ROTORUA
Economic Development
Te Whanaketanga Ōhanga o Rotorua

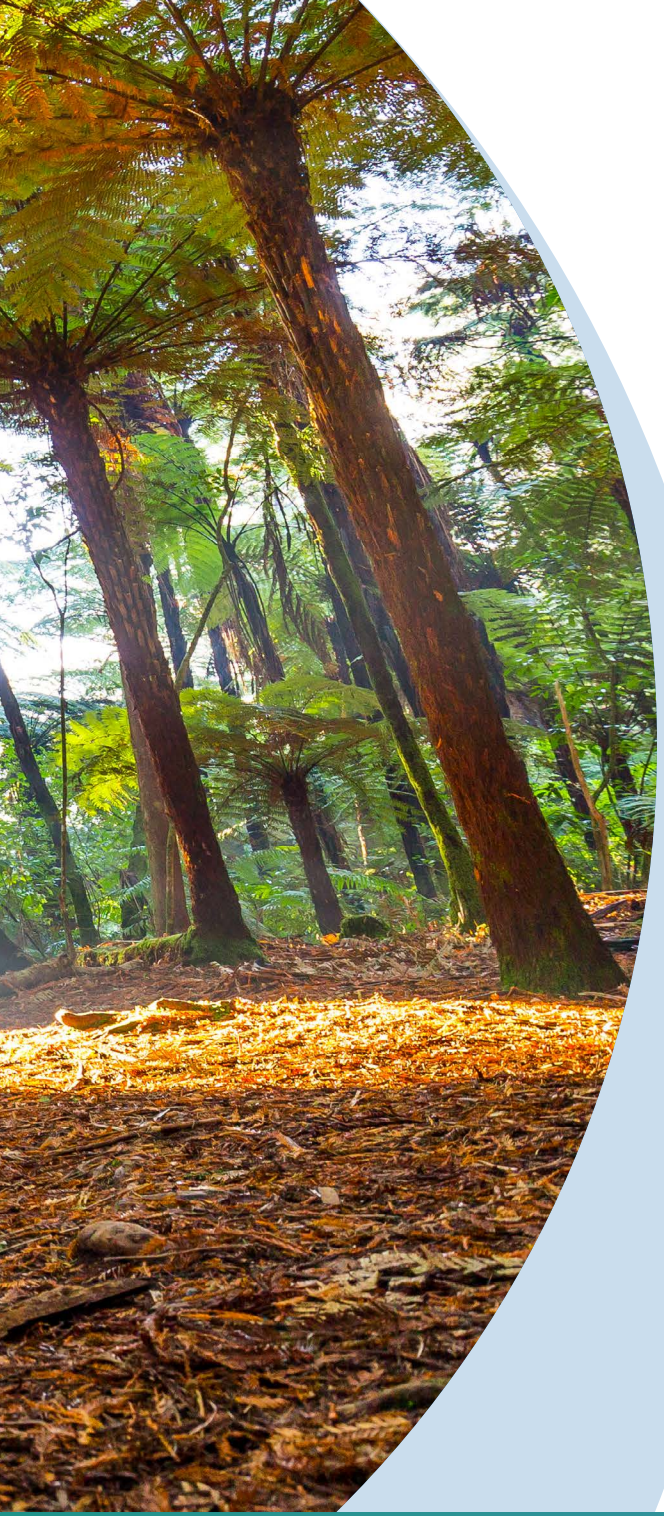
ROTORUA
LAKES COUNCIL
Te kaunihera o ngā roto o Rotorua

The Rotorua Destination Management Plan

The Rotorua Destination Management Plan has been developed in partnership with Te Arawa, Central Government, Rotorua Lakes Council, and members of Rotorua's tourism, hospitality and accommodation sectors. The process was facilitated by Rotorua Economic Development (RED) and guided by a project steering group.

RED will continue its facilitation role to ensure The Plan is delivered. A number of additional entities will have a key role in ensuring its implementation is *he paīnga mō te ao katoa* – for the betterment of all.

This document provides a summary of The Plan. Further details about the issues facing the destination and how the actions will address these can be found in the full destination management plan. Please contact RED for more information.



Executive Summary

Rotorua is the most established and recognised tourism destination in Aotearoa.

The Rotorua region was New Zealand's first international tourism destination and continues to play a central role in the country's off-shore reputation and tourism offering, with rich visitor experiences based on the environmental and Māori cultural values of Rotorua. These values provide a strong and compelling set of iconic experiences that are central to the Aotearoa brand story. For this reason, it is essential that the city thrives and continues to offer an exceptional visitor experience once international visitors return.

Managing the Rotorua destination to ensure there is an effective value exchange between the visitors and the destination has grown more complex over time. A growth in tourism numbers pre-Covid, increased breadth of experiences on offer, changing visitor expectations, and local, national and global issues affecting the destination, have required a change of approach to how Rotorua as a tourist destination is managed.

There is now a need to move from a visitor-driven approach to a destination-driven approach where the important social, environmental, cultural and economic values underpin a more holistic approach to destination management.

The Rotorua Destination Management Plan (The Plan) has been developed to assist Rotorua in driving tourism for the betterment of the destination as a whole. The holistic, values-based approach will ensure the benefits of tourism are spread across Rotorua to reach all sectors of the region.

The Plan builds on several core vision documents such as the Rotorua Lakes Community Vision 2030, Te Arawa Vision 2050 – Mauri Tū, Mauri Ora, Te Arawa E! and the 2021 - 2031 Long Term Plan. The Plan has been developed together with Te Arawa and the community and sets out a vision, values, strategic direction and a set of actions to map out the future of the Rotorua destination.

The core elements of The Plan are set out on the following page.

DESTINATION VISION

He painga mō te ao katoa

For the betterment of all

DESTINATION VALUES

Tiaki Taiao	Kotahitanga	Ōhanga Ōranga	Manaakitanga	Auaha / Tu Maia	Pono
Enhancing the environment	A collaborative approach	Prosperity	Welcoming and caring	Innovation and courage	Genuine and authentic

STRATEGIC DIRECTIONS

Rotorua's tourism product will reflect the values of the destination and ensure it meets its potential as Aotearoa's premiere tourism destination	The Rotorua destination will function more effectively in partnership with Te Arawa	The tourism workforce will grow in capacity and capability	Infrastructure that is important to the functioning of the destination will be in place and working for Rotorua	Tourism in Rotorua will assist in the regeneration and revitalisation of important cultural and natural values	The social issues that are negatively affecting the destination will be resolved

ACTIONS

Implementation	Tier One Actions Transformational Change			Tier Two Actions Investing in a Positive Future		Tier Three Actions Creating Stronger Foundations						
Implementation	The Rotorua Commit-ment	Aotearoa Tourism and Hospitality Innovation Hub	Wellness	Revitalising the Inner City	Quality Accommodation	Rotorua Cultural Presence	Tiaki Taiao	Markets	A Connected Destination	Workforce Develop-ment	Events Strategy	Trails Strategy

Contents

EXECUTIVE SUMMARY 3

1 INTRODUCTION AND CONTEXT 6

1.1 WHAT IS A DESTINATION MANAGEMENT PLAN? 7
1.2 THE DESTINATION DEVELOPMENT PROCESS 8
1.3 THE ROTORUA DESTINATION 8
1.4 KEY MARKETS 10
1.5 IT'S ALL FOUND WITHIN ROTORUA – THE DESTINATION ROTORUA PLAYBOOK 10

2 DESTINATION ISSUES 12

3 DESTINATION VISION 13

4 DESTINATION VALUES 14

5 STRATEGIC DIRECTIONS 16

6 ACTIONS 17

6.1 KEY PERFORMANCE INDICATORS 17
6.2 ACTION PLAN 17
6.2.1 IMPLEMENTATION 17
6.2.2 TIER ONE - TRANSFORMATIONAL CHANGE 18
6.2.3 TIER TWO – INVESTING IN A POSITIVE FUTURE 20
6.2.4 TIER THREE – CREATING STRONGER FOUNDATIONS 21

7 TARGETS 26

APPENDICES 28

1. Introduction and Context

Destination management is the coordinated management of all aspects of a destination that contribute to a visitor's experience including residents, businesses, industries, and iwi. This approach reflects an important and necessary shift in tourism planning in Aotearoa.

The purpose of the Rotorua Destination Management Plan (The Plan) is to provide strategic direction for destination management planning for Rotorua Lakes District. The Plan explores options to unlock and enable sustainable growth and resilience for the destination and has been developed using a holistic approach across the four wellbeings (social, cultural, economic and environmental) through a visitation lens. This lens enables the plan to be cognisant of the wider issues, opportunities, and wider planning being undertaken for the district by the Rotorua Lakes Council and iwi while focusing on Rotorua Lakes District as a functioning, thriving visitor destination with benefits to the local community.

The holistic approach used is not limited to the tourism industry and considers how the concept of kaitiakitanga, environmental stewardship, the four wellbeings, can be built into the visitation and destination aspirations of the community.

The plan has been developed with a ten-year timeframe in mind. It can be used to inform public and private investment decisions, support funding applications for central government and private funding, and inform regional planning, including that which is carried out by council and iwi.

A destination management plan is a shared statement of intent to manage and sustain a destination over a stated period.

The Rotorua Destination Management Plan reflects the shared views of the community on managing their destination in a sustainable way. The Rotorua community includes residents, iwi, business owners, community groups, tourism operators, landowners and others. The Plan also has a high degree of alignment with national, regional and local planning documents including Vision 2030 – The Rotorua Way, the 2021 - 2031 Long Term Plan, and the Te Arawa 2050 Vision - Mauri tū, Mauri ora, Te Arawa e!

