

# WAITAKI DESTINATION MANAGEMENT DEVELOPMENT PLAN





Date of last modification: 6/07/22

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# PART 1: EXECUTIVE SUMMARY

## 1.1. Introduction

This Destination Management Development Plan (DMDP) for the Waitaki District (the District) sets a framework that will enable Waitaki's visitors and communities to be connected and see that the District's environment flourishing and the Waitaki is thriving.

This DMDP is written as a "road map" to rally purpose, concentrate effort and inform all stakeholders of what the tourism development opportunities are for Waitaki.

## 1.2. Strategic Framework

**“Visitors and Communities are connected.  
Our environment is flourishing.  
Waitaki is thriving.”**

**1. The visitor economy is managed effectively, ensuring Waitaki's unique identity is celebrated and communities thrive.**

**2. Waitaki is a destination of choice for visitors who value what we value. Sustainable increases achieved in day visitation, overnight stays, and spend year-round**



### Community Tiaki Hapori

#### Culture & Histories

- Waitaki stories.
- Community engagement.
- Informative programmes.
- Increase community knowledge and engagement with Ngāi Tahu Whānui history.
- Waitaki heritage.



### Visitor Tiaki Manuhiri

#### Visitor Experience

- Visibility of offering: Touring Routes/Signage/Interpretation.
- Accessible recreational activities.
- Cultural interpretation of Ngāi Tahu Whānui.
- Visitor Hubs/Centres of Learning.
- Marketing & Promotion.



### Environment Tiaki Taiao

#### Environment

- Appropriate protection and interpretation for important geological sites.
- Enhancement of cultural interpretation and mahinga kai sites.
- Visitors and visitor sector "giving back" via restoration activities
- Sustainable infrastructure.



### Economy Tiaki Ōhanga

#### Business Development

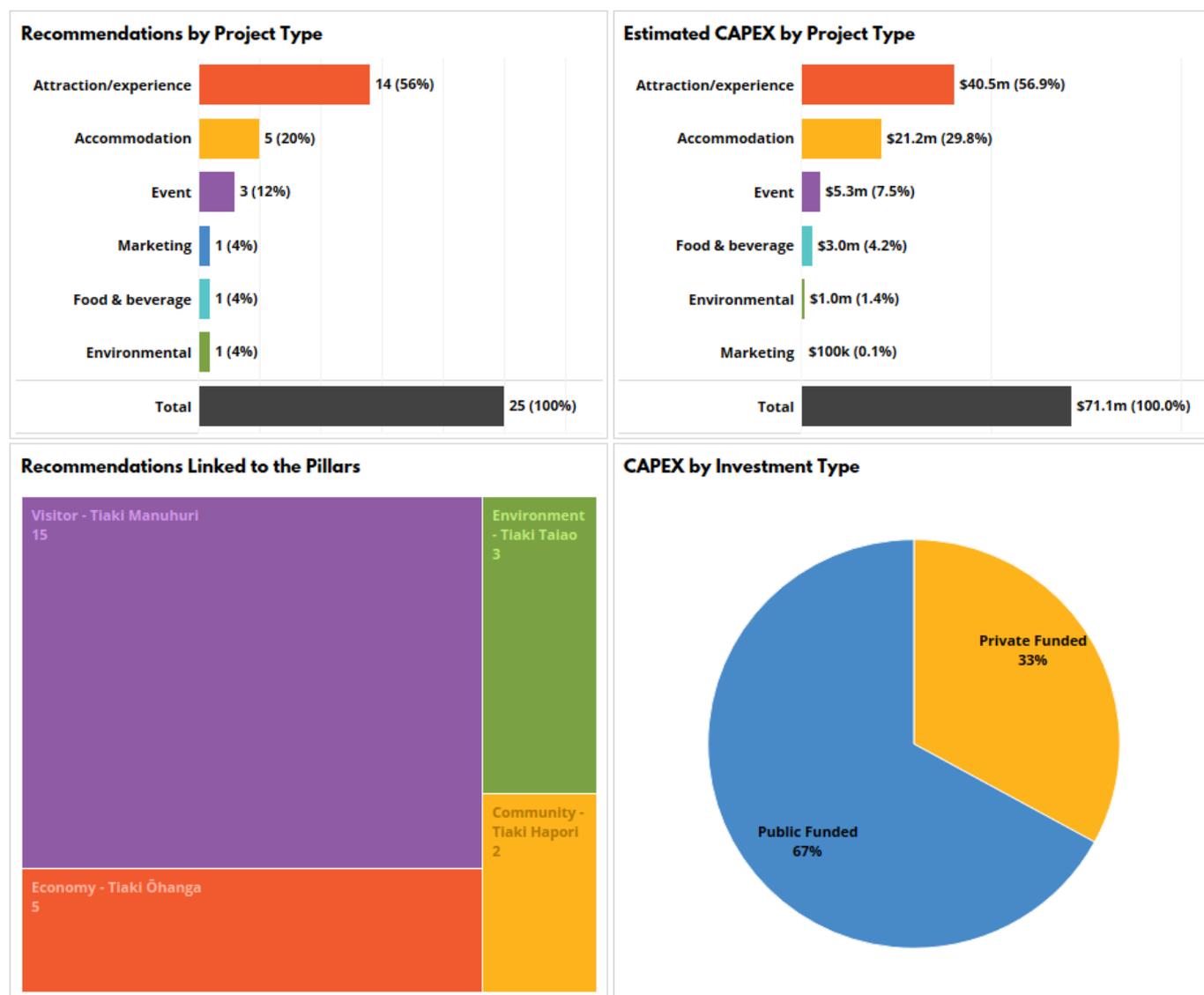
- Enhance capability and service delivery.
- Enhance/develop sustainable Memorable Experiences.
- Events & Visitor Packages.
- Develop the "Waitaki Grown" Food and Beverage initiative.
- Support Mana Whenua in developing tourism activities, and experiences.

### 1.3. Opportunities

Through this DMDP process, **25** recommendations have been identified to deliver on the vision for Waitaki’s visitor economy. Many of these are supply-led and are aimed at introducing more commissionable products and private investment into the region’s tourism offering. Figure 1 provides a summary of all the recommendations identified, followed by Figure 3 which provides a spatial map of the recommendations. Together, they demonstrate that:

- 56% of the projects identified are attraction/experiences;
- accommodation projects, however, require the largest share of capital investment, totalling over half (57%) of the investment identified (\$40.5 million);
- a total of \$71 million is estimated to be required to activate all the project recommendations identified (based on a top-line assessment only and subject to feasibility studies);
- 15 of the recommendations align with the Visitor - Tiaki Manuhiri pillar;
- one-third of the CAPEX required is attributed to capital funding coming from private sector sources; and
- the recommendations are distributed across the Waitaki region, with larger clusters being at Oamaru and Moeraki, and to a lesser extent around the various hydro lakes throughout the Waitaki Valley and in smaller towns such as Palmerston.

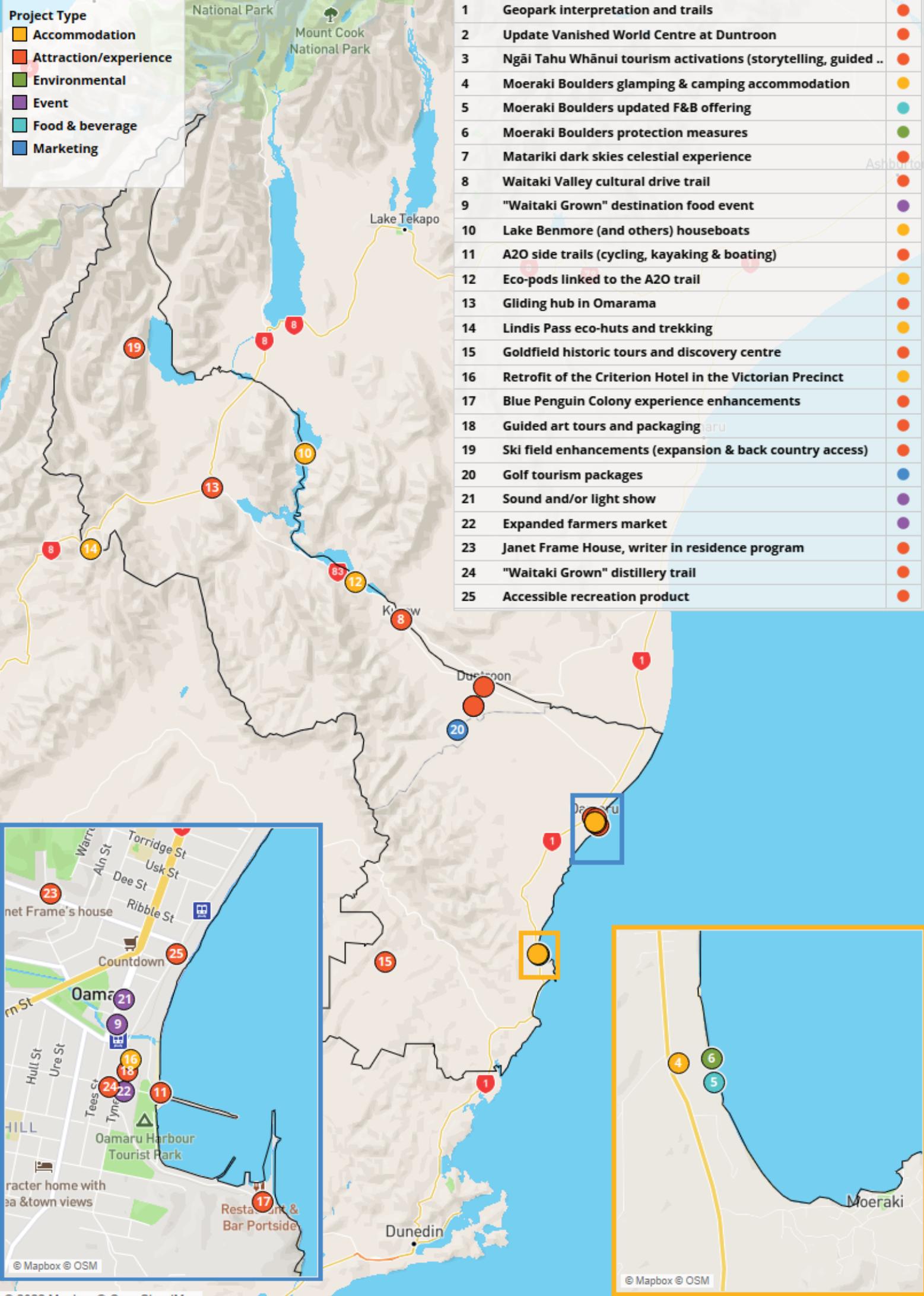
Figure 1: Project recommendations summary



**Project Type**

- Accommodation
- Attraction/experience
- Environmental
- Event
- Food & beverage
- Marketing

1	Geopark interpretation and trails	<span style="color: red;">●</span>
2	Update Vanished World Centre at Duntroon	<span style="color: red;">●</span>
3	Ngāi Tahu Whānui tourism activations (storytelling, guided ..	<span style="color: red;">●</span>
4	Moeraki Boulders glamping & camping accommodation	<span style="color: yellow;">●</span>
5	Moeraki Boulders updated F&B offering	<span style="color: cyan;">●</span>
6	Moeraki Boulders protection measures	<span style="color: green;">●</span>
7	Matariki dark skies celestial experience	<span style="color: red;">●</span>
8	Waitaki Valley cultural drive trail	<span style="color: red;">●</span>
9	"Waitaki Grown" destination food event	<span style="color: purple;">●</span>
10	Lake Benmore (and others) houseboats	<span style="color: yellow;">●</span>
11	A2O side trails (cycling, kayaking & boating)	<span style="color: red;">●</span>
12	Eco-pods linked to the A2O trail	<span style="color: yellow;">●</span>
13	Gliding hub in Omarama	<span style="color: red;">●</span>
14	Lindis Pass eco-huts and trekking	<span style="color: yellow;">●</span>
15	Goldfield historic tours and discovery centre	<span style="color: red;">●</span>
16	Retrofit of the Criterion Hotel in the Victorian Precinct	<span style="color: yellow;">●</span>
17	Blue Penguin Colony experience enhancements	<span style="color: red;">●</span>
18	Guided art tours and packaging	<span style="color: red;">●</span>
19	Ski field enhancements (expansion & back country access)	<span style="color: red;">●</span>
20	Golf tourism packages	<span style="color: blue;">●</span>
21	Sound and/or light show	<span style="color: purple;">●</span>
22	Expanded farmers market	<span style="color: purple;">●</span>
23	Janet Frame House, writer in residence program	<span style="color: red;">●</span>
24	"Waitaki Grown" distillery trail	<span style="color: red;">●</span>
25	Accessible recreation product	<span style="color: red;">●</span>



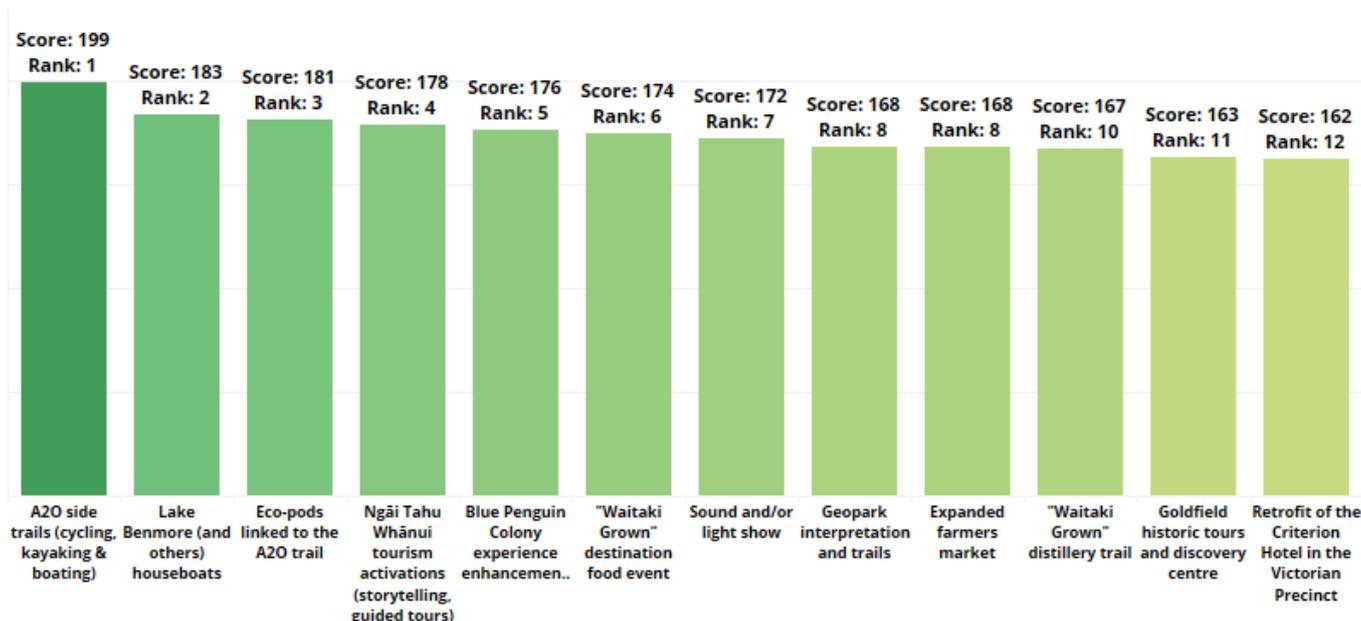
## 1.4. The Priority Project Recommendations

To determine the refined list of project recommendations, each has been assessed against the weighted criteria explained in Section 3.4.1 of this DMDP. Variables included in this weighted criterion are summarised below.

 Ability to act as a catalyst project to stimulate other investment projects	 Likelihood to be profiled by Tourism NZ
 Ability to attract a higher spending visitor market	 Likely to avoid reducing community social licence
 Ability to encourage stronger domestic visitation	 Likely to be supported by the community
 Ability to encourage stronger international visitation	 Likely visitor appeal
 Ability to help address climate change impacts	 Regional dispersal of visitors
 Ability to improve the environment	 Requirement for ongoing operational government funding
 Ability to secure govt. funding for project	 Short-term to activate
 Employment (operational) potential	 Size of private investment
 Encourage mana whenua involvement in the visitor economy	 Size of public investment
 Landowner	 Uniqueness of product

Based on this methodology, 12 projects were identified as the priority project recommendations. Figure 2 summarises these. These provide a starting point as it is impractical to try and activate too many projects at the same time. These projects offer great diversity in their scale, type of development and their timeframe for activation. We would suggest that only 2-3 projects initially be focussed on for the short term.

Figure 2: The Top 12 Projects



## 1.5. Next Steps

Importantly, many of the project opportunities build on the success of existing tourism activities and aim to offer value-added elements to support their growth and sustainability. This DMDP builds on the DMS which already exists for Waitaki and both need to be read as an integrated pathway forward.

As tourism and visitor economy activity is now to be integrated within the new Economic Development agency for Waitaki, it is important that the unique elements of tourism as a sector and the mechanisms to deliver optimum results with all of its stakeholders are not lost. To achieve the successful delivery of this DMDP it is therefore suggested that:

- A tourism governance group be established to ensure that core stakeholders (representing all areas of the visitor economy including the government) are actively involved in driving the agreed outcomes
- That an ongoing relationship be formalised with Mackenzie District Council for the joint opportunities identified for tourism project activation across both TLAs and which will require an ongoing collaborative approach
- Whilst this DMDP has deliberately identified the 12 priority projects to support the sustainable growth of the Waitaki visitor economy, the tourism governance group suggested above should select 2-3 projects only to drive the DMDP as the top priorities for the short term (others can be added to over time)
- Delivery of new tourism projects identified within this DMDP will require funding for feasibility study analysis and a business case. Funding should be set aside for allowing at least the top 3 priority projects to move to the next stage.
- Tourism also will require an ongoing budget for marketing covering tourism promotional campaigns and offering the chance to leverage promotional funds from industry partners and Central Government. To ensure Waitaki is well known and

on travel agendas for various domestic and international visitor markets, tourism marketing funds should be ring-fenced for at least 3 years as marketing programs often extend typically beyond one financial year.

- Destination events and festivals will also necessitate a dedicated budget to ensure they can not only be maintained but sustainably grow. We note in this DMDP that Waitaki has a strong competitive advantage in the agri-tourism and gastronomy space with signature restaurants, great local produce (cheeses etc well recognised) and with the potential to create a nationally significant food-based event, which will need to be well marketed through a variety of online and other media channels.

The action plan offered in this DMDP outlines, at a top-line level only, the mechanisms required to activate a number of the initiatives identified to grow the visitor economy sustainably. It also offers indicative top-line funding requirements to help activate projects, as a guide only.

