

TIMARU DISTRICT

DESTINATION MANAGEMENT PLAN

September 2021



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EXECUTIVE SUMMARY

Introduction

Venture Timaru has prepared this Destination Management Plan to support the future growth and development of the Timaru District's visitor economy. This Plan has been informed by the Government's Destination Management Guidelines and by extensive engagement with partners and stakeholders, including Te Rūnanga o Arowhenua.

As a destination, the Timaru District is centrally located and is a gateway to the wider South Canterbury region. The district offers a range of amenities and attractions to visitors including Caroline Bay, Peel Forest, Timaru's historic CBD, Geraldine and the Te Ana Māori Art Centre.

While relatively small when compared to the district's overall economy, the tourism sector, and the visitor economy more broadly, plays an important role, providing amenity, leisure activities and experiences to visitors and residents alike.

Over the last year, despite closed borders, the district's visitor economy has fared better than many other places. This is because of the district's visitor profile, which is more heavily weighted towards domestic visitors than international. However, it is still expected that international tourism will rebound as borders reopen and vaccines are rolled out.

Now is the right time for the district to be looking to the future and considering how best to develop a high value tourism sector for the district. This requires a focus not simply on the economic returns from visitation but also how visitors contribute to the overall wellbeing of the district.

The destination management approach

While the benefits of tourism are clear, the rapid pace of growth of the sector across New Zealand has created concerns regarding the impact of high visitor numbers on our national environment.

Destination management recognises the need for a holistic and coordinated approach to managing tourism and ensuring that the sector adds value to communities. Destination management is an active process, ensuring that tourism is not placing undue pressure on our natural environment.

Environmental sustainability and partnership, including partnership with iwi, sit at the heart of the destination management approach. Tourism is integral to economic development and a tool to achieve wider goals for the district, including building reputation and attracting residents, businesses and students.

As part of the destination management approach, there is also a growing focus on the concept of regenerative tourism and how a more regenerative tourism system can give more back to the environment than it takes away, supporting social, environmental cultural and economic wellbeing for communities.

The vision for Timaru District

Timaru District Council's vision for the district, as set out in the Council's Long-Term Plan is for the district to be a place:

Where people, place and businesses prosper within a healthy, adaptable and regenerative environment.

In support of this vision, the Council is investing to deliver wellbeing outcomes for the community. These investments include the redevelopment of the Aigantighe Art Gallery, the further development of Aorangi Park and the Stadium, and the regeneration of Timaru's CBD.

Venture Timaru has an important role to play in supporting the delivery of the Council's vision and maximising the benefits of these investments, which will also create opportunities for the district's visitor economy. Venture Timaru plays an enabling and facilitation role, working across the district, with surround districts and with relevant national agencies and partners.

As the district's Regional Tourism Organisation, Venture Timaru has already accessed the Government's Strategic Tourism Assets Protection Programme (STAPP), which was created in response to Covid-19. This funding, along core funding from Timaru District Council, means that action is already underway to support the implementation of this Plan.

This Plan is the basis for collective action across the district and with surrounding areas, to support the sustainable growth of the district's tourism sector and wider visitor economy.

Having completed the Plan, Venture Timaru will now seek further input from the wider community and will work with surrounding districts and national agencies to progress priority areas of focus.

Strategic framework

This Destination Management Plan sets out a framework for shared action, a clear vision, based on three key foundations:

- **Manaakitanga** – as a destination we will welcome visitors to the Timaru District and extend them hospitality, respect and kindness so that they will remember their time with us and share their positive experiences of the district to others.
- **Kaitiakitanga** – we will ensure that the future growth and development of Timaru District's visitor economy is sustainable and not achieved at the expense of our people, our culture or our environment.
- **Kōtahitanga** – across the Timaru District, we will work together to ensure that all aspects of our visitor economy are supported to reach their full potential so that we collectively thrive.

Our vision is that by working together and through our collective actions:

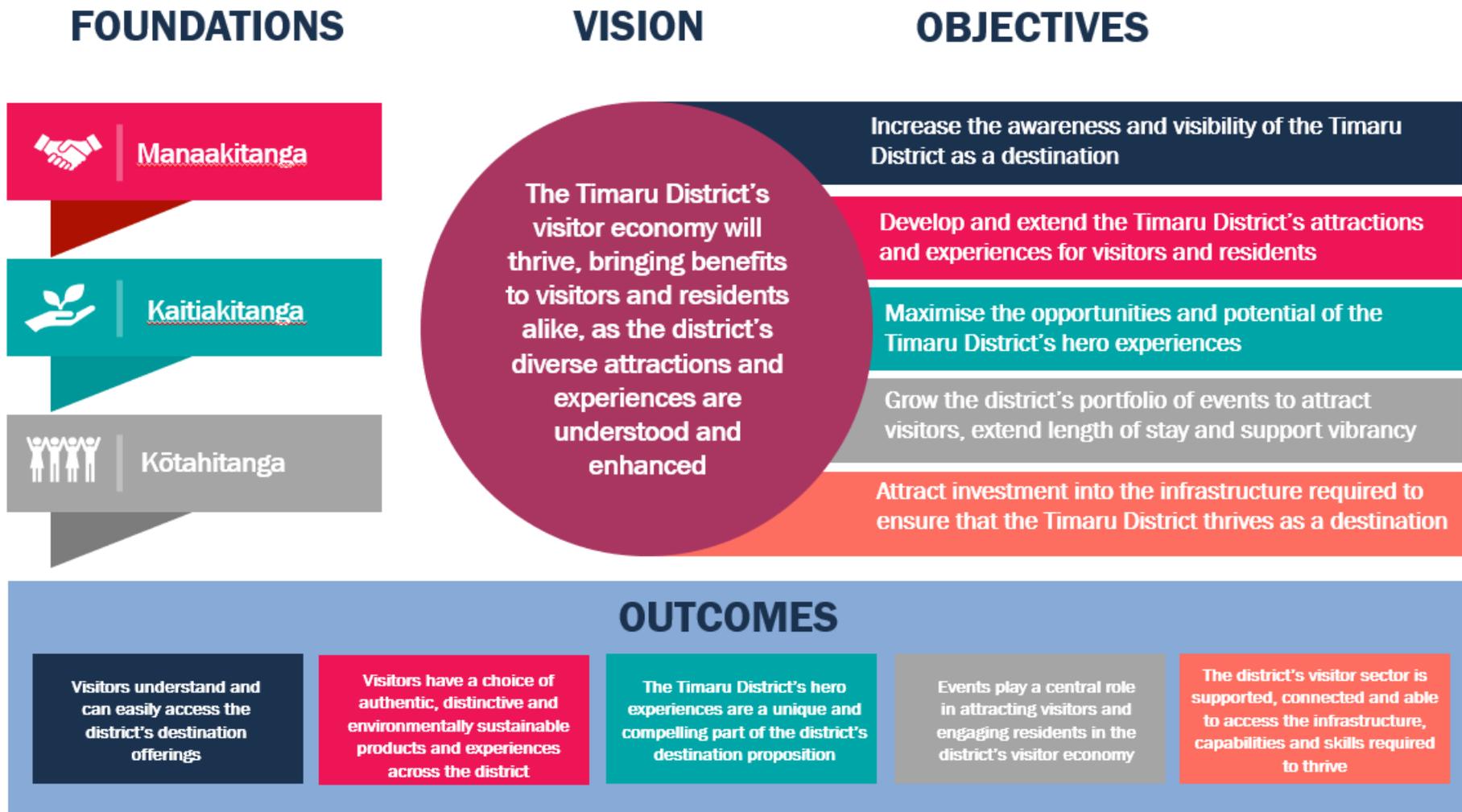
The Timaru District's visitor economy will thrive, bringing benefits to visitors and residents alike, as the district's diverse attractions and experiences are understood and enhanced.

Five strategic objectives support this vision:

- 1 Increase the awareness and visibility of the Timaru District as a destination.
- 2 Develop and extend the Timaru District's attractions and experiences for visitors and residents.
- 3 Maximise the opportunities and potential of the Timaru District's hero experiences.
- 4 Grow the district's portfolio of events to attract visitors, extend length of stay and support vibrancy for residents.
- 5 Attract investment into the infrastructure required to ensure that the Timaru District thrives as a destination.

Subsequent sections of this Plan set out the wider strategic and economic context for these objectives, as well as the perspectives of key partners and stakeholders. Figure 1 summarises the overarching strategic framework and our desired outcomes for the Timaru District's visitor economy.

Figure 1: The Timaru District Destination Management Plan



INTRODUCTION

About this Destination Management Plan

The Timaru District is located on the east coast of the South Island and includes the key settlements of Timaru, Temuka, Geraldine and Pleasant Point (Figure 2). The district is home to a resident population of 48,400 people, 5,511 businesses and 26,004 employees¹.

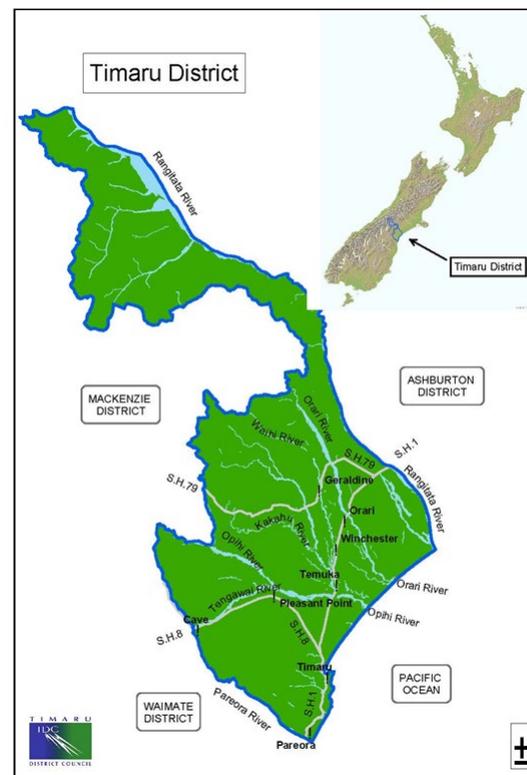
The economy of the district is rooted in the primary sector and good producing industries, specifically manufacturing, agriculture, fishing and forestry. As a destination, the Timaru District is centrally located within South Canterbury and is a gateway to the wider region.

This Destination Management Plan has been prepared to provide a basis for collective action across the district and with surrounding areas, to support the sustainable growth of the district's tourism sector and the wider visitor economy.

The development of this Plan has been led by Venture Timaru, the integrated Economic Development Agency (EDA) and Regional Tourism Organisation (RTO) for the district.

The process of developing this Plan has involved engagement with a wide range of stakeholders and partners across the district, including with Te Rūnanga o Arowhenua, as the principal Māori kainga of South Canterbury. The development of the Plan has been overseen by Venture Timaru's Board and informed by Venture Timaru's Tourism and Visitor Advisory Group.

Figure 2: The Timaru District boundary



Source: Timaru District Council

¹ Timaru District Economic Profile, Infometrics

Tourism and the visitor economy

While relatively small when compared to the Timaru District's overall economy, the tourism sector, and the visitor economy more broadly, plays an important role across the district, providing amenity, leisure activities and experiences to visitors and residents alike.

Across the district, the tourism sector directly employs over 1,500 people and indirectly supports employment and expenditure in many other sectors. Each year over 1.8 million people visit the district, with more visitors spending time in the Timaru District than in any of the surrounding districts of South Canterbury².

Looking at overall market share, the Timaru District captures almost a quarter of all visitors to the wider sub-region and domestic and international visitors contribute \$119 million in Gross Domestic Product (GDP) to the local economy.

Beyond this, tourism matters to the Timaru District for several other reasons:

- tourism often provides an entry point to the labour market for many workers, particularly young people, and teaches valuable soft skills such as customer care.
- visitor spending underwrites the amenity of the district, supporting local bars, restaurants and cafés and can support investment in new infrastructure which also brings benefits to residents.
- a vibrant visitor economy helps to create a positive perception of the district and can support wider objectives such as population growth and talent attraction.

While the Covid-19 pandemic has impacted the Timaru District and New Zealand's visitor economy as a whole, the district has fared better than many other locations across the South Island. This is because of the district's visitor profile, which is more heavily weighted towards domestic visitors, who make up approximately 80 percent of all visitors. Consequently, the district's tourism sector has been less impacted than those destinations with a greater reliance on international markets.

However, it is still expected that international tourism will rebound as borders reopen and vaccines are rolled out. The softening of border restrictions with Australia is already expected to bring additional visitors to the district, reflecting the fact that Australia has typically been the district's largest overseas market.

In short, tourism matters, and will continue to matter, to the Timaru District. Now is the right time for the district to be looking to the future and considering how best to develop a high value tourism sector for the district. This requires a focus not simply on the economic returns from visitation but also how visitors contribute to the overall wellbeing of the district.

This Plan sets out a shared vision, objectives and actions to support the sector as a key element of our overall approach to economic development and sustainable growth.

² Figures referenced were for the period prior to the Covid-19 pandemic. See Appendix 1 for further details.

The destination management approach

While the benefits of tourism are clear, the rapid pace of growth of the sector across New Zealand, created concerns regarding the impact of high visitor numbers on our national environment. In some locations this has challenged the 'social licence' of the sector and led to calls to restrict, tax or regulate the sector to minimise its impact upon local communities.

These concerns have contributed to the development of the destination management approach, globally and within New Zealand. Destination management recognises the need for a holistic and coordinated approach to managing tourism and ensuring that the sector adds value to communities. Destination management is an active process to ensure that tourism is not placing undue pressure on our natural environment and that supply and demand are balanced appropriately.

In January 2020, before the full scale of the Covid-19 pandemic became clear and before New Zealand's borders were effectively closed to international visitors, the Ministry of Business, Innovation and Employment (MBIE) published a set of Destination Management Guidelines. The Guidelines were created to inform the development of Destination Management Plan's across New Zealand³.

The Guidelines, which sit alongside the New Zealand-Aotearoa Government Tourism Strategy⁴, published in May 2019, are intended to ensure that tourism reflects the wishes of communities and that the benefits are maximised, and negative externalities managed.

Sustainability sits at the heart of any Destination Management Plan and partnership is essential in developing and implementing plans. Partnership with iwi is recognised as being of critical importance. The Guidelines also acknowledge that tourism is integral to economic development and a tool to achieve wider goals including building reputation and attracting residents, businesses and students.

The Guidelines have informed the development of this Plan. While the Timaru District had not previously experienced some of the challenges associated with over-tourism that impacted other parts of the South Island and New Zealand, there is still a need to be mindful of the environmental and social impacts of tourism. As the sector prepares for the future there is a need to embrace the principles of destination management.

This is reinforced by climate change projections for the Canterbury region which suggest, amongst other environmental impacts, that the region will see increases in mean annual temperatures, in the number of days above 25 degrees Celsius, and a rise in sea levels⁵.

There is also a growing focus on the concept of regenerative tourism and how a more regenerative tourism system can give more back to the environment than it takes away, supporting social, environmental cultural and economic wellbeing for communities.

³ Destination Management Guidelines, January 2020, MBIE

⁴ New Zealand-Aotearoa Government Tourism Strategy, May 2019, MBIE and DoC

⁵ DOC, Canterbury Region Climate Change Projections

Strategic context

Alongside MBIE's Destination Management Guidelines, there is also a need to consider the wider national, regional and local policy context relevant to the Timaru District.