The development of The Plan has also been cognisant of the 2020 Destination Management Guidelines published by the Ministry of Business Innovation and Enterprise.

1.1 What is a destination management plan?

A destination management plan sets out a strategic pathway for sustainably growing tourism development. The key focus of The Rotorua Destination Management Plan is on developing Rotorua Lakes District as a functioning and thriving visitor destination that benefits the local community.

The purpose of The Plan is to identify a tangible pathway for sustainable growth and resilience for the benefit of the local community, and visitors, including:

- Environmental, economic, social and cultural outcomes
- Coordination of the system horizontally (across government, mana whenua and partners) and vertically (visitor journey)
- A vision and strategy that reflect the community's aspirations
- Alignment between national, regional and local tourism frameworks
- A commitment to kaitiakitanga and environmental stewardship as part of a sustainable approach to tourism development.

Destination management involves the management of all aspects of a destination that contribute to a visitor's experience, including the perspectives, needs and expectations of:

- visitors
- Māori/iwi/hapū
- the tourism industry
- the community
- central and local government.

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

Furthermore, destination management ensures the values of mana whenua are recognised, protected, maintained and enhanced.

The short to medium term is uncertain due to COVID-19, while in the long term, significant growth in visitor arrivals is forecast to continue with impacts on the environment and the community. To address this, we need:

- To protect and celebrate the cultural, environmental and community values that are at the heart of our wellbeing and success
- A shared and clear long-term destination vision
- To recognise, protect, maintain and enhance the values of mana whenua
- A clear strategy to manage growth and associated impacts, or sudden changes in demand, environment or external shocks
- Integrated plans and resources to address pressure on the environment including land, waters, public reserves and facilities
- High quality, safe visitor experiences
- Communities to value and support the tourism sector and the hosting of visitors
- A strong vibrant workforce and support for tourism as an occupation or career
- Long-term regional planning and investment to manage visitor growth that meets international and New Zealand best practice standards.

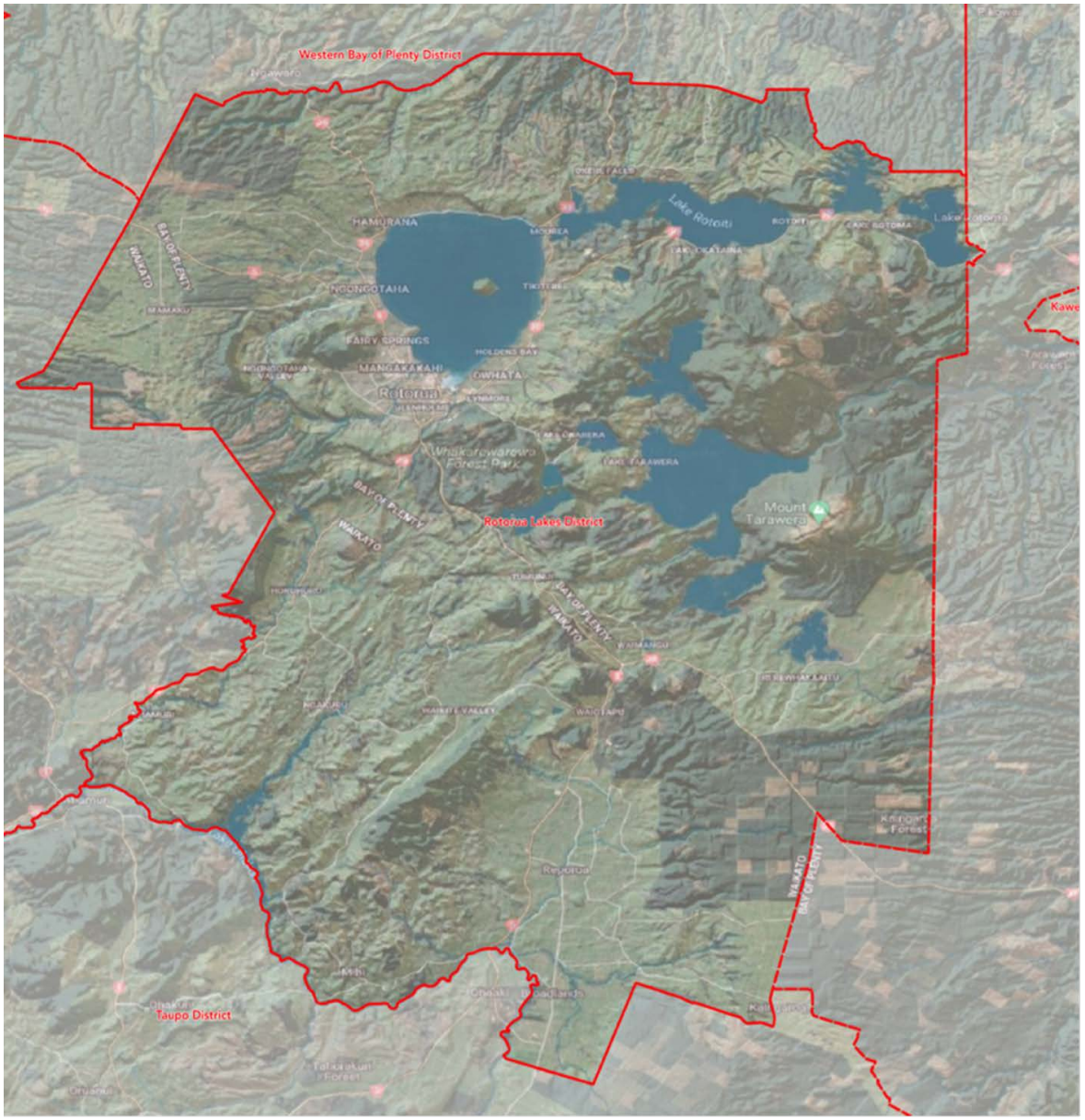
1.2 The destination development process

Successful destination management planning involves collaboration across the multiple stakeholders that make up the ecosystem of a destination.

The plan was developed in a collaborative manner facilitated by Rotorua Economic Development (RED) over a period of nine months in 2021 against a backdrop of COVID-19 recovery. In addition to a comprehensive review of relevant plans and strategies, data, and destination insights, there was comprehensive korero with Te Arawa, destination stakeholders and the wider community. This engagement included over 80 interviews with individuals and groups, 12 focus group workshops, attendance at public open days, and workshops with Te Arawa and destination stakeholders. In addition, the process was governed by a project steering group consisting of representatives from Te Arawa, RED, Rotorua Lakes Council, Department of Conservation, the tourism industry, Tourism New Zealand, and the Ministry of Business, Innovation and Employment. This process enabled a comprehensive, collaborative discussion to be held with the community to develop a plan that articulates the issues, visions and values of the Rotorua destination.

1.3 The Rotorua destination

For the purposes of The Rotorua Destination Management Plan, the destination is the area generally consisting of Rotorua Lakes District, as shown on the right.



The Rotorua sub-region is served by State Highway 30 and State Highway 5, and is on the route of the Thermal Explorer Highway which runs along State Highway 5. Rotorua is located in the centre of the Bay of Plenty Region, one hour from Taupō, an hour and a half from Whakatāne, and 80 minutes from Tauranga. The region is situated around Lake Rotorua, which is nearly 300 metres above sea level and is the centre of an ancient caldera that is 20km across at its widest point. Rotorua is famous for its geothermal activity, with seven geothermal fields with hot pools and spectacular steam eruptions that attract over three million visitors per year. Volcanic activity has also shaped the wider landscape with Mount Tarawera, Rainbow Mountain, Mount Ngongotahā and Mokoia Island being significant features.

The region also includes 18 lakes, three major rivers and 100,000 hectares of native and exotic forests with the largest commercial plantation forest in the Southern Hemisphere. There are 120 wetlands and hundreds of kilometres of walking, cycling and mountain biking tracks.

Rotorua is arguably the oldest tourism destination in the country, attracting visitors for more than 150 years to experience its unique geothermal and cultural offerings. Thomas Cook & Sons sent a representative from the UK to the destination in the late 1800s to assess tourism's potential in Rotorua. It was agreed then that the place would develop into a tourism town.

Despite limited travel in those days, tourists came from around the world to see the famous Pink and White Terraces. Unfortunately the terraces were reclaimed by Mount Tarawera when it erupted late in the 19th century.

The effects of that disaster rippled through the local Tuhourangi and Ngāti Rangitihi people, as everything they knew was lost. Many of the survivors were offered land at Whakarewarewa and Ngāpuna and the Whakarewarewa Thermal Valley became the new home for many. The tradition of guiding continues in the thermal area today[1].

Since that time, Rotorua has been and continues to be regarded as one of New Zealand's most important and iconic tourism destinations.

[1] www.rotoruanz.co.nz

1.4 Key markets

The Rotorua destination has a strong focus on outdoor, adventure, cultural and thermal (including hot pools) activities. Pre-COVID-19, about 60% of visitors to Rotorua were domestic, with the remainder international, predominantly (in order) from Australia, North America, Europe, the UK, China and Southeast Asia. There were more than three million visits in 2019. Tourism is a very important part of the economy, accounting for over 30% of the destination's GDP. Prior to 2020 Rotorua had the highest visitation growth rate when compared to other destinations in the Bay of Plenty, and received the highest share of international visitor spend at $370M in 2016. The destination also received a high Net Promoter Score when compared to other destinations in the Bay of Plenty.

Post-COVID-19, it is not expected that these trends will resume in the short term. The collapse of the international markets, including cruises, has had a significant impact on businesses in the main Aotearoa tourism destinations. In Rotorua, iconic attractions that focused on the international markets had, in some cases, fewer than 10% domestic visitors. Businesses such as Te Puia, Tamaki Māori Village, Rainbow Springs, Agrodome and some adrenaline adventure products are seriously impacted.