In summary, this DMDP dovetails into the general economic development strategy direction which has only recently been created for Waitaki and importantly offers greater specificity and direction for tourism priority projects.

In turn, these will offer a very important economic and social pillar to help support the growth in the overall regional economy, noting that tourism offers a driver for activating economic growth in retailing, food production and processing, accommodation, attractions, and experiences (which also link into other elements of the economy such as gold mining), transport services etc. Most importantly, this DMDP will help build critical partnerships with mana whenua, to support their aspirations for greater involvement in the Waitaki visitor economy for the long term.

# PART 2: WHERE ARE WE NOW?

## 2.1. Introduction

Stafford Strategy (Stafford) was commissioned by Tourism Waitaki to develop a Destination Management Development Plan (DMDP) for the Waitaki District (the District). The overarching purpose of the DMDP is to set the framework that will enable Waitaki’s visitors and communities to be connected and see that the District’s environment flourishing and the Waitaki is thriving.

Phase 1 of the project has been completed which included the development of a Destination Management Strategy (DMS) as well as the creation of a governance group and working group. This piece of work comprises phase 2 of the project.

This DMDP is written as a “road map” to rally purpose, concentrate effort and inform all stakeholders of what the tourism development opportunities are for Waitaki to deliver on the vision and goals identified as part of the DMS.

While this DMDP’s geographic scope is Waitaki TLA, it is cognisant that visitors do not recognise local government boundaries. It, therefore, adopts a border-less view of opportunities and projects to identify clever synergies and partnerships with surrounding areas.

## 2.2. Tourism Waitaki’s role

The role of Tourism Waitaki is to coordinate tourism-related strategies and projects that will promote and achieve growth and prominence of the visitor economy across Waitaki. These will be in line with the objectives, strategies, and commitments of the New Zealand Government and MBIE in particular. This will be achieved

in partnership and with the support of other Government agencies and the Waitaki District Council; industry and business associations; and tourism and allied business operators throughout Waitaki.

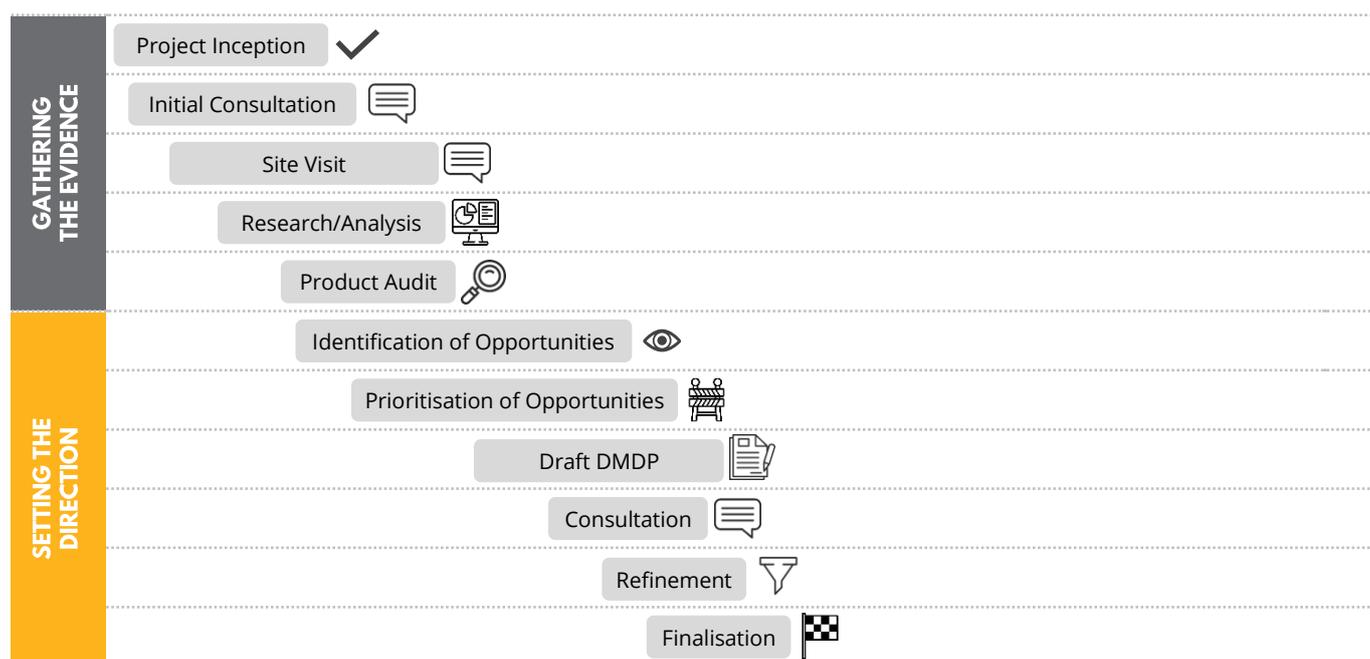
Whilst this DMDP has been developed as an initiative of Tourism Waitaki, its role will be one of ongoing coordination, advocacy, and support. Implementation will be by a mix of stakeholders including Waitaki District Council, and Tourism Waitaki, in partnership with tourism industry stakeholders and mana whenua. At the time of writing this DMDP, Waitaki DC is undergoing a review of its economic development activity which includes the functions and placement of Tourism Waitaki. Under the draft proposals, Tourism Waitaki is to be placed within a broader economic development team as a “visitor” core programme of work. Of note, the broader requirement of destination management as set out by the MBIE guidelines and this report, will also require well-integrated work with “place” and the other three programmes noted: people, business and land well aligned.

## 2.3. Process followed

Working alongside those directly involved in the visitor economy in the district, this DMDP was developed via a 13-stage process, which is outlined in Figure 3.

**Importantly, this DMDP builds on the existing DMS developed in 2021 and which involved extensive consultation. This DMDP, therefore, focuses on tourism development opportunities that align with the direction set by the DMS.**

Figure 3: The process followed



## 2.4. The Waitaki region

Waitaki, situated in New Zealand's South Island, is home to significantly diverse landscapes and natural features and is located along two major state highways. The natural and built features of the region are vast, including stunning coastlines, mountains and unique sites of geological significance including the Moeraki Boulders. Because of the abundance and significance of these geological sites, Waitaki has been endorsed by the NZ National Commission for UNESCO to become an Aspiring Global Geopark (which will be a first for New Zealand delivering global status to Waitaki as an area of international and national geological significance).

There are various towns scattered throughout the region, with the main service centre being the historic town of Oamaru which features Whitestone architecture and is noted as one of New Zealand's best-preserved Victorian Commercial streetscapes.

The region is home to the renowned Alps 2 Ocean Trail (A2O) – New Zealand's longest cycle trail - which starts near Mount Cook and finishes in Oamaru. Examination of an extension along the 120km to Dunedin along a coastal route via various coast communities is already being considered.

From a tourism perspective, Waitaki offers various strengths to leverage including, but not limited to the following.



**Nature and wildlife**



**Arts, history, and culture**



**Geology**



**Food and beverage**



**Recreation**



**Adventure**

## 2.5. Waitaki's visitor profile

### **Agreed metrics and a consistent approach to the collection of visitation data and visitor economy impacts are a priority need not only for Waitaki but more broadly across the country.**

The methodology that has been applied for the collation of visitor data is contained in Appendix 1. It has relied upon a variety of different sources, including the IVS, TECTs and FreshInfo's NZ Activity Forecasts. The lack of a single robust data set for reviewing current visitor trends and to allow for forecasting is a limitation that needs to be acknowledged.

Figure 4 on the following page provides a snapshot of Waitaki's visitor profile and demonstrates the following.

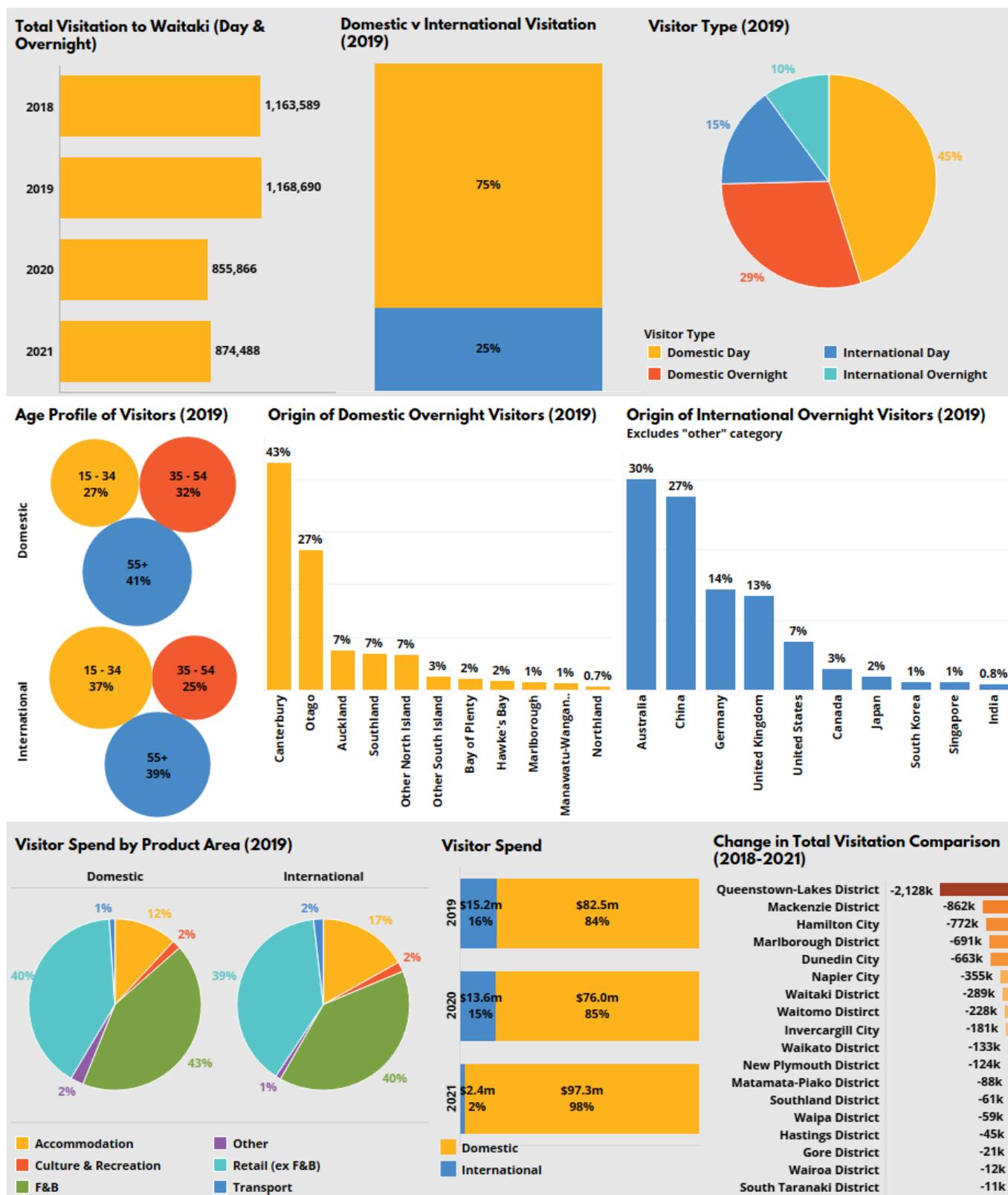
- Before COVID-19, visitation to Waitaki was steadily growing, increasing from 1.163 million visitors in 2018 to 1.168 million visitors in 2019.
  - While Waitaki's visitation was not as significantly impacted by COVID-19 as some other areas, a noticeable decline was experienced, falling to 856,000 visitors in 2020 and increasingly slightly (due to the relaxation of border and lockdown restrictions) to 874k visitors in 2021.
  - Waitaki's visitation is characterised by a very strong domestic market, comprising almost three-quarters (75%) of total visitation to the area. This strong domestic market profile is one of the primary reasons the region did not suffer as dramatic a decline in visitation due to COVID-19.
  - Waitaki also attracts a strong day trip market, comprising 60% of total visitation. While the day trip market is an important one, to generate stronger financial yield will require focusing on initiatives to grow the share of overnight visitation.
  - Overnight visitors (in other similar destinations) typically spend two to three times more per trip than day trip visitors. This is due to their spending on accommodation along with additional food and beverage, attractions and transport spend.
  - Waitaki has a fairly even age profile of both its domestic and international visitors, with the largest share being those aged 55+ (comprising 41% of domestic visitors and 39% of international visitors). Given the strong cultural and arts focus that Waitaki has, this is not surprising.
  - Canterbury represents the largest share of domestic visitors, totalling 43% of all domestic visitors in 2019. This was followed by Otago (27%). Both these regions are close to Waitaki and comprise major urban centres (Christchurch and Dunedin).
- Australia represents the largest international market of origin for Waitaki, totalling 30% of international visitation in 2019.<sup>1</sup> Australia is a large market for New Zealand generally and with the ongoing COVID pandemic, it represents one of the few initial major international markets for the country. Waitaki's proximity to the major international aviation hubs of Christchurch and Queenstown, and the domestic hub of Dunedin, present opportunities to grow this market, many of whom are repeat travellers looking for new things to do off the traditional tourism "golden route".
  - Both international and domestic visitors spent the largest proportion of their spending on F&B<sup>2</sup> (representing 43% and 40% of spend respectively). This was followed by accommodation (representing 40% and 39% of spend respectively). Based on the data there currently appears to be limited spending on culture and recreation, representing only 2% of spend across both markets. This is thought to potentially be because the region has a limited amount of commissionable (paid) tourism products on offer.
  - Breaking down visitor spend by market also reinforces the importance of the domestic market for Waitaki. While in 2019, domestic visitors represented 75% of visitation, they accounted for 84% of all visitor spending. The domestic and international markets also tend to be constrained by seasonality which despite best efforts, has only marginally changed over many years and is a national ongoing issue. Domestic leisure visitation is impacted by peak school holiday travel periods and long weekend options, whilst international visitation is impacted by seasonal preferred travel periods. Domestic visitor markets over recent periods have started to grow into shoulder periods where there are events and festivals to attend especially. Unless these are of international market interest and appeal, they generally are not a driver for international visitation.
  - Whilst Australian visitation may be able to recover reasonably quickly, the China market may be slower to re-activate along with other longer-haul visitor markets. This is likely to be due to many factors including the cost of long-haul travel, ongoing COVID variance issues, lack of tourism supply and significant competition from many other regional areas throughout NZ along with global competition currently already being seen.

<sup>1</sup> Note this excludes the "other" country market which is an amalgam of all smaller countries.

<sup>2</sup> This includes spend in cafes and restaurants along with retail spend on F&B.

Figure 4: Waitaki visitor profile<sup>3</sup>

# VISITATION TO WAITAKI



<sup>3</sup> See Appendix 1 for data sources.

## 2.6. Waitaki's product offering

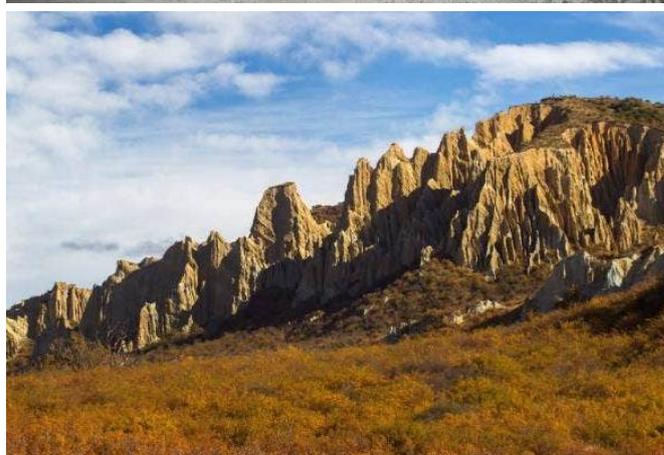
Waitaki has a growing array of attractions and experiences and a strong boutique accommodation sector. The following figures provide a summary of the region's tourism offering, including both accommodation (Figure 5) and experiences/attractions (Figure 6). More detailed supporting data, along with the methodology utilised, is available in Appendix 2.

With respect to accommodation, the analysis demonstrates the following.

- Waitaki's accommodation range and type is largely characterised by boutique accommodation, including B&Bs, cottages, guesthouses and baches, comprising 30% of the accommodation properties identified.
- While motels comprised 18% of properties identified, in terms of bookable unit stock<sup>4</sup>, it is the largest, offering 391 bookable units which comprise 36% of the bookable unit stock. Hotels are similar – while only comprising 10% of properties identified, they supply 22% of bookable units reflecting the importance of these two typologies in offering a strong supply of bookable unit stock.
- There are 24 different DOC huts scattered largely throughout the western part of Waitaki. They also offer a relatively strong supply of bookable unit stock, with 166 bunk beds provided through these huts.
- There is one luxury lodge in the region – The Lindis – which is one of the country's newest luxury lodges. It garners strong positive feedback and assists in elevating the profile of Waitaki to a select smaller niche market.
- In terms of consumer sentiment (see Appendix 2 for an understanding of how this is calculated), Waitaki generates a strong positive rating of +54 (based on 7,596 reviews across 98 properties). This strong score should be noted, particularly considering the scores achieved in surrounding regions, such as the Mackenzie which generated an NPS of +44<sup>5</sup>.
- Waitaki's boutique properties receive the highest score, with an average NPS of +78, based on 443 reviews. This is a strong result and reflects a high degree of consumer sentiment regarding boutique properties.
- Motels received the lowest NPS score of +38. While this is still a positive score (anything over +30 is considered positive), it is at the lower end of the positive rating. However, motels generally do tend to score lower, primarily because the price being charged at these properties, particularly in many regional locations throughout the country, does not always match up with the quality offered. At times, much of a region's motel stock requires significant upgrades to align better with consumer expectations. Many motels were often introduced

to deliver transit accommodation being located on main entry roads into towns rather than the visitor market desire for destination properties in locations which may be more strategically located in areas such as waterfront precincts, on hills to capture views etc.

- Waitaki's accommodation product is largely clustered around Oamaru (approximately 58 properties) with smaller nodes at Moeraki, Otematata and Omarama.



<sup>4</sup> If a hotel has 25 rooms, this is recorded as 25 bookable units. If a holiday home has 4 bedrooms, this is recorded as 1 bookable unit as this can only be booked by the one party.

<sup>5</sup> This is based on an audit that was undertaken as part of the Te Manahuna DMP in March 2021.

The analysis of Waitaki's tourism attractions and experiences mix shows the following.