New Zealand-Aotearoa Government Tourism Strategy

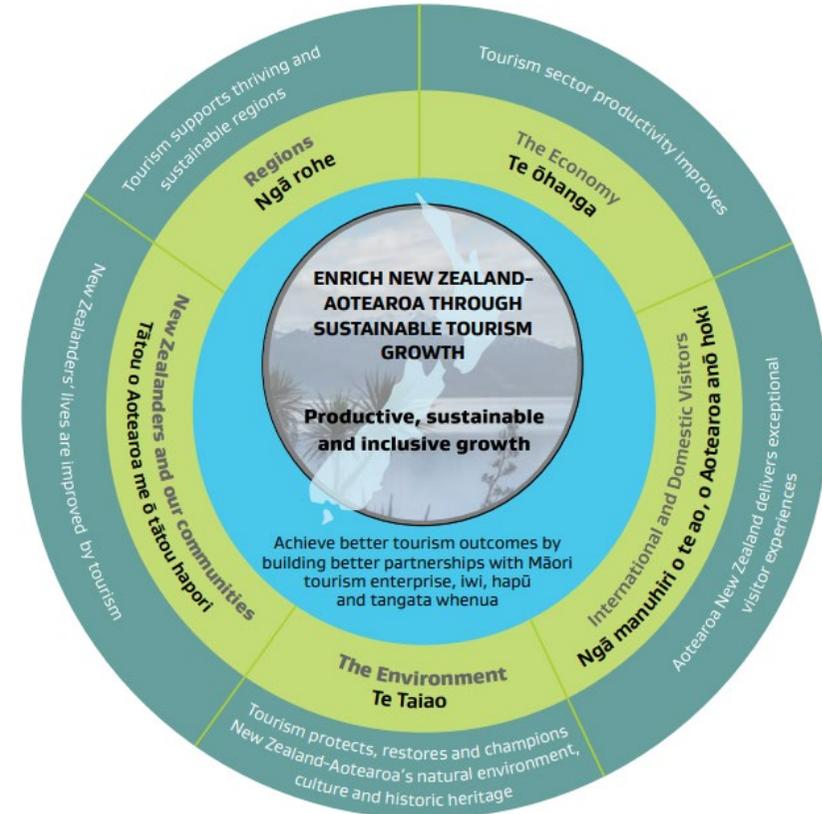
The New Zealand Government's goals for tourism are set out in the national Tourism Strategy⁶. The objective of the national strategy is to enrich New Zealand-Aotearoa through sustainable tourism growth. Figure 3 summarises the key dimensions of the national strategy.

The implementation plan within the national strategy contains several work streams and actions which will also support the implementation of this Plan and prioritised four top actions for Government, reflecting the ability of these actions to deliver across multiple outcomes within the strategy, these being:

- Improving coordination across the tourism system.
- Establishing long-term sustainable funding mechanism for the sector.
- Implementing destination management and planning across the sector.
- Developing better data and insights to improve future planning.

As Government continues to progress actions within the national strategy there will be opportunities for the Timaru District, and this Plan, to leverage national investment and expertise to benefit the district's visitor economy.

Figure 3: Government's goals for tourism



Source: New Zealand-Aotearoa Government Tourism Strategy

⁶ New Zealand-Aotearoa Government Tourism Strategy, May 2019, MBIE And DOC

Department of Conservation Heritage and Visitor Strategy

Given the highlighted importance of environmental sustainability as well as desire to adopt regenerative approaches to develop the district's visitor economy, it is also relevant to consider the principles and goals of DOC's Heritage and Visitor Strategy⁷. The goals of the Strategy are to:

- **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.

The Strategy recognises the significant role that DOC plays in ensuring that the visitor system functions effectively, alongside other organisations and acknowledges DOC's role as a steward, agent and regulator. There are opportunities for the Timaru District to work with DOC to connect the principles and goals of the national strategy to the development of the district as a destination.

⁷ DOC, Heritage and Visitor Strategy, He Rautaki Taonga Tuku Iho, Manuhiri Tūārangi hoki, 2021

South Island Destination Management Plan

As a destination, the Timaru District is also part of the wider Central South Island and it is important to recognise the relationship between the district's tourism sector and the wider region, as well as the South Island more generally. The destination management approach requires us to consider this wider context.

Consequently, it is important to look for alignment and synergies between the Destination Management Plan for the South Island, Te Wai Pounamu⁸. The South Island Destination Management Plan was published in November 2019 and was developed on behalf of the Canterbury Mayoral Forum, which includes the Timaru District.

The vision for the South Island Destination Management Plan, is that:

Our visitors (both Kiwis and overseas visitors) will be invigorated by the South Island experiences we offer, stimulating them to explore more widely and encouraging them to respect our environment, culture and communities.

⁸ Te Wai Pounamu – South Island Destination Management Plan 2019-2030, Canterbury Mayoral Forum

The South Island Destination Management Plan has six strategic aims:

- 1 **Te Taiao** – Ensure the environment is protected to continue to underpin the sector's prosperity.
- 2 **Manaaki Manuhiri** – Achieving stronger destination marketing through product differentiation.
- 3 **Rangatiratanga** – Encourage business leadership and good governance through stronger collaboration through destination management.
- 4 **Ngā manuhiri O Te Ao, O Aotearoa Anō Hoki** – Grow higher quality and commissionable experiences to support visitor dispersal.
- 5 **Ngā Rohe** – Improved infrastructure to support the visitor economy.
- 6 **Tātou O Aotearoa Me O Tātou Hapori** - Strengthen the host community's social licence for tourism.

Alignment between these aims and the objectives of the Timaru District Destination Management Plan is important, as it provides a basis for collaboration with other RTOs across South Canterbury and throughout the South Island.

Neighbouring Districts

While territorial boundaries help define administrative roles and responsibilities, they mean little to visitors. Consequently, there is also a need to take a wider South Canterbury view of the visitor economy and understand how destination assets and amenities connect and complement. This is essential to understanding visitor journeys and to ensuring the visitors receive the best end to end experience possible.

As the Timaru District's neighbouring districts also develop and implement their Destination Management Plans, there will be more opportunities for collaboration, particularly with Mackenzie District and Waimate District. This will create the potential to join up approaches to destination management and deepen collective engagement and partnership with tangata whenua.

Timaru District Council Long Term Plan

Timaru District Council's Long-Term Plan (LTP) is a key strategy document for the district and needs to be considered a part of this Destination Management Plan. The current LTP, entitled 'Together we can thrive', covers the period 2021-2031 and has a stated vision for the district to be a place:

Where people, place and businesses prosper within a healthy, adaptable and regenerative environment.

The LTP was prepared following extensive community consultation and sets out the actions and investment that Council will make to realise its vision and the desired outcomes for the community. Table 1 summarises the LTP's goals and areas of focus.

Table 1: Timaru District’s Community Wellbeing Outcomes

Goal	Focus areas
Connected Citizens	<ul style="list-style-type: none"> • Open to Ideas • Sharing Stories • Enabling Community • Foster Iwi Relationships • Advocacy and Leadership
Enhanced Lifestyle	<ul style="list-style-type: none"> • Accessible and Active • Shared Spaces • Facilities and Services • Affordability • Health & Wellness
Sustainable Environment	<ul style="list-style-type: none"> • Kaitiakitanga • Low Carbon and Energy • Minimise Waste • Clean Environment • Encourage Biodiversity
Diverse Economy	<ul style="list-style-type: none"> • Sustainable growth • New and Niche • Leverage Local Strength • Thriving Business
Resilient Infrastructure	<ul style="list-style-type: none"> • Invest for Future • Apply Good Practice • Responsive Planning • Engage with People

Source: Together we can thrive, Timaru District Long Term Plan 2021-31

As a Council Controlled Agency (CCO) Venture Timaru has an important role to play in supporting the delivery of the LTP. The district’s visitor economy can also contribute to LTP outcomes. In addition, several of the projects contained in the LTP are directly relevant to this Plan and will create further opportunities for the district’s visitor economy. Key relevant projects within the LTP are highlighted in Table 2.

Table 2: Key Timaru District LTP projects and investments

Project	Description
Aigantighe Art Gallery Redevelopment	Constructing a new modern purpose Art Gallery on the current Wai-iti Road. The redevelopment will maintain links with the Historic House Gallery and sculpture garden, address current storage issues with no need for offsite storage, provide temperature humidity control for the art collection and create greater ability to improve community services with educational space.
Developing Aorangi Park and the Stadium	Fast-tracking the development of Aorangi Park and Stadium, with a feasibility study getting underway in Year 1 of the LTP, detailed design planning in Year 2 and moving construction forward to Year 3.
A vibrant Timaru City Hub	Enabling the regeneration of the Timaru City Centre including leading a significant work programme to change the look and feel of inner-city public spaces to improve inner city lifestyles, assisting with the creation of focal points and public gathering places, and supporting the scaling up of existing events such as the Caroline Bay Carnival and Food Festivals to regional level events.

Source: Together we can thrive, Timaru District Long Term Plan 2021-31

As these projects are progressed, they will become important assets for the district's visitor economy. These projects, together with the wider programme of LTP investment, will create significant opportunities for the district's tourism sector. Other relevant LTP decisions and investments relevant to this Plan, include:

- Strategy and policy decisions:
 - The development of a district wide Play Strategy.
 - The development of a golf strategy.
 - A review of the current public art policy.
 - A review of the current Off-road Walking and Cycling Strategy and the Active Transport Strategy, to achieve a single strategy for the development of on-road and off-road walking and cycling opportunities for the district.
- Community and recreational facilities decisions:
 - \$1 million contribution to the CPlay project in Caroline Bay and a \$350,000 upgrade to the Temuka Aviary.
 - Additional financial investment into Timaru Botanic Gardens, the Geraldine Nature and Sculpture Trail, walking and cycling trails and Saltwater Creek weir.
- Event funding decisions:
 - An allocation of a further \$180,000 per annum to Venture Timaru for event funding.

The LTP also recognises the challenge of climate change and the need for the Council to do more. This further reinforces the need for a destination management approach to be central to how the district's tourism sector develops in the future.

Venture Timaru's role

The development of this Destination Management Plan is timely, coinciding with the relatively recent transfer of visitor related activities from Timaru District Council to Venture Timaru. Venture Timaru now operates as an integrated Economic Development Agency (EDA) and Regional Tourism Organisation (RTO) for the district.

Action to realise the benefits of this integration are already underway. Since assuming responsibility Venture Timaru have been active in working across the district, responding to the immediate impacts of Covid-19, and engaging with partners to progress key initiatives.

Venture Timaru have played a key role in facilitating collaboration, engaging at the national level to secure support for the sector, including an initial allocation of \$400,000 from the Government's Strategic Tourism Assets Protection Programme (STAPP).

The STAPP is part of MBIE's response to the disruption to New Zealand's tourism sector because of Covid-19. Under the programme, funding has been allocated to support tourism businesses, Inbound Tour Operators (ITOs) and Regional Tourism Organisations (RTOs). The Timaru District has already received funding under this programme, including funding to develop this Destination Management Plan, and the ability to access any future funding will be a potential mechanism for implementing elements of this Plan.

Venture Timaru is embedding the destination management approach in its current and future activities and through the development of this Plan is ensuring that the principles and practices of destination management are reinforced.

This Plan also sits alongside and is integrated with the Timaru District's Economic Development Strategy. Together, these two documents provide a framework for action and implementation to support the sustainable growth and development of the district's economy.

Venture Timaru's Statement of Intent includes a specific objective on destination promotion and event development. This objective includes actions to:

- Implement a new district-wide destination management approach.
- Develop an authentic and integrated identity for Timaru District.
- Grow and attract events to the district and promote the case for investment in new destination products and infrastructure.
- Collaborate with surrounding districts to define the wider, and more cohesive South Canterbury offer and sustainably grow visitor numbers and spending across the district.

This Plan incorporates these actions and the focus on destination management and event development and gives effect to Venture Timaru's Statement of Intent.

In developing this Plan, Venture Timaru have considered Timaru District Council as a key partner and have sought to align this Plan with the Council's vision for the district as set out in the LTP. The LTP itself was also informed by extensive community consultation and feedback. Now that this Destination Management Plan is complete, and the LTP is approved, further community perspectives will be sought to inform the ongoing implementation of this Plan.

Partnership and collaboration will be essential if the objectives of this Plan are to be realised. Venture Timaru will play a key role in co-ordination and facilitation of actions associated with this Plan.

TIMARU DISTRICT'S VISITOR ECONOMY

Tourism sector overview

The Timaru District's tourism sector is a small but important part of the district's overall economy, providing a range of employment opportunities and amenities for the district's residents. Table 3 provides a summary of how the district's tourism sector compares to some surrounding districts⁹ and shows that in comparative terms the district's tourism sector is more significant than in surrounding areas.

Table 3: Tourism employment, GDP and spending (2020)

	Employment	GDP	Spending
Ashburton	1,275	\$94.8m	\$188m
Selwyn	1,013	\$65m	\$123m
Timaru	1,550	\$119m	\$228m
Waitaki	1,431	\$88.9m	\$188m

Source: Infometrics Regional Profile

Appendix 1 provides a fuller profile of the district's visitor economy and how it compares to the wider South Canterbury area, with a summary provided in the following sections.

Employment and GDP

The sector directly accounts for 6 percent of all filled jobs in the Timaru District, while this proportion is lower than the New Zealand or Canterbury averages, the proportion of jobs in the district is higher than the proportions for the majority of surrounding districts, except for Ashburton¹⁰.

While the Gross Domestic Product (GDP) attributed directly to the tourism sector accounts for less than 4 percent of the district's total GDP, the total value of the sector's GDP in 2020 was still \$119 million, having grown by \$8 million since 2019. The total amount of GDP generated by the Timaru District's tourism sector is also higher than the amount of GDP generated in many of the surrounding districts, including Ashburton (\$94 million), Waitaki (\$88.9 million) and Selwyn (65 million).

Visitor profile

Data presented in the South Island Destination Management Plan and summarised in Table 4, shows that, in 2018, the Timaru District welcomed over 1.8 million visitors. Of all visitors to the district, 91 percent were domestic in origin and 77 percent were day visitors.

The data also shows that when compared to surrounding areas, the Timaru District receives more visitors than any surrounding district, except for Mackenzie, and that more domestic visitors come to the Timaru District than they do to any other surrounding area. The district's market share of all visitors is 23 percent, rising to 27 percent for domestic visitors only.

⁹ Data is only presented for those Districts included in Infometrics Regional Profile

¹⁰ Infometrics, Timaru District Profile

Table 4: Summary of visitor numbers (2018)

	Domestic	International	Total	Market Share
Ashburton	698,000	84,000	782,000	10
Mackenzie	1,134,000	880,000	2,014,000	26
Selwyn	635,000	86,000	721,000	9
Timaru	1,647,000	155,000	1,802,000	23
Waimakariri	461,000	18,100	479,100	6
Waimate	173,000	9,200	182,200	2
Waitaki	1,440,000	304,000	1,744,000	23

Source: South Island Destination Management Plan and MartinJenkins

Visitor spending

One of the key benefits of the visitor economy is the expenditure that occurs in the local economy as visitors purchase goods and services, such as food, petrol, entertainment and accommodation.

According to MBIE's monthly regional tourism estimates for the year ending October 2019, visitors to the Timaru District spent \$226 million. This expenditure was greater than for surrounding districts which saw Ashburton record \$193 million, Selwyn \$112 million and Waimakariri \$87 million.