Led by RED and Tourism New Zealand, there has been a very active and successful domestic tourism marketing campaign. With the strong rebound of the New Zealand economy since May 2020, visitor demand for some of the attractions in Rotorua has been good with an annual visitor spend of $695M in 2020. RED has a goal of growing this figure to $1 billion by 2030 which will rely on a growth of 3.5% per annum.

Rotorua receives the majority of its domestic visitors from nearby with Auckland, Waikato and other areas of Bay of Plenty comprising over 70% of domestic visitation. In 2019, visitors from Australia made up the fourth largest visitor market for the destination.

A 2019 report by Colliers International indicated that Rotorua is comparatively over-represented in group travel and under-represented in Australian and US guest sectors, which are the highest yielding average daily room rate segments in 4.5- and 5-star hotels throughout New Zealand.

While there will be a very strong reliance on the domestic market in the foreseeable future, there is currently a lack of clarity on who the key international markets are likely to be. While Australia is likely to still be the largest international market, work is being undertaken at a national level to better understand other key international markets.

Historically, the two main visitor profiles for Rotorua are families and 'young savvies', both weighted towards a younger demographic travelling with and without children. Active retirees made up a newer market segment pre-COVID-19 and work has been done over the past 18 months to encourage older New Zealanders to visit Rotorua outside of the peak weekend and school holiday periods.

Work will now be undertaken to identify the future visitor who will best contribute in line with the values of the destination.

1.5 It's all found within Rotorua – the Destination Rotorua Playbook

Pre-COVID-19, Rotorua had a poorly defined identity built on a history of trying to be all things to all people. In partnership with Rotorua Lakes Council and Te Arawa, RED has identified a brand story to define the unique Rotorua story more clearly.

This brand story identifies Rotorua as a place alive, where the active wairua of the place nurtures the spirit of the people. The identity is based on three pillars:

- Active geothermal environments that inspire and nourish
- Vibrant and expressive Māori culture at the heart of life
- Richness of invigorating experiences accessible to all.

With a focus on being in a position to drive sustainable tourism, including minimising negative social, cultural, and environmental impacts, the brand story forms a binding concept and place identity.

As well as providing positive and relevant messaging to support destination marketing, this identity is also relevant to destination management and reflects the wider social, cultural and environmental values that underpin Rotorua Lakes District.

2. Destination Issues

The following are the key destination issues that have been identified to inform the development of The Rotorua Destination Management Plan (The Plan). These issues are considered to restrict the destination in meeting its potential. The issues are listed below.

1. Social Deprivation
2. Accommodation
3. Destination Definition
4. Central Business District
5. Environmental Stewardship
6. Reliance on International Markets
7. Human Resources
8. Amenities Services and Infrastructure
9. Industry Support

Given the contribution that Rotorua makes to New Zealand's brand story, some of these issues may have international implications. For this reason, Central Government support may be required to address these.

The role of The Plan will not be to solve all of these issues. Some of these issues have root causes which are outside of the ability of this plan to fix and will require central government or third-party intervention. The role of The Plan is to identify opportunities for the tourism and hospitality industry to support positive change where it can for such issues.

The significant impact that COVID-19 has had on the destination has not been identified as an issue in its own right. While it is acknowledged that the global pandemic has had a significant impact on the destination, The Plan has not been developed as a COVID-19 recovery plan. It is anticipated that the implementation of the actions identified in The Plan will, however, work to address some of the underlying issues with the destination that were further highlighted by the effects of COVID-19.

3. Destination Vision

The vision for the destination, including its important historical and contemporary context, is set out below.

He painga mō te ao katoa

For the betterment of all

On 22 November 1880, Judge FD Fenton met with 47 Māori leaders to discuss a proposal supporting the creation of the township of Rotorua. Contained within that agreement (The Rotorua Township Agreement of 1880, sometimes referred to as the Fenton Agreement) was a clause setting aside thermal springs "Hei oranga mō ngā iwi katoa o te ao – for the benefit of the people of the world".

The spirit that underpinned the original statement is very relevant today to The Rotorua Destination Management Plan, albeit with a wider scope. The statement reflects an intent of improving the destination for the benefit of the local community, manuhiri and the place (te taiao) itself.

The approach, embodied within the vision, is consistent with the values identified through the engagement process and situation analysis. There has been an overriding desire for visitation to result in an improved and enhanced destination, driven by the fact that this will improve the state of the environment and the lives of the local community and visitors.

The vision incorporates the four wellbeings which forms the basis for successful destination management planning. It is about making people and places safe by protecting and nurturing the mauri whenua (life force) of the destination.

4. Destination Values

Underpinning the vision are six destination values that were developed through a series of workshops with destination stakeholders and Te Arawa. They have guided the construction of the strategy and actions contained in this destination management plan.

The values capture what is important about the destination, guide how the vision is to be achieved, and have given direction on the options and actions that needed to be considered as part of this plan. These values should also be utilised and applied when considering opportunities or initiatives which may not be identified in this plan but may arise in the future. Generally, those opportunities or initiatives which align with these values will assist the destination in meeting and applying its vision.

The six destination values, as illustrated in Figure 1, purposefully overlap and interrelate. For the values to be applied successfully, they need to be applied collectively and with a degree of balance, or tau utu utu. When applied collectively across all destination management activity, the values will ensure both community and visitor needs and aspirations are met concurrently, and growth is achieved for the region that is environmentally sustainable.

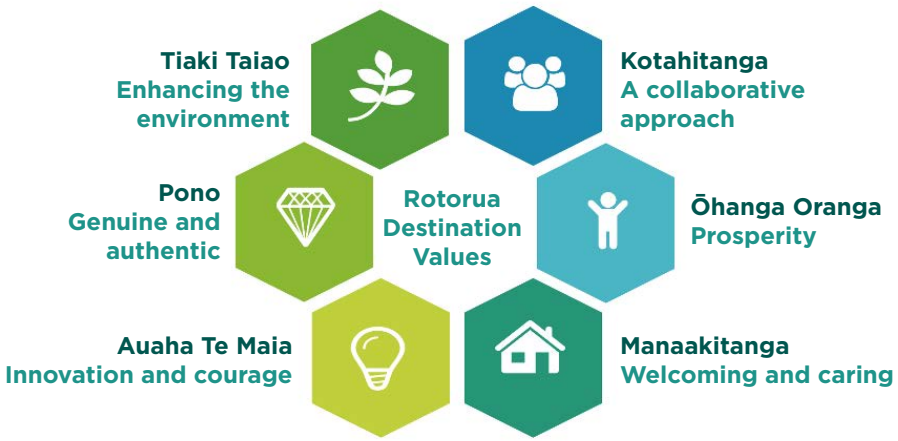


Figure 1 Rotorua Destination Values

4.1 Tiaki Taiao – Enhancing the environment

The need to protect, restore and enhance the environment is a message that has been constant throughout stakeholder workshops. The value of tiaki taiao encompasses environmental stewardship and restoration, expresses the community's desire to improve the environment, and demonstrates the active role that visitation has to play in this approach. Embracing tiaki taiao as a value is an important part of being mana whenua, so enabling such an approach will benefit Te Arawa and the wider community of the Rotorua destination.

4.2 Kotahitanga – A collaborative approach

The value of kotahitanga involves taking a collective approach (te tatau tatau – we together) to address destination issues and realise opportunities. It is about working together, whether this is within the destination, with neighbours or with central government. Naku te rourou nau te rourou ka ora ai te iwi – cooperation and a collective approach is required to overcome the issues that face the destination.

4.3 Ōhanga Oranga – Prosperity

This value represents the aspiration that the destination is economically prosperous and successful, leading to the reinstatement and enhancement of mauri ora (health and wellness). When the community is successful, its people benefit financially and their quality of life is enhanced. Rather than being exported elsewhere, wealth is captured within the destination and shared within the community so that the whole region can benefit from visitation.

4.4 Manaakitanga – Welcoming and caring

Manaakitanga is a value that will see the destination welcome and look after all people who come to Rotorua to visit or live. The industry and the community will provide visitors with positive, genuine and uplifting experiences by actively caring for people and place, showing aroha and focusing on an experience they can be proud of. Visitors will have a more positive experience if the community is proud of their destination, and these experiences will reflect the significant tourism heritage of Rotorua as a strength of place that will endure in the memories of visitors.

4.5 Auaha / Tu Maia – Innovation and courage

The concepts of auaha (innovation) and tu maia (courage) represent a value that will guide Rotorua to embrace its role as a tourism leader and show the way in a new world. The destination must adapt to changes and be resilient to the impacts of this change, whether they are pandemics, natural hazards or social challenges. For the benefit of the destination and for Aotearoa as a whole, the destination and its communities should not be afraid to continue to be leaders in times of adversity.

4.6 Pono – Genuine and authentic

Pono is the value of being genuine, authentic, true and sincere. The value of pono is at the heart of Rotorua's offering, with a belief that the destination is the Aotearoa originator of authentic experiences that help people immerse themselves more fully, whatever they seek, whether it is invigoration, excitement, inspiration, relaxation, recharging or renewal. Rotorua is a place that holds and creates richer stories for all who experience it. For people wanting to live full lives, the destination enriches through authentic experiences that connect them to people and place.

5. Strategic Directions

Strategic directions have been identified that set out the imperatives for the destination and establish a frame of reference for the actions that will implement those directions. These directions provide a thematic approach to address the destination issues while realising opportunities.