- Based on the audit findings, there are 220 tourism attractions/experiences in the region. There is an additional 200+ properties listed for Waitaki on Airbnb which are not covered in this audit.<sup>6</sup>
- Waitaki's attraction/experience mix is largely dominated by natural attractions and cultural products. These comprise 37% (81 experiences) and 15% (32 experiences) respectively of the attractions/experiences identified.
- Waitaki's product mix is skewed heavily towards predominately free products, accounting for more than three-quarters (80%) of all experiences/products identified. These are largely walking and mountain biking trails, along with natural sites of significance and historic sites and attractions. Although free-entry products form an important part of a destination's product mix, it is important to ensure there is a balance: paid product generates far greater economic benefit which can assist in growing social licence for tourism.
- Aside from a small selection of products, there are limited all-weather experiences for visitors to undertake during times of inclement weather.
- There are two ski/snowboard areas, though, these are largely club/local facilities rather than international ski fields (when compared with this in Queenstown, for example).
- While there is an array of cultural, historic, trails and wildlife-viewing products, much of this appears to be self-guided. Opportunities may exist to grow the number of guided operators to leverage public assets and create local employment.
- There appears to be a lack of product for those visitors with younger families. This could be a reason why Waitaki has a higher share of those aged 55+ visiting.
- Based on the tourism experiences and attractions on offer, the region could currently be characterised as largely a nature-based and heritage/cultural destination.
- Waitaki's attractions/experiences product received an overall NPS of +58, based on 17,731 reviews. This is a strong rating that should continue to be built on.
- The product category that receives the highest average NPS score is bicycle hire & repair services, with a very high NPS of +83 (based on 62 reviews). This is followed by gardens (+82) and ski resorts and hot tubs (+78).
- The category with the lowest NPS was natural sites and areas (+48), however, this is still an above-average score. This may reflect the lack of supporting infrastructure with these natural sites such as car parking, signage, etc.



<sup>6</sup> Airbnb properties are not included in the detailed audit because Airbnb do not allow their data to be scraped online and sell their data via data resellers. To include Airbnb data would require purchasing this data from Airbnb.

Figure 5: Waitaki's accommodation offer (a summary)

## WAITAKI'S TOURISM OFFER:

### Accommodation

Waitaki has a wide range of accommodation, with more than **140** properties throughout the region.

There are an additional **200+** properties listed on Airbnb which are not covered in this audit.

Waitaki's accommodation mix receives an NPS\* of **+54** (based on 7,596 reviews of 98 properties).

\* (a measure of consumer sentiment)

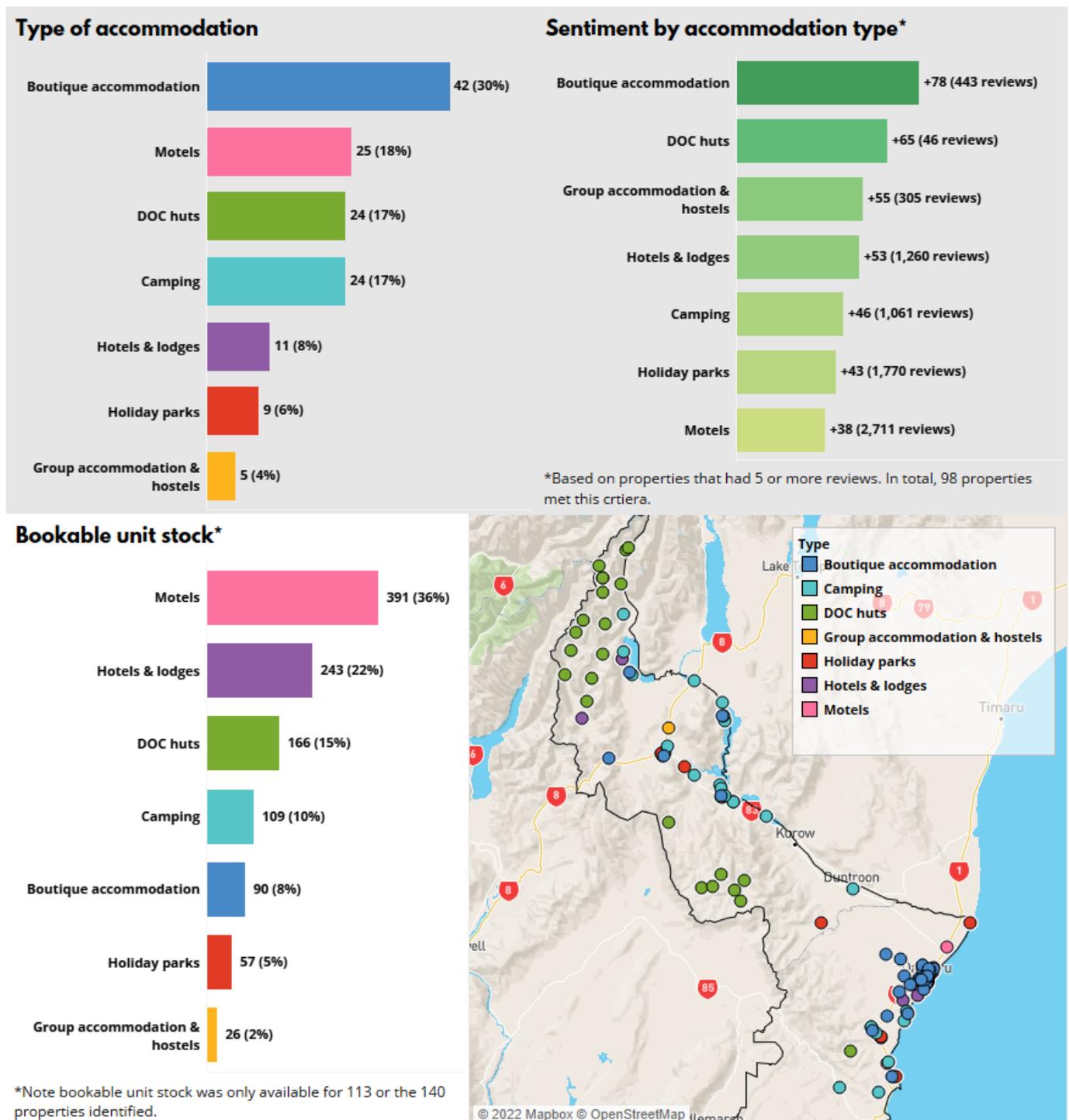


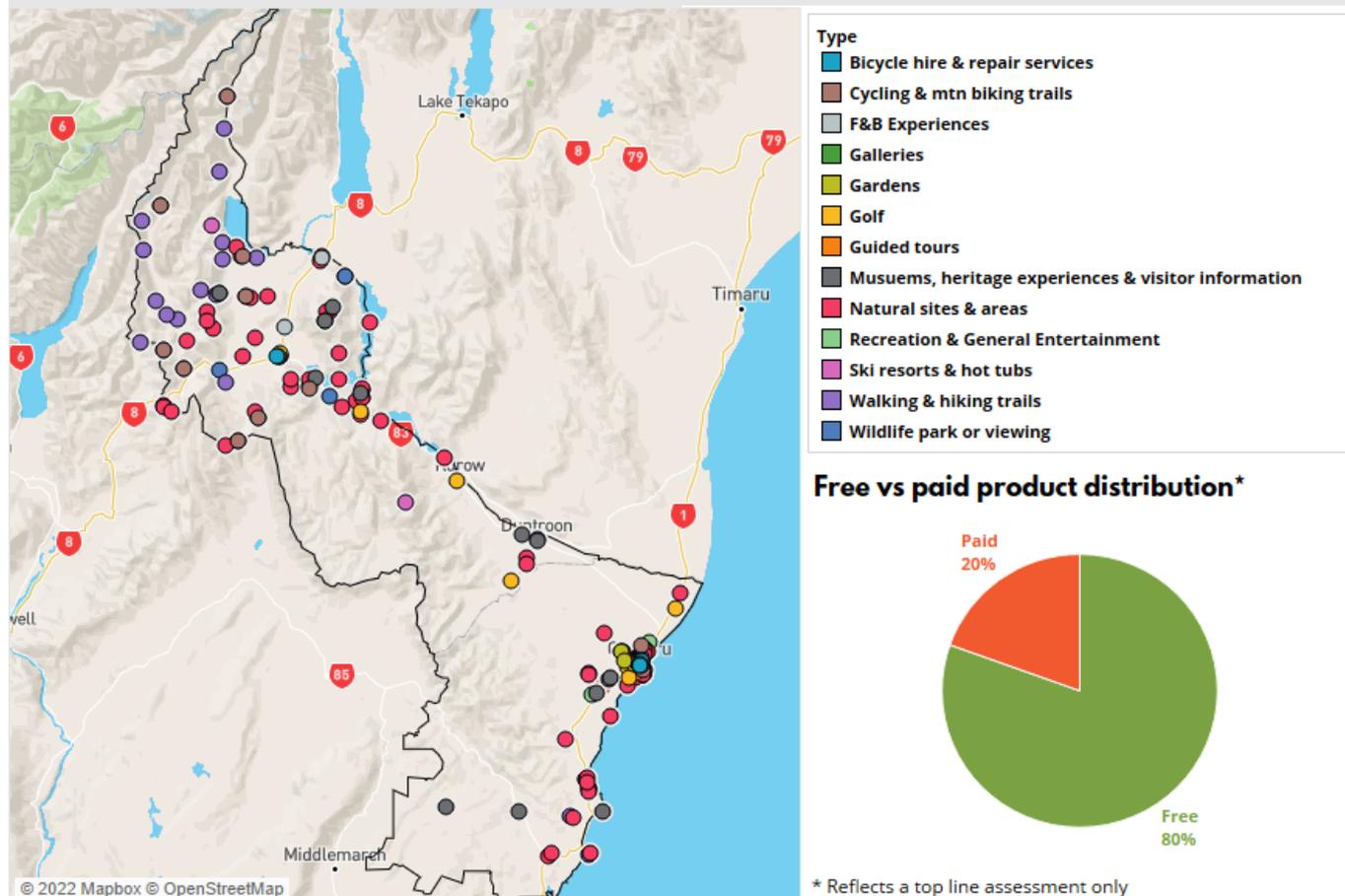
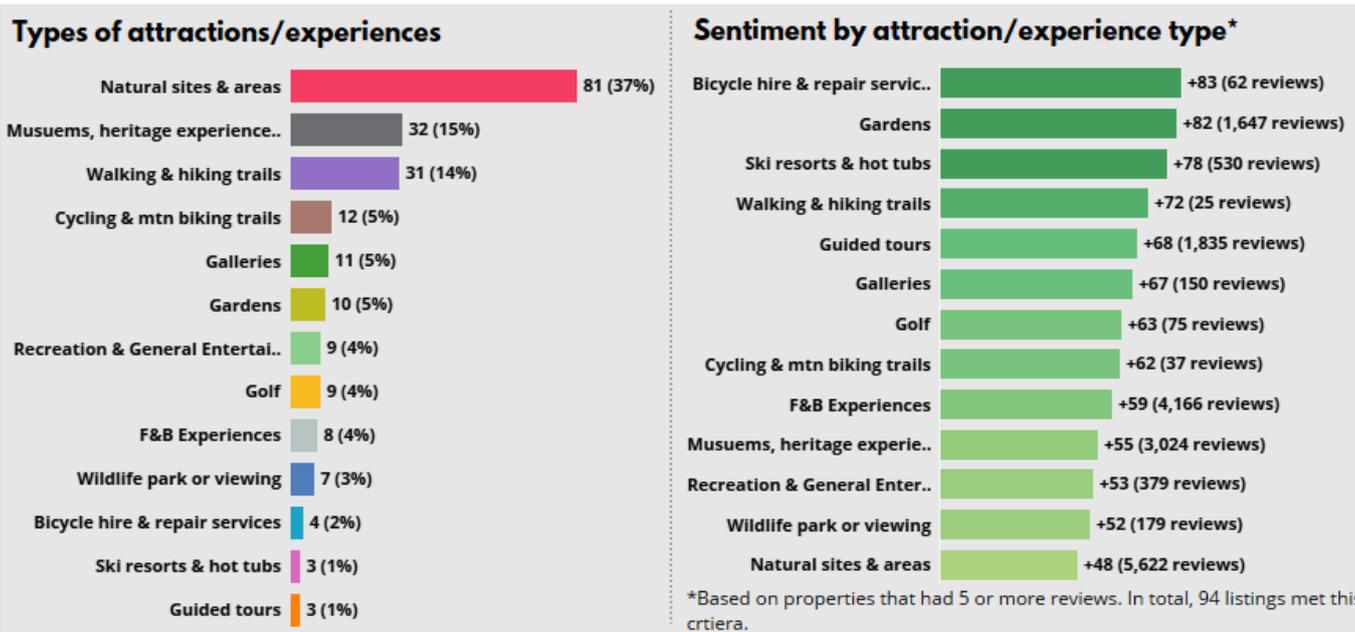
Figure 6: Waitaki's attractions/experiences offer (a summary)

# WAITAKI'S TOURISM OFFER:

## Attractions & Experiences

Waitaki has a diverse range of tourism product, with more than **220** attractions/experiences available.

Waitaki's product receives an NPS\* of **+58** (based on 17,731 reviews of 94 attractions/ experiences).  
\* (a measure of consumer sentiment)

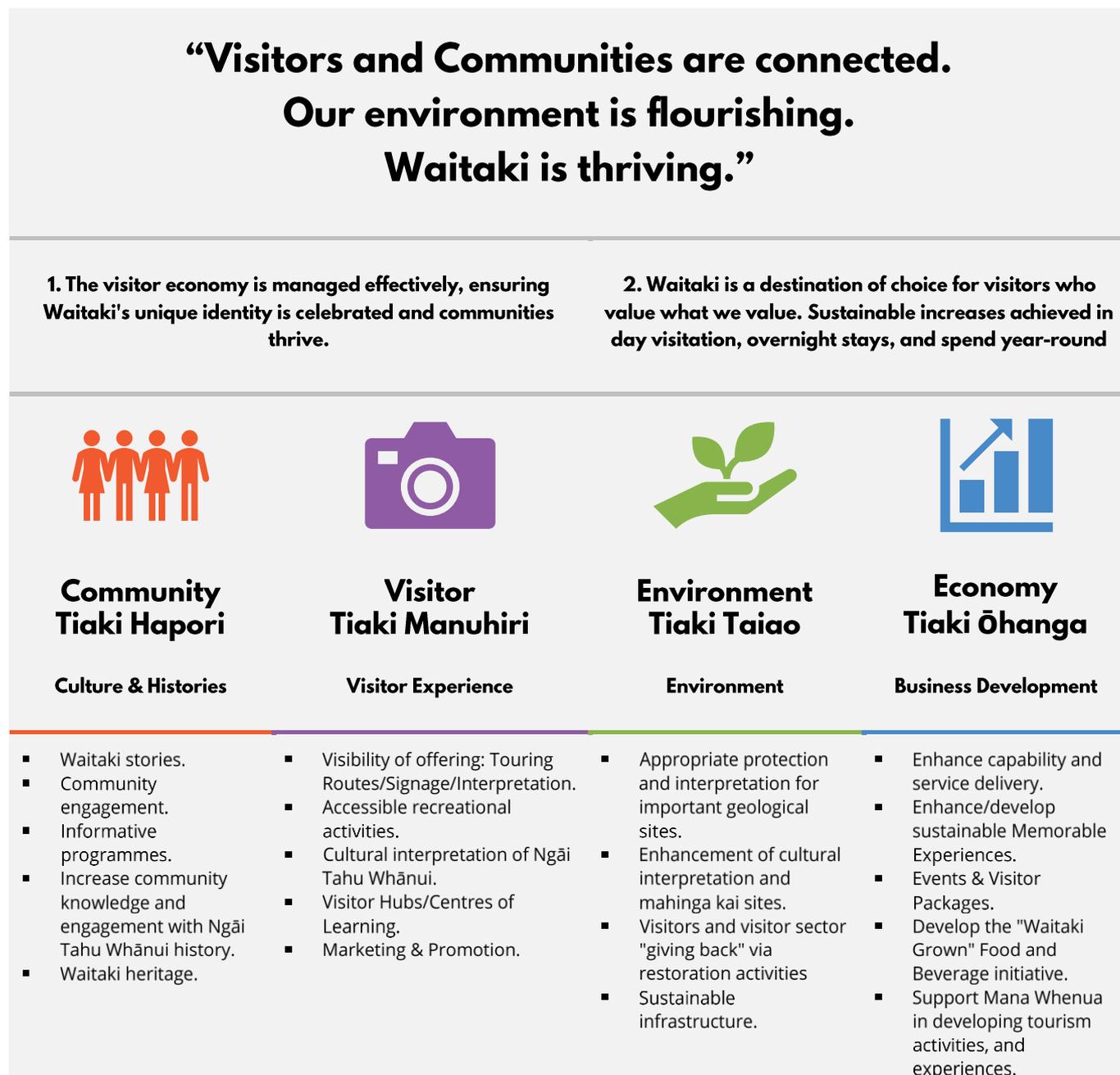


# PART 3: WHERE DO WE WANT TO BE?

### 3.1. Strategic Framework

The following outlines the strategic framework (that was identified as part of the DMS) and which has guided the development of this DMDP.

Figure 7: Strategic Framework



## 3.2. Waitaki Visitor Forecasts

### 3.2.1. Total Visitation

Figure 8 provides visitor projections for visitor trips to Waitaki over the period 2023 to 2032, followed by Figure 9 which provides forecasts by source market. The projections are based on three different low, medium, and high growth scenarios. It is important to note that the unstable environment that has resulted from COVID-19 and fluctuating conditions (including snap border closures and new variants of the virus strain) means that forecasting with a higher degree of accuracy (and through using historic trends) is problematic.

Traditionally, international visitation has comprised a relatively small proportion of total visitation for Waitaki, so the closure of borders has had less of an impact than for many other regions in New Zealand (such as Queenstown, Mackenzie, South Westland, Auckland, Christchurch). The projections, therefore, reflect the success of Waitaki in continuing to grow its domestic day and overnight markets out to 2032.

The data reflects the following.

- The low growth scenario reflects a more conservative recovery from COVID-19, with visitation anticipated to reach pre-COVID-

19 levels by 2027. This recovery is primarily driven by the domestic visitor market, with international visitation reaching pre-COVID-19 levels by 2029-2030.

- The medium growth scenario reflects a more likely recovery scenario. This scenario assumes the region benefits from several new tourism-related developments over the period out to 2032. Under this scenario, visitation is projected to reach pre-COVID-19 levels by approximately 2026. By 2032, visitation is forecast to reach 1.5 million visitors, an increase of just over 350,000 visitors from 2018. This scenario is dependent on a variety of new marketing, events and product development occurring.
- The high growth scenario sees a much stronger post-COVID-19 recovery. This scenario assumes most of the recommendations in this DMDP are adopted and implemented with far faster development timeframes. Under this scenario, visitation is forecast to reach 1.8 million visitors by 2032 – an increase of just over 600,000 visitors between 2018 and 2032 (importantly, most of this growth originates from the domestic visitor market). importantly, this high growth scenario is the only one where domestic overnight visitation eventually surpasses domestic day visitation.