Reflecting the district's visitor profile, domestic visitor spending accounts for over 80 percent of visitor expenditure compared to only 59 percent nationally. This profile also helps explain why the growth of visitor expenditure, which nationally has been driven by the growth in international tourism, has been low.

¹¹ South Island Destination Management Plan 2019

However, this profile will also have provided some cushioning of the district's visitor economy over the past year as international borders remain closed.

Seasonality

Following similar patterns to the national averages, visitor numbers and spending in the Timaru District varies across the year, peaking in the summer months and declining in the winter. The district's heavy weighting to domestic visitation has provided a degree of protection from this seasonality, as domestic visitor expenditure fluctuates less dramatically than international visitor spending.

In terms of international expenditure, the data suggests that the Timaru District's largest percentage of international expenditure comes from Australian visitors, with the gradual re-opening of Trans-Tasman routes this could provide an early boost to the district visitor economy.

Commercial accommodation

While most visitors to the district are day visitors, with the Timaru District having one of the highest proportions of day visitation in the entire South Island¹¹, overnight visitors still provide an important contribution to the local economy.

In 2019, there were a total of 305,341 commercial accommodation nights in the Timaru District. While the rate of growth over the previous five years was lower than the national rate, the district did at least experience growth, which was not the case in most of the surrounding districts, many of whom saw a fall in guest nights and arrivals¹².

¹² Statistics New Zealand (June years), Accommodation Survey (September 2019, last release of this survey)

However, a key area where the Timaru District compares unfavourably to surrounding areas, or national averages, is length of stay. In 2019, the average length of stay for visitors to the district was 1.7 days compared to 1.99 days nationally.

Overnight stays are concentrated in the town of Timaru, which is also home to the most commercial accommodation options. TripTech data for April 2021, shows that 62 percent of overnight visitors stay in Timaru, an increase of 5 percent since April 2019.

Table 5: Distribution of overnight stays

	April 2019	April 2021	Change
Timaru	57%	62%	+5%
Geraldine	15%	18%	+3%
Temuka	14%	15%	+1%
Peel Forest	2%	2%	-
Pleasant Point	6%	2%	-4%
Winchester	0%	0%	-
Other	6%	1%	-5%

Source: Venture Timaru, Monthly Tourism Indicators, TripTech

Visitor amenities and attractions

As highlighted in the South Island Destination Management Plan, compared to other South Island destinations, the Timaru District has a lower number of visitor attractions than most other locations.

The audit of tourism attractions and services contained in the South Island Destination Management Plan identified just 25 attractions within the district. As shown in Table 6, the Timaru District has one of the lowest levels of visitor attractions in the South Island and compared to surrounding areas, only Waimate has a lower number of attractions.

Table 6: Visitor attractions Timaru District and surrounding districts

	Number of Tourist Attractions	Share (South Island)	Share (Surrounding Districts)
Ashburton	30	2.2%	11%
Mackenzie	100	7.4%	35%
Selwyn	35	2.6%	12%
Timaru	25	1.9%	9%
Waimakairi	35	2.6%	12%
Waimate	15	1.1%	5%
Waitaki	43	3.2%	15%

Source: South Island Destination Management Plan and MartinJenkins

In addition, most attractions in the district also tend to be free activities (52 percent of all attractions), with a heavy emphasis on outdoor, nature-based activities (Table 7).

Table 7: Attractions Timaru District (2018)

Number	Accommodation types
8	Walks (trails and guided tours)
4	History and heritage
4	Wildlife viewing and farm experiences
3	Arts and culture
2	Recreation and adventure-based experiences
2	Hunting and fishing
1	Water sports
1	Great walks and great rides
25	Total attractions

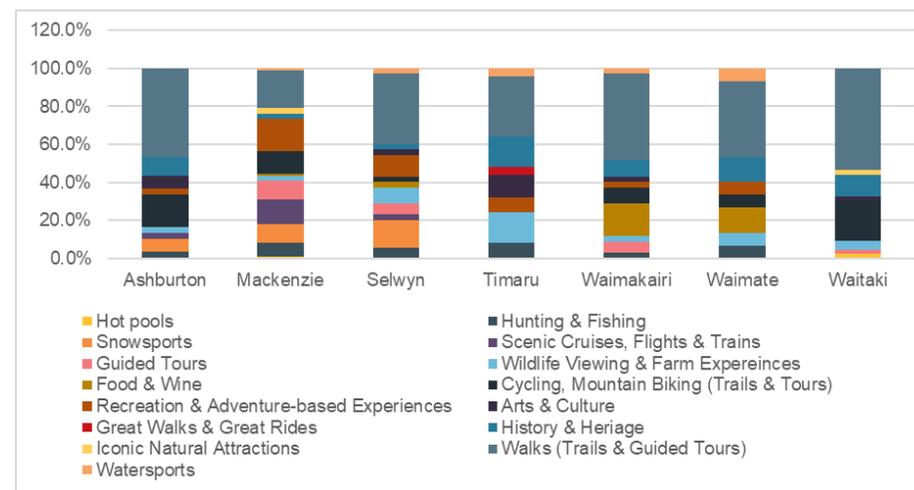
Source: South Island Destination Management Plan (2019), Timaru District, page 30.

While this is not unique to the Timaru District, with most of the attractions and activities on offer in the South Island being nature based, the challenge is one of differentiation and the ability to create commissionable product that can attract visitor expenditure, particularly from international visitors (Figure 4).

Visitor satisfaction

It is helpful to consider visitor perceptions of the Timaru District as a destination. Having recently assumed responsibility for destination management, Venture Timaru do not have recent visitor satisfaction data. While work is underway to introduce a visitor Net Promoter Score (NPS) for the district, no specific data directly relevant to either domestic or international visitors to the district is currently available.

Figure 4: Percentage share of attraction type



Source: Extract from South Island Destination Management Plan (2019)

However, at the national level, Tourism Industry Aotearoa (TIA) publish research in domestic visitor satisfaction. The latest information for the year ending March 2021¹³ found that three in four New Zealanders had taken an overnight domestic leisure trip in the past year. One in two New Zealanders indicated that their expectations were exceeded on their most recent trip, with only two percent of domestic tourists stating that their trip was worse than expected.

The average overall level of satisfaction reported was 8.7 out of 10, which was the same as for the year ending March 2020. Although TIA also reported that the NPS, which measures whether visitors are likely to recommend New Zealand as a destination, had fallen from +68 to +64.

¹³ TIA, Domestic Visitor Satisfaction, Update Year Ending March 2021

Nearly half of all trips were for a holiday or a short break, up from 43 percent the previous year and over a third of all trips were to visiting family or friends, which was the same proportion as the previous year. Nearly a quarter of all trips were for two nights, and the average number of nights stayed was three.

While district level data is not published separately, Table 8 shows the top 15 regions visited in the past two years. Of those visiting the Canterbury region, 45 percent of domestic visitors reported that they were extremely satisfied and a further 29 percent rated their satisfaction as 9 out of 10. Combined, this gave the Canterbury region a higher level of visitor satisfaction than any other region.

Turning briefly to international visitor satisfaction, while data is again not available at a district level, previous research¹⁴ found that most international visitors were highly satisfied with their visit to New Zealand with visitors rating their visit an average of 9 out of 10. International visitors tend to be particularly satisfied with our natural and built environment and with their sense of safety when visiting New Zealand.

Over 95 percent of visitors indicated that their visit met or exceeded their expectations, and the Net Promoter Score for international visitors was +78. Areas where international visitors rated New Zealand less favourably related to high prices, no free Wi-Fi or internet, and inconsistent quality of facilities, of public transport and customer service.

Table 8: Profile of last domestic overnight leisure trip

Region (Top 15)	Year End March 2020	Year End March 2021
Auckland	24%	22%
Wellington	14%	13%
Christchurch	10%	11%
Hamilton/Waikato (excl. Taupō & the Coromandel)	10%	11%
Rotorua	12%	11%
Bay of Plenty (excl. Rotorua)	10%	11%
Taupō	11%	11%
Northland	13%	11%
Canterbury (excl. Christchurch)	8%	10%
Queenstown	7%	8%
Hawke's Bay	6%	8%
The Coromandel	8%	7%
Palmerston North & Manawatū	5%	7%
Dunedin	6%	6%
Taranaki	5%	5%

Source: TIA, Domestic Visitor Satisfaction, Update Year Ending March 2021

¹⁴ MBIE, International Visitor Experience, Tourism Insight Series, August 2017

Stakeholder perspectives

Looking beyond the data presented above, it is also important to consider the perspectives of local stakeholders and their views on the Timaru District's visitor economy.

To inform this Plan, 27 individual interviews were conducted with key stakeholders¹⁵. Eight workshops were held with representatives of all aspects of the district's visitor economy, including tourism operators, event organisers, café, bar and restaurant operators, and accommodation providers. Two workshops were held with the Venture Timaru Board and a further two with the Tourism and Visitor Advisory Group. In addition, a youth workshop was also organised by the YMCA.

Conversations were also conducted with Te Rūnanga o Arowhenua, who were also represented on the Tourism and Visitor Advisory Group, and whose input was sought a several stages of the project.

Through this engagement, several key themes emerged that are critical to growing and developing the district's visitor economy. These themes were seen to be equally as relevant to iwi partners as they were to other stakeholders. These themes were:

- Planning for the future growth of the district's visitor economy.
- Embedding the destination management approach.
- Building upon and better leverage existing areas of strengths.
- Focusing on clear market segments and to tailor tourism products and experiences to these markets.

- Using events as a driver for visitation and a tool for addressing seasonality.
- Maximising the value of potential 'hero' experiences that the district could offer to visitors.
- Securing the infrastructure needed to support future growth.

Planning for the future

In previous years, the Timaru District has missed out on much of the recent tourism boom that New Zealand has experienced. The district has largely failed to capture the export revenue associated with international visitors and, apart from Geraldine, the district has not featured strongly in international visitor journeys. The short average length of stay and the heavy bias towards day trips reflects the fact that the district is not regarded as a destination in its own right.

In planning for the future, the district needs to prepare for a gradual re-opening of borders and the return of international visitors. An ongoing reliance solely on domestic visitors would be a mistake. There is a need therefore to work now to develop the district's proposition to international visitors, to better leverage and enhance existing visitor products and experiences, and to take a strategic approach to the development of new assets and experiences.

On the upside, through the current Covid-19 pandemic, the lack of reliance on the visitor economy, and specifically the strongly domestic profile of tourism in the district, has been an advantage and has lessened the negative impacts of lockdown and closed borders.

¹⁵ Stakeholder interviewees were identified by Venture Timaru and covered issues relating to both the Destination Management Plan and the wider Economic Development Strategy for the district.

However, some part of the sector and the district have suffered, and many businesses have struggled to maintain normal operations and staffing numbers.

In supporting the tourism sector to survive and thrive, it is also important to recognise that the destination management approach underpins amenity, for residents and visitors alike, and supports the district's wider economic development objectives.

Embedding destination management

Stakeholders recognised that while the district has escaped some of the negative impacts of New Zealand's recent tourism boom, with social licence being less of an immediate concern, there was a need to put sustainability at the heart of how the sector grows and develops.

Consequently, there was an opportunity to embrace the destination management approach and to ensure that the sector seeks to 'build back better' as we move out of the initial phase of the current pandemic. As part of this approach, it is also important to recognise the linkages between destination management and economic development, taking an integrated approach to implementation and delivery.

Linked to the desire for the sector to grow sustainably in the future, and to encourage visitors to stay longer, stakeholders also identified the opportunity for the district to focus on 'slow tourism' and for there to be a focus on the principles of Manaakitanga to enhance visitor experience, lessen the impact of visitation and extend the length of stay within the district.

There was a recognition that the destination management approach would also emphasise partnership opportunities with iwi and DOC to create new experiences for the district, specifically those that are focused on outdoors and to apply Kaitiakitanga principles to unlocking these opportunities.

Through a destination management approach, it was also noted that there were opportunities to deepen collaboration across the district and with surrounding districts to create shared value and demonstrate the principle of Kōtahitanga.

Leveraging existing strengths

As a destination, there was a view that the district had several existing areas of strength which could be better leveraged and promoted to further benefit the visitor economy. These strengths include the district's:

- Attractive setting and rich culture and heritage including Edwardian period buildings in Timaru CBD.
- Established arts, culture and heritage offerings, including those activities found in Geraldine, which could be further built upon and enhanced.
- Easy access to outdoors and active lifestyle opportunities, both with the district and surrounding areas, including Centennial Park, Peel Forest and Rangitata Gorge.

Stakeholders also highlighted the central location of the district and how this made for an ideal meeting point which could continue to be leveraged. There was also an acknowledged opportunity for the district to offer a quintessentially kiwi experience to domestic and international visitors alike, and to offer authentic experiences that could tap into a sense of history and nostalgia.

It was also felt that more could be done to build on the Timaru District's strength in primary industries, to create more on-farm experiences and to focus more on South Canterbury's credentials as a 'food bowl'. Lastly, stakeholders saw opportunities to work more closely with Ngāi Tahu and the Te Rūnanga o Arowhenua to acknowledge and respect tangata whenua. This includes promoting existing assets such as Te Ana Māori Rock Art and

developing new products and experiences to unlock economic opportunities for Māori.

Market focus

While recognising the need to capture a greater share of international visitors, once the borders re-open, stakeholders acknowledged that in the immediate future the domestic market will continue to be important to the district's tourism sector and will offer the greatest opportunities for growth.

The ability of the district to appeal to families and 'active boomers' was seen as particularly important, and it was felt that there was a good fit between what the district offered as a destination and the requirements of these groups. This included easily accessible and free and low-cost activities and experiences, such as Caroline Bay and Peel Forest, as well as a good range of affordable accommodation options.

It was noted that there are also opportunities linked to business visitors to the district, reflecting the wider strengths of the local economy, and that these would continue to be important to the visitor economy. Finding ways to extend the stay of business visitors, as well as attracting them back with their families to explore more of what the district has to offer was seen as a market opportunity.

Stakeholders also highlighted the established strength of the district in attracting and hosting sporting events. The Timaru District's existing and planned sporting facilities, stadiums and related infrastructure was seen as a unique offering in the South Island. It was noted that there were further opportunities to focus on this market, to leverage the district's central location and ability to host events of increasing scale and duration, and to maximise the potential of LTP investments in developing Aorangi Park and the Stadium.

Finally, stakeholders felt that more focus on creating better experiences across some key market segments would not only benefit the district's visitor economy, but it would also serve to provide greater amenity for current and future residents. Moreover, it was recognised that every visitor was also a future resident or employee, both of which would be welcomed and would align with broader economic development objectives.

Events strategy

It was suggested that there were further opportunities to use events as a tool for supporting and developing the district's visitor economy and that the success of recent events, such as Rock n Hop, demonstrated the demand and opportunity to grow the scale and impact of the district's events centre. This would be further enhanced by the planned investments in the Theatre Royal, Timaru CBD, Heritage Hub and Aigantighe Art Gallery.

The district's capacity to host events, sporting and others, was seen to be growing and it was acknowledged that Venture Timaru's focus on this was already making an impact, but there was an opportunity to go further and to extend the length and impact of events hosted in the district. Stakeholders noted that the impact of events was reaching across the district, with all locations potentially benefiting from larger events.

Recent success provides a firm basis for collaboration and co-ordination to ensure that opportunities are not missed across all aspects of the district's visitor economy and work was needed to make sure the district was 'event ready'. This would require continued cooperation between all parts of the sector to make the most of every event.

