.govt.nz/assets/the-tourism-futures-taskforce-interim-report-december-2020.pdf>

Parliamentary Commissioner for the Environment Report

The report titled 'Not 100% - but 4 steps closer to sustainable tourism' was released in February 2021, following on from a previous report from 2019, 'Pristine, popular imperilled? The environmental consequences of projected tourism growth. It is expected that the proposals in this report will strongly influence the government on its

future approach to tourism. <https://www.pce.parliament.nz/media/197087/report-not-100-but-four-steps-closer-to-sustainable-tourism-pdf-24mb.pdf>

The four proposals are:

1. Introduce a departure tax that reflects the environmental cost of flying internationally from New Zealand and use the revenue to support the development of low-emissions aviation technologies and provide a source of climate finance for Pacific Island nations.
2. Make any future central government funding for tourism infrastructure conditional on environmental criteria and aligned with mana whenua and the local community's vision for tourism development.
3. Clarify and strengthen the tools DOC can use to address the loss of wildness and natural quiet at some of Aotearoa's most spectacular natural attractions. This includes tightening up rules around commercial activity on conservation lands and waters.
4. Strengthen the existing standard for self-contained freedom camping, improve oversight of the certifying process and require rental car agencies to play a greater role in collecting freedom camping infringement fees and fines.

This table shows the strategies, reports and documents relevant to the development of the TNDMP.

Table 4: Strategies, reports and documents relevant to the development of the TNDMP

Strategies, Plans, Projects, Books, and Reports	
National	Regional
Te Tiriti o Waitangi The Treaty of Waitangi	The Taitokerau Northland Economic Action Plan (Northland Inc)
Wai 262 treaty claim and the Waitangi Tribunal report, Ko Aotearoa Tēnei, as well as Te Pae Tawhiti: Wai 262 (2019) whole of government approach in response	He Tangata, He Whenua, He Oranga An Economic Strategy for the Taitokerau Māori Economy (2015)
New Zealand-Aotearoa Government Tourism Strategy 2019 (MBIE, DOC)	The Taitokerau Māori Tourism Strategy 2018 – 2023 (DRAFT)
Optimising Tourism New Zealand's Future Role and Contribution to New Zealand (MBIE Chair David Smol)	Investing for Impact in Northland (Centre for Social Impact, May 2018)
Tourism New Zealand Strategy (Tourism NZ)	Far North 2100 Mapping Our Future (FNDC, 2019)
He kai kei aku ringa A vision for Māori Economic Development to 2040 (Māori Economic Development Panel 2012)	Twin Coast Discovery Route and Northland Journeys Wayfinding Single Stage Business Case (Stantec/NZTA 2019)
Tuia 250 Project and Report (Aug 2020)	Twin Coast Discovery Route Recommended Business Case Programme, Waka Kotahi
100% Pure Tourism Future (Edited Sarah Bennett, 2020)	COVID-19 Economic Recovery Plan Taitokerau
Climate Change Commission (Advice for Consultation Jan 2021)	Township Plans (Isthmus/Waka Kotahi)
Tapuwae: A Vision for Places of Māori Heritage (Māori Heritage Council)	
Shaping The Future Enabling Community-led Change (Inspiring Communities 2020)	



For further information please visit www.northlandnz.com