Figure 8: Visitor projections

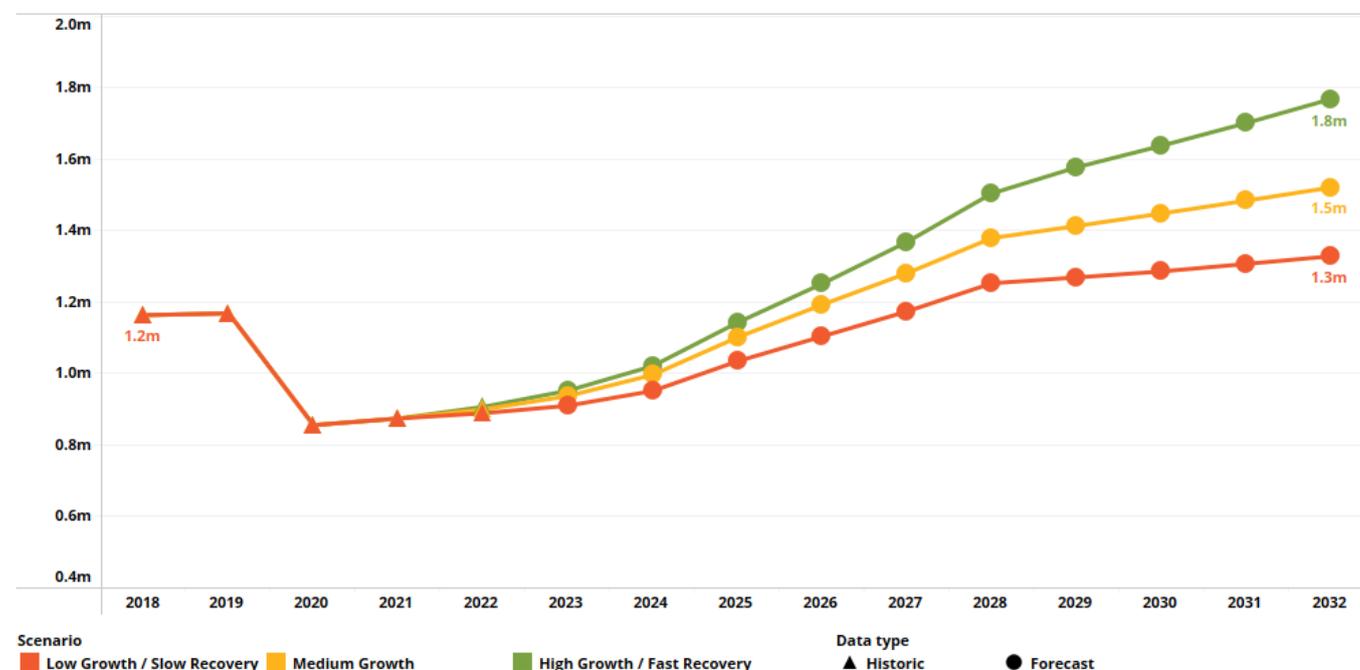
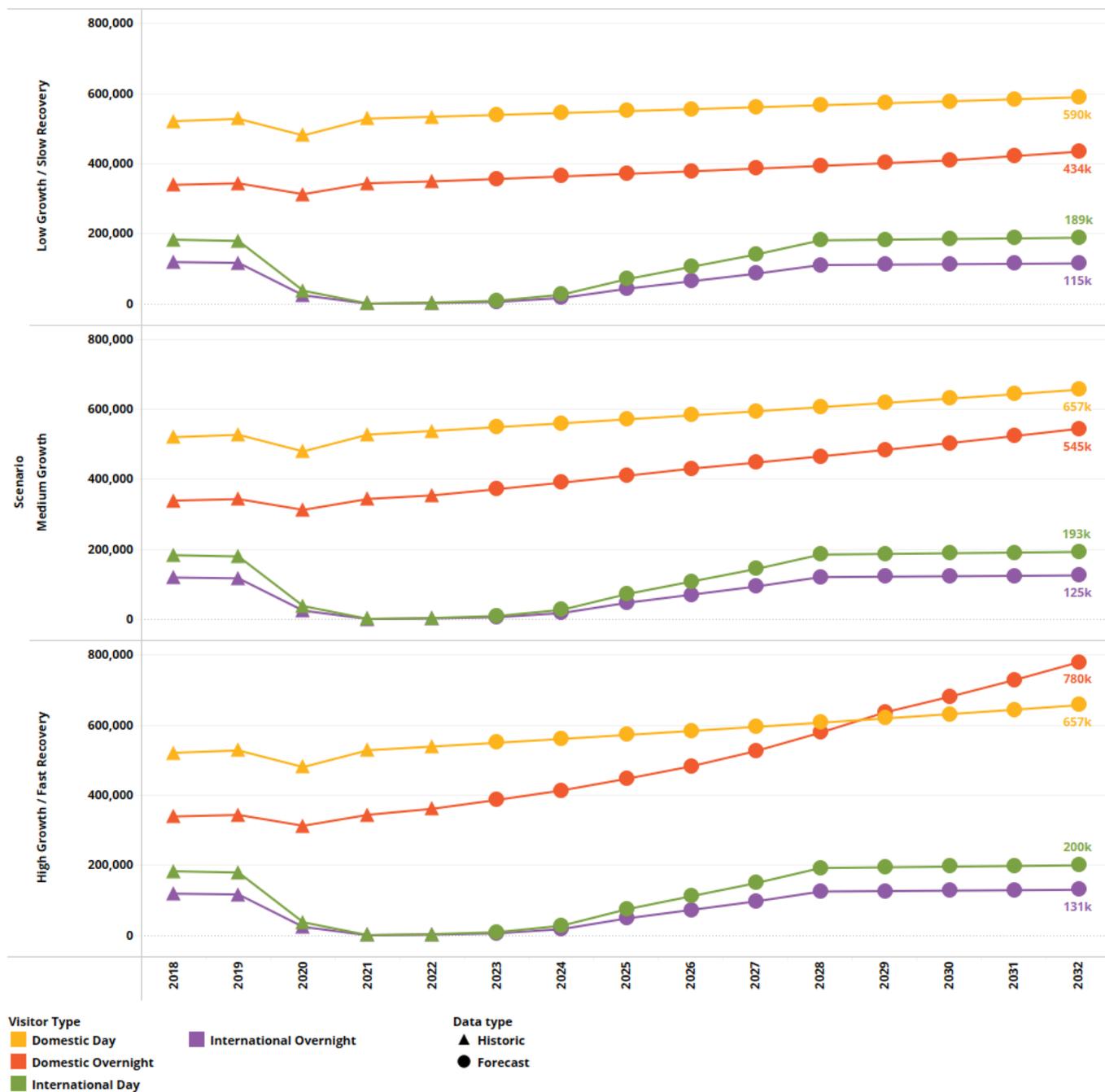


Figure 9: Visitor projections by source market



### 3.2.2. Domestic target markets

The vast majority of visitation to Waitaki is expected to remain a mix of domestic visitor markets coming for leisure, VFR, business, and other purposes. Growth in domestic visitation is expected to be strongly supported by new and enhanced visitor products and amenities which are required to continue to support the growth in the leisure sector specifically.

Business travel will grow in alignment with the potential increase in economic sectors associated with the strong agricultural sector, mining, fishing, and forestry. We do note, however, that some areas of business travel associated with conferences and meetings may continue to be impacted by working from home and advances in electronic communication trends which are now dominant due to COVID-related restrictions and which may have a hangover effect for some time.

Domestic leisure visitor growth is going to align with new products and experiences associated with:

- the growth of the A2O with extension products; or possible extension along a coastal route to Dunedin.
- new walking tracks and overnight experiences in and around the Lindis Pass area and environs;
- more agri-tourism development in and around Oamaru specifically along with various food trails out to producers;
- continued enhancements to the Blue Penguin colony to offer new experiences for a repeat visitor market especially;
- enhancements to Moeraki Boulders area;
- enhancements and development of the GeoPark throughout the region including it being certified as a UNESCO site; and
- other product experiences such as the suggested gold discovery centre which will stimulate more visitor demand.

The growth projections in Figure 9 also reflect if, and when, new products may be introduced, with the high growth forecast reflecting all of the projects being introduced and the low growth forecast reflecting far fewer new products being introduced.

Competition from other regions throughout New Zealand to entice more domestic travellers to come and visit and to try and retain existing market share will be intense going forward. There is also the added challenge of far stronger outbound destination marketing and competition from traditional visitor markets to New Zealanders including Australia, Thailand, Singapore etc.

Domestic target markets will need to include:

- those interested in coming for gastronomy experiences offered throughout the region but specifically to enjoy some of the top restaurants and food experiences in Oamaru which can include domestic visitor markets in both city and rural locations throughout the South Island especially
- a domestic market out of key generating markets from Wellington, Auckland and other major urban North Island

centres who are more likely to prefer to fly into Dunedin or Queenstown and to tag a visit to Oamaru on with a 3–7-day break to include food experiences and various ½ day and day walks and cycle experiences throughout various regions

- a strong domestic market coming to ride the A2O along with wanting to do some of the value-added products or trails which are suggested in this DMDP which can increase the length of visitor stay.
- The traditional caravan and camping market who visit in large numbers over the summer periods and enjoy key locations including the hydro lakes through the Waitaki Valley amongst others
- A domestic events market coming from key locations such as throughout the region as well as including visitation from Christchurch, Dunedin, Queenstown Lakes District and Southland, Timaru and potentially further afield if it is well packaged and accessibility (flights) is strengthened via Dunedin, Timaru especially.
- A domestic market coming for sports competitions and related tournaments etc.
- And a cultural and historic interest market sector who will gravitate to sites including the Oamaru historic precinct (and associated festivals and attractions such as Steampunk), GeoPark sites of significance, the suggested Janet Frame writer of residence project (including literary events and forums etc) and those who will come for mana whenua experiences able to be offered including visiting sites and undertaking guided tours where possible. Depending on the quality of cultural product experiences able to be offered, these could generate market interest from throughout the country.



### 3.2.3. International Target Markets

Waitaki needs to continue to build on the profile and demand for quality cycling and walking experiences that New Zealand has generated with products including the A2O especially. A stunning natural environment coupled with well-marketed and developed outdoor products will continue to grow a visitor market from the following:

- An Australian market wanting to come for A2O cycle experiences and with a strong aligned interest in agri-tourism.
- A short break Australian market who will look to fly into Queenstown and Christchurch, and drive to Waitaki with options of including potential circuits into the Mackenzie /Waitaki region.
- An Australian market wanting to discover new areas of New Zealand off the traditional list of Queenstown Lakes and Fiordland, Christchurch, Rotorua, Auckland, and Bay of Islands for which Waitaki is able to offer attractive alternatives
- A smaller number of international visitors from various Southeast Asian markets, the UK, and select countries in

Europe and North America also wanting to experience the product offering of the Waitaki

- We also see a student and family market out of Dunedin and Christchurch with international visitors and students coming to visit the Waitaki for short breaks.
- The South Island DMP undertaken in 2018-19 showed that most visitors don't undertake major drive circuits anymore but rather, stay in more defined regional areas. The Waitaki has the potential to link with key access hubs such as Queenstown, Christchurch, and Dunedin to encourage those international markets who will come to explore the regions of Central Otago, Queenstown Lakes, the Mackenzie and Waitaki as a well-defined region offering cycle trails, great walks, stunning scenery, food tourism and heritage - cultural experiences etc. This will require a strong twinning arrangement by Waitaki with surrounding regions which can add value to the Waitaki tourism proposition.
- Among these options is a growing interest in 'active recreation/ active mobilities' as ways of increasing length of stay and dispersal.



### 3.3. Project Recommendations

#### 3.3.1. Introduction

A variety of recommendations have been identified through this DMDP process. In total, **25** recommendations have been identified. They are tourism-focused and align with the Strategic Framework identified in Section 3.1.

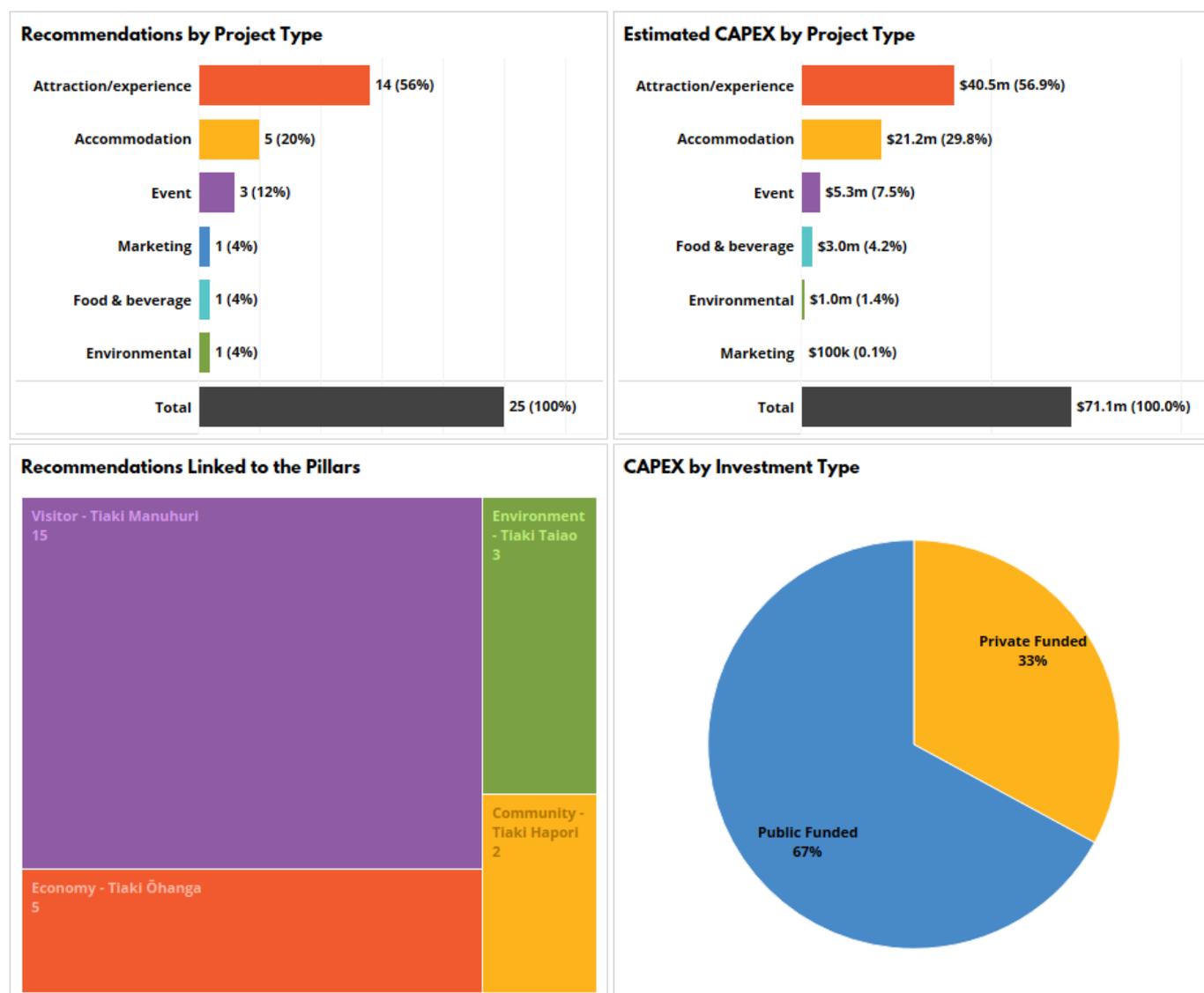
Many of the recommendations are supply-led and are aimed at introducing more commissionable products and private investment into the region’s tourism offering. Figure 10 provides a summary of all the recommendations identified, followed by Figure 11 which provides a spatial map of the recommendations.

Together, they demonstrate that:

- 56% of the projects identified are attraction/experiences;

- accommodation projects, however, require the largest share of capital investment, totalling over half (57%) of the investment identified (\$40.5 million);
- a total of \$71 million is estimated to be required to activate all the project recommendations identified (based on a top-line assessment only and subject to feasibility studies);
- 15 of the recommendations align with the Visitor - Tiaki Manuhiri pillar;
- one-third of the CAPEX required is attributed to capital funding coming from private sector sources; and
- the recommendations are distributed across the Waitaki region, with larger clusters being at Oamaru and Moeraki, and to a lesser extent around the various hydro lakes throughout the Waitaki Valley and in smaller towns such as Palmerston.