Stakeholders recognised that a revitalised Theatre Royal represents a strategic opportunity for the district but that it needs to be more than a hall for hire. This highlights the importance of the district taking an active approach to event development and curation. If the potential of events is to be realised this will be essential and requires a strategic approach to the use of any available funding and support for the sector.

In addition, it was also noted that there was potential for the district to explore opportunities for attracting smaller business events and conferences, but that this will require appropriate infrastructure to support such events (including a centrally located quality hotel).

Potential hero experiences

Stakeholders acknowledged that one of the things that held the district's tourism back was the lack of any true hero experiences, which would attract visitors in their own right. However, several potential hero experiences were identified and there is an opportunity to further develop each of these opportunities for the benefit of the district's entire visitor economy.

Te Ana Māori Rock Art

The Te Ana Māori Rock Art Centre is a unique asset that could also be a gateway to further growth and development of cultural tourism. It is an opportunity to acknowledge, respect and enhance tangata whenua and provide a platform for Māori economic development across the district.

Figure 5: Te Ana Māori Rock Art Centre

Te Ana Māori Rock Art Centre is focused on the ancient Māori rock drawing sites and rich tribal history of the Aoraki region. Established by Ngāi Tahu, the Centre is in the Landing Services Building in Timaru CBD and provides access to tours and sites across the district and wider region.

The Centre operates as a not for profit with all profits being returned to conservation and protection of the rock art sites. Visitors are hosted by local Ngāi Tahu guides, and there are opportunities to explore the rock drawings through hosted experiences at the Rock Art Centre in Timaru, and on guided tours to the region's most iconic Māori rock art sites.

The Centre also has a strong focus on the education sector, hosting schools and running activities for school children, raising the profile of ancient rock art and encouraging a new generation of rock art guardians.

Caroline Bay

Caroline Bay is one of the most widely known parks in the Timaru District, but the value it offers to the district's visitor economy is not being fully realised (Figure 6). There are opportunities for the tourism sector to work in partnership with the Council to take a more strategic approach to promoting and enhancing the Bay for visitors and residents.

Figure 6: Caroline Bay

Caroline Bay is the most widely known park in the Timaru District and covers an area of 34 hectares, excluding the beach, and is used for outdoor recreation and events such as triathlons. The Bay has outdoor artwork and sculptures, a children's playground, BBQ facilities, outdoor gym equipment, beach volleyball courts, mini golf, tennis courts, a skate park, and a small train. The various walks are enjoyed daily by many people and are also used for events such as triathlons.

The beach itself is the only sandy beach between Oamaru and Banks Peninsula. Caroline Bay beach has previously been voted the most popular beach in the South Island and is a popular spot for swimming.

The beach is sheltered by the harbour breakwater and lies near Timaru CBD. The adjacent Piazza provides access for pedestrians to the CBD. The dunes of Caroline Bay have been revegetated with native sand binding plants. Little penguins have also established a colony in and around Caroline Bay.

The Bay also hosts the annual Caroline Bay carnival, which includes rides, concerts and sideshow style games. The Carnival has been running for over 100 years and draws visitors from across New Zealand. From November to July the Trevor Griffiths Rose Gardens is in bloom providing a collection of Old Roses.

Timaru CBD

Timaru CBD's collection of heritage buildings including the Landing Services Building, as well as the town's Edwardian architecture, has significant potential to enhance the district's destination offering and identity (Figure 7). The planned investment in the CBD will create an opportunity for a new visitor offering, particularly when combined with renewal of the Theatre Royal and new Heritage Hub and possible Food Heritage Centre.

Figure 7: Timaru CBD

Timaru's CBD has a rich history and collection of heritage buildings, Edwardian architecture and visitor amenities. The town was originally developed at the only sheltered point on the coast between Banks Peninsula and North Otago. Growth was fuelled by the development of an artificial harbour in the late 1800s, resulting in the town becoming an industrial centre processing products from South Canterbury farms.

Relatively slow growth since the 1950s means the town has a well-preserved early 20th-century main street and other historic buildings, concentrated along George Street, Stafford Street, Strarhallan Street, and Sophia Street.

Notable buildings in the CBD include the Landing Services Building, the Theatre Royal, the Grosvenor Hotel, the Arcade Chambers and the Chief Post Office. The Landing Services Building is particularly unique, built from local volcanic basalt and was originally used for unloading ships in the 1870s. It is the only remaining example of such a building in Australasia.

Geraldine

Geraldine is one of the only parts of the district that is on international visitor routes and is connected to established South Island visitor journeys (Figure 8). Geraldine's boutique feel and growing food and beverage, arts and culture offering, as well as its attractiveness to older visitors can be a focus for growing slow tourism, in the district and a hook for extending stays.

Figure 8: Geraldine

Geraldine sits inland from Timaru and is located on State Highway 79 between the Orari and Hae Hae Te Moana Rivers. Geraldine is a traditional kiwi country town, with a boutique feel and arts and crafts offering as well as several established destination experiences including a vintage car and machinery museum, a private observatory, and the Geraldine Domain.

The town's location and variety of attractions has made it a stopping point on the South Island's inland scenic route and supported the development of local cafés and visitor amenities, including art galleries, walking trails and the recently completed Barkers Foodstore and Eatery – which celebrates the history and products of Barkers of Geraldine.

Geraldine is a gateway to a wide range of outdoor and adventure activities including cycling trails, white water rafting, skiing, horse riding, canyoning, hunting, 4 x 4 adventure tours, kayaking, golf, mountain biking, and fishing. The town lies in close proximity to the Peel Forest, with its extensive podocarp forest, abundant wildlife and popular horse riding and trekking routes. Geraldine also provides easy access to the Rangitata River, home to white water rafting and salmon fishing and to Woodbury, a quiet little village with a pretty church and old library. The village sits between the Waihi and Orari rivers, whose gorges lie further into the hills and offer camping and tramping.

Infrastructure for growth

During discussions with stakeholders, a range of infrastructure and other constraints were identified, including a need for renewals and upgrades of some facilities and amenities, such as public toilets and parking facilities.

In terms of new infrastructure and experiences, there is potential to collaborate with Ngāi Tahu, and Te Rūnanga o Arowhenua and the private sector to bring forward new assets including those that would support the future growth of the cruise sector, a centrally located 4* hotel, food destination restaurants, and cultural experiences.

Prior to Covid-19, there were opportunities associated on New Zealand's growing cruise market, with the district offering easy access to a range of destinations and attractions across South Canterbury. To capitalise on these opportunities there was an acknowledged need for supporting infrastructure

and commissionable product. Te Rūnanga o Arowhenua was in the process of exploring these opportunities for tangata whenua and while the pandemic has currently stalled any development in this area, these opportunities may return in the future and should be kept under consideration.

It was also recognised that one of the challenges facing Timaru CBD was the issue of severance created by State Highway 1 and location of most of the accommodation along the Highway, which makes it harder to attract visitors into the CBD and makes them more likely to bypass the centre.

The absence of centrally located quality accommodation in the CBD was also identified as a drawback. In addition, while the CBD is home to many heritage buildings, the costs and regulations associated with building renewals and refurbishment made it harder to maximise the heritage value of the CBD.

Visitor information, signage and wayfinding were also identified as particular challenges and there was a view that this negatively impacts awareness and visibility of the district's offer. As highlighted in the Council's LTP there is interest from mana whenua to use of traditional place names appropriately across the district.

The need for ongoing development of journeys and experiences, particularly more commissionable products, was highlighted. There is relationship between this and the ability of the district to increase its visibility and attract more international visitors in the future. Linked to this and aligned with the EDS, there is also an ongoing challenge of addressing established perceptions of the district's identity and destination proposition.

Developing operator capabilities will be important and stakeholders across the visitor economy also highlighted ongoing challenges in hiring and retaining skilled staff in all parts of the sector and how this was impacting upon the services and experiences that could be offered. In some instances, this was leading to reduced hours of operation, higher staff turnover and increased competition for labour across the sector.

Summary of opportunities and challenges

As set out above there are several opportunities and challenges that are central to this Destination Management Plan. These are summarised in Table 9 and have informed the foundations, vision, objectives and actions for this Plan, as set out in the following sections.

Table 9: Summary of destination opportunities and challenges

Opportunities	Challenges
<ul style="list-style-type: none"> • Strong domestic visitation supported by access to a range of free and affordable experiences and activities and affordable accommodation options. • Opportunity for slow tourism and ability to offer a quintessentially kiwi experience to domestic and international visitors. • Centrally located within South Island with easy access to outdoor activities including those across the wider South Canterbury area. • Strengths in primary sector and food production present opportunities to offer more on farm experiences and high-quality food and beverage experiences. • Geraldine is located on the inland scenic route and has an established proposition for international visitors and a growing arts, craft and food offering. • Opportunity to enhance the visibility of the Te Ana Māori Rock Art Centre as a unique experience for visitors and one which highlights and respects tangata whenua. • Historic urban environment, architecture and planned investment in infrastructure to support future growth, including investment in Timaru CBD, the Theatre Royal, Heritage Hub, the Art Gallery and Stadium. • Access to the outdoors, parks, reserves and scenic domains spread throughout the district including Caroline Bay, Peel Forest and Rangitata George. • Fewer challenges to the sectors social licence than other parts of the South Island and an opportunity to embed a destination management approach in future activity. • Established and growing portfolio of sporting, arts and culture, and food related events and opportunities to scale these in response to proven demand. 	<ul style="list-style-type: none"> • Reliance on domestic visitors and failure to capitalise on previous growth of New Zealand's international tourism sector. • Limited range of unique visitor experiences and shortage of commissionable visitor products that would help establish greater visibility in international trade markets. • Lack of true hero experiences that help position the district as a destination in its own right. • Competition from surrounding destinations and wider South Island. • Reliance on day trippers and lack of overnight visitors as well as short length of stays. • Shortage of locally specific insights on visitor perceptions and satisfaction with the Timaru District as a destination. • No clear or unified destination identity for the district which can be used to drive messaging and increase awareness. • Lack of a four star centrally located hotel limits district's ability to attract more business visitors and events, or leisure visitors seeking higher quality accommodation. • Increasing shortage of skilled staff to support the district's visitor economy and strong competition for labour across the local labour market. • Need for improved and unified signage strategy as well as enhanced wayfinding and improved provision of visitor information.

FOUNDATIONS, VISION AND OBJECTIVES

Our foundations

As the Timaru District moves to embrace a destination management approach to support a thriving visitor economy, there are three firm foundations that sit at the centre of how we will work together as a district, and with our surrounding districts and with national organisations.

- **Manaakitanga** – as a destination we will welcome visitors to the Timaru District and extend them hospitality, respect and kindness so that they will remember their time with us and share their positive experiences of the district to others.
- **Kaitiakitanga** – we will ensure that the future growth and development of Timaru District's visitor economy is sustainable and not achieved at the expense of our people, our culture or our environment.
- **Kōtahitanga** – across the Timaru District, we will work together to ensure that all aspects of our visitor economy are supported to reach their full potential so that we collectively thrive.

These foundations are rooted in tikanga Māori and reflect our commitment to Te Tiriti o Waitangi principles. While these foundations can be applied in many settings, they are well suited to how we support and develop the district's visitor economy and have informed our vision for this Destination Management Plan.

Building on these foundations will allow us to focus on ensuring that our actions and activities are consistent with destination management principles and that they focus on developing a sustainable, regenerative and high-value visitor economy.

Our vision

Our shared vision for this Plan is that by working together and through our collective actions:

The Timaru District's visitor economy will thrive, bringing benefits to visitors and residents alike, as the district's diverse attractions and experiences are understood and enhanced.

This vision recognises that as a destination, the Timaru District not only offers experiences to visitors, domestic and international, but also supports the amenity that the district offers to current and future residents, contributing to higher quality of life and increased wellbeing of those that call the district home.

There are important connections between this aspect of our Destination Management Plan and our wider economic development objectives for the district, including how we attract future residents, skilled workers and investment.

Our strategic objectives

Informed by the above foundations and by our shared vision for the district as a destination, we have identified five strategic objectives. These are aligned with the aims of the South Island Destination Management Plan and form the basis of the Timaru District Destination Management Plan.

- 1 Increase the awareness and visibility of the Timaru District as a destination.
- 2 Develop and extend the Timaru District's attractions and experiences for visitors and residents.
- 3 Maximise the opportunities and potential of the Timaru District's hero experiences.
- 4 Grow the district's portfolio of events to attract visitors, extend length of stay and support vibrancy for residents.
- 5 Attract investment into the infrastructure required to ensure that the Timaru District thrives as a destination.

Increase the awareness and visibility of the Timaru District as a destination

As a destination, the Timaru District has much to offer to both domestic and international visitors but there is a need to capture a greater number of overnight visitors. While the range of commissionable products and experiences are more limited than other South Island locations, the district has a good variety of urban and outdoor amenities that could be further promoted. The district is also close to other locations and amenities which could easily be reached from the district.

The Timaru District suffers from a lack of a shared and compelling destination identity. While good work is being done to promote key aspects of the district's destination offer, there is no overarching proposition that can be leveraged across the district's visitor economy. There is an opportunity to integrate this with wider promotional activities highlighted in the district's Economic Development Strategy. The district needs to do more to maximise the value of its central location in South Canterbury and position itself as a hub for visitors and a gateway to the wider region.

There is also a need to focus the messages to reflect the district's offer to key market segments, including visitors who are seeking an authentic kiwi experience, access to the outdoors and to arts and culture. Families and visitors seeking a slow tourism experience, including active older people, are two priority markets to focus on. Work has already begun to enhance domestic marketing including a series of campaigns and videos, these provide a firm starting point for future activity.

As part of increasing awareness of the district as a destination, there is a need to enhance visitor signage across the district, ensuring a coherent and uniform approach to promoting the key locations and amenities. Linked to this, improvements are required to the provision of visitor information and wayfinding, including the appropriate use of traditional place names, as identified as a priority for tangata whenua in Council's LTP.

Improvements in these areas will also benefit the further development of visitor journeys and routes across the district, and between the district and surrounding areas.

Actions to support this strategic objective will include:

- Agreeing a shared and genuine destination narrative for the Timaru District as a common basis for all future promotional activities.
- Leveraging the district's central position in South Canterbury to act as a destination hub and gateway to the wider region.
- Enhancing visitor signage and wayfinding across the district.
- Refreshing and enhancing the Timaru District's visitor information systems and approach.

Develop and extend the Timaru District's attractions and experiences for visitors and residents

Overall, the Timaru District needs to extend the range of attractions and experiences available to visitors and residents. Future growth should be sustainable and aligned to destination management principles. This includes exploring opportunities to develop sustainable, low impact and slow tourism across the district. There is also a need to growth awareness and understanding of environmental impacts of current activities and to mitigate these wherever possible, promoting more regenerative approaches and practices across the sector.

As highlighted in the South Island Destination Management Plan, the Timaru District has one of the lowest levels of recognisable tourism attractions in the South Island. In addition, many of the attractions and experiences that are available are not commissionable, this limits visitor spending and holds the district back from gaining more visibility with international visitor and the trade sector.

In parallel, the district needs to maximise the value of its existing heritage and architecture, as well as its established arts and cultural offering. There is also a need to continue to focus on leveraging the district's inherent strengths in food and beverage, as the food bowl of South Canterbury, including the initiative to develop a Food Heritage Centre.