Each of these strategic directions has a set of focus areas that will need to be activated by the destination actions. These are set out in Table 1.

DIRECTION	FOCUS AREAS
1. **Tourism product in Rotorua will reflect the values of the destination and ensure it meets its potential as the premiere tourism destination for Aotearoa**	1. Activities 2. Night-time experiences 3. Food offerings 4. Events 5. Environmental connections 6. Accommodation 7. Storytelling 8. Māori tourism 9. Product revitalisation
2. **The Rotorua destination will function more effectively in partnership with Te Arawa**	1. Te Arawa role 2. Leadership 3. Target markets 4. Taiao (regeneration) 5. Definition and brand 6. A supported industry 7. Reputation management
3. **The tourism workforce will grow in capacity and capability**	1. Workforce 2. Training
4. **Infrastructure that is important to the ongoing functioning of the destination will be in place and working for Rotorua**	1. Connectivity 2. Venues 3. Central business district 4. Resilience
5. **Tourism in Rotorua will assist in the regeneration and revitalisation of important cultural and natural values**	1. Te reo Māori and Te Arawa tikanga 2. Environmental regeneration
6. **The social issues that are negatively affecting the destination will be resolved**	1. Advocacy 2. Central business district 3. Housing 4. Wellness – social and environmental

Table 1 Destination Strategic Directions

6. Actions

A discrete range of actions has been developed. These actions align with the destination vision, values and strategic directions and will help to leverage recent investment in infrastructure, including the forest and lakefront developments. Implementation of these actions over the next 10 years will result in sustainable growth and resilience for the Rotorua destination.

These actions are classified into four general categories as follows:

1. Implementation – actions to implement the plan to make sure that the actions are undertaken and reported against.
2. Tier One – actions which are considered to be game changers for the destination, and will involve the private sector in place-making to leverage investment in physical infrastructure.
3. Tier Two – projects that are focussed on investing in a positive future for the destination, adding significant value to the destination.
4. Tier Three – enabling projects which provide a more resilient and effective foundation for the destination to grow in value.

6.1 Key performance indicators

For each action a set of key performance indicators (KPIs) have been identified by which to monitor the progress of each action. These KPIs include a range of measures which endeavour to reflect that the successful implementation of the Rotorua destination management plan will contribute social, cultural and environmental benefits to the destination, in addition to financial gain. The KPIs will be reported against on an annual basis as per action point 1.1.

For some actions, measures will be more clearly defined in the first stage of implementation.

6.2 Action plan

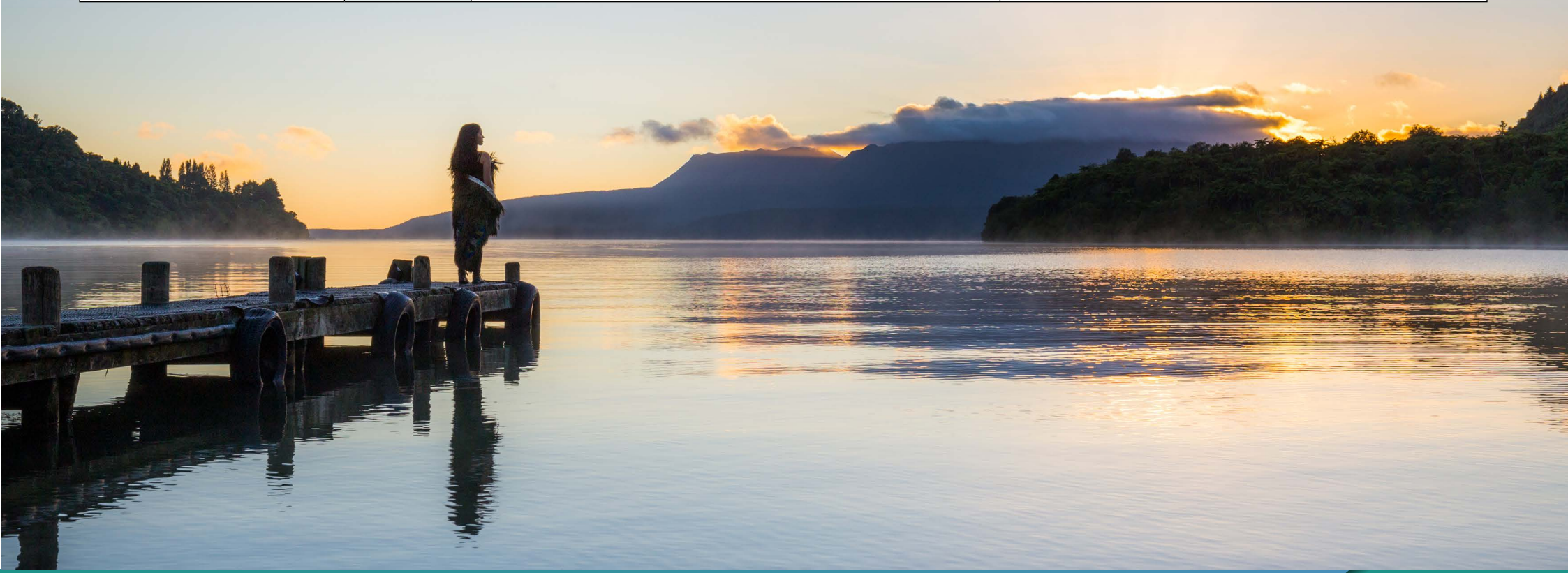
6.2.1 Implementation

ACTION	PRIORITY	TASKS AND TIMEFRAMES
1. **Implementation** – Putting in place resource to implement The Plan, including reporting on its effectiveness and reviewing it every three years.	**High**	1.1 Destination Implementation Unit and Advisory Group is established **within one month.** 1.2 An **annual** report will be developed by the implementation unit on progress made in implementing The Plan's actions. 1.3 Review The Plan **every three years** to ensure that it is relevant and reflective of the destination.

6.2.2 Tier One - Transformational Change

ACTION	PRIORITY	TASKS AND TIMEFRAMES	KEY PERFORMANCE INDICATORS
2. The Rotorua Commitment - Develop a commitment framework for Rotorua tourism and hospitality businesses that delivers an experience to manuhiri (guests) and the local community reflecting the destination brand and values Rotorua has adopted. The Commitment is an investment in our people to support their essential place-making role.	**High**	2.1 The framework for the Rotorua Commitment is established **within 12 months.** 2.2 The Commitment is developed and supported by the community and industry. A minimum of 25% of operators (this can include activities, hospitality, accommodation, and retail) have signed up to the commitment and are actively engaged in the programme. 2.3 100% of complying businesses are signed up to the commitment and are actively engaged in the programme **within five years.** 2.4 Advocate for regional variances to national tourism standards such as Qualmark to ensure that local initiatives (such as the Rotorua Commitment) are recognised.	1. The number of operators who have signed up to the Commitment increases annually. 2. New Zealanders' perception of Rotorua as a desirable place to visit increases over time. 3. The awareness by Te Arawa and locals that the tourism industry is an active and positive part of the community increases over time.
3. Aotearoa tourism and hospitality innovation hub – Create a hub that offers innovative and creative support, education and inspiration for others to develop tourism and hospitality initiatives, innovative businesses and experiences in Rotorua and nationally.	**High**	3.1. A business case is developed for the hub in **12 months.** 3.2. The hub is established, thriving, supporting and assisting business, and is nationally and internationally recognised **within three years.**	1. The hub directly generates tourism and hospitality new business start-ups and products that match the destination values and brand. 2. Patronage by local and national businesses and organisations. 3. A positive satisfaction rating for those who have gone through the hub. 4. The hub has an economic impact on Rotorua through the increase in the numbers of jobs in Rotorua and revenue generated in tourism and hospitality.

ACTION	PRIORITY	TASKS AND TIMEFRAMES	KEY PERFORMANCE INDICATORS
4. Rotorua the centre of wellness for Aotearoa – The destination positions itself as the centre of wellness for Aotearoa with a coherent range of experiences that cater to the wellness of the mind, body and soul.	**High**	4.1 **Within 12 months,** develop a strategy to position Rotorua as the leading wellness destination in Aotearoa. 4.2 **Within 18 months,** establish an investment support team to assist existing and new wellness providers in making informed investment and marketing choices. 4.3 **Within six months,** ensure the Rotorua Commitment explores opportunities for tourism to contribute to addressing social and economic issues in Rotorua, utilising wellness activities.	1. Value of wellness sector to the destination. 2. Increase in perception of Rotorua as a wellness destination.



6.2.3 Tier Two – Investing in a Positive Future

ACTION	PRIORITY	TASKS AND TIMEFRAMES	KEY PERFORMANCE INDICATORS
5. Rotorua inner city revitalisation – Support the Rotorua Lakes Council plan for the revitalisation of the CBD, with a view to ensure that the planning and development reflects the importance of the inner city as a place for visitors as well as locals.	**High**	5.1. A plan for the inner city that is visitor friendly and showcases the values of the wider destination is developed and adopted by RLC **within 12 months.** 5.2 Residential and accommodation uses are established in the CBD **within five years.** 5.3 Te Arawa has a strong visible and authentic presence in the CBD **within two year.s** 5.4 The Rotorua Court House is moved off the Tutānekai spine **within five years.** 5.5 A change to the Rotorua District Plan is notified for the intensification of the inner city **within two years.** 5.6 A CBD which is a key part of the visitor experience is advocated for on **an ongoing basis.**	1. Visitor spend increases within inner city. 2. Visitor accommodation available in the inner city increases. 3. Footfall increases in the CBD 4. Increase of visitor and local perception of CBD. 5. Local business confidence improves.
6. Planning for quality accommodation – Focus commercial accommodation uses into the right locations (including the central city area) and support the development of new and redevelopment of existing accommodation to respond to the needs of the destination and visitor demand.	**High**	6.1 A new Rotorua online booking system is developed and is actively supporting quality visitor accommodation choices **within eight months.** 6.2 Work with visitor accommodation providers to support them signing up to the Rotorua Commitment. 6.3 Work with potential investors to help realise the opportunities associated with forest accommodation and an upmarket hostel in Rotorua **within 12 months.** 6.4 A change to the Rotorua District Plan becomes operative which enables quality accommodation options in the city centre **within three years.** 6.5 **Within six months**, establish an investment support team to assist visitor accommodation providers in making informed investment choices about redeveloping and refurbishing their businesses. 6.6 Positively advocate for the implementation of 'He papakāinga he hāpori taurikura – Homes and thriving communities' strategic framework.	1. Increased average daily room rate (ADR) and revenue per available room (RevPAR) across accommodation classes 2. Increase in number of under-construction and planned new hotel rooms. 3. Increase in number of rooms available in inner city.