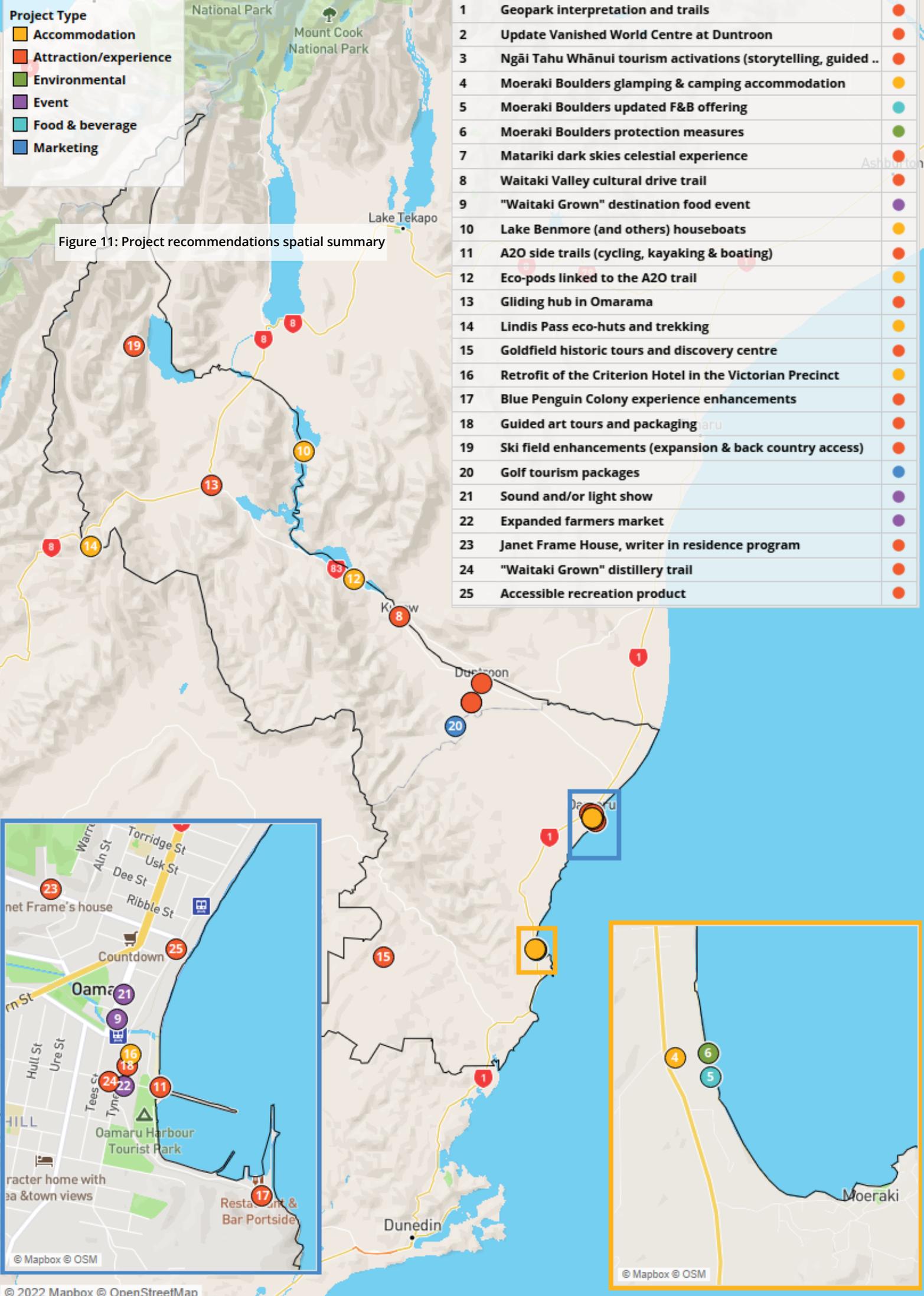
Figure 10: Project recommendations summary



- Project Type**
- Accommodation
  - Attraction/experience
  - Environmental
  - Event
  - Food & beverage
  - Marketing

1	Geopark interpretation and trails	<span style="color: red;">●</span>
2	Update Vanished World Centre at Duntroon	<span style="color: red;">●</span>
3	Ngāi Tahu Whānui tourism activations (storytelling, guided ..	<span style="color: red;">●</span>
4	Moeraki Boulders glamping & camping accommodation	<span style="color: yellow;">●</span>
5	Moeraki Boulders updated F&B offering	<span style="color: cyan;">●</span>
6	Moeraki Boulders protection measures	<span style="color: green;">●</span>
7	Matariki dark skies celestial experience	<span style="color: red;">●</span>
8	Waitaki Valley cultural drive trail	<span style="color: red;">●</span>
9	"Waitaki Grown" destination food event	<span style="color: purple;">●</span>
10	Lake Benmore (and others) houseboats	<span style="color: yellow;">●</span>
11	A2O side trails (cycling, kayaking & boating)	<span style="color: red;">●</span>
12	Eco-pods linked to the A2O trail	<span style="color: yellow;">●</span>
13	Gliding hub in Omarama	<span style="color: red;">●</span>
14	Lindis Pass eco-huts and trekking	<span style="color: yellow;">●</span>
15	Goldfield historic tours and discovery centre	<span style="color: red;">●</span>
16	Retrofit of the Criterion Hotel in the Victorian Precinct	<span style="color: yellow;">●</span>
17	Blue Penguin Colony experience enhancements	<span style="color: red;">●</span>
18	Guided art tours and packaging	<span style="color: red;">●</span>
19	Ski field enhancements (expansion & back country access)	<span style="color: red;">●</span>
20	Golf tourism packages	<span style="color: blue;">●</span>
21	Sound and/or light show	<span style="color: purple;">●</span>
22	Expanded farmers market	<span style="color: purple;">●</span>
23	Janet Frame House, writer in residence program	<span style="color: red;">●</span>
24	"Waitaki Grown" distillery trail	<span style="color: red;">●</span>
25	Accessible recreation product	<span style="color: red;">●</span>

Figure 11: Project recommendations spatial summary



### 3.3.2. The projects explained

Table 1 explains each of the project recommendations.

Table 1: The projects explained

Name	Description
Geopark interpretation and trails	It is understood that the Geopark management team are currently proceeding with an upgrade of signboards on the Vanishing World Trail. A consistent approach should be applied across all geo sites in the region to ensure standardised products and signage are offered. There is a need to investigate further which suggested routes could be improved and where bookable/guided products could be offered.
Update Vanished World Centre at Duntroon	Seek funding to undertake an upgrade to the Duntroon Vanished World Visitor Centre to include a refreshed appearance with interactive displays and a quality audio-visual experience that promotes the various geopark sites (as well as those around the world – noting that UNESCO Global Geopark assessors are likely to request more detailed earth science displays and details about other Global Geoparks in the world). In conjunction with the Geopark Trust, Vanished World could act as the commercial centre for the Geopark moving it closer to a sustainable financial operating model.
Ngāi Tahu Whānui tourism activations (storytelling, guided tours)	Storytelling and guided interpretation of Māori sites of significance such as Moeraki Boulders and the Rock Art site. There is a need to ensure that mana whenua is describing what stories need to be told. There is a need for a close partnership between mana whenua, DOC and the Geopark Trust. UNESCO like to see both the indigenous/matauranga and the western scientific story told at such sites.
Moeraki Boulders glamping & camping accommodation	Enhancements of the Moeraki Boulders to include small-scale accommodation possibly including a camping ground and glamping pods (20 powered sites and 10 all-weather glamping pods).
Moeraki Boulders updated F&B offering	Moeraki Boulders currently has an F&B outlet but the potential exists to elevate this experience to provide a rejuvenated experience which may assist in growing visitor dwell time and yield. The investigation would need to take place into whether a new building is required (it is noted that the building is very close to the cliff edge so it could potentially be undermined by erosion). The facility could also include an integrated interpretative experience, telling the indigenous and scientific interpretations of the site.
Moeraki Boulders protection measures	Moeraki Boulders is an extremely significant site from a cultural and geological perspective. There is a need to ensure that site protection measures are introduced to protect the boulders and circumvent people from walking over the boulders. This could include signage, soft pathways, and better wayfinding. This would likely require a joint response by Council, DOC, Geopark Trust and mana whenua.
Matariki dark skies celestial experience	The opportunity exists to develop a Matariki dark skies celestial experience at the Elephant Rocks site. This could include a viewing area and astrological interpretive experience and under a covered area. To provide a year-round experience (which can take place during cloudy evenings), the rocks could be illuminated.
Waitaki Valley cultural drive trail	Investigate the introduction of a drive trail up through the Waitaki Valley from Oamaru to Omarama (or further into the Mackenzie Basin). This trail would target free independent travellers and potential special interest groups and could include interpretation of mana whenua food journeys to access waterways for eels etc., for stronger interpretation of Māori rock art sites to visit etc.
Lake Benmore (and others) houseboats	To activate the region's waterways, investigate the introduction of electric/solar houseboats on Lake Benmore and other lakes. These could be offered as a linked experience to the A20.
Cycling extensions: A20 side trails (cycling, kayaking & boating) and Coastal trail expansion	Continue upgrading the A20 introduce new side activities (including cycling, kayaking, 4WD, farm tours, wind surfing, and boating), and separately, examine the development of a coastal route to Dunedin. These offer opportunities for an extended length of stay and new product options (e.g., luxury lodges). This would need to include the development of the trails along with supporting infrastructure such as equipment hire. The goal is to attract new and repeat overnight visitors and to offer more value-added experiences

Name	Description
Eco-pods linked to the A2O trail	To grow overnight stays in Waitaki for A2O users, the potential may exist to encourage the development of small-scale eco-pods which could potentially be the overnight hubs for the new side trails. A “template model” for the eco-pods could be developed that applies green building technology and which helps create economies of scale for the various landowners who may be keen to offer these.
Gliding hub in Omarama	Investigate positioning Omarama as a hub for gliding. This could include an increased airfield presence for more glider training, events, and competitions. It is noted that this activity used to take place before the CAA changed the rules for commercial gliding which made it unviable. An investigation would need to take place to see whether this is still the case.
Lindis Pass eco-huts and trekking	Assess the development potential for several huts (possibly three) to position Lindis Pass as a trekking hub. Investigate the potential to introduce more ½ and 1–2-day trails for walking and or cycling. Landowners and DOC would need to be approached regarding hut development.
Goldfield historic tours and discovery centre	Palmerston offers a small set of regional opportunities that could be initiated around two or three projects: low-cost camping, walks and exploration of Māori settlement (a site at the mouth of the Shag river has strong archaeological significance), and gold mining. As a start, the Macraes gold mine is still operating in the region, however, it is unable to be accessed by visitors because it is a commercial operation, however, the potential may exist to develop a gold mine interpretive experience in Palmerston utilising an existing heritage space.
Retrofit of the Criterion Hotel in the Victorian Precinct – a catalyst to Victorian Precinct revival	The Victorian Precinct as a visitor hub has great potential – and requires consistent activities to advance its activation, It is understood that the current operators are mid-way through installing a commercial kitchen at the Criterion Hotel. Further out, the potential may exist to work with the operators and the Whitestone Civic Trust (the owners of the building) to apply for funding support to retrofit the accommodation rooms. To maintain the area as a vibrant day and night-time precinct, having visitors and locals stay in the precinct (via serviced apartments and owner-occupied apartments needs to be investigated.
Expanded farmers' market and events	Support the expansion of the existing Oamaru Farmers' Market. This could include greater marketing and promotional initiatives along with supporting the market to include a wider regional focus and expanded operating hours. This could be taken further with a semi-permanent, all-weather market, possibly within the Victorian Precinct with support from existing well-established local food and beverage producers.
"Waitaki Grown" destination food event	Develop a major destination food event for Waitaki centred on seafood and quality meats. This could be held on a seasonal basis and feature produce available within that season, and add to the presence of the farmers market, There may also be the potential for this to include the best produce from surrounding regions as well so it has far greater regional and national cache as a major annual event.
"Waitaki Grown" distillery trail	Build on Waitaki's emerging distillery scene by supporting the development of a Waitaki Distillery Trail. This could include encouraging a further new boutique distillery (which produces different alcohol than what is currently offered – possibly something unique to Waitaki) and linking up the distilleries with guided tours. This could also include expansion to covering cider and craft beers if unique to the region. This could be a further night-time economy activation initiative.
Blue Penguin Colony experience enhancements	The Blue Penguin Colony is a major asset for the region but on-site enhancements, including a re-branding exercise and introducing virtual/digital value-added experiences, may assist in elevating the experience in an increasingly competitive space for a wider regional area.
Guided art tours and packaging	Oamaru has an abundance of art galleries and heritage/historical sites. The potential exists to encourage a private operator to offer paid guided tours that tell these stories.
Ski field enhancements (expansion & backcountry access)	Look to enhance both Ohau and Awakino (Kurow) ski fields, including expanding terrain and introducing infrastructure to encourage cross-country skiing, backcountry skiing and snowshoeing into backcountry huts. Examine the possibility of summer activities such as mountain biking and hang-gliding
Golf tourism packages	There are nine golf courses in the region. The potential exists to package these up to offer short-break golf stays which include golf, accommodation, and F&B. These packages could also be offered with complementary experiences such as wine tours.

Name	Description
Sound and/or light show	Investigate the development of a sound and light show that leverages the Whitestone buildings and Victorian precinct buildings as the canvas to tell the story of when the town was a much larger prosperous port etc. This would assist in developing Oamaru's night-time economy and would need to involve the local bars, restaurants, and retail operators.
Janet Frame House, writer in residence program	Introduction of a writer in residence program at Janet Frame House. Discussions would need to be held with the Trust who looks after the house to gauge their interest. It is noted that Council also owns a house in the public gardens which could potentially be used to house an artist/writer.
Accessible recreation product	Accessible tourism is now recognised as an important component of the product mix to enable those with disabilities to also enjoy much of what Waitaki can offer via ramps for wheelchair access, guard rails-hand rails, accessible parks/playgrounds etc. Complete an investigation of where accessible tourism products could be introduced.

## 3.4. The Priority Project Recommendations

### 3.4.1. Methodology

To determine the refined list of project recommendations, each has been assessed against the weighted criteria outlined in Table 2. A weighted score has been used to reflect that some of the criteria have a stronger positive impact or a higher level of importance to each stakeholder than others. The strongest weighting has been given to regional dispersal and potential for mana whenua involvement, alongside financial ability to support implementation.

Where possible, the assessment has utilised quantitative data (particularly for those projects where feasibilities or business cases have been developed). In the absence of such assessments, however, a qualitative assessment has been undertaken based on local knowledge, stakeholder consultation, professional experience, and a general assessment of the perceived benefits. All projects will need to have feasibility studies and business cases to ensure they are viable and able to deliver desired outcomes.

Table 2: Opportunity ranking criteria

Criteria	Score	Weighting	Description
Encourage mana whenua involvement in the visitor economy	Yes = 1 No = 0	7	Projects that actively encourage mana whenua involvement in the visitor economy and/or which grow mana whenua ventures are ranked higher.
Regional dispersal of visitors	None = 0 Limited = 1 Medium = 2 Strong = 3	7	If a project is able to encourage stronger visitor dispersal throughout the region, it is ranked higher.
Short term to activate	Yes = 1 No = 0	7	If the project is likely to be able to be activated in a shorter period, it is ranked higher.
Size of private investment	<\$100,000 = 1 <\$500,000 = 2 <\$1,000,000 = 3 >\$1,000,000 = 4	7	Projects which are more likely to attract private sector investment (regardless of the value of this investment) are ranked higher.
Ability to encourage stronger domestic visitation	None = 0 Limited = 1 Medium = 2 Strong = 3	6	Those which are likely to encourage stronger domestic (rather than local) visitation are ranked higher.
Ability to help address climate change impacts	None = 0 Limited = 1 Medium = 2 Strong = 3	6	Projects that may assist in helping to mitigate climate change impacts are ranked higher.
Ability to improve the environment	None = 0 Limited = 1 Medium = 2 Strong = 3	6	Projects that comprise environmental initiatives are ranked higher.
Ability to secure govt. funding for project	None = 0 Limited = 1 Medium = 2 Strong = 3	6	Those projects which may be more likely to be able to secure government funding (capex or opex) are ranked higher.
Uniqueness of product	None = 0 Limited = 1 Medium = 2 Strong = 3	6	The uniqueness of the product is ranked according to whether it is unique across NZ (ranked higher), across the region, or whether the product is likely to be unique only to the specific area it is situated in (ranked lower).
Ability to act as a catalyst project to stimulate other investment projects	None = 0 Limited = 1 Medium = 2 Strong = 3	5	Projects that are more likely to encourage additional or complementary investment into other projects are rated higher.
Ability to attract a higher spending visitor market	None = 0 Limited = 1 Medium = 2 Strong = 3	5	Those which are likely to be drivers for encouraging visitation by those markets which typically spend more are ranked higher.

Criteria	Score	Weighting	Description
Likely to avoid reducing community social licence	None = 0 Limited = 1 Medium = 2 Strong = 3	5	Those projects that may potentially grow and/or not impact the community's social licence for tourism are ranked higher.
Employment (operational) potential	None = 0 Limited = 1 Medium = 2 Strong = 3	4	Projects which are likely to generate greater employment opportunities once operational are ranked higher.
Likely to be supported by community	None = 0 Limited = 1 Medium = 2 Strong = 3	4	Those projects that may be supported (either through visitation or general support) by the local community are ranked higher.
Likely visitor appeal	None = 0 Limited = 1 Medium = 2 Strong = 3	4	The projects which are likely to have a stronger appeal to the visitor market are ranked higher than those which may generate lower visitor interest.
Size of public investment	<\$100,000 = 4 <\$500,000 = 3 <\$1,000,000 = 2 >\$1,000,000 = 1	2	Projects which have a stronger public sector investment requirement are ranked lower.
Ability to encourage stronger international visitation	None = 0 Limited = 1 Medium = 2 Strong = 3	1	Those which are likely to encourage stronger international visitation and profile are ranked higher.
Landowner	DOC = 0 Mana whenua = 1 Council = 2 Other Govt. Agency = 2 Private = 3	1	Projects which are situated on private land are ranked higher because there are likely to be fewer constraints.
Likelihood to be profiled by Tourism NZ	None = 0 Limited = 1 Medium = 2 Strong = 3	1	The ability of the project to grow the region's destination profile. Projects which may have stronger marketing budgets (particularly those run by larger tourism players), as well as highly unique products, are ranked higher.
Requirement for ongoing operational govt. funding	None = 4 Limited = 3 Medium = 2 Strong = 1	1	If the project is likely to require ongoing government contributions to fund operating costs, it is ranked lower. If the project is likely to be commercially viable/sustainable, it is ranked higher.

### 3.4.2. The Top 12 Projects

Figure 12 summarises the top 12 projects identified which achieved a top 12 score based on the ranking matrix. These projects, by virtue of their higher ranking, offer a starting point for activation of this DMDP as it is impractical to try and activate too many projects at the same time. The top 12 projects offer great diversity in their scale, type of development and their timeframe for activation.

Table 3 which follows provides the full ranking of the projects based on the total weighted score. The full ranking matrices are included in Appendix 3.