Recognising the opportunities associated with the district's access to the outdoors, there is a need to work with the Department of Conservation, Ngāi Tahu and Te Rūnanga o Arowhenua, as well as existing operators to further enhance the district's outdoor experience and amenities and contribute to regenerative outcomes.

As well as enhancing and scaling existing visitor experience, there is an ongoing need to explore the creation of new commercially viable visitor experiences that can both attract more visitors and give them a reason to stay longer in the district. Across these activities, there is an opportunity to build upon the development that has already occurred to create the heritage trails and touring app.

Actions to support this strategic objective will include:

- Supporting sustainable growth of tourism products across the district.
- Maximising the district's diverse arts, cultural and heritage attractions and building on inherent strengths in food and beverage.
- Exploring opportunities to create new commercial destination products and services that are high-value and enhance resident and visitor experience.
- Working with DOC, Ngāi Tahu, and Te Rūnanga o Arowhenua, as well as established providers to further enhance the district's outdoor experiences.
- Increasing awareness and understanding of environmental impacts, mitigating these impacts and promoting more regenerative approaches.

Maximise the opportunities and potential of the Timaru District's hero experiences

Hero experiences can play an important role in driving visitation and can often be the hook to capture visitors who may otherwise pass through the district.

While the Timaru District does not have any truly iconic hero experiences, as are found elsewhere in the South Island, there is a need to do more to promote the best of the district's destination offering. Te Ana Māori Rock Art Caroline Bay, the historic Timaru CBD and Geraldine and should be elevated in the minds of visitors, and more should be done to leverage these as key tourism assets. There is a need to focus on each of these experiences to ensure they reach their full potential as part of the district's visitor economy.

The Te Ana Māori Rock Art Centre has the potential to be a catalytic asset for the district and should be further leveraged and promoted. There are opportunities to enhance the visibility of the significant collection of rock art sites across the district and South Canterbury, and to enhance the experience offered to visitors.

Caroline Bay is a well-regarded and locally iconic destination with a wide range of amenities already available, and several more in development. There is a need to consider how current and proposed amenities and investment in the Bay can support the district's visitor economy.

Timaru CBD has a largely unrealised heritage and architectural value. As noted in the South Island Destination Management Plan activities and attractions around heritage and history are a core strength of the Timaru District. Timaru CBD has a historic setting and collection of buildings that have the potential to create new tourism experience, products and a unique identity.

Geraldine is one of the few locations within the district that is already on the international visitor route. It will be important to ensure that this is maintained and leveraged to maximise the value of the town's position on the Inland Scenic Route. This includes the focus on developing the Geraldine Walkway and Sculpture Trail.

Actions to support this strategic objective will include:

- Supporting and developing Te Ana as a catalyst for growing cultural tourism and as a platform for acknowledging tangata whenua.
- Enhancing Caroline Bay as one of the Timaru District's key attractions.
- Leveraging planned investment in central Timaru to develop new hero experiences for the district.
- Maintaining and enhancing Geraldine's destination offering for the Timaru District.

Grow the district's portfolio of events to attract visitors, extend length of stay and support vibrancy

Events play an important role in attracting visitors and supporting local amenity for residents. The district already has an established reputation for hosting sporting events and has a growing portfolio of other events that can be supported to scale up and expand. There are opportunities to develop or attract new events to the district, with specific opportunities to further expand those related to food and beverage that reflect the district's core economic strengths.

There is also a need to maximise the ongoing investment in the Theatre Royal and the Heritage Hub, recognising that previous research has highlighted the need for the district to develop new infrastructure to host larger events, specifically business events¹⁶, but that there was demand and capability to do so.

Recognising the existing and planned sports and stadium infrastructure, this should remain an ongoing focus for the district and a priority area for event attraction and promotion. These investments also provide an opportunity to respond to the findings of previous research looking at sports and recreation needs and opportunities across South Canterbury¹⁷.

In addition, to maximise the value of events, there is a need to continue to enhance coordination between event organisers and the district's wider visitor economy. Improved awareness of the portfolio of current and planned events across the district will create more opportunities for collaboration and leverage and create higher levels of visitor expenditure and longer stays.

Actions to support this strategic objective will include:

- Building on the success of established events and enhancing and refreshing older events.
- Exploring opportunities to develop or attract new events to the district.
- Build on track record in delivering sporting events and extending impact of these across the district.
- Enhancing coordination, collaboration and alignment across the district's event sector.

¹⁶ Horwath HTL, Timaru Business Events Venue Demand and Opportunities Study, 2016

Attract investment into the infrastructure required to ensure that the Timaru District thrives as a destination

This final objective recognises that resources will always be limited and that it is not possible or practical to easily fund all the infrastructure that the sector might require or desire. In the first instance, there are opportunities to fully leverage current or planned investment across the district, including the investment already underway in Timaru CBD and the investments committed in the Council's LTP.

The district's visitor economy will also benefit from further investment in other key infrastructure, including Timaru Airport. There is a need to work closely with the Airport to support future investment and develop in the airport as a key gateway to the district.

Where destination-related infrastructure is still required, for example centrally located and high-quality accommodation, there is a need to explore the feasibility of these investments and to look for commercial solutions to fund infrastructure gaps.

In addition, recognising that the impacts of Covid-19 will still be felt for some time, there is a need to keep close to national policy initiatives, and to develop strong business cases and widespread support in response to national funding opportunities.

Finally, there is a need to ensure that the district's visitor economy and its tourism operators have the capabilities that they need to be successful, including access to the skills and talent required to support the recovery and growth of the sector. This recognises that there were challenges in

¹⁷ South Canterbury Sport and Active Recreation Spaces and Places Strategy, September 2018

accessing labour even prior to Covid-19, that recruitment and retention were challenging, and that the situation is now even more difficult.

Actions to support this strategic objective will include:

- Leveraging planned infrastructure investment to maximise destination outcomes for the district.
- Exploring commercial solutions for future infrastructure provision and supporting the case for future development that supports the district's destination offering.
- Responding to national and regional funding and grant opportunities to address infrastructure deficits or gaps.
- Enhancing operator capability and ensuring the visitor sector has access to a skilled workforce to support recovery, growth and development of the district's visitor economy.

Destination Management Action Plan

For each of the objectives and the associated actions set out above, there are a series of specific activities that together form a detailed action plan. These are set out in the following section, together with nature and expected outcome. All activities will be progressed over the next three years, with subsequent activities to be identified as implementation progresses.

DESTINATION MANAGEMENT ACTION PLAN

Increasing the awareness and visibility of the Timaru District

Table 10: Key actions and activities to increase the awareness and visibility of the Timaru District as a destination

Actions	Key Activities	Activity Type	Desired Outcome
Agreeing a shared and genuine destination narrative for the Timaru District as a common basis for all future promotional activities.	<ul style="list-style-type: none"> • Develop the district's destination narrative, key messages and destination proposition. • Confirm key market segments and areas of focus for promotional materials and activities. • Review existing promotional materials and activities and develop new shared promotional materials and activities targeted at identified markets 	Promotion	Visitors understand and can easily access the district's destination offerings
Leverage the district's central position in South Canterbury to act as a destination hub and gateway to the wider region.	<ul style="list-style-type: none"> • Ensure promotional material and messaging reflects the district's central position and look for further opportunities to leverage this to attract visitors and events. • Continue to develop and promote collaborative campaigns, visitor journeys across the district and work with surrounding districts to promote integrated visitor journeys 	Promotion	
Enhance visitor signage and wayfinding across the district.	<ul style="list-style-type: none"> • Undertake an audit of all existing visitor signage across the district to identify opportunities for improvement and alignment. • Engage with key agencies, including NZTA, to explore opportunities for enhancing signage and ensuring cohesive signage and wayfinding across the district. • Work with Ngāi Tahu and Te Rūnanga o Arowhenua to explore the appropriate use of traditional place names as part of signage and wayfinding. 	Delivery	
Refresh and enhance the Timaru District's visitor information systems and approach.	<ul style="list-style-type: none"> • Review and deliver cohesive visitor information across the district, including face to face, mobile and social media. • Use famils and information sharing to grow cross sector awareness of the Timaru District's destination offer and experiences. 	Delivery	

Developing and extending the Timaru District's attractions and experiences

Table 11: Key actions and activities to develop and extend the Timaru District's attractions and experiences for visitors and residents

Actions	Key Activities	Activity Type	Desired Outcome
Support sustainable growth of tourism products across the district.	<ul style="list-style-type: none"> Explore opportunities to develop new visitor experiences and attractions, including those that are low impact, slow tourism and emphasise destination management principles. 	Development	Visitors have a choice of authentic, distinctive and environmentally sustainable products and experiences across the district
Maximise the district's diverse arts, cultural and heritage attractions and build on inherent strengths in food and beverage.	<ul style="list-style-type: none"> Promote and leverage existing arts, cultural and heritage attractions and identify opportunities for new arts, cultural and heritage experiences across the district. Encourage the development of new food and beverage offerings and experiences, including the potential establishment of a Food Heritage Centre. 	Promotion and Development	
Exploring opportunities to create new commercial destination products and services that are high-value and enhance resident and visitor experience.	<ul style="list-style-type: none"> Work with tourism sector stakeholders and operators to identify and support commercial product development that will create impact and attract visitors to the Timaru District Develop new commissionable products that are 'trade ready' for national and international visitors. Engage with tourism trade sector to promote commissionable products and experience across the wider district, including Temuka, Pleasant Point, Peel Forest, Geraldine. 	Development	
Working with DOC, Ngāi Tahu, and Te Rūnanga o Arowhenua, as well as established providers to further enhance the district's outdoor experiences.	<ul style="list-style-type: none"> Identify opportunities for new outdoor experiences and attractions across the district including walking, cycling, rafting, canyoning, hunting and fishing. Work with DOC, iwi and existing operators to extend and enhance existing outdoor experiences and establish new outdoor experiences. 	Development	
Increasing awareness and understanding of environmental impacts, mitigating these impacts and promoting more regenerative approaches.	<ul style="list-style-type: none"> Consider environmental impacts of current activities and how these might be better managed and reversed. 	Promotion and Coordination	

Maximising the opportunities and potential of hero experiences

Table 12: Key actions and activities to maximise the opportunities and potential of the Timaru District's hero experiences

Actions	Key Activities	Activity Type	Outcome
Support and develop Te Ana as a catalyst for growing cultural tourism and as a platform for acknowledging tangata whenua.	<ul style="list-style-type: none"> Work with Ngāi Tahu, and Te Rūnanga o Arowhenua to identify actions and enhancements required to maximise the potential of Te Ana as a hero experience for the district. 	Coordination	The Timaru District's hero experiences are a unique and compelling part of the district's destination proposition
Enhance Caroline Bay as one of the Timaru District's key attractions.	<ul style="list-style-type: none"> Work with relevant stakeholder groups to identify actions and enhancements required to maximise the potential of Caroline Bay. Coordinate the development and promotion of complementary tourism products, such as CPlay, hot-pools, and blue penguins viewing, to enhance Caroline Bay's destination offering. 	Coordination	
Leverage planned investment in central Timaru to develop new hero experiences for the district.	<ul style="list-style-type: none"> Work with Council, building owners and developers to identify actions and enhancements required to maximise the potential of Timaru CBD. Leverage the City Hub Strategy investment, the Theatre Royal refurbishment and the Heritage Hub to create a new hero experience for the district. 	Coordination	
Maintain and enhance Geraldine's destination offering for the district	<ul style="list-style-type: none"> Work with Geraldine NZ and local operators to build upon the town's boutique feel, arts and culture and position on international tourism routes. 	Coordination	

Growing the district's portfolio of events

Table 13: Key actions and activities to grow the district's portfolio of events to attract visitors, extend length of stay and support vibrancy

Actions	Key Activities	Activity Type	Desired Outcome
Build on the success of established events and enhance and refresh older events.	<ul style="list-style-type: none"> Continue to promote established events and explore opportunities to refresh, scale up and extend existing events. 	Delivery	Events play a central role in attracting visitors and engaging residents in the district's visitor economy
Explore opportunities to develop or attract new events to the district	<ul style="list-style-type: none"> Identify opportunities to develop and attract new events for the district including off-season events. Stimulate the district's arts and culture sector and curate content for the refurbished Theatre Royal, including concerts, plays, exhibitions and dance. 	Development	
Build on track record in delivering sporting events and extend impact of these across the district.	<ul style="list-style-type: none"> Continue to focus on attracting and hosting sporting events in the district, leveraging existing infrastructure and capitalising upon planned future investment. 	Facilitation	
Enhance coordination, collaboration and alignment across the district's event sector	<ul style="list-style-type: none"> Work with the Tourism and Visitor Advisory Group to bring the district's event organisers and promoters together to leverage events. Develop a directory of events offerings across the district, including information on facilities, accommodation options and local service providers. Take a portfolio approach to hosting regular and one-off events across the district and coordinate the events calendar to promote all events across the district. 	Coordination	

Securing the infrastructure to ensure that the district thrives as a destination

Table 14: Key actions and activities to secure the infrastructure required to ensure that the Timaru District thrives as a destination

Actions	Key Activities	Activity Type	Desired Outcome
Leverage planned infrastructure investment to maximise destination outcomes for the district.	<ul style="list-style-type: none"> Engage and leverage LTP investments to support destination development and activation. Work with Timaru Airport, as a key gateway to the district, to support future development and investment and to unlock destination outcomes. 	Facilitation	<p>The district's visitor sector is supported, connected and able to access the infrastructure, capabilities and skills required to thrive</p>
Explore commercial solutions for future infrastructure provision and support the case for future development that supports the district's destination offering.	<ul style="list-style-type: none"> Undertake feasibility studies on development of new visitor infrastructure including the feasibility of a new four star boutique hotel and conference facilities. Develop and promote investment propositions to commercial developers and investors. 	Facilitation	
Respond to national and regional funding and grant opportunities to address infrastructure deficits or gaps	<ul style="list-style-type: none"> Continue to work with government and key industry groups to secure funding and investment to support the district's visitor economy. 	Facilitation	
Enhance operator capability and ensure the visitor sector has access to a skilled workforce to support recovery, growth and development of the district's visitor economy.	<ul style="list-style-type: none"> Develop operator capability in key areas including sustainability, business operations, and digital capability. Support skills development and talent attraction across the district's visitor economy. Promote careers in the tourism sector and wider visitor economy and engage with relevant career development initiatives. 	Facilitation	

CONSULTATION, IMPLEMENTATION, AND GOVERNANCE

Consulting on the draft DMP

The process of developing this Plan has included significant engagement with key partners and stakeholders, including Te Rūnanga o Arowhenua. This Plan has also been informed by the wider community consultation undertaken as part of the development of Council's LTP. Council undertook extensive community engagement and sought input and perspectives on the key proposals within the LTP, several of which, as highlighted above, are relevant to the district's visitor economy.

The Council held 38 events and stakeholder meetings and received 559 formal submissions on the proposals contained in the LTP, including significant input of the options associated with the Aigantighe Art Gallery, Aorangi Park and City Hub.

Now that this Destination Management Plan is complete, Venture Timaru will seek further community perspectives to inform implementation and delivery. This feedback will also be considered as activities are prioritised and integrated into the development of Venture Timaru's annual Statement of Intent.

Approach to implementation

The delivery and implementation of this Destination Management Plan requires a collective approach. This recognises that across the district there is already work underway to support and enhance the Timaru District as a destination. No single organisation has responsibility, mandate, or resources to deliver this plan in isolation.