6.2.4 **Tier Three** – Creating Stronger Foundations

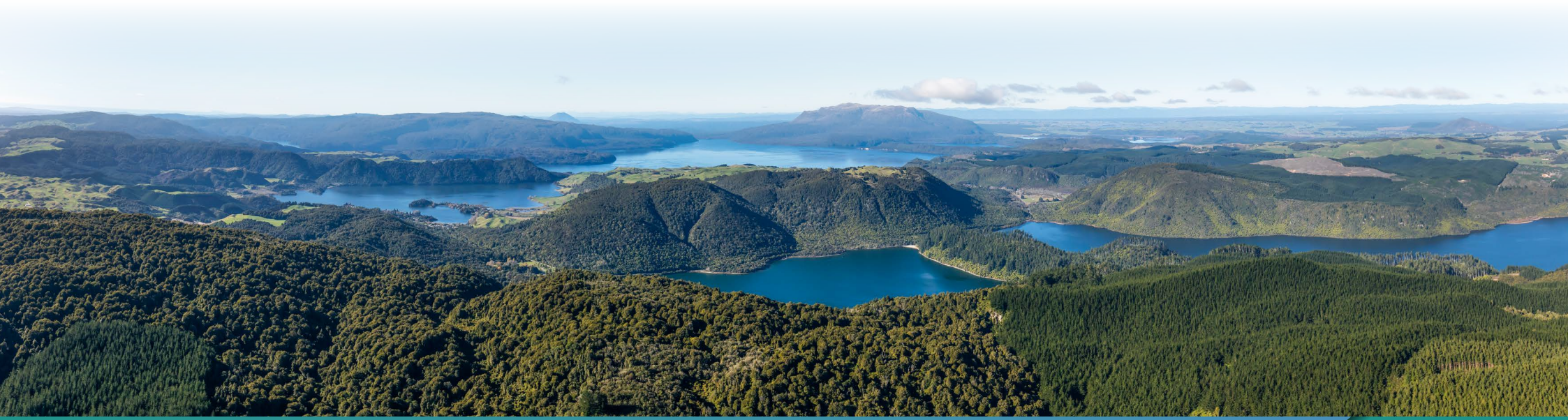
ACTION	PRIORITY	TASKS AND TIMEFRAMES	KEY PERFORMANCE INDICATORS
7. Workforce development – A series of initiatives to improve the capacity and capability of the tourism and hospitality workforce.	**High**	7.1 Develop and deliver Rotorua-focused training courses **within 12 months.** 7.2 Work with local education providers to deliver nationally recognised tourism training courses in Rotorua **within three years.** 7.2 Complete a long-term Rotorua tourism and hospitality needs analysis and workforce strategy, and develop an associated implementation strategy to address actions identified. 7.3 Positively advocate for the implementation of 'He papakāinga he hāpori taurikura – Homes and thriving communities' strategic framework.	1. Staff turnover within the Rotorua tourism and hospitality sectors decreases. 2. Percentage of tourism and hospitality businesses paying the living wage increases. 3. The number of locals employed by tourism and hospitality businesses increases annually. 4. Average wage for tourism and hospitality staff increases.
8. Creating a more connected destination - Strengthen connections with the wider Te Arawa waka, establish strong and resilient connections to Queenstown. Strengthen relationships with Wellington tourism and social infrastructure development.	**Medium**	8.1. Advocate for connecting flights between Rotorua and Queenstown. 8.2. Develop a Bay of Plenty (including Taupō) destination / tourism forum to actively discuss and share destination issues and opportunities, and explore options to work more closely together for the benefit of all destinations **within six months.** 8.3. Te Arawa is represented on the destination advisory group and the destination implementation unit on its initiation. 8.5. A quarterly destination forum is established **within three months**. 8.6 Work more actively with key high-value markets to grow visitation from these groups and grow the associated value to the destination. 8.7. The feasibility and effectiveness of a Locals Card and associated benefits will be explored and, if found to be feasible, established **within 12 months.** 8.8 Develop an online booking tool for Rotorua **within eight months.** 8.9 Review the location of visitor centres to ensure that they are in or close to key visitor locations within the destination **within two years.**	1. Queenstown and Rotorua are jointly marketing overseas within three years. 2. Industry satisfaction with RED increases.

ACTION	PRIORITY	TASKS AND TIMEFRAMES	KEY PERFORMANCE INDICATORS
9. Markets - Ensure that the destination has a good understanding of current and future markets, is positioned to meet the demands of those markets, and that the community is also supportive.	**Medium**	9.1 Conduct a biennial survey locally to gain an understanding of the social license of tourism in Rotorua – **ongoing.** 9.2 Identify the key high-value Rotorua visitors that will benefit the destination, and undertake a gaps analysis of the destination based on these visitor's experience requirements **within 12 months.** 9.3 Work with Tourism New Zealand to gain an understanding of what the domestic traveller wants from cultural products in New Zealand. 9.4 **Within 12 months,** establish an investment support team to assist tourism and hospitality businesses in making informed investment choices to align with key markets. 9.5 Research and analysis is shared with the private sector to support a 24/7 visitor destination.	1. Visitor spend within the destination increases, leading to the overarching goal. 2. Community support for tourism is measured through the biennial survey and is maintained or increased annually. 3. Private investment in tourism and hospitality increases.
10. Rotorua cultural presence - Supporting Te Arawa to ensure their culture is more physically evident throughout the destination. This includes developing an action plan with Te Tatau o Te Arawa that encompasses wayfinding, bilingual signage, public sculpture and installations, and supporting businesses to be more through bilingual resources, workshops and training for operators, businesses, etc.	**High**	10.1 A Te Arawa reo and cultural toolkit is developed and utilised by tourism and hospitality businesses **within 12 months.** 10.2 All council, government and Te Arawa signage in the central business district is bilingual (and complies with Te Taura Whiri I te Reo signage guidelines) **within two years.** 10.3 The CBD revitalisation project includes plans for greater physical expressions of the district's authentic Te Arawa cultural identity **within two years.** 10.4 Urban design guidelines are developed by Rotorua Lakes Council that include the integration of authentic cultural elements into new and existing development in the CBD and wider city **within two years.** 10.5 Cultural gateway features are established at the Ngongotahā and eastern entrances to the city **within three years.** 10.6 Initiate a programme to work with local artists, sculptures and creatives to bring the Māori culture to life throughout the destination in a compelling and interactive manner **within two years.**	1. The perception of Rotorua as a Māori cultural hub increases 2. The amount of bilingual signage in the inner city increases. 3. All council, government and Te Arawa signage in the central business district is completed.