Figure 12: The Top 12 Projects

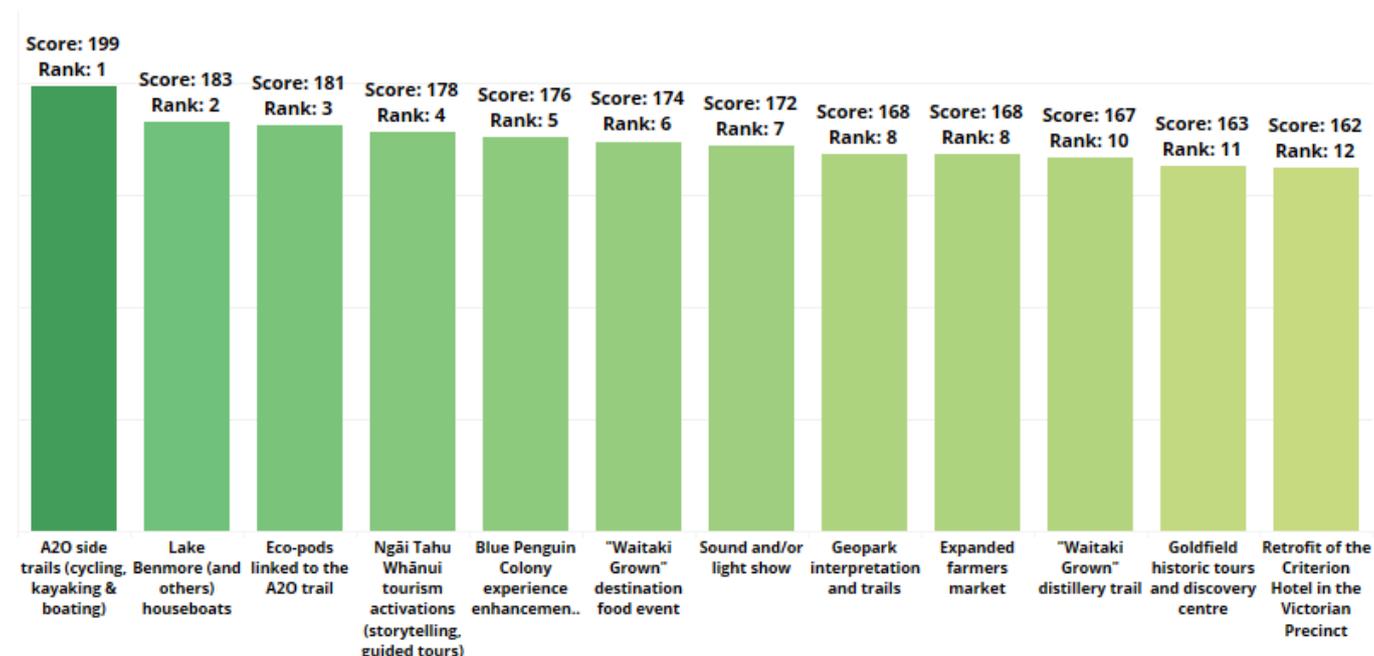


Table 3: All projects ranked

Rank	Name	Project Type	Pillar Alignment	Score
1	A2O side trails (cycling, kayaking & boating)	Attraction/experience	Visitor - Tiaki Manuhuri	199
2	Lake Benmore (and others) houseboats	Accommodation	Visitor - Tiaki Manuhuri	183
3	Eco-pods linked to the A2O trail	Accommodation	Visitor - Tiaki Manuhuri	181
4	Ngāi Tahu Whānui tourism activations (storytelling, guided tours)	Attraction/experience	Community - Tiaki Hapori	178
5	Blue Penguin Colony experience enhancements	Attraction/experience	Environment - Tiaki Taiao	176
6	"Waitaki Grown" destination food event	Event	Economy - Tiaki Ōhanga	174
7	Sound and/or light show	Event	Visitor - Tiaki Manuhuri	172
8	Geopark interpretation and trails	Attraction/experience	Environment - Tiaki Taiao	168
8	Expanded farmers market	Event	Economy - Tiaki Ōhanga	168
10	"Waitaki Grown" distillery trail	Attraction/experience	Economy - Tiaki Ōhanga	167
11	Goldfield historic tours and discovery centre	Attraction/experience	Community - Tiaki Hapori	163
12	Retrofit of the Criterion Hotel in the Victorian Precinct	Accommodation	Visitor - Tiaki Manuhuri	162
13	Moeraki Boulders protection measures	Environmental	Environment - Tiaki Taiao	157
14	Waitaki Valley cultural drive trail	Attraction/experience	Visitor - Tiaki Manuhuri	156
15	Moeraki Boulders glamping & camping accommodation	Accommodation	Visitor - Tiaki Manuhuri	154
16	Moeraki Boulders updated F&B offering	Food & beverage	Economy - Tiaki Ōhanga	147
17	Lindis Pass eco-huts and trekking	Accommodation	Visitor - Tiaki Manuhuri	145
18	Matariki dark skies celestial experience	Attraction/experience	Visitor - Tiaki Manuhuri	140
	Gliding hub in Oamaru	Attraction/experience	Visitor - Tiaki Manuhuri	140
20	Janet Frame House, writer in residence program	Attraction/experience	Visitor - Tiaki Manuhuri	132
21	Update Vanished World Centre at Duntroon	Attraction/experience	Visitor - Tiaki Manuhuri	131
	Ski field enhancements (expansion & back country access)	Attraction/experience	Visitor - Tiaki Manuhuri	131
23	Guided art tours and packaging	Attraction/experience	Visitor - Tiaki Manuhuri	130
24	Golf tourism packages	Marketing	Economy - Tiaki Ōhanga	126
	Accessible recreation product	Attraction/experience	Visitor - Tiaki Manuhuri	126

### 3.4.3. The Top 12 Projects Explained

#### 3.4.3.1. A2O side trails (cycling, kayaking & boating) and coastal trail expansion

Continue enhancing the A2O, introduce new side trail activities (including cycling, kayaking, 4WD, farm tours, wind surfing, and boating), and examine the development of a 126km coastal route to Dunedin. These offer opportunities off the A2O for an extended length of stay and more new product options (e.g., luxury lodges, more guided tour experiences and attractions). This may need to include the development of trails along with supporting infrastructure such as equipment hire, possibly jetties etc. The Alps 2 Ocean (A2O) is New Zealand's longest cycle trail already, which traverses west to east across the South Island. The trail takes approximately 5 to 7 days to complete and commences at the base of the Aoraki Mt Cook (or alternatively at Takapō), travels on to Twizel and the shoreline of Lake Ohau before down to Omarama and the Waitaki Valley. Oamaru is the last point on the trail and offers the ocean connection.

Potential exists to expand the cycling experiences by adding spur trails and /or a coastal trail to create different trail options and to encourage visitation into the wider region. As the A2O traverses along the side of the various hydro lakes through the Waitaki Valley, the potential needs to be explored to add kayaking options to get people across the lakes where appropriate and introducing boats-barges to get cyclists and their bikes safely across the various waterways.

The introduction of additional value adds will provide future enhancements to the A2O existing trail and offer a broader visitor base the opportunity for repeat visitation along with different time frames to experience more of what the Waitaki Valley has to offer.

The trail networks throughout New Zealand are far more numerous now and having clear points of difference and unique value adds will help the A2O to maintain its competitiveness.

#### 3.4.3.2. Lake Benmore (and others) electric houseboats

Waitaki offers several high-quality waterways, including Lake Benmore and the other hydro lakes which run through the Waitaki Valley. These waterways are underutilised as tourism assets and have the potential to play a far greater role in encouraging visitation to the region across different seasons of the year and will support growing the visitor economy on a sustainable basis.

The introduction of electric houseboats may provide the region with a new attraction experience and unique accommodation typology while complementing the region's high-quality natural environment. Electric houseboats offer an alternative to fuel-powered boats and are far quieter, more efficient and far more environmentally friendly.

Lake Benmore would appear to be well suited to this type of boating activity as well as additional active recreations such as wind surfing and potentially paddle boarding etc. Further research would need to be undertaken with relevant government agencies and the major power generating companies to scope these out further. We note, however, that houseboats already exist on Lake Benmore and other lakes so there is a precedent in place; it is the chance for expanding the product and making it a stronger attractive accommodation option.

Figure 13: Electric & solar houseboat precedents



### 3.4.3.3. Eco-pods linked to the A2O trail

The A2O trail is a major asset for Waitaki. To continue to reap the benefits of this infrastructure, there is a need to find ways to encourage trail users to spend more time in Waitaki when completing the trail (or pre/post the trail). To encourage this, there is a need to grow Waitaki's accommodation mix and to offer options closely aligned to the A2O trail.

focus on lower cost and sustainable green building technology. The concept could allow for individual property owners to establish a small cluster of eco-pods on-site as a low-impact sustainable solution to offering overnight accommodation options which can meet market demand, and which are likely to carry a lower commercial risk because of their lower capital development costs.

The potential may exist to work with a tertiary architectural school to develop the design as a best practice, green building pod template that could be piloted in the Waitaki. Options exist to work with design departments of universities in Dunedin and Christchurch for this.

Figure 14: Eco-pod precedents



### 3.4.3.4. Ngāi Tahu Whānui tourism activations (storytelling, guided tours)

There is a desire amongst various visitor markets, (including a growing segment of the domestic market), to engage in more authentic visitor experiences. These include interacting with different cultures and gaining far greater insight into stories and history.

Waitaki has several major Māori sites of significance, including the Moeraki Boulders and the Te Ana Ngāi Tahu Māori Rock Art sites which are important parts of the Waitaki Geopark. Currently, the predominant story being told is a scientific one, and to a lesser extent a cultural one. UNESCO has a strong preference for both cultural and scientific interpretations of sites being shared.

While there is visitor demand to explore these sites, the story needs to be carefully controlled, told, and interpreted by Ngāi Tahu. To continue to guide the authentic interpretation of these sites, there is a need for Ngāi Tahu Whānui, DOC and the Geopark Trust to continue to work closely together.

To raise the profile of many of these sites and to encourage a far wider understanding of their significance, especially to mana whenua, free access may need to be provided, except for guided tour options which should be actively promoted.

Offering a highly authentic and immersive experience through quality guided tours, is an important value add to promote. As a paid experience, it would need to offer several value-added benefits which would distinguish it from a free self-guided experience of many of the sites.

### 3.4.3.5. Blue Penguin Colony experience enhancements

The Oamaru Blue Penguin Colony is a major tourist attraction situated within Oamaru at the harbour and has been operating for many years. The attraction enables visitors to observe blue penguins in the wild. While the attraction is popular with visitors (receiving approximately 75,000 visitors per annum<sup>7</sup>), the opportunity exists to introduce enhancements to both the branding and the experience offered in an increasingly competitive sector.

While the penguins are the showcase and hero of the Blue Penguin Colony experience, many wildlife-based attractions are progressively introducing new technology to provide new ways for visitors to interact with and see wildlife.

Enhancements will help the attraction retain its position as a leading wildlife attraction in New Zealand and its ability to keep on generating strong visitation numbers.

<sup>7</sup> <https://www.yellow-eyedpenguin.org.nz/app/uploads/2021/06/YEPT-Hoiho-May-2021.pdf>

### 3.4.3.6. “Waitaki Grown” destination food event

To profile what Waitaki has to offer by way of produce (both grown and value-added), a nationally significant destination food event “Waitaki Grown” could be held. The destination food event would need to capture and profile something unique to Waitaki or for which Waitaki is well-known for (in a similar fashion to the way the Bluff Oyster & Food Festival profiles Bluff Oysters).

The region is already recognised for the quality cheeses it produces along with high-quality meat products and as a strong seafood industry. The quality of its produce is what has supported many of its leading restaurants such as Casa Nova, Cucina and previously Fleurs, amongst others).

What is proposed is the potential for both a national annual food event along with the possibility of creating a destination showcase centre that can profile the best of what the wider region has to offer. In turn, this could include a series of drive or cycle circuits to encourage visitors to venture throughout the region to meet growers and to see where and how top-quality produce etc is farmed, cultivated, packaged and value-added.

### 3.4.3.7. Sound and/or light show

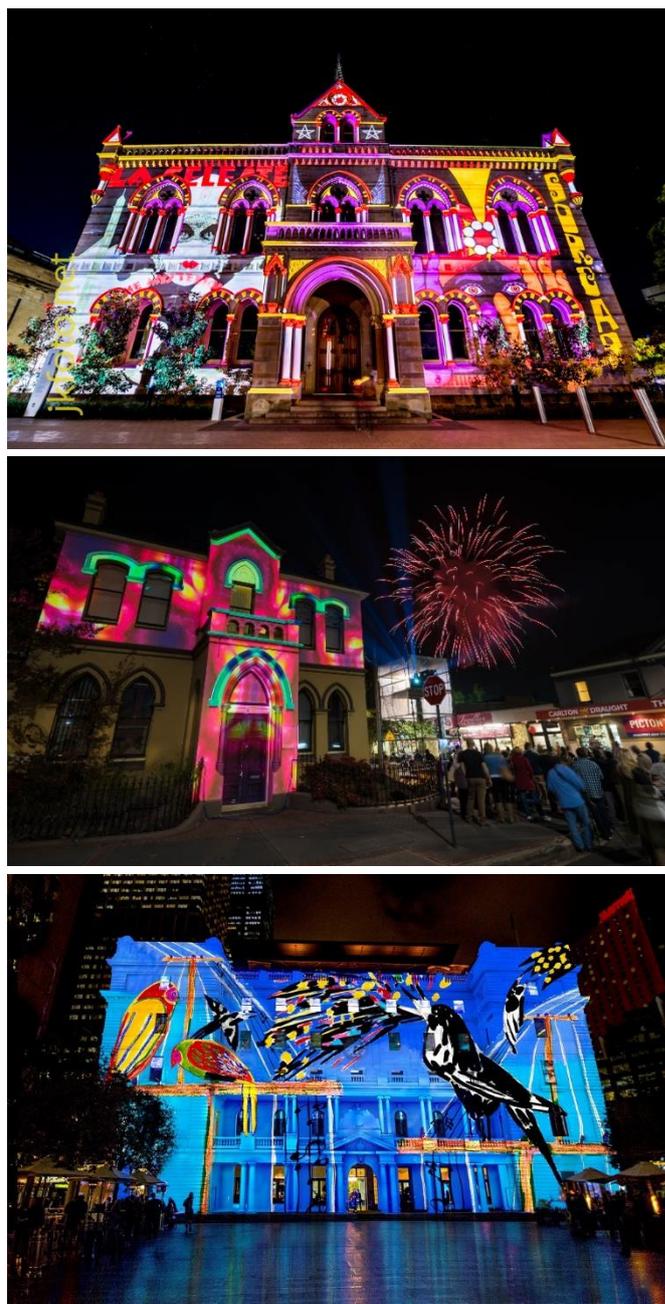
Oamaru is a highly attractive city and the CBD is fortunate to have a strong cluster of white stone heritage buildings. These heritage buildings provide a fantastic backdrop that could be leveraged to host a sound and light show. The sound and light show event, which would need to be held during the evening, may not only act as a drawcard to encourage stronger visitation, and grow the profile of the CBD but may also act as a catalyst for activating Oamaru’s night-time economy, particularly during summer months.

The success of major sound and light show events in Australia such as Vivid Sydney and the popularity of sound and light shows such as the Tower of David (Israel) and the Blood on the Southern Cross (Ballarat, Australia) illustrates that with the right product and technology mix, heritage stories can be brought alive and made more interesting. Smaller-scale light shows (without sound) have also been introduced successfully in towns such as Picton (Wollondilly Shire, NSW, Australia) to encourage night-time visitation and to support heritage and related events.

For Waitaki, there are a number of themes and stories which the sound and light show could focus on including arts, culture, the geopark, wildlife stories along with potential European history and mana whenua stories.

Importantly, these types of experiences can help stimulate visitors to get out during the evening; to walk, dine and experience the unique history of Waitaki.

Figure 15: Sound and light show precedents<sup>8</sup>



<sup>8</sup> Adelaide Fringe Festival (North Lights Terrace Show), IlluminARTE (Picton, NSW) and Vivid Sydney

### 3.4.3.8. Geopark interpretation and trails

The Waitaki Whitestone Geopark includes an abundance of unique geological and geomorphological features. Major features of the Geopark include the Moeraki Boulders, karst limestone at Elephant Rocks, as well as “Badlands” and faults at Clay Cliffs.

To enhance the Geopark experience and its profile and to leverage greater economic benefit, the potential may exist to consider the following.

- The Geopark experience is currently predominately self-guided. While self-guided experiences may suit some markets, there is likely a niche market that would readily participate in a guided experience to gain far greater insight into the significance of the various geosites and the Geopark as a whole.
- While some sites across the Geopark have signposts and/or explanatory panels, there is a need to ensure there is consistency across the whole park. It is understood that the Geopark management team is currently mid-way through a plan to refresh all signboards on the Vanished World Trail.

We also understand that the Geopark is to be independently assessed in 2022 to determine if it can be recognised as a World Heritage UNESCO site, and the first one in New Zealand. These criteria are rigorous and are expected by the governance group managing the Geopark to potentially require some site enhancements to enable the accreditation to be gained.

Figure 16: Waitaki Whitestone Geopark



### 3.4.3.9. Expanded Farmers Market

Waitaki already has a regular farmers' market though the opportunity exists to expand on this to make it into a best-of-region farmers market, encompassing significant quality produce (agricultural, aquaculture etc) from a number of surrounding regional areas.

Oamaru especially has several quality providers and food producers along with some top restaurant experiences. It, therefore, has the potential to grow a quality “paddock to plate” gastronomy experience and be recognised within the lower South Island as a hub for this.

The Oamaru Farmers' market currently open every Sunday has the potential for expansion. Many destinations have aspirations in agri-tourism but Waitaki has an early start. Alongside some well-known brands and outlets, it has a range of spaces available to support expansion, to an all-weather offering, and a more permanent set of vendor stalls. The availability of space in a recreational business precinct is a stumbling block in many places elsewhere.

Figure 17: Oamaru Farmers' Market



### 3.4.3.10. “Waitaki Grown” distillery trail

There are already several distillery operators operating in Oamaru. While some of these operators were temporarily closed due to COVID-19, as visitor numbers grow post-COVID, the opportunity is to link these into a cohesive distillery trail and the story-telling proposition that resonates with free and independent travellers and locals and which can be offered as part of a guided proposition. The potential may also exist to combine the trail with an artisan trail linking to artists and craftspeople as well.

To continue to support the growth of the trail, the opportunity may exist to encourage the development of new boutique distilleries in other parts of Waitaki, with a focus on distilling different varieties of alcohol. While other parts of New Zealand have claimed “wine” as their core product, no destination appears to have yet captured craft breweries and distillery products as their own.

### 3.4.3.11. Goldfield historic tours & discovery centre

The region has one of the few remaining major gold mining operations nationally being McCraes Gold Mine. Due to safety and health requirements, it is not possible to visit the mine. As the region has a rich mining history dating back to the gold rush days and export from the port of Oamaru, the potential may exist to create an interactive experience centre to explain the history of the gold fields and the significance to the wider region, to explain how the current gold mining operations are conducted, to offer further insight into gold production globally and the significance of the commercial operations within the region.

### 3.4.3.12. Retrofit of the Criterion Hotel in the Victorian Precinct to support the development of the Victorian Precinct

There is a need to continue to foster the development of new and enhanced tourism hubs and accommodation options in Waitaki.

It is understood that private developers (who currently operate another luxury B&B property in Oamaru) are mid-way through renovating the Criterion Hotel situated within Oamaru's Victorian Precinct. Currently, however, this renovation only covers the dining facility and the installation of a commercial kitchen. The upgrade of accommodation rooms is not yet included.

With the Criterion Hotel building being owned by the Whitestone Civic Trust, there is a need to work with the developers and the building owners to investigate funding sources that may encourage them to retrofit the accommodation rooms to include ensuite facilities.