It will be important to recognise the range of activities and interventions already underway and, wherever possible, to build upon these, looking for alignment with the objectives and actions of this plan, and extending and scaling those programmes that are already delivering the outcomes for the district's visitor economy.

Coordination and collaboration will be essential if the district is to harness the opportunities associated with the visitor economy and with adopting a destination management approach to future growth. As the district's RTO, Venture Timaru has a central role to play in coordinating activities across the visitor economy, acting as a facilitator and enabler of future activities.

Venture Timaru has an important role to play in facilitating ongoing collaboration and coordination of activities across the destination sector and with neighbouring districts. Venture Timaru will also lead on the engagement with government, identifying and responding to future funding opportunities for the sector.

Recognising that this Plan contains a significant programme of work for the district, there is also a need to focus and prioritise. While further feedback will be sought from partners, stakeholders and the wider community, the suggested priority initiatives that will be progressed immediately are:

- Supporting and developing Te Ana Māori Rock Art as a catalyst for growing cultural tourism and as a platform for acknowledging tangata whenua.
- Enhancing Caroline Bay as one of the Timaru District's key attractions.
- Exploring opportunities to create new commercial destination products and services that enhance resident and visitor experience.

Governance arrangements

As a CCO, Venture Timaru is ultimately accountable to its Board and to Timaru District Council, with an annual workplan agreed through the Statement of Intent process. Where activities are funded through other agencies, for example the investment from Government via the STAPP, then Venture Timaru is required to report on these activities to funding agencies.

However, Venture Timaru has already recognised the importance of working in partnership with the district's visitor economy and has established a Tourism and Visitor Advisory Group to inform relevant activities and to facilitate greater collaboration and coordination across the sector. The Tourism and Visitor Advisory Group will continue to play an important role in informing implementation and delivery of this Plan.

Monitoring and Reporting

Monitoring progress in delivering this plan will primarily be achieved through Venture Timaru's regular reporting arrangements to stakeholders and the Council. Venture Timaru are also committed to seeking feedback from visitors to the district and are in the process of developing a mechanism for capturing visitor perceptions and satisfaction with the Timaru District as a destination. This will involve collecting information to establish a regular Net Promoter Score specifically for visitors to the district.

In addition, longer-term progress against this Plan will be measured through the reporting framework set out in Table 15. This framework recognises that there are important links between the objectives and actions set out in this plan and the future sustainable growth and development of Timaru as a destination.

Table 15: Destination Management Plan – Monitoring Framework

Objective	Activities	Outputs	Intermediate Outcomes	Long-term Outcomes
Increase the awareness and visibility of the Timaru District as a destination.	<ul style="list-style-type: none"> • Develop shared destination narrative. • Enhance visitor signage, wayfinding and journeys. • Review visitor information systems and approach. 	<ul style="list-style-type: none"> • Timaru destination narrative. • Upgraded visitor signage and wayfinding. • Updated visitor information services. 	<ul style="list-style-type: none"> • Increased awareness of the Timaru District’s destination offerings. 	<ul style="list-style-type: none"> • Increase in visitor expenditure. • Retained market share in visitation to the district compared to surrounding areas.
Develop and extend the Timaru District’s attractions and experiences for visitors and residents.	<ul style="list-style-type: none"> • Develop regenerative, low impact and slow tourism opportunities. • Maximise the district’s diverse arts, cultural and heritage attractions. • Build on inherent strengths in food and beverage. • Enhance the district’s outdoor experiences. • Create new destination products and services. 	<ul style="list-style-type: none"> • Enhancements to existing attractions and experiences. • Development of new commissionable products, attractions and experiences. 	<ul style="list-style-type: none"> • Increased range of visitor attractions, experiences and commissionable products available across the district. 	<ul style="list-style-type: none"> • Increase in length of stay of visitors in line with national averages. • Increase in visitor expenditure. • Growth in international visitor numbers.
Maximise the opportunities and potential of the Timaru District’s hero experiences.	<ul style="list-style-type: none"> • Support and develop Te Ana as a catalyst for growing cultural tourism. • Enhance Caroline Bay as a key attraction. • Leverage investment in central Timaru. • Enhance Geraldine’s destination offering. 	<ul style="list-style-type: none"> • Development and promotion of distinctive hero propositions for the district. 	<ul style="list-style-type: none"> • Increased awareness and visitation to hero experiences. 	<ul style="list-style-type: none"> • Increase in visitor expenditure. • Growth in international visitor numbers.

Objective	Activities	Outputs	Intermediate Outcomes	Long-term Outcomes
Grow the district's portfolio of events to attract visitors, extend length of stay and support vibrancy.	<ul style="list-style-type: none"> • Build on the success of established events. • Develop or attract new events. • Grow number and extend impact of sporting events. • Enhance coordination and alignment across the events sectors. 	<ul style="list-style-type: none"> • Regular portfolio and established and new events across the district. • Director of events offerings across the district. 	<ul style="list-style-type: none"> • Growth in number of events run throughout the year. • Increase in event attendance and financial sustainability. 	<ul style="list-style-type: none"> • Increase in visitor expenditure.
Secure the infrastructure required to ensure that the Timaru District thrives as a destination.	<ul style="list-style-type: none"> • Leverage planned investment and support the case for future investment. • Explore commercial solutions for future infrastructure provision. • Respond to future national and regional funding and grant opportunities. • Develop operator capabilities and ensure the visitor sector has access to a skilled workforce. 	<ul style="list-style-type: none"> • Feasibility studies and business cases for new infrastructure. • Training and development for operators • Improved understand of training, employment and career opportunities. 	<ul style="list-style-type: none"> • Investment in new infrastructure. • Improved recruitment and retention rates. 	<ul style="list-style-type: none"> • Increased investment in infrastructure. • Increase in numbers employed in tourism sector.

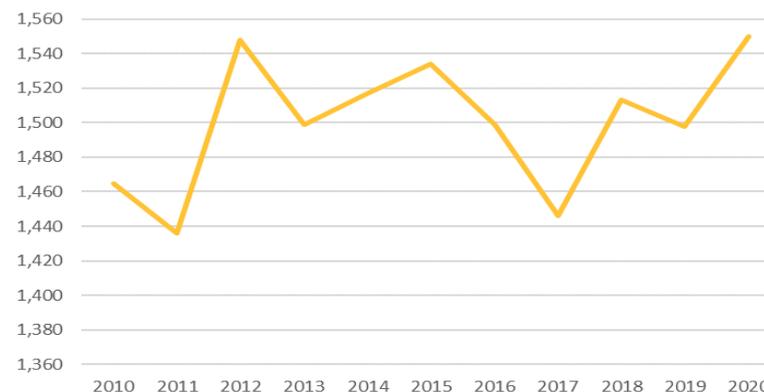
APPENDIX 1: TIMARU DISTRICT'S TOURISM SECTOR

Tourism sector profile

Tourism employment

Figure 9 shows that around 1,550 (or 6 percent of) the district's filled jobs in the year to March 2020 were attributable to the tourism sector. This number has remained stagnant, with just 0.2 percent growth in tourism jobs over the past 5 years. Nationally, growth has been much higher at a rate of 3.3 percent per year, with employment in tourism accounting for 8.7 percent of all jobs. Figure 10 shows that comparable districts have also experienced higher growth in tourism jobs, with their share of tourism jobs ranging from 2.8 percent (Waimakariri) to 6.7 percent of filled jobs (Ashburton)¹⁸.

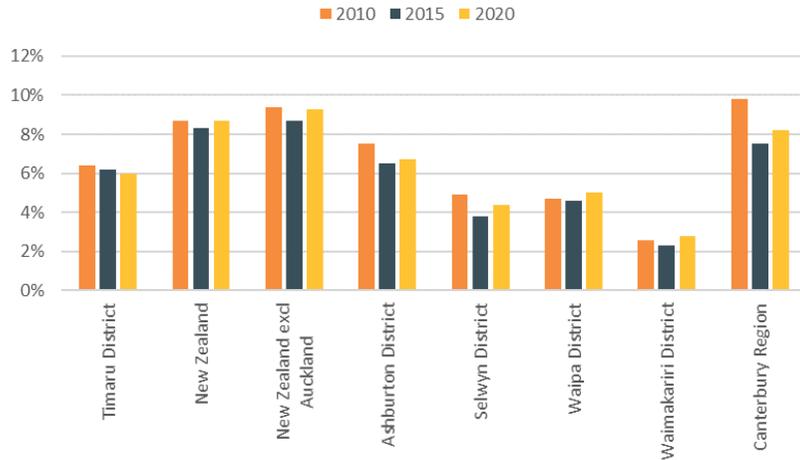
Figure 9: Employment in tourism, Timaru District, 2010-2020



Source: Infometrics, Timaru District Profile

¹⁸ Infometrics, Timaru District Profile. Years 2015-2020.

Figure 10: Tourism employment share of total employment, Timaru District and comparable districts, 2010, 2015 and 2020



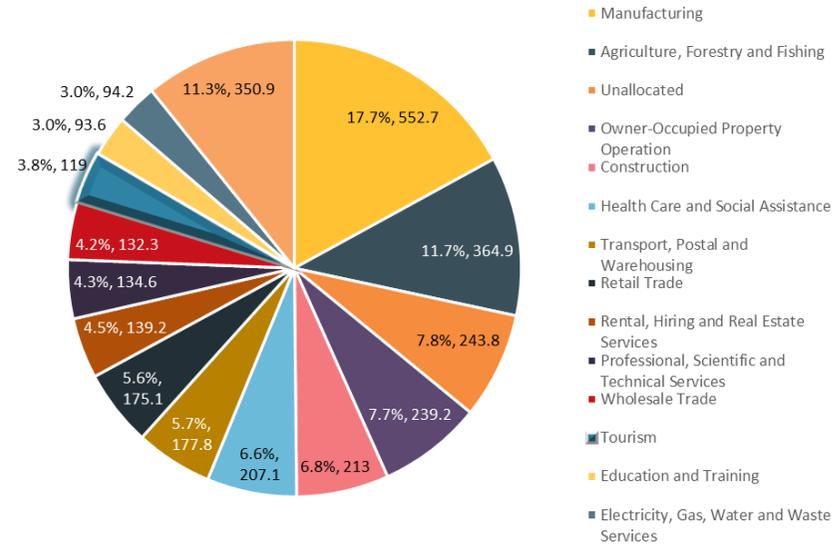
Source: Infometrics, Timaru District Profile

Tourism GDP

The total value-add or GDP of tourism for the district for the year to March 2020 was \$119 million, up from \$111 million in the year 2019 (Figure 10). Tourism GDP grew at an average rate of 4.8 percent per year between 2015 and 2020. This is almost half the growth rate of New Zealand (8.2 percent) and comparable districts (Ashburton 6 percent, Selwyn 11.9 percent, Waipa 10 percent, Waimakariri 10.6 percent)¹⁹.

¹⁹ Infometrics, Timaru District Profile. Years 2015-2020.

Figure 11: Tourism GDP in comparison to total GDP Timaru District, 2020, \$M and percentage

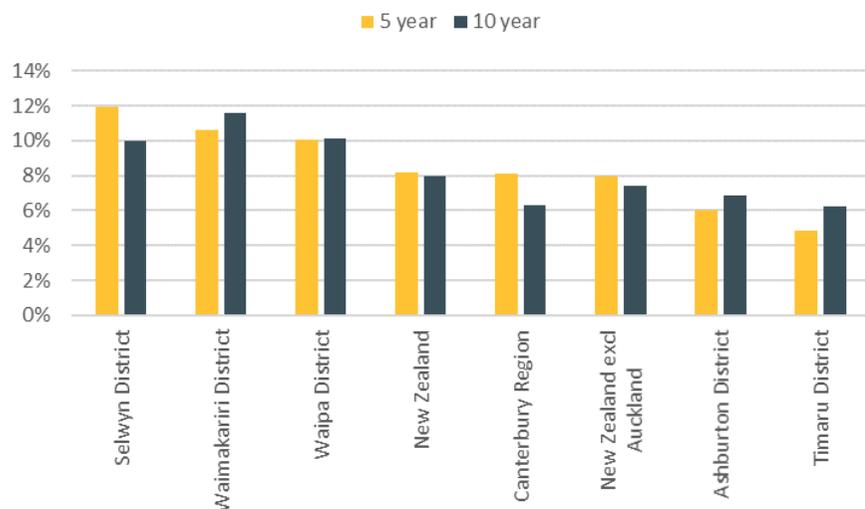


Source: Infometrics, Timaru District Profile

With its growth, tourism GDP is also growing in its share of total GDP in the Timaru District, rising from 3.3 percent of total GDP in 2015, to 3.8 percent in 2020. Relative to the GDP contribution of the district's industries, tourism ranks as the 11th largest. Nationally, tourism is ranked 7th (at 5.1 percent of national GDP). Figure 12 shows that tourism GDP as a share of GDP in comparable districts ranges between 2.1 percent (Waimakariri) to 3.8 percent (Ashburton)²⁰.

²⁰ Infometrics, Timaru District Profile. Years 2015-2020.

Figure 12: Growth in tourism GDP 2015-2020 and 2010-2020, Timaru District and comparable districts



Source: Infometrics, Timaru District Profile

Profile of visitors to the district

When considering the district’s visitor economy, it is helpful to understand the profile of who visits the district and for what purpose. The South Island Destination Management Plan provides information on the number of day and overnight domestic and international visitors to each of the South Island’s Territorial Local Authorities. Table 16 shows how the Timaru District compares to surrounding districts.

Table 16: Visitation to surrounding districts (2018)

District	Domestic Visitors		International Visitors	
	Day	Overnight	Day	Overnight
Ashburton	495,000	203,000	38,000	46,000
Mackenzie	750,000	384,000	526,000	354,000
Selwyn	450,000	185,000	39,000	47,000
Timaru	1,300,000	347,000	90,000	65,000
Waimakariri	327,000	134,000	8,200	9,900
Waimate	114,000	59,000	6,500	2,700
Waitaki	1,100,000	340,000	184,000	120,000

Source: South Island Destination Management Plan 2019

This data highlights that the district is primarily a destination for the domestic market, with 91 percent of all visitors being domestic in origin, compared for example to Mackenzie District where domestic visitors account for only 56 percent of all visitors. Of the districts shown in the table only Waimakariri and Waimate have higher proportions of domestic visitors, at 96 percent and 95 percent of all visitors, respectively.

It is also apparent that the Timaru District is primarily a destination for day trips, with only 21 percent of all domestic visitors and 42 percent of international visitors staying in the district overnight. In 2018, for example, of all visitors to the district, domestic and international combined, only 23 percent of total visitors stayed in the district overnight.

Amongst surrounding districts, the Timaru District had the lowest level of overnight stays, Mackenzie had the highest proportion of overnight stays with 34 percent of domestic and 40 percent of international visitors staying overnight and combining to reach 37 percent of all visitors staying overnight in the Mackenzie District. Mackenzie, together with Waimate reported the highest proportion of domestic overnight stays, both at 34 percent.

Ashburton, Waimakariri and Selwyn reported the highest proportion of international visitor overnight stays, all at 55 percent.

Looking at this data based on market share, Table 17 shows that in terms of total visitation across surrounding districts, the Timaru District performs comparatively well, with nearly a quarter of all visitors coming to the district. This is again driven by strong domestic performance, with 27 percent of all domestic visitors coming to Timaru. Mackenzie achieved the highest market share, with 26 percent of all visitors, which included 57 percent of all international visitors coming to the Mackenzie District. At the other end of the spectrum, the Waimate District only achieved a 3 percent share of domestic and a 1 percent share of international visitors.