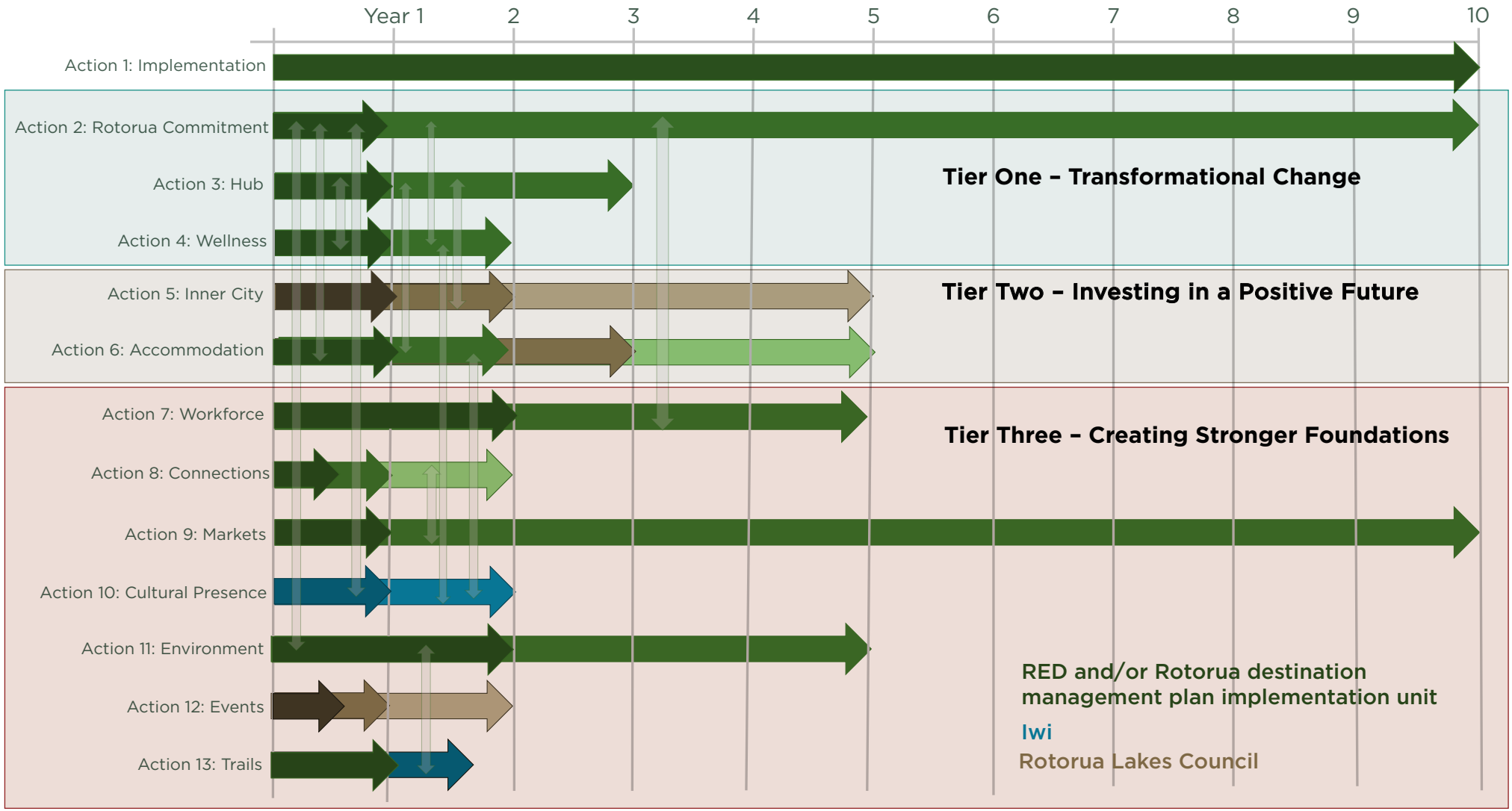
ACTION	PRIORITY	TASKS AND TIMEFRAMES	KEY PERFORMANCE INDICATORS
11. Tiaki tiaio (Enhancing the environment) – Improve or establish initiatives that incentivise tourism and hospitality businesses to actively contribute to the environmental wellbeing of the destination – including water quality, and habitat protection and restoration – and assist them and their manuhiri to become carbon neutral.	**High**	11.1 A sustainable / environmental toolkit is developed and utilised by tourism and hospitality businesses **within six months.** 11.2 Facilitate the Rotorua Sustainable Charter to expand its work by growing the number of tourism and hospitality businesses who have signed up to the charter under the Rotorua Commitment. 11.3 Develop an inventory of environmental regenerative initiatives around the destination that manuhiri and tourism and hospitality businesses can be part of and/or support **within 12 months.** 11.4 Delivery of the vision and strategy for the lakes of Rotorua. 11.5 RED becomes a carbon zero organisation **within 12 months.** 11.6 Consider and create a mitigation plan for climate risks to the visitor economy such as extreme weather events or the impact of changes in rainfall on our lakes and rivers.	1. Tourism and hospitality businesses signed up to the Rotorua Sustainable Charter increases. 2. The percentage of tourism and hospitality businesses within Rotorua which are carbon neutral increases annually. 3. Rotorua has two more tourism product offerings whose experiences directly contribute to the environment within three years. 4. The perception of Rotorua as a city defined positively by its natural environment is maintained / or increased.
12. Events strategy – Support the implementation of the events strategy including looking at the destination's events infrastructure.	**Medium**	12.1 The Rotorua events strategy is completed, and an action plan has been developed to deliver on the strategy's recommendations **within 12 months.** 12.2 Investigate the opportunity to hold an indigenous food festival during Matariki **within six months.** 12.3 **Within two years,** a review of the destination's conference facilities, with specific focus on the role, value and future proofing of the Energy Events Centre, has been undertaken and options have been presented to the destination steering group for any additional investment. 12.4 A measurement and reporting tool to consistently assess future event opportunities and report on outcomes of investment in events and their delivery has been developed and is actively used by RED **within one year.**	1. Average daily spend from events increases. 2. Rotorua maintains or improves its relative position as a preferred location for business events in New Zealand.

ACTION	PRIORITY	TASKS AND TIMEFRAMES	KEY PERFORMANCE INDICATORS
13. Developing a Rotorua trails strategy – Develop a recreational trails strategy that establishes a coherent trail plan for the destination. It will include consideration of the long-term functioning of Whakarewarewa and trail connections to the CBD.	**Medium**	13.1. A Rotorua trails strategy is developed in collaboration with the community, including landowners and managers, trail users and iwi **within 13 months.** 13.2 A business case for a new Great Walk has been completed **within 18 months.**	1. Economic impact of all trails increases. 2. Bed nights associated with trail users increases. 3. Repeat visitation from trail users increases. 4. Perception of Rotorua as a desirable mountain biking destination increases.

Thirteen action areas have been identified. As this is a 10-year strategy, it is anticipated that the rollout of these recommendations will be dispersed over this period. The ability to deliver these recommended actions is predicated on the level of support from key stakeholder organisations, especially councils and central government, the level of resourcing able to be applied by both government and the private sector, the acceptance of sustainable tourism growth outcomes by local communities, and the ability of the destination to work collaboratively to develop Rotorua in a positive and balanced manner.



The following chart shows the relative timing of the implementation of these actions, and sub-actions where appropriate.



7. Targets

The following targets have been identified to measure the economic and social benefits associated with the visitor industry that will result from the implementation of The Plan. These targets do not reflect the full value of tourism to the destination, but it is important to aim for an overall increase in the value of the visitor industry resulting from the implementation of The Plan.

1. Reach $1b visitor spend by 2030
2. Increase our average daily spend per visitor index by 5% per annum in comparison to the rest of New Zealand from:
   a. International 2.10% (December 2019)
   b. Domestic 1.025% (June 2021)
3. Maintain a positive perception of the impact of tourism with Te Arawa and on the local community
4. Increase the GDP contribution per person employed in tourism (from $57,546 in 2019).

ACKNOWLEDGMENTS

The Destination Management Plan (DMP) process has involved extensive consultation and Rotorua Economic Development (RED) would like to thank everyone who has contributed.

We would like to acknowledge the Ministry for Business, Innovation and Employment (MBIE) for their financial support through the Strategic Tourism Asset Protection Programme.

We would also like to thank the DMP working group of Dave Bamford, Rowan Sapsford and Tessa Richardson, who facilitated the destination management planning process.

Their work has been guided by the DMP project steering group, who have been generous with their time, knowledge and expertise: Chair David Tapsell (Pukeroa Oruawhata), Jean-Paul Gaston (Rotorua Lakes Council), Rawiri Waru (Te Tatau o Te Arawa), Stuart Taylor (MBIE), Paul Rayner (Rotorua Tourism Investment Partnership), Rebecca Ingram (Tourism New Zealand), Tim Cossar (Te Puia) Andrew Wilson, and Jo Holmes (both RED).

Finally, over 100 people have participated in a series of workshops and interviews to help shape the direction of this plan. We are grateful for the time they have committed to this process and their shared commitment to the destination. By continuing to work together, we will achieve the Plan's vision of *he painga mō te ao katoa* – for the betterment of all.

Photo: Mark Smith Photography

Appendix 1. Destination Issues

Issue 1: Social Deprivation

A range of social issues are adversely affecting the destination's communities, the visitor experience, and Rotorua's ability to function as a tourism destination.

There is a significant lack of housing for Rotorua residents and a large number of people are living in emergency accommodation in local motels for long periods of time. This is a very visible issue that has created flow-on effects for visitor experiences and their accommodation options and selection.

Rotorua has crime and unemployment rates that are higher than the national average. Rotorua is experiencing significant inequity, with Māori significantly more deprived on average than Pākehā and other ethnicities.

These deprivation issues are also heavily reported on by local and national media which can negatively affect the visitor perception and challenge the marketability of the destination.

These issues are impacting on the pride of the destination and its people.

Issue 2: Accommodation

The motel stock is largely based on Fenton Street, much of which is considered to be tired and run down. Fenton Street is seen as Rotorua's front window and the state and occupancy of these motels can create the perception that the destination is tired and dated.

A large number of motels are occupied by Ministry of Social Development (MSD) clients which is having a range of effects on the destination, including reducing overall available bed numbers.

This long tail of lower quality motels is also impacting on the investment case for the development of new accommodation properties (particularly in the inner city), or refurbishment of existing.

There is also a lack of quality (i.e., 4-star and above) backpacker accommodation and 4.5- and 5-star hotel accommodation in Rotorua.

Issue 3: Destination Definition

Rotorua has some very strong attributes (natural features, Māori culture, health and wellbeing, outdoor recreation activities), however, it lacks definition as a destination. It is criticised for trying to be all things to all people. There is not a strong understanding from the community of what kind of visitor is wanted and what key experiences should be championed.

There is a perceived disconnect between the tourism industry and the community, including a lack of wider understanding of the actual value of tourism to the wider community. This has led, in part, to a community perception that tourism is attracting low-value manuhiri (visitors) to the district.

There is an opportunity for additional strategic thinking in some areas, including attracting events and the improving or building new walking and biking trail networks.

Some of the destination's key features and strengths, such as the health and wellbeing industry, the lakes, and cultural tourism, are under-invested and not meeting their potential.

The destination's Māori cultural tourism experiences have suffered due to the loss of international visitors while the borders are closed during the COVID-19 pandemic. These businesses are having to reinvent themselves to meet the different preferences and expectations of the domestic market.