Being located within the Oamaru historic Victorian Precinct is also an important consideration as encouraging accommodation (hotel or apartment units) within heritage buildings helps support the use of the precinct during the day and in the evening. This is important to support the precinct's commercial viability and use, as is the development of a more permanent home for the food market.

Figure 18: Criterion Hotel, Oamaru



## 3.5. Building-Block Initiatives (non-development projects to be considered)

### 3.5.1. Industry upskilling workshops (social media, digital literacy, IT, marketing, and finance up-skilling)

There is a need for those in the visitor sector (and those contemplating getting involved) to continue to upskill to understand and apply social media and digital programming requirements which offer a far more cost- and time-effective way to reach a wider range of visitor markets. There may be a need for Tourism Waitaki to take a role in facilitating training programs for all industry operators and other interested parties on how to move into the digital space and to potentially offer regular monitoring of industry players to ensure upskilling change is occurring.

### 3.5.2. Host community tourism awareness-raising campaign

Community input needs to be increased by clear and consistent lines of community input into destination development and elements of management particularly over publicly managed assets.

Elsewhere, although parts of the host community understand and accept the importance of the visitor economy for the district, there are parts of the community that are not as supportive. Tourism can generate many part-time and full-time jobs for residents and is a solid contributor to economic output and GDP. There is benefit in, therefore, creating a broad-reaching visitor economy awareness campaign, that informs the local community, in an easy-to-understand way, why tourism is very useful as a sector through its ability to spread the economic benefits from it quite widely. This is particularly the case where industries such as logging and resource extraction/mining, for example, are viewed as sunset industries and where a more diversified economy is seen as beneficial.

### 3.5.3. New forms of visitor servicing

The visitor servicing landscape continues to shift dramatically. It is noted that the i-SITE network is currently looking at the best ways to offer visitor information to support industry needs and noting changing consumer trends.

The opportunity may exist for Waitaki to investigate integrating new forms of visitor information provision, including (but not limited to): engaging locals as roaming ambassadors, digital unmanned information centres, pop-up information vans and information containers, just to name a few. Visit Scotland is one of the leaders in information servicing and has adopted many of these forms of information provision and applied them throughout the country including mobile visitor van facilities to enable these to be parked at event venues so information is taken to where visitors are

gathered. Importantly, with limited mobile phone coverage, one cannot leave solutions to online only.

Various opportunities need to be investigated including digital-electronic information kiosks around the district – possibly including Omarama, Kurow, Duntroon, Oamaru, and Palmerston. Such facilities would need to ideally be sited close to power sources and car parking areas. The advantage with digital electronic kiosks is they aren't manned so don't need to open at 9 am and close at 4 pm, so travellers can access visitor information 24/7. This is important to assist all of the region-wide growth potential in mountain biking and trekking along with other pursuits where visitor information is required.

### **3.5.4. Product packaging**

There is limited bookable product packaging available on destination-based websites for Waitaki. The region does have a number of products that could be packaged together to create attractive short break packages including various components to enhance the visitor experience. There is a need, however, to make sure visitors can book these, rather than merely providing suggested itineraries. The bookable packages could include

accommodation, transport, guided walks/cycling, food, beverage etc. Package deals offer the potential to focus on and target specific markets, particularly during shoulder and off-season periods<sup>9</sup> and to gain greater market exposure and sales<sup>10</sup>. To achieve this may require offering industry information programs to identify opportunities for packaging products of similar quality.

### **3.5.5. Ongoing distribution of tourism data**

As explained earlier, there is a dearth of reliable and accurate tourism data nationally. It is noted that a Tourism Data Co-governance Group has been appointed to create a more collaborative and fit-for-purpose tourism data system for New Zealand but the outcomes of this recent initiative may take some time to generate the quality of data needed to support sector planning and monitoring.

There is a need to ensure that Waitaki stays abreast of developments from this group. Once a robust dataset is available, which includes both domestic and international visitor data, the data should be disseminated on an ongoing basis to the industry free of charge to ensure that all interested parties are using the same data.

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<sup>9</sup> Packaging and Bundling, Tourism Council WA

<sup>10</sup> Product Review and Packaging, Tourism Australia



# PART 4: HOW WILL WE GET THERE?

## 4.1. Implementation Plan

Table 4 and Table 5 provide the action plan to assist in delivering the various priority projects identified in this DMDP. It highlights the:

- activations needed to implement the priority projects;
- key agencies who should collectively be engaged to drive public projects;
- an estimated time frame for effective activation noting that many may change over time as resources are revised and priorities potentially change;
- indicative budget required for feasibility studies, or strategies required to be undertaken; and
- key performance indicators to ensure actions are implemented.

The reason why all projects are not listed in the implementation plan is because it is our strong recommendation that focus be directed on the priority projects only, as getting these activated quickly is essential for obtaining community buy-in and industry support for the DMDP.

This implementation plan needs to be considered a working document and, as such, it needs to remain fluid to take account of the needs of different stakeholders and their ability to undertake actions along with their other responsibilities.

Several projects will necessitate feasibility studies and business cases to support funding especially and to assess the scale and capital investment requirements. This detail was outside of the scope of this DMDP exercise, which is focused on a pragmatic and strategic level.

Concerning the timeframes indicated in the implementation plan:

- Short term: reflects those that could be activated within the next two-three years (2023/24 -2024/25 financial years [FY]).
- Medium term: reflects those that could be activated within the five years from 2025/26 – 2029/30 FY.
- Long term: reflects those that could be activated in and beyond the 2030 FY.

Table 4: Implementation Plan – The Priority Projects

Recommendation	Action	Who	Budget est.	When	KPIs
A2O side trails & coastal trail expansion	<ul style="list-style-type: none"> <li>▪ Undertake an assessment of potential side trails that could be developed including cycling, kayaking, and boating trails and offer new product opportunities</li> <li>▪ Work with private operators to determine interest and needs (including infrastructure requirements)</li> <li>▪ Complete cost assessment for the development of side trails</li> </ul>	Waitaki District Council and industry operators	\$35k for side trail assessment  \$5m for infrastructure & development	Medium-long term	<ul style="list-style-type: none"> <li>▪ Potential side trails are identified</li> <li>▪ Cost assessment is undertaken</li> <li>▪ Private operators who may utilise the side trails are identified</li> <li>▪ Side trails are developed and utilisation of the A2O and side trails grows</li> <li>▪ Visitor dwell time and spending in Waitaki grows and economic uplift is quantified</li> </ul>
Blue Penguin Colony experience enhancements	<ul style="list-style-type: none"> <li>▪ Engage a brand specialist to assist in identifying branding enhancements that could elevate the profile of the facility</li> <li>▪ Continue to investigate possible online experiences that could be implemented to expand the experience</li> <li>▪ Undertake market demand assessment to demonstrate demand potential which can be used as part of funding applications</li> </ul>	Industry operator and Waitaki District Council	\$110k for brand enhancement \$2.5m for digital and AR and VR experience enhancements	Medium term	<ul style="list-style-type: none"> <li>▪ The brand specialist is engaged</li> <li>▪ Brand enhancements are identified</li> <li>▪ Brand redevelopment is funded and rolled out</li> <li>▪ Potential funding streams for experience enhancements are identified</li> <li>▪ Funding for experience enhancements is secured</li> <li>▪ Community and visitor access to the facility increases via online experiences and greater site visitation</li> </ul>

Recommendation	Action	Who	Budget est.	When	KPIs
Eco-pods linked to the A2O trail	<ul style="list-style-type: none"> <li>Undertake feasibility to assess the potential to introduce small-scale eco-accommodation pods linked to the A2O trail and the ideal location for these</li> <li>Commission design work to support sites</li> <li>Commission construction work</li> <li>Create a marketing program for the promotion of unique accommodation potentially over 5-6 locations.</li> </ul>	Waitaki District Council and landowners	\$2.4m (\$80k per pod x 30 pods)	Medium – long term	<ul style="list-style-type: none"> <li>The feasibility study is undertaken for eco-accommodation pods</li> <li>Eco-pods are constructed</li> <li>The utilisation of the A2O grows</li> <li>Visitor dwell time and spend in Waitaki grows</li> <li>Eco pod operators generate attractive returns on investment</li> <li>Stronger A2O marketing activity occurs and broader market reach</li> </ul>
Lake Benmore (and other lakes) electric houseboats	<ul style="list-style-type: none"> <li>Undertake a feasibility assessment to investigate the viability and demand for electric houseboats on Lake Benmore (or other lakes) in the Waitaki.</li> </ul>	Tourism Waitaki with industry operators	\$35k for feasibility assessment  \$8m for purchase of vessels and setup of operation	Medium term	<ul style="list-style-type: none"> <li>A feasibility assessment is undertaken.</li> <li>If proven feasible, the concept is promoted to developers and investors to garner interest.</li> <li>A series of houseboat experiences are offered on various lakes and marketed accordingly</li> </ul>
Ngāi Tahu Whānui tourism activations (storytelling, guided tours)	<ul style="list-style-type: none"> <li>Ngāi Tahu Whānui to determine interest in storytelling and guided experience opportunities regarding the Moeraki Boulders and the Takiroa Māori Rock Art site amongst others.</li> <li>Ngāi Tahu Whānui intellectual property is protected and applied to experiences</li> </ul>	Ngāi Tahu Whānui, DOC, Geopark Trust	\$500k for roll-out	Medium-long term	<ul style="list-style-type: none"> <li>Discussions with Ngāi Tahu Whānui, DOC and Geopark Trust are completed.</li> <li>Storytelling and guided experience opportunities are identified and confirmed by Ngāi Tahu Whānui and once approved, rolled out.</li> <li>Awareness of Ngāi Tahu Whānui's history and their stories grows.</li> <li>Cultural visitation to Waitaki grows.</li> <li>Revenue opportunities develop</li> </ul>
Geopark interpretation and trails	<ul style="list-style-type: none"> <li>Accreditation as a UNESCO Geo Park is secured</li> <li>Continue to support the Geopark management team for their refresh of all signboards etc.</li> <li>Investigate the potential to expand suggested routes on whitestonegeopark.nz and investigate the potential for bookable packages.</li> </ul>	Geopark management team	\$500k for infrastructure and brand rollout  \$x yet to be known if additional development is required for UNESCO accreditation	Short – medium term	<ul style="list-style-type: none"> <li>Refresh of signboards etc. are undertaken.</li> <li>Expanded routes and product opportunities are identified and profiled on whitestonegeopark.nz.</li> <li>Awareness of the Waitaki Whitestone Geopark continues to grow.</li> <li>Accreditation is secured for the Geopark</li> </ul>

Recommendation	Action	Who	Budget est.	When	KPIs
Sound and/or light show	<ul style="list-style-type: none"> <li>Host a workshop with night-time economy operators (F&amp;B operators, tourism operators, retail etc.) to ascertain interest in an evening sound and/or light show within the Oamaru Historic Precinct.</li> <li>Complete assessment of other sound and light shows to determine unique selling point (USP) for Waitaki.</li> <li>Engage sound and light show developers to identify potential concepts.</li> <li>Develop collateral for the sound and light show event.</li> <li>Promote the sound and light show event to community and visitor markets.</li> </ul>	Waitaki District Council, with industry operators	\$25k for research and a feasibility study  \$1-1.5m for event development and promotion	Short – medium term	<ul style="list-style-type: none"> <li>A workshop with operators is held to ascertain interest.</li> <li>A comparative assessment is undertaken and USP to be focused on is identified.</li> <li>Sound and light show developers are identified and quotes are sought.</li> <li>Marketing collateral for the sound and light show event is developed.</li> <li>Funding is sought and secured</li> <li>Sound and light show is held on an annual basis and Oamaru’s night-time economy is more active.</li> <li>Visitation to the CBD by locals and visitors at night grows.</li> <li>Economic uplift quantified</li> </ul>
Retrofit of the Criterion Hotel in the Victorian Precinct	<ul style="list-style-type: none"> <li>Support operators to identify funding streams to retrofit accommodation rooms to include ensuites to support restaurant development</li> </ul>	Hotel developers and Whitestone Civic Trust	\$2-3m for retrofit and development of rooms	Short-medium term	<ul style="list-style-type: none"> <li>Identify potential funding streams for support</li> <li>Funding support is secured</li> <li>A new unique heritage precinct accommodation facility is established</li> </ul>
Expanded Farmers Market	<ul style="list-style-type: none"> <li>Building on the existing Sunday market in Oamaru</li> <li>Expanding into a wider best of regions farmers' market</li> <li>Increase range of high quality produce from around regional areas</li> <li>Promote widely and nationally</li> </ul>	Tourism Waitaki, producers/growers, F&B operators,	\$100k annually for promotion	Short-medium term	<ul style="list-style-type: none"> <li>Investigate wider regional producer interest in participating</li> <li>Expand the range of produce and identify a clear point of difference</li> <li>Promote Oamaru as the lower South Island gastronomy hub</li> </ul>
Goldfield historic tours & discovery centre	<ul style="list-style-type: none"> <li>Tell the gold mining story of the region as both a modern and historic experience</li> <li>Offers a major visitor attraction for Palmerston</li> <li>An immersive experience to appeal to a wide audience as a fee-paying experience</li> <li>Develop as the NZ national gold mining story experience centre</li> </ul>	Tourism Waitaki, Council, Macrae Mining Co.	\$120k for a feasibility study If viable, an estimated capital development cost of \$18m	Medium term	<ul style="list-style-type: none"> <li>Feasibility study to determine viability and site</li> <li>Detailed concept design drawings and interactive concepts</li> <li>Grant funding to support any local investment</li> <li>Establish as the hub for tourism activity in and around Palmerston</li> </ul>

<b>Recommendation</b>	<b>Action</b>	<b>Who</b>	<b>Budget est.</b>	<b>When</b>	<b>KPIs</b>
"Waitaki Grown" distillery trail	<ul style="list-style-type: none"> <li>■ Complete an audit to identify potential operators who could feature on the distillery trail</li> <li>■ Host a workshop with operators to ascertain interest and level of involvement</li> <li>■ Develop brand and marketing collateral for the distillery trail</li> <li>■ Link, where possible, into the Waitaki Grown, brand</li> </ul>	Tourism Waitaki with brewers, distillers	\$10-13m for trail development, two new micro-distilleries and a tour bus for organised tours	medium-long term	<ul style="list-style-type: none"> <li>■ Audit of operators is completed</li> <li>■ Workshop with operators is held and interested operators are engaged with</li> <li>■ Additional distilleries and/or craft breweries are developed</li> <li>■ Marketing collateral is developed</li> <li>■ Distillery trail is launched</li> </ul>
"Waitaki Grown" destination food event and showcase centre	<ul style="list-style-type: none"> <li>■ Host a workshop with local growers and the F&amp;B sector to determine interest in participating in a destination food event</li> <li>■ Determine insurance and related approval requirements</li> <li>■ Establish a site for the destination food event</li> <li>■ Establish collateral for the destination food event</li> </ul>	Tourism Waitaki, producers/growers, F&B operators, with Whitestone Civic Trust	\$300k for concept development and site development	Medium term	<ul style="list-style-type: none"> <li>■ Workshop with operators is undertaken and interest is ascertained</li> <li>■ The site for the event is determined and secured</li> <li>■ collateral for the event is created</li> <li>■ Insurance requirements are identified</li> <li>■ Funding sources are identified and secured</li> <li>■ The event is rolled out on an annual basis</li> <li>■ Visitation to the event grows year-on-year</li> <li>■ Visitation as part of food trails is grown</li> <li>■ Economic uplift is shown via higher visitor spend</li> </ul>

**Table 5: Implementation Plan – The Building Blocks**

<b>Recommendation</b>	<b>Action</b>	<b>Who</b>	<b>Budget</b>	<b>When</b>	<b>KPIs</b>
Industry upskilling workshops (social media, digital literacy, IT, marketing, and finance up-skilling)	<ul style="list-style-type: none"> <li>■ Tourism Waitaki to introduce training modules to help upskill industry operators covering IT, marketing, and basic finance/accounting</li> </ul>	Tourism Waitaki, NZTIA	\$35k (program facilitation)	Short term - ongoing	<ul style="list-style-type: none"> <li>■ An industry upskilling programme tailored for Waitaki is developed and rolled out.</li> <li>■ Participation in the programme by tourism, retail and hospitality operators grows.</li> <li>■ Customer service standards increases.</li> <li>■ The online profile of the region grows stronger.</li> <li>■ Visitor satisfaction grows.</li> </ul>
Host community tourism awareness-raising and engagement campaign	<ul style="list-style-type: none"> <li>■ Develop and roll out a tourism benefits community awareness campaign.</li> </ul>	Tourism Waitaki	\$55k awareness campaign	Short term - ongoing	<ul style="list-style-type: none"> <li>■ A community tourism awareness campaign is developed and rolled out.</li> <li>■ Community awareness of the benefits of tourism grows.</li> <li>■ Community satisfaction increases.</li> <li>■ Visitor satisfaction increases.</li> </ul>
New forms of visitor servicing	<ul style="list-style-type: none"> <li>■ Work with the Visitor Information Network (i-SITE NZ) to identify pilot project opportunities for new forms of visitor information servicing</li> <li>■ Investigate unmanned digital information kiosks in various locations</li> </ul>	Tourism Waitaki, i-SITE NZ	\$TBA	Short – medium term	<ul style="list-style-type: none"> <li>■ Discussions with i-SITE NZ are held to identify options.</li> <li>■ Pilot project(s) is identified and rolled out.</li> <li>■ Funding is secured</li> <li>■ Visitor information provision grows.</li> <li>■ Visitor satisfaction levels increase</li> </ul>
Product packaging	<ul style="list-style-type: none"> <li>■ Work with select tourism operators to develop a series of bookable packages.</li> <li>■ Once proven to be successful, open up the opportunity to a wider range of operators.</li> </ul>	Tourism Waitaki, Industry	\$10k for package development and online marketing	Short term - ongoing	<ul style="list-style-type: none"> <li>■ Bookable tourism packages are identified and rolled out.</li> <li>■ Bookings via packages grows.</li> <li>■ New, additional packages are developed as interest grows.</li> <li>■ Visitor spending and dwell time in Waitaki increases.</li> </ul>

Recommendation	Action	Who	Budget	When	KPIs
Ongoing distribution of tourism data	<ul style="list-style-type: none"> <li>■ Continue to keep up to date with outcomes from the Tourism Data Co-Governance Group.</li> <li>■ In the meantime, create a visitor data survey for tourism industry members to complete on a bi-annual basis. Create a platform to disseminate data regularly.</li> <li>■ Provide industry with data updates on an ongoing basis when data are made available.</li> </ul>	Tourism Waitaki	n/a	Short term - ongoing	<ul style="list-style-type: none"> <li>■ A visitor survey is developed.</li> <li>■ The survey is rolled out bi-annually.</li> <li>■ Survey responses continue to grow.</li> <li>■ The utilisation of the data platform grows.</li> <li>■ Waitaki maintains and grows a robust visitor database offering all forms of visitor data, spending patterns etc.</li> </ul>



# PART 5: SUPPORTING INFORMATION

## Appendix 1 Visitation Data

### + The Challenge with NZ Tourism Data

There are significant data gaps in New Zealand tourism data. Before 2012, a comprehensive dataset covering regional tourism was issued<sup>11</sup>, however, this full dataset is no longer available.