Table 17: Market share of visitation for surrounding districts (2018)

	Market Share (Percent)		
	Domestic	International	All Visitors
Ashburton	11	5	10
Mackenzie	18	57	26
Selwyn	10	6	9
Timaru	27	10	23
Waimakariri	7	1	6
Waimate	3	1	2
Waitaki	23	20	23

Source: MartinJenkins analysis of South Island Destination Management Plan 2019

Domestic visitors

While the available data does not allow us to comprehensively compare the motivations of domestic visitors with international visitors it is possible to gain a good high-level picture of both groups.

Looking in more detail at domestic visitors, while statistics on the purposes of travel for domestic visitors is not available at a district level, but in line with overall visitor's purpose statistics, most domestic visitors do so for leisure purposes, primarily holidays and visiting family and friends.

According to data presented in the South Island Destination Management Plan, roughly 75 percent of all visitation to the Timaru District in 2018 was for leisure purposes, followed by business (11 percent) and other purposes (13 percent)²¹.

In line with spending, most domestic visitors are those from surrounding districts and regions. TripTech data captures visitor movements for its users and provides detailed summaries of the origin of visitors to the Timaru District. Table 18 lists the top 10 places of origin for user visitors, by volume, for the year end December 2019 and highlights the relative importance of surrounding districts, as well as the importance of larger cities such as Christchurch and Auckland.

²¹ South Island Destination Management Plan 2019.

Table 18: Domestic visitor origin 2019

Ranking	Visitor Origin
1	Christchurch City
2	Auckland
3	Queenstown-Lakes District
4	Selwyn District
5	Ashburton District
6	Dunedin City
7	Tasman
8	Mackenzie District
9	Waimakariri District
10	Central Otago District

Source: TripTech portal. Timaru District. Visitor origin/home numbers for yearend December 2019. Based on collected user data. Accessed March 2021.

International visitors

While international visitors are almost non-existent during the Covid-19 pandemic, past data tells a story about the types of visitors the Timaru District has typically attracted and is useful in understanding which features and drivers the district could build on or adapt in expectation of future visitors.

International visitors to the district were around 77,600 to the year ended 2019 (0.7 percent of total international visitors to New Zealand)²². As shown in Figure 13, most visitors come to the district for holiday purposes (62 percent), followed by a wish to visit family and friends (23 percent), this is

similar to New Zealand as a whole. It is estimated that only a small number of international visitors come to the Timaru District for business purposes (3 percent compared to 5 percent nationally)²³.

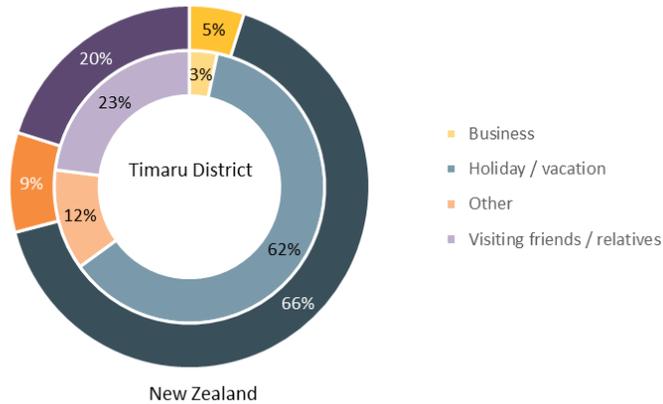
As most international visitors are from Australia (37.5 percent in the year ended June 2019), followed by the rest of Europe (18.4 percent), Germany (11.8 percent) and the UK (10.9 percent). Most travelers from each country of origin visited the Timaru District for a holiday. Large numbers of visitors from the UK, Australia and Canada also visited to family and friends (41, 40 and 17 percent respectively), and they were more likely to come for business than other groups too. Business travel was distinctly high for visitors from Japan, where 35 percent of Japanese travelers noted business as their main reason for travel (while 40 percent noted holiday purposes)²⁴.

²² Statistics New Zealand, International Visitor Survey – year end June 2019.

²³ Statistics New Zealand, International Visitor Survey – year end June 2019.

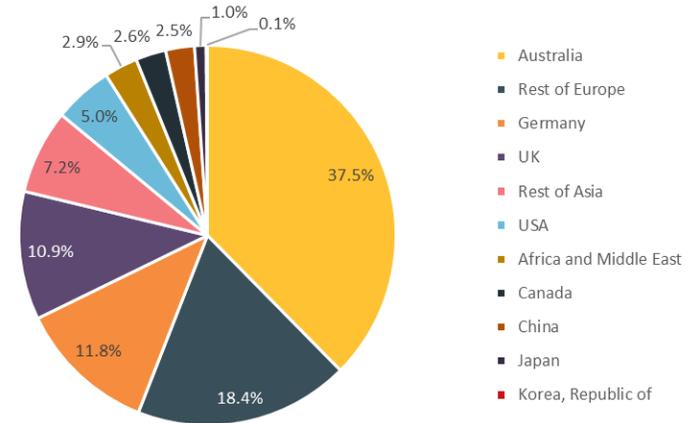
²⁴ Statistics New Zealand, International Visitor Survey – year end June 2019.

Figure 13: Purpose of travel, international visitors, Timaru District and New Zealand year ended June 2019



Source: Statistics New Zealand, International Visitor Survey – Year End June 2019.

Figure 14: Share of visitor origin – percentage of total international visitors in Timaru District to the year ended June 2019



Source: Statistics New Zealand, International Visitor Survey – Year End June 2019.

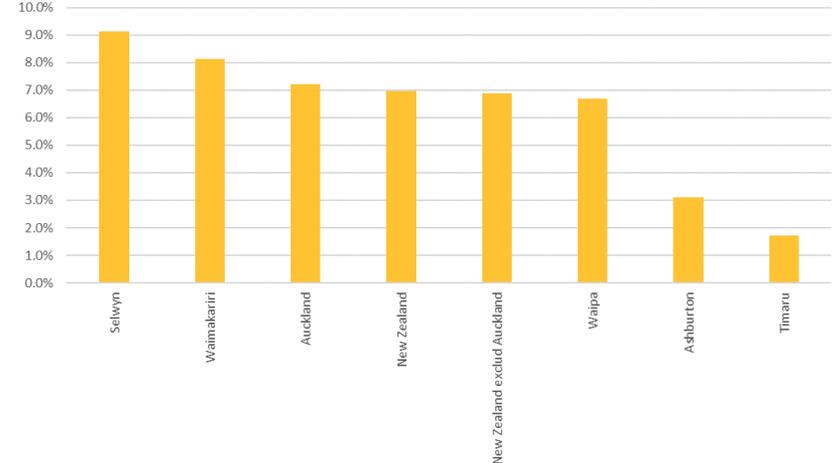
Visitor spending

Visitor spending in the Timaru District is has been relatively higher than comparable districts. In 2019 (to the year ended October) total visitor expenditure was \$226 million. This was higher than surrounding districts Ashburton (\$193 million), Selwyn (\$112m), Waimakariri (\$87m) and the comparable Waipa District (\$118m)²⁵.

²⁵ MBIE monthly regional tourism estimates (years ended October 2019).

Although spend is higher than others, growth in spend has been much lower. Between 2014 and 2019 visitor spending in the district grew at an average of 1.7 percent per year, compared to 7 percent per year nationally. Ashburton experienced average per year growth of 3.1 percent (still higher than Timaru), Selwyn 9.1 percent, Waipa 6.7 percent and Waimakariri 8.1 percent²⁶.

Figure 15: Annual average growth in visitor expenditure 2014-2019 (\$m)



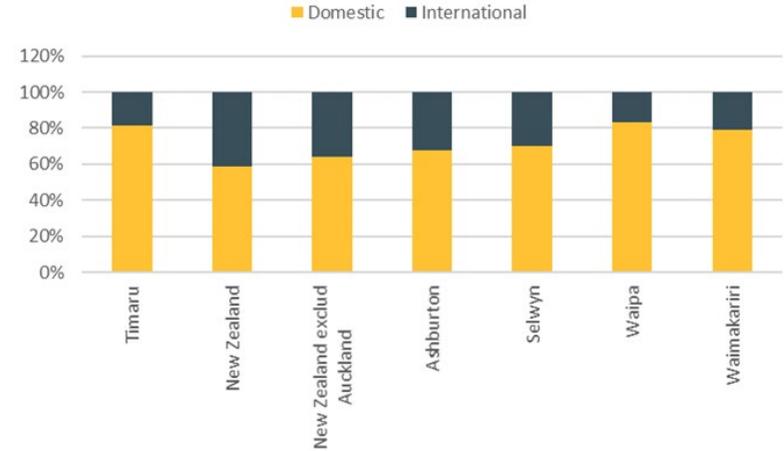
Source: MartinJenkins using MBIE monthly regional tourism estimates (years ended October 2019).

Growth in spend in the district, as across New Zealand, had been driven by international expenditure (at 7.3 percent per year between 2014-2019, and 10.2 percent nationally per year over the same period).

²⁶ MBIE monthly regional tourism estimates (year ended October 2019).
²⁷ MBIE monthly regional tourism estimates (year ended October 2019).

However, as shown in Figure 16, the Timaru District has a much lower proportion of international expenditure than comparable districts and New Zealand as a whole. In 2019, just 19 percent of visitor spend was international, compared to 41 percent nationally (or 55 percent when Auckland is excluded). This was also lower than Ashburton (32 percent), Selwyn (30 percent), and Waimakariri (21 percent) and only just higher than Waipa (17 percent)²⁷.

Figure 16: Share of visitor spending 2019



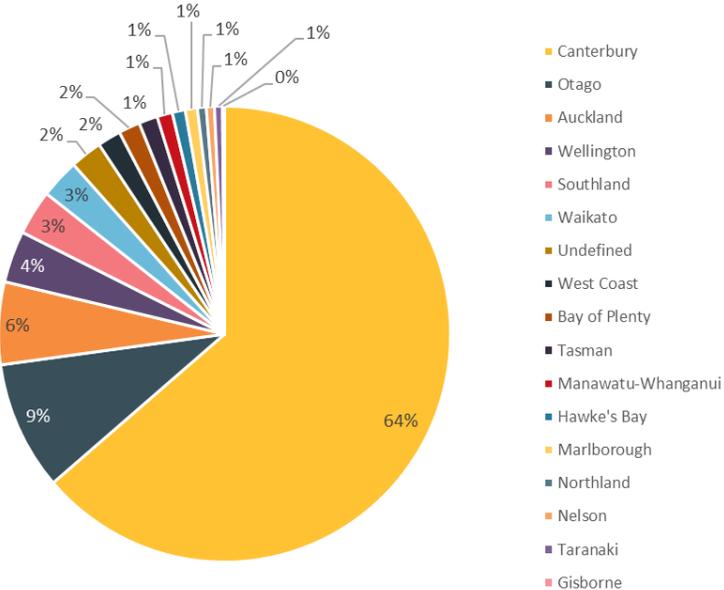
Source: MartinJenkins using MBIE monthly regional tourism estimates (years ended October 2019).

Having a typically low international visitor spend has seen the Timaru District fare better than other districts in the face of Covid-19 (see Covid-19 commentary). The impacts of border closures will only see the proportion of domestic expenditure rise across the country, even if overall spending falls.

Over the past 5 years, domestic visitor expenditure has accounted for around 81 percent of the district spend (compared to 59 percent nationally). However, expenditure growth was low, at 0.7 percent per year (on average) between 2014 and 2019. Although higher than Ashburton (0.1 percent), this is lower growth than most comparable districts, such as Selwyn (7.7 percent), Waipa (6.2 percent), and Waimakariri (8 percent). This is also lower than national growth in domestic spend of 5 percent per year²⁸.

As shown in Figure 17, visitors from the wider Canterbury region are the largest source of visitor spending in the district, accounting for 64 percent of domestic visitor expenditure in the year ended October 2019. Following this is spend by visitors from Otago (9 percent), Auckland (6 percent) and Wellington (4 percent)²⁹.

Figure 17: Origin of domestic visitor spending Timaru District, 2019



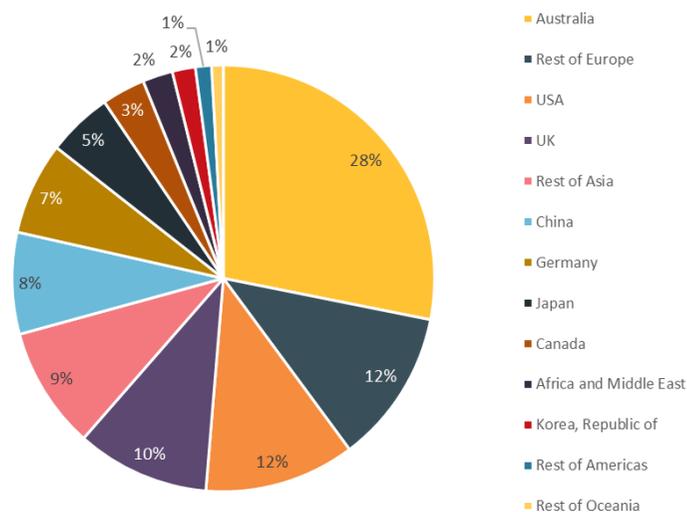
Source: MBIE monthly regional tourism estimates (year ended October 2019).

²⁸ MBIE monthly regional tourism estimates (year ended October 2019).

²⁹ MBIE monthly regional tourism estimates (year ended October 2019).

Turning to international visitor expenditure, Figure 18 shows that, in 2019, the largest percentage of international visitor expenditure came via visitors from Australia (28 percent), followed by the Rest of Europe (12 percent), the USA (12 percent), and the UK (10 percent). Nationally, Australian visitors also represented the highest proportion of spend (at 23 percent). This was followed by China (14 percent), the Rest of Asia (13 percent), the USA (12 percent) and the Rest of Europe (9 percent) – a different make-up to the Timaru District³⁰.

Figure 18: Origin of international visitor spending Timaru District, 2019



Source: MBIE monthly regional tourism estimates (year ended October 2019).

³⁰ MBIE monthly regional tourism estimates (year ended October 2019).

Spending profile

The Timaru District's profile of visitor expenditure is more heavily weighted toward retail, and food and beverage spend than expenditure nationally (Figure 19).

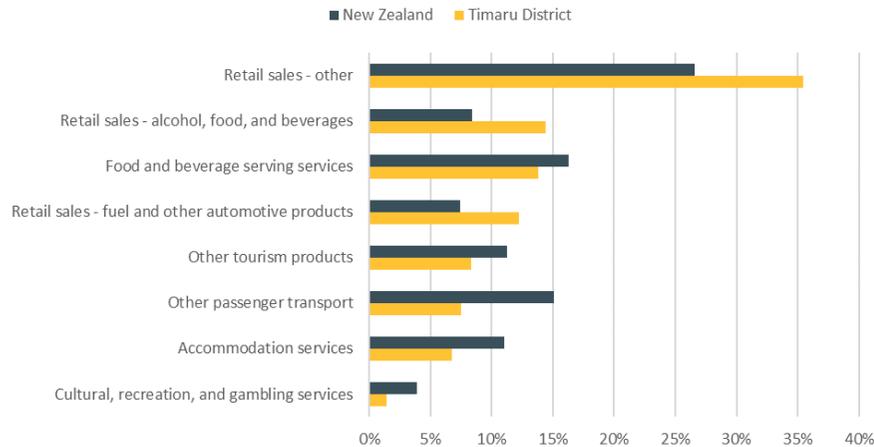
In 2019, the highest proportions of visitor expenditure in the Timaru District were spent on retail sales (35 percent compared to 27 percent nationally) and retail for food and beverage spend (14 percent compared to 8 percent). Lower proportions of expenditure went on recreation, accommodation, transport and other tourism products than occurred nationally (a 2-7 percentage point difference for each)³¹.