There is a lack of comprehensive involvement with Te Arawa (its people and values) in all areas of the tourism sector. This has meant that there are missed opportunities for both Māori and the destination in general. The rich history of Māori tourism and the strength of the Te Arawa culture is undervalued and should be reflected more comprehensively in the destination's identity, experiences and infrastructure (including governance and education).

Te Arawa values need to be applied throughout the destination to better support the positive advancement of the people and the place.

Issue 4: Central Business District

The central business district (CBD) stretches between Rotorua Central Shopping Centre (the mall) (Amohau and Tutanekai streets) and Eat Streat (lake end of Tutanekai Street) and a number of blocks on each side of Tutanekai Street. This spreads users and dissipates the focus and vibrancy of the CBD.

There are a large number of absentee landlords within the CBD who do not maintain their buildings, giving the area a tired look.

Apart from the Eat Streat area, the wider CBD does not get much visitation in the evenings and is characterised by high levels of antisocial behaviour. This is exacerbated by the fact that many of the shops are not open in the evenings, meaning the CBD can be very quiet and uninviting for manuhiri.

Issue 5: Environmental Stewardship

The destination's environment has not been noticeably affected by tourism, however there have been pressure areas, especially around high-use lakeside areas (e.g. Lake Ōkareka).

The quality of the environment does have a significant impact on the attractiveness of the destination. Matters such as freshwater quality have been a long-running concern.

The tourism industry is well placed to be more actively involved in enhancing the environment. While there are some positive stories within the destination, the industry should be more active in creating a regenerative-based approach (i.e., not just sustaining but improving) to protect and enhance the environment. As well as producing environmental benefits, this will also improve the community's perception of the industry.

The impact of climate change is also a matter that needs to be considered. Tourism does contribute to climate change, the effects of which can include additional natural hazard events such as flooding, which is already an issue in some parts of the destination.

Geothermal activity is a compelling feature of the destination but is also a hazard (geothermal eruptions). The wider geological vibrancy of the destination has led to hazardous events in the past, such as the Tarawera eruption, that caused significant loss of life, displacement of populations and destruction of private, civic and tourism assets and infrastructure.

Issue 6 Reliance on International Markets

Rotorua has, for a long time, had a strong reliance on international visitors. This dependence on overseas visitation has created a destination that may not be resilient in the face of events that impact the number of international visitors to Aotearoa. There has also been a heavy reliance on high-volume international markets, such as, for example, the Chinese coach market.

There is also a high reliance on international and tourist workers in hospitality and tourism businesses.

Rotorua is perceived throughout Aotearoa as an international destination. This may affect its versatility in responding or repositioning the region to attract a stronger domestic market.

Issue 7: Human Resources

Concerns have been raised about problems with quality of staff and staff retention within the tourism sector. There is a perception that tourism is not a valid career and is characterised by low pay.

International and tourist workers make up a high proportion of hospitality staff. Such staff generally accept a lower wage which can drive down pay rates.

A lot of local youth leave Rotorua looking for opportunities based on a perceived lack of suitable roles locally. This has been exacerbated by COVID-19 and is also fuelled by the lack of available affordable housing.

COVID-19 is a short-term issue, however it has resulted in many staff who were employed in tourism and ancillary industries, moving to other industries. This may have a significant long-term effect on the tourism labour supply. This could also severely affect institutional and legacy knowledge, especially in some areas of cultural tourism where roles have been passed to successive generations.

Issue 8: Amenities, Services and Infrastructure

There is no good, centrally located venue for events in Rotorua. There are a number of important assets in the destination that are underutilised and underinvested in. Some of them need to be worked harder for their own benefit, specifically (a) Arawa Park Rotorua Racecourse, (b) International Stadium, (c) Rotorua Museum, (d) Rotorua Lakefront, and (e) Government Gardens.

Rotorua Airport is susceptible to the impacts of flooding and land development and could benefit from more domestic links, especially with Queenstown.

There is a lack of coherent wayfinding signage throughout the destination.

Central and local government regulations and processes (i.e., Conservation Act, Resource Management Act, and Building Act) can unnecessarily inhibit development opportunities. There is also a poor understanding of these statutory processes among existing or new operators which can make it difficult for expansion or development of new activities.

Issue 9: Industry Support

The destination would benefit from (a) stronger collaboration between all parties, including the community, (b) greater transparency, openness and sharing of information, and (c) a more structured approach to the various conversations taking place around the future of tourism.

There is a range of organisations and entities who manage and market Rotorua, however there is an apparent disconnect between these groups, tourism management entities and the wider community. This complexity is also affecting the brand proposition of the destination and its ability to establish and implement a vision.

There is an emerging leadership deficit and age gap, with a need to ensure a systematic approach to the nurturing, developing and retaining younger talent capable of leading the destination in the future.

There is a strong sense of competition with surrounding destinations. This can mean that potential synergies created by working closer with these destinations are not realised.

Appendix 2. Destination Actions

IMPLEMENTATION

Action 1: Implementing the Rotorua Destination Management Plan

Priority: High

Context (Why)

To ensure the actions in the Rotorua Destination Management Plan (The Plan) are implemented, it is important that a suitably resourced team is formed to oversee the implementation. There was strong direction from stakeholders throughout the engagement process that the implementation of The Plan must be actively led and undertaken. To ensure this will occur, resource and mana need to be attributed to the implementation process.

Description (What)

Establishment of a Destination Implementation Unit and a Destination Advisory Group.

The implementation unit will be led and managed by RED, and overseen by and report to the advisory group.

The implementation unit will lead the delivery of the actions within The Plan. Members of this unit will have the appropriate skills and experience to work with key individuals and organisations to progress the actions. They will also undertake or enable the delivery of key actions themselves. The team will be housed within RED and will include capacity and capability from Te Arawa.

The implementation unit will provide a monthly report to the advisory group on progression of the actions set out in the following sections. Where required, the implementation unit may create working groups for certain actions to add specific capability and capacity.

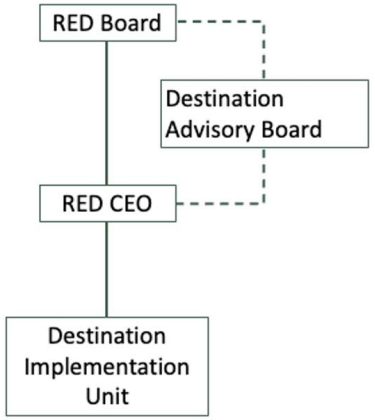
The advisory group will report to the Rotorua Economic Development Board on the implementation unit's progress on a regular basis. The Plan's implementation will become a recurring agenda item at every RED Board meeting.

Those in the advisory group should have the level of leadership, relevant experience and authority to facilitate directly the implementation of The Plan to ensure it is carried out in a timely manner. The advisory group will consist of six to eight individuals, with representation from the following:

- RED
- Te Arawa
- Rotorua Lakes Council
- Tourism and hospitality industry leaders

The advisory group will meet monthly for 12 months after The Plan is adopted, and every second month thereafter.

The role and makeup of the advisory group should be reviewed on an annual basis to ensure members' skills and experience are aligned with the actions to be undertaken in the following 12 months.



While Central Government has provided initial funding for the first phase of implementation through its Tourism Communities: Support, Recovery and Reset funding, additional funding sources will need to be identified to implement The Plan in its entirety. The implementation unit will be responsible for accessing funding and considering ways for manuhiri to financially contribute to the development of the visitor infrastructure.

Action (How)

	Action	Timeframe	Responsibility
1.1	The Destination Advisory Group and Destination Implementation Unit will be formed	One month	Rotorua Economic Development
1.2	An annual report will be published by the implementation unit on progress made in carrying out The Plan's actions	Annually	Destination Implementation Unit

TIER ONE ACTIONS – TRANSFORMATIONAL CHANGE

Action 2: The Rotorua Commitment

Priority: High

Context (Why)

The Rotorua destination is facing a multitude of challenges that are having a significant effect on the visitor experience and the ability of the destination to function effectively. The answers to these challenges are complex and the tourism industry is not responsible for resolving all of them. The industry does, however, have an opportunity to take a leadership role by assisting the wider community to address these challenges within its own sphere of influence.

The Rotorua Commitment is a proposed initiative. It is based on the destination brand which RED would encourage its operators to demonstrate not only to visitors but to the local community as well. Development and implementation of the commitment's framework should reflect the destination brand and values in a way which will drive meaningful change and a more coherent destination proposition. The commitment will ensure key issues outlined in The Plan are addressed in accordance with the destination values, and actions taken will benefit both the local community and visitors.

The values-based commitment will also provide an opportunity to strengthen the destination brand with greater integrity by applying the values when addressing issues such as capability and development, industry support and environmental stewardship.

By creating the Rotorua Commitment and then gaining acceptance and adoption of it by the destination's tourism operators, Rotorua will become the desired destination to work in as employers will provide better working environments. Additionally, the destination definition will be clearer as manuhiri will feel the local culture throughout their experience in Rotorua.

Description (What)

Develop a commitment framework (the Rotorua Commitment) that reflects the destination values Rotorua has adopted. The Rotorua Commitment is a proposed programme to address some of the key issues the region is facing. The commitment will be based on three of the four wellbeings: social, cultural and environmental. The fourth wellbeing – economic – will be a default outcome of addressing the first three wellbeings.

This commitment will help address two key destination issues: social deprivation, and care for the environment. The desired outcomes of the commitment are:

- to become the destination that people want to live and work in
- to be the place where manuhiri enjoy great customer experiences from the moment they arrive
- to be the place where business owners are giving back to the environment.

Another desired outcome of the commitment is that Rotorua will have a clear destination definition.

The commitment framework will be managed in a way to bring about positive change in tourism products. The intent is to recognise those who are part of the framework so that they can benefit from this involvement through marketing and wider support from RED and other agencies.