As a result, data must be collected from a number of different sources<sup>12</sup>, each of which uses a different methodology and often have differing boundaries applied (due to the shifting nature of NZ RTO boundaries). This makes it extremely challenging to determine a complete picture of visitation to a region and perform trend analysis.

### + The Methodology Applied

To determine a comprehensive picture of visitation to Waitaki, a variety of datasets have been leveraged. These are summarised in Table 6.

Table 6: Data Used in this DDMP

Metric	Boundary Used	Source Used
Visitor Spend – Domestic & International	TLA	<ul style="list-style-type: none"> <li>MBIE's TECT Data</li> </ul>
Visitation – Domestic Day Trip	TLA	<ul style="list-style-type: none"> <li>Domestic day trip travel as a percentage of total international travel was obtained from the 2011 Regional Tourism Estimates and applied to current domestic overnight data from the New Zealand Visitor Activity Forecast. This is the latest robust set of data for this trip type</li> </ul>
Visitation – International Day Trip	TLA	<ul style="list-style-type: none"> <li>International day trip travel as a percentage of total international travel was obtained from the 2011 Regional Tourism Estimates and applied to current IVS data. This is the latest robust set of data for this trip type</li> </ul>
Visitation – Domestic Overnight	TLA	<ul style="list-style-type: none"> <li>Data compiled by FreshInfo as part of the New Zealand Visitor Activity Forecast. This is based on a comprehensive nationwide survey of AA members. Though the survey sample is large it is biased due to only covering AA members</li> </ul>
Visitation – International Overnight	TLA	<ul style="list-style-type: none"> <li>New Zealand International Visitor Survey</li> </ul>

<sup>11</sup> Including total visitation by market (overnight and day trips by international and domestic visitors), spend, average length of stay etc.

<sup>12</sup> Including the IVS, MBIE's visitor spend data, the Accommodation Monitor, Qrious data etc.

## Appendix 2 Waitaki's Tourism Offering

### + Methodology

The purpose of the audit of Waitaki's tourism offering is twofold:

- firstly, to ascertain where product gaps may exist in the tourism product mix; and
- secondly, to complete sentiment analysis on the existing product in the region.

The audit is primarily based on an extensive 'data scraping' exercise that leveraged the following sources: The New Zealand Tourism Operator Database, TripAdvisor, Booking.com, Google Travel and Google Maps.<sup>13</sup>

The audit was undertaken in late May 2022 and reflects results at this point.

When assessing the accommodation audit, it is important to recognise that:

- some properties are listed online across multiple categories - in these cases, Stafford has selected the most applicable category based on online information available;
- for each property, the number of bookable units<sup>14</sup> was also included which typically reflects room numbers (where this information was available);
- for caravan parks, bookable units were only required for cabins, chalets, and villas - site numbers have been excluded from the assessment as these data are difficult to obtain with accuracy;
- for DOC Huts, the number of bunks has been included as these can be individually booked/utilised;
- for holiday homes and apartments, bookable units are recorded as "1" because they can only be booked by one party and, therefore, represent one unit.

When assessing the attractions/experiences audit, it is important to note that:

- general parks are excluded from the audit because of the number of these throughout the region which would skew the findings;
- those products which are primarily utilised by the local community have been excluded;
- events have been excluded from the audit; and
- general food and beverage (cafes, restaurants, bars), rather, the audit only focuses on unique food experiences such as distilleries, food tours, cooking classes etc. if these are available in the area.

<sup>13</sup> It is important to note, therefore, that the audit may not be fully comprehensive, particularly for those operators who are not listed online.

<sup>14</sup> If a hotel has 25 rooms, this is recorded as 25 bookable units. If a holiday home has 4 bedrooms, this is recorded as 1 bookable unit as this can only be booked by the one party.

### + Net Promoter Score

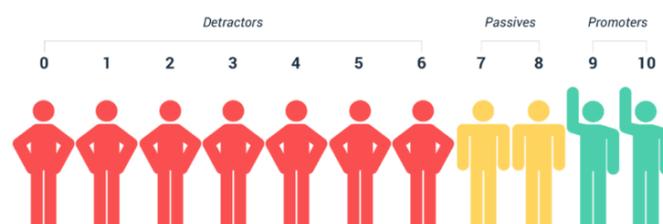
To undertake a top-line assessment of the quality of a region's product offering, the Net Promoter Score (NPS) metric can be used. This is a measurement of consumer loyalty. In a tourism context, this translates to a visitors' willingness to not only return for another stay but also make a recommendation to their family, friends, and colleagues. NPS scores are reported with a number from -100 to +100, with a score above 0 considered good and a score above 50 considered excellent.

The NPS is calculated using a scale (see Figure 19), with:

- a score between 0-6 being considered unhappy customers who are unlikely to return, and may even discourage others from staying with the provider;
- a score between 7-8 being passives, meaning they are satisfied with the provider but not happy enough to be considered promoters; and
- a score between 9-10 are considered promoters who are typically loyal and enthusiastic customers and who are likely to return and strongly promote the provider.

TripAdvisor and Google<sup>15</sup> use a scale of 1-5 for consumer ratings on accommodation product. Converting this to the NPS scale means that a rating of 1-3 are considered "detractors" for the product, a score of 4 are the product's "passives" and a score of 5 are the products "promoters".<sup>16</sup> Only product with more than 5 reviews was included in the NPS assessment to ensure a robust sample size.

Figure 19: NPS Score Scale



<sup>15</sup> Booking.com has not been used to derive a NPS because it does not provide a scale of scores, but rather, only provides an overall score. Therefore, an NPS is unable to be calculated from Booking.com listings.

<sup>16</sup> <https://birdeye.com/blog/net-promoter-score-explained/>

## Appendix 3 The Full Project Ranking Matrices

Table 7: Full opportunity matrix with values

Name	Ability to act as a catalyst project to stimulate other investme..	Ability to attract a higher spending visitor market	Ability to encourage stronger domestic visitat..	Ability to encourage stronger international vl..	Ability to help address climate change impacts	Ability to improve the environment	Ability to Secure Govt. Funding for Project	Employment (Operational) Potential	Encourage mana whenua involvement in the visitor econ..	Estimated Visitation	Landowner	Likelihood to be profiled by Tourism NZ	Likely to avoid reducing community social licence	Likely to be supported by community	Likely visitor appeal	Regional Dispersal of Visitors	Requirement for ongoing operational Govt. funding	Short term to Activate	Uniqueness of Product
A20 side trails (cycling, kayaking & boating)	High	High	High	High	Medium	Medium	Medium	High	Yes	Medium	Other Govt. Agency	High	High	High	High	Low	No	High	
Accessible recreation product	Low	Low	Medium	Low	Low	Low	Medium	Low	No	Medium	Council	Low	High	High	Medium	Low	Medium	Yes	medium
Blue Penguin Colony experience enhancements	Medium	Medium	High	High	Medium	High	Medium	Medium	Yes	High	Council	High	High	High	High	Low	Low	No	medium
Eco-pods linked to the A20 trail	High	High	Medium	High	Low	Medium	Low	High	No	Medium	Private	High	Medium	Medium	High	Medium	None	No	medium
Expanded farmers market	Medium	Medium	Medium	Medium	Low	Low	Low	High	no	Medium	Council	Low	Medium	High	High	High	None	Yes	medium
Geopark interpretation and trails	Medium	Low	Low	Medium	Low	Medium	High	Low	Yes	Medium	Private	Medium	Medium	Medium	Medium	High	Low	Yes	High
Gliding hub in Omarama	Medium	High	Low	Medium	Medium	Low	Low	Low	No	Low	Private	Low	Medium	Medium	Low	Low	Low	No	medium
Goldfield historic tours and discovery centre	Medium	Medium	Medium	Medium	Low	Low	High	Medium	No	Medium	Council	High	Medium	Medium	High	Medium	Low	No	High
Golf tourism packages	Low	High	Medium	Low	Low	Low	Low	Low	No	Low	Private	Medium	Medium	Medium	Medium	Medium	Low	Yes	low
Guided art tours and packaging	None	Medium	Low	Low	Low	Low	Low	Low	Yes	Low	Private	Low	Medium	Medium	Medium	Medium	Low	Yes	low
Janet Frame House, writer in residence program	Low	Medium	Medium	Low	Low	Low	Medium	Low	No	Low	Private	Medium	Medium	High	Medium	Low	Medium	No	medium
Lake Benmore (and others) houseboats	High	High	High	Medium	Medium	High	None	Medium	No	Medium	Private	Medium	Medium	Medium	Medium	Medium	None	No	medium
Lindis Pass eco-huts and trekking	Low	Medium	Medium	Medium	High	High	Medium	Low	Yes	Medium	DOC	Medium	Medium	Medium	Medium	Medium	Medium	No	low
Matariki dark skies celestial experience	Low	Medium	Medium	Medium	Low	Low	Medium	Low	Yes	Medium	Other Govt. Agency	High	Medium	Medium	High	Medium	Medium	No	High
Moeraki Boulders glamping & camping accommodation	Medium	Low	High	Medium	Low	Low	Low	Medium	Yes	Medium	Mana whenua	Low	Medium	Medium	Medium	Medium	None	No	low
Moeraki Boulders protection measures	Low	Low	Low	Low	High	High	Medium	Low	Yes	Medium	Other Govt. Agency	Low	High	High	Medium	Low	Medium	Yes	High
Moeraki Boulders updated F&B offering	Medium	Low	Medium	Medium	Low	Low	Low	Medium	Yes	Medium	Mana whenua	Low	Medium	Medium	Medium	Low	Low	Yes	Low
Ngāi Tahu Whānui tourism activations (storytelling, g..	Medium	Medium	Medium	Medium	Medium	High	Medium	Low	Yes	Medium	Mana whenua	High	High	High	Medium	Medium	Medium	No	High
Retrofit of the Criterion Hotel in the Victorian Preci..	High	High	Medium	Medium	Low	Low	Low	High	No	High	Private	Low	Medium	Medium	High	Low	None	No	low
Ski field enhancements	Medium	High	Medium	Low	Medium	Low	Low	Medium	No	Medium	Private	Medium	Medium	Medium	Medium	Medium	Low	No	low
Ski field enhancements (expansion & back country..	Medium	Medium	Medium	Medium	Low	Low	Medium	Low	Yes	High	Council	High	High	High	High	Low	Medium	Yes	medium
Update Vanished World Centre at Duntroon	Low	Low	Medium	Medium	Low	Low	Medium	Low	No	Medium	Private	Medium	Medium	Medium	Medium	Medium	Medium	Yes	High
"Waitaki Grown" destination food event	Medium	High	High	Medium	Low	Low	Medium	Low	No	Medium	Council	Medium	Medium	Medium	High	High	Medium	Yes	medium
"Waitaki Grown" distillery trail	Medium	High	High	Medium	Low	Low	Low	High	No	Medium	Private	Medium	Medium	Medium	High	High	None	Yes	High
Waitaki Valley cultural drive trail	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	No	Medium	Other Govt. Agency	Medium	Medium	Medium	Medium	Medium	Medium	Yes	High

Table 8: Full opportunity matrix results (unweighted/weighted scores)

Name	Ability to act as a catalyst project to stimulate other investment proj.	Ability to attract a higher spending visitor market score	Ability to encourage stronger domestic visitat.L.	Ability to encourage stronger international vis..	Ability to help address climate change impacts score	Ability to improve the environment score	Ability to Secure Govt. Funding for Project Score	Employment (Operational) Potential score	Encourage mana whenua involvement in the visitor econo..	Estimated Visitation score	Landowner Score	Likelihood to be profited by Tourism NZ score	Likely to avoid reducing community social licence score	Likely to be supported by community Score	Likely visitor appeal score	Regional Dispersal of Visitors Score	Requirement for ongoing operational Govt. funding Score	Short Term to Activate Score	Size of Private Investment Score	Size of Public Investment Score	Uniqueness of Product Score	Grand Total
A2O side trails (cycling, kayaking & boating)	3/15	3/15	3/18	3/3	2/12	2/12	2/12	3/12	1/7	2/6	2/2	3/3	3/15	3/12	3/12	3/21	2/2	0/0	0/0	1/2	3/18	47/199
Accessible recreation product	1/5	1/5	2/12	1/1	1/6	1/6	2/12	1/4	0/0	2/6	2/2	1/1	3/15	3/12	2/8	1/7	1/1	1/7	0/0	2/4	2/12	30/126
Blue Penguin Colony experience enhancements	2/10	2/10	3/18	3/3	2/12	3/18	2/12	2/8	1/7	3/9	2/2	3/3	3/15	3/12	3/12	1/7	2/2	0/0	0/0	2/4	2/12	44/176
Eco-pods linked to the A2O trail	3/15	3/15	2/12	3/3	1/6	2/12	1/6	3/12	0/0	2/6	3/3	3/3	2/10	2/8	3/12	2/14	3/3	0/0	3/21	4/8	2/12	47/181
Expanded farmers market	2/10	2/10	2/12	2/2	1/6	1/6	1/6	3/12	0/0	2/6	2/2	1/1	2/10	3/12	3/12	3/21	3/3	1/7	2/14	2/4	2/12	40/168
Geopark interpretation and trails	2/10	1/5	1/6	2/2	1/6	2/12	3/18	1/4	1/7	2/6	3/3	2/2	2/10	2/8	2/8	3/21	2/2	1/7	1/7	3/6	3/18	40/168
Gliding hub in Omarama	2/10	3/15	1/6	2/2	2/12	1/6	1/6	1/4	0/0	1/3	3/3	1/1	2/10	2/8	1/4	1/7	2/2	0/0	3/21	4/8	2/12	35/140
Goldfield historic tours and discovery centre	2/10	2/10	2/12	2/2	1/6	1/6	3/18	2/8	0/0	2/6	2/2	3/3	2/10	2/8	3/12	2/14	2/2	0/0	2/14	1/2	3/18	39/163
Golf tourism packages	1/5	3/15	2/12	1/1	1/6	1/6	1/6	1/4	0/0	1/3	3/3	2/2	2/10	2/8	2/8	2/14	2/2	1/7	0/0	4/8	1/6	33/126
Guided art tours and packaging	0/0	2/10	1/6	1/1	1/6	1/6	1/6	1/4	1/7	1/3	3/3	1/1	2/10	2/8	2/8	2/14	2/2	1/7	2/14	4/8	1/6	32/130
Janet Frame House, writer in residence program	1/5	2/10	2/12	1/1	1/6	1/6	2/12	1/4	0/0	1/3	3/3	2/2	2/10	3/12	2/8	1/7	1/1	0/0	2/14	2/4	2/12	32/132
Lake Benmore (and others) houseboats	3/15	3/15	3/18	2/2	2/12	3/18	0/0	2/8	0/0	2/6	3/3	2/2	2/10	2/8	2/8	2/14	3/3	0/0	3/21	4/8	2/12	45/183
Lindis Pass eco-huts and trekking	1/5	2/10	2/12	2/2	3/18	3/18	2/12	1/4	1/7	2/6	0/0	2/2	2/10	2/8	2/8	2/14	1/1	0/0	0/0	1/2	1/6	32/145
Matariki dark skies celestial experience	1/5	2/10	2/12	2/2	1/6	1/6	2/12	1/4	1/7	2/6	2/2	3/3	2/10	2/8	3/12	2/14	1/1	0/0	0/0	1/2	3/18	34/140
Moeraki Boulders glamping & camping accommodation	2/10	1/5	3/18	2/2	1/6	1/6	1/6	2/8	1/7	2/6	1/1	1/1	2/10	2/8	2/8	2/14	3/3	0/0	3/21	4/8	1/6	37/154
Moeraki Boulders protection measures	1/5	1/5	1/6	1/1	3/18	3/18	2/12	1/4	1/7	2/6	2/2	1/1	3/15	3/12	2/8	1/7	1/1	1/7	0/0	2/4	3/18	35/157
Moeraki Boulders updated F&B offering	2/10	1/5	2/12	2/2	1/6	1/6	1/6	2/8	1/7	2/6	1/1	1/1	2/10	2/8	2/8	1/7	2/2	1/7	3/21	4/8	1/6	35/147
Ngāi Tahu Whānui tourism activations (storytelling, guided ..	2/10	2/10	2/12	2/2	2/12	3/18	2/12	1/4	1/7	2/6	1/1	3/3	3/15	3/12	2/8	2/14	1/1	0/0	1/7	3/6	3/18	41/178
Retrofit of the Criterion Hotel in the Victorian Precinct	3/15	3/15	2/12	2/2	1/6	1/6	1/6	3/12	0/0	3/9	3/3	1/1	2/10	2/8	3/12	1/7	3/3	0/0	3/21	4/8	1/6	42/162
Ski field enhancements (expansion & back country acce..	2/10	3/15	2/12	1/1	2/12	1/6	1/6	2/8	0/0	2/6	3/3	2/2	2/10	2/8	2/8	2/14	2/2	0/0	0/0	1/2	1/6	33/131
Sound and/or light show	2/10	2/10	2/12	2/2	1/6	1/6	2/12	1/4	1/7	3/9	2/2	3/3	3/15	3/12	3/12	1/7	1/1	1/7	3/21	1/2	2/12	40/172
Update Vanished World Centre at Duntroon	1/5	1/5	2/12	2/2	1/6	1/6	2/12	1/4	0/0	2/6	3/3	2/2	2/10	2/8	2/8	2/14	1/1	1/7	0/0	1/2	3/18	32/131
"Waitaki Grown" destination food event	2/10	3/15	3/18	2/2	1/6	1/6	2/12	1/4	0/0	2/6	2/2	2/2	2/10	2/8	3/12	3/21	1/1	1/7	2/14	3/6	2/12	40/174
"Waitaki Grown" distillery trail	2/10	3/15	3/18	2/2	1/6	1/6	1/6	3/12	0/0	2/6	3/3	2/2	2/10	2/8	3/12	3/21	3/3	1/7	0/0	1/2	3/18	41/167
Waitaki Valley cultural drive trail	2/10	2/10	2/12	2/2	2/12	2/12	2/12	2/8	0/0	2/6	2/2	2/2	2/10	2/8	2/8	2/14	1/1	1/7	0/0	1/2	3/18	36/156