This spending structure is strongly influenced by higher proportions of domestic visitors who tend to spend more on retail than international visitors. As expected, international visitors tended to spend more on eating out (food and beverage services), accommodation, and retail sales for fuel than domestic visitors did in the Timaru District.

This structure has also remained almost the same over the past decade with culture and recreation, passenger transport, fuel, and other tourism products increasing slightly in their share of spend.

³¹ MBIE monthly regional tourism estimates (year ended October 2019).

Figure 19: Spending structure for all visitors to the Timaru District, 2019



Source: MBIE monthly regional tourism estimates (year ended October 2019).

Visitor stay and flow

Day and overnight visitation

The Timaru District has one of the highest proportions of day visitation in the South Island. It has been estimated that in 2018 around 77% of all visitors were day trippers³².

The high rate of day trippers is due to the district having a higher proportion of domestic visitors than international visitors. Domestic travellers have a

³² South Island Destination Management Plan 2019.

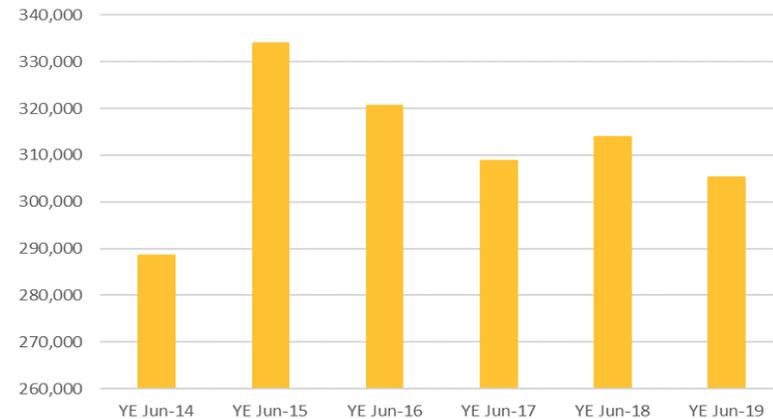
³³ Statistics New Zealand (June years), Accommodation Survey (September 2019, last release of this survey).

greater propensity to make day trips than international travellers. It is also due to the location of the district in relation to larger cities and more popular tourism destinations in the South Island.

Commercial accommodation nights

Figure 20 shows total commercial accommodation nights for the 2014-2019 period. Total commercial accommodation nights for the year ended June 2019 were 305,341 in the Timaru District. The total number of guest nights has risen by around 16,880 on the 2014 year, an average increase of 1.1 percent per year. However, there has been an overall decline since 2015³³.

Figure 20: Timaru District total commercial accommodation nights³⁴

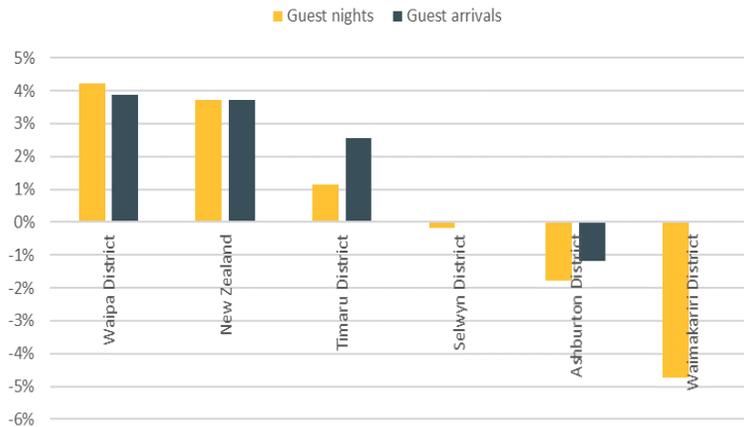


Source: Statistics New Zealand (June years), Accommodation Survey (September 2019, last release of this survey).

³⁴ Includes hotels, motels, backpackers and holiday parks. Some data is excluded here due to confidentiality exclusions by Stats.

Growth of guest nights in the district over the 5-year period was lower than the national rate of 3.7 percent per year. However, growth was positive which was not the case for most comparable districts, as shown in Figure 21.

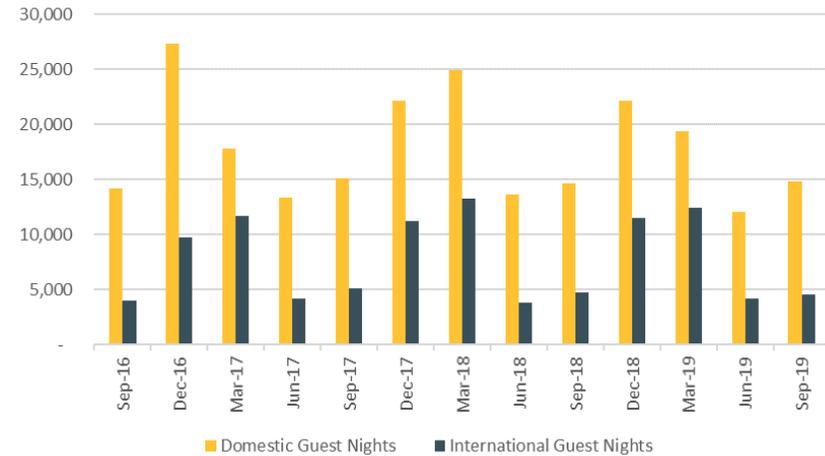
Figure 21: Growth in guest nights and arrivals 2019



Source: Statistics New Zealand (June years), Accommodation Survey (September 2019, last release of this survey).

In line with visitor numbers, around 60 to 70 percent of guest nights each month are by domestic visitors staying the night (Figure 22). Guest nights tend to peak across the summer and early autumn months for both domestic and international visitors.

Figure 22: Monthly guest nights by domestic and international origin, Timaru District, 2016-2019



Source: Statistics New Zealand. | Accommodation Survey 2019, RTO and origin, monthly.

As shown in Table 19 the Timaru Districts average length of visitor stay in 2019 was 1.7 days, lower than the New Zealand average (1.99 days) and also lower than comparable districts (Ashburton of 2.14 days and Waipapa of 1.94 days). Length of stay has fallen by a few hours (0.12 days) since 2014³⁵.

³⁵ Statistics New Zealand (June years), Accommodation Survey (September 2019, last release of this survey).

Table 19: Average length of stay 2019

Location	Days
New Zealand	1.99
Timaru District	1.7
Waipa	1.94
Ashburton	2.14

Source: Statistics New Zealand (June years), Accommodation Survey (September 2019, last release of this survey). Unavailable statistics due to confidentiality mean some comparable districts are excluded here.

As shown in Table 20, the number of economically significant commercial accommodation establishments was less in 2019 than 2014, reducing by 5 establishments (mainly hotels and backpackers) and around 60 stay units in terms of daily capacity over the 5-year period³⁶. In 2019 there were 42 commercial accommodation establishments in the district – 6 hotels (112 daily capacity stay-units available), 27 motels (400 stay-units), 2 backpackers (52 stay-units), 7 holiday parks (783 stay-units).

Table 20: Commercial accommodation Timaru District 2014-2019

	2019	Change on 2014	CAGR
Guest nights	305,341	+16,880	1.1%
Guest arrivals	179,800	+21,240	2.4%
Average length of stay (days)	1.7	- 0.12	-1.4%
Commercial accommodation units	42	- 5 units	-2.2%
Occupancy rates	34.07%	+ 5.1 percentage points	3.3%

Source: Statistics New Zealand (June years), Accommodation Survey (September 2019, last release of this survey).

³⁶ Based upon those establishments that have provided responses to Stats New Zealand's Accommodation Survey

With establishments and capacity falling and guest arrivals increasing occupancy rates for commercial accommodation have trended upwards. In 2014 occupancy rates were around 29 percent, by 2019 this was around 34 percent, an average increase of 3.2 percent per year.

A 2018 stock take of accommodation types in the Timaru District, undertaken for the South Island Destination Management Plan, showed there were a range of commercial accommodation options, although most cater to those on lower budgets (Table 21).

Table 21: Accommodation Timaru District (2018)

Number	Accommodation types
6	B&B, bach, guesthouse, boutique resort/retreat
1	Backpacker
5	Commercial caravan park/camping ground
3	DOC campsites
8	DOC huts
3	Hotels
19	Motels
2	Serviced apartments
47	Total accommodation options

Source: South Island Destination Management Plan (2019), Timaru District, page 25.

TripTech data shows most overnight stays are concentrated in Timaru town, for both domestic and international visitors, though there is slightly more dispersal throughout the district for domestic visitors³⁷. This reflects typically domestic visitor tendencies of staying with family and friends and seeking more varied accommodation types.

Flows

While no detailed information on visitor trips and flows is available at a district level, the geographic position of the Timaru District and visitor data clearly points to Timaru as being a place for visitors to stopover rather than a clear visitor destination.

As the previous Timaru District Visitor Strategy highlights, the district is centrally located between Christchurch and Dunedin, the South Islands largest cities, and provides gateways to popular tourist destinations in the Queenstown-Lakes and the Mackenzie Districts (Mount Cook, Lake Tekapo). This gateway positioning is reflected in popular visitor routes (as identified in the South Island's Destination Management Plan). Holiday makers staying overnight in Christchurch, Queenstown and the Mackenzie District, often travel via Timaru.

TripTech data of visitor movements also reflects this. Traffic flows for entry and exit note visitors travelling from surrounding districts through Timaru and on to larger destinations. The most significant roads of entry and exit are the Geraldine-Fairlie highway (typically 30-45% of traffic inflow and outflow in a given month), and State Highway One (typically between 22% and 32% of traffic inflow and outflow in a given month). Waimate Highway use has

become more prominent since lockdown, at around 18 - 20% of traffic inflow and outflow in a given month³⁸. This is likely due to a greater proportion of domestic visitors travelling.

We also know domestic travelers visiting friends and family often make day trips from Christchurch to visit the Timaru District. Entry and exit times and spend further point to these short-stay tendencies. Most visitors enter and leave the district between 10 a.m. and p.m.³⁹, and spend is heavily weighted toward retail, food and beverage, and fuel spending⁴⁰.

Seasonality

As shown in Figure 23, visitor numbers and spend in the Timaru District are very seasonal, closely following the spending and visitation patterns across New Zealand with peaks in the summer months and troughs in winter. This is true for both domestic and international visitor spend, although it appears that in recent years international spending fluctuations are slightly more dramatic than across New Zealand, while domestic spending fluctuations are slightly less dramatic (Figure 24).

The significant fall in domestic visitor spend in the second quarter of 2020 was due to the Covid-19 lockdown. Spend fell to \$1.98 million in April 2020, or 12 percent of April 2019 spend. Spend has recovered in the months following⁴¹.

³⁷ TripTech portal. Timaru District. Overnight stay clusters, June 2018-March 2021 data reviewed.

³⁸ TripTech portal, Timaru District, user movements, June 2018 – March 2021 data reviewed.

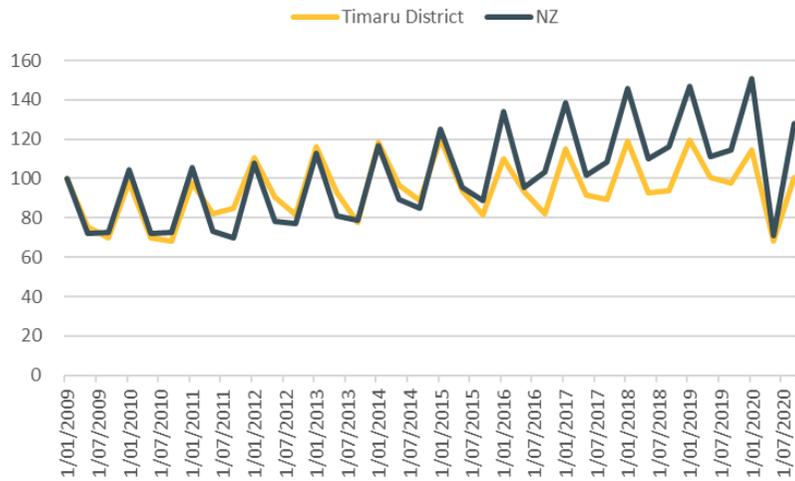
³⁹ TripTech portal, Timaru District. Entry and exit time. June 2018- March 2021 data reviewed.

⁴⁰ MBIE monthly regional tourism estimates (year ended October 2019).

⁴¹ MBIE monthly regional tourism estimates (year ended October 2020), domestic spend by RTO and Product, Timaru District. April 2019 and April 2020.

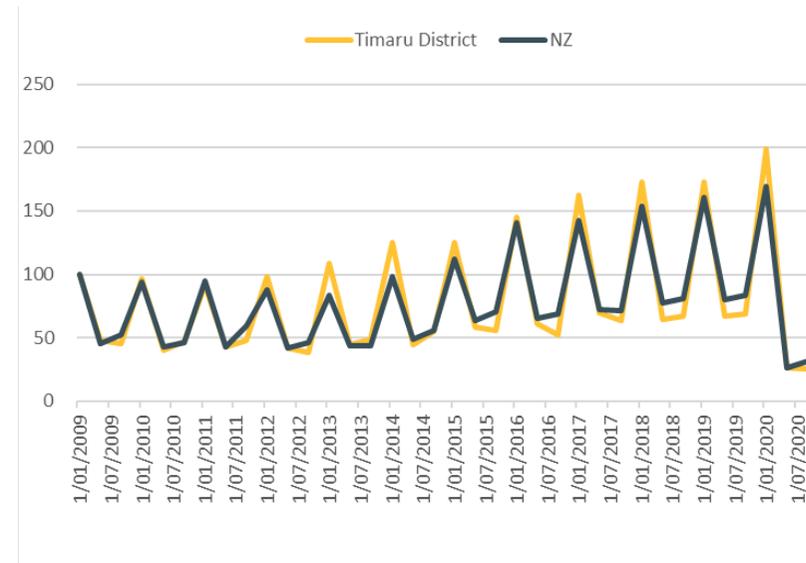
International visitor spend also fell dramatically during lockdown to around \$0.22 million in April or 6 percent of spend in April 2019, and \$0.89 million in May 2020 or 40 percent of the spend in May 2019⁴². As borders remain closed international visitor spend remains low.

Figure 23: Domestic visitor spend 2009-2020 indexed to 2009, Timaru District



Source: MBIE, MRTEs domestic spend by RTO. Timaru derived by Aoraki Tourism RTO coverage. Indexed by MartinJenkins.

Figure 24: International visitor spend 2009-2020 indexed to 2009, Timaru District



Source: MBIE, MRTEs domestic spend by RTO. Timaru derived by Aoraki Tourism RTO coverage. Indexed by MartinJenkins.

⁴² MBIE monthly regional tourism estimates (year ended October 2020), international spend by RTO and Product, Timaru District. April and May 2019 and 2020.