Development of the Rotorua Commitment is anticipated to include the following:

1. Research current best practice and lessons learned around commitments and promises in Aotearoa and globally. Draw on examples from: Finland, Manchester, Dundee, Niue promise, Pacific promise, Tourism Sustainability Commitment, UN Sustainable Development Goals, QRC ambassador programme, Waikato ambassador programme, tourism taskforce work and the Simon Upton report. This research would then assist in the development of the framework for the Rotorua Commitment.
2. Socialise and develop the concepts with:
    - Destination Advisory Board
    - Visitor economy stakeholders
    - Te Arawa
    - Qualmark (to enable cross-accreditation)
    - Tourism Industry Aotearoa's (TIA) sustainability team (to enable cross-accreditation)
    - Rotorua Tourism Industry Partnership (RTIP)
    - Rotorua Sustainable Charter
3. Design the programme to include the following (co-designed with Qualmark, TIA and RTIP)
    - Objective
    - Tasks
    - Costings
    - How to get buy-in, such as gaining a listing on Rotoruanz.com, being included in famils, etc.
    - Measurables

In developing the framework, it will be important to work with national accreditation entities, such as Qualmark, to ensure that they include recognition of regional accreditation programmes in their processes. This would support destination-based frameworks but reduce potential double ups between national and local programmes.

Action (How)

	Action	Timeframe	Responsibility
2.1	The framework for the Rotorua Commitment is established	Six months	Destination Implementation Unit
2.2	The Commitment is developed and supported by the community and industry. A minimum of 25% of operators (this can include activities, hospitality, accommodation, and retail) have signed up to the Commitment and are actively engaged in the programme	Two years	Destination Implementation Unit
2.3	100% of complying businesses are signed up to the Commitment and are actively engaged in the programme	Five years	Destination Implementation Unit
2.4	Advocate for regional variances to national tourism standards such as Qualmark to ensure that local initiatives (such as the Rotorua Commitment) are recognised	Two years	Destination Implementation Unit

Key Performance Indicators

1. The number of operators who have signed up to the Rotorua Commitment increases annually
2. New Zealanders' perception of Rotorua as a desirable place to visit increases over time
3. The awareness by locals that the tourism industry is an active and positive part of the community increases over time

Action 3: Aotearoa Tourism and Hospitality Innovation Hub

Priority: High

Context (Why)

Despite being New Zealand's largest export earner (pre-COVID-19), tourism has fallen behind other key sectors when it comes to innovation driving development at a national level. There is no obvious centre of excellence focused on nurturing and stimulating new ideas for the benefit of the wider industry and NZ Inc.

During the Rotorua Destination Management Plan consultation, including the research and situation analysis stages, there was considerable discussion about the need for supporting current and future businesses, innovation, regeneration and creativity. Rotorua as the birthplace for tourism in Aotearoa, and especially Māori tourism, was repeatedly mentioned as a key attribute. COVID-19's impact on traditional tourism products has been significant. Providing Rotorua with support for tourism businesses and concepts, growing and enabling the workforce, and contributing to Aotearoa's revalued tourism sector are seen as essential for the destination. Assisting hibernating and recovering tourism businesses is a priority.

There are several approaches within Aotearoa, and internationally, supporting innovation in business and nurturing and growing human talent. These approaches include:

- The Lightning Lab concept https://www.lightninglab.co.nz/programmes/tourism/
- Creative HQ https://creativehq.co.nz
- Small Business Enterprise Centres
- Involving exemplars and innovation developers as motivators and support for aspiring innovators and tourism business start-ups

The proposed Aotearoa Tourism and Hospitality Innovation Hub should have a strong Rotorua lens that reflects the strengths and heritage of the destination. It should also consider some of the identified destination issues around workforce capability, destination definition and environmental matters, and consider how these issues can be positively influenced.

As well as the birthplace of tourism in Aotearoa, Rotorua is currently regarded as an innovator with forestry and is known for its creativity in this area. There is the potential to harness and replicate this innovation by creating a focused tourism and hospitality hub that is seen as national leader and supports the Rotorua tourism industry and the destination values.

Description (What)

To create a distinctive national tourism and hospitality innovation hub that will support creative, bold and innovative tourism and hospitality ideas and experiences, and test them against markets, practicality, implementation and costings. The hub will be a support centre for current and growing tourism businesses and will reflect the status of Rotorua as the oldest visitor destination in Aotearoa. It will be a national centre for destination resilience, innovation, learning and transformational growth in tourism in Aotearoa.

As well as having a national outlook, the hub will also provide support for local growing tourism and hospitality businesses, and will work with new businesses to support their development and connect them to required capital.

The hub will play to the strengths of the destination, exploring opportunities to grow cultural and environmental-based experiences and capability.

The hub will be located centrally and will be a place used by locals and visitors to grow their own knowledge and ideas.

Action (How)

	Action	Timeframe	Responsibility
3.1	A business case is developed for the Aotearoa Tourism and Hospitality Innovation Hub	12 months	Destination Implementation Unit
3.2	The hub is established, thriving, nationally and internationally recognised, and is supporting and assisting local and national tourism development	Three years	Destination Implementation Unit

Key Performance Indicators

1. The hub directly generates tourism and hospitality new business start-ups and products that match the destination values and brand
2. Patronage by local and national businesses and organisations
3. Good satisfaction rating for those who have gone through the hub
4. The hub leads to a positive economic impact on Rotorua through the increase in the numbers of jobs in Rotorua and revenue generated in tourism and hospitality

Action 4: Rotorua the Centre of Wellness for Aotearoa

Priority: High

Context (Why)

Rotorua is not currently meeting its full potential as a wellbeing-based tourism destination, but has considerable opportunity to capitalise on the existing international, and emerging domestic, wellness market.

The global wellness market is worth in excess of $3.7 trillion – three times the value of the pharmaceutical industry. The market covers spas, anti-ageing, weight loss, alternative therapies, fitness, and healthy eating. People are becoming more focused on taking proactive management of their health and well-being to avoid illness and disease, and the size of the market reflects that.

This segment of the tourism market mirrors the wider tourism market. Although there has been a move in the past decade to more experiential activities, future trends are moving to transformational experiences that take the authentic experiences to a deeper, self-reflective level. Manuhiri are seeking true experiences rather than just disconnected offerings. They seek experiences that truly link together to take the individual on a journey – whether it be relaxation, self-discovery or developing creativity.

This journey-based focus has led to experiences being adapted, with traditional spa offerings being mixed with native bush walks, local cuisine, role-playing shows or educational classes. The Global Wellness Institute describes it as “mixing up fitness, connection with nature, local cultural immersion, and healthy food...with treatments, to create a more immersive necklace (or circuit) of experiences.”

A small but important segment of this market is the thermal/mineral springs segment. The number of global thermal/mineral springs properties grew from 26,847 in 2013 to 27,507 in 2015. These businesses earned $51 billion in 2015, up 2% (from $50 billion) from 2013.

In New Zealand there is only one home of significant geothermal activity, and 79% of New Zealanders associate geothermal activity with Rotorua. With this connection to thermal springs already existing in the minds of New Zealanders, Rotorua is well placed to leverage this advantage with domestic and international visitors.

Rotorua has a long history of rehabilitative bathing, going back as far as the days of the Pink and White Terraces in the 1880s, and in pre-European times when the hot pools were seen as an integral part of Māori health practices. This strong history of wellness visitation and its influences from mātauranga Māori is an immense strength of the destination, and there is significant opportunity in exploring traditional Māori health and wellbeing practices which can be experiences in their own right or incorporated into wider experiences where appropriate.

The cultural elements associated with wellness and manaakitanga should be key to the delivery of Rotorua wellness experiences.

While the spa offering in Rotorua is a strength of the destination, it will be important to ensure this is curated in a manner that maximises value for the visitors and the products themselves. There is a risk that competition between the current and new spa-based businesses could lead to detrimental outcomes for all.

There is a significant opportunity to package a wider range of experiences under wellbeing tourism. These include recreation experiences such as biking and trail walking. Conservation activities and those experiences which have a strong linkage to the environment and looking after te taiao (the environment) are also within the ambit of wellness experiences.

Description (What)

Support new and existing spa and wellness experiences that capitalise on the natural resources, Māori culture and existing experiences that underpin the Rotorua destination.

Develop a strategy that explores how Rotorua can position itself as the leading cultural wellness destination in Aotearoa based around all facets of wellness.

Explore opportunities for tourism to contribute more to addressing social issues in Rotorua to extend this wellness culture to the community.

Action (How)

	Action	Timeframe	Responsibility
4.1	Develop a strategy to position Rotorua as the leading cultural wellness destination in Aotearoa	12 months	Rotorua Economic Development
4.2	Establish an investment support team to assist existing and new wellness providers in making informed investment and marketing choices with a strong emphasis on cultural wellness	18 months	Rotorua Economic Development
4.3	Ensure the Rotorua Commitment explores opportunities for tourism to contribute to addressing social and economic issues in Rotorua, utilising wellness activities	Six months	Destination Implementation Unit

Key Performance Indicators

1. Value of wellness sector to the destination
2. Increase in perception of Rotorua as a wellness destination

TIER 2 ACTIONS – INVESTING IN A POSITIVE FUTURE

Action 5: Rotorua Inner City Revitalisation

Priority: High

Context (Why)

The Rotorua inner city, or central business district (CBD), is a focal point for the destination. It is where key services are concentrated such as bars, restaurants, visitor information and visitor facilities. The inner city is one of the destination's 'shop windows', showcasing Rotorua to visitors and providing visitor experiences that are indicative of the wider destination.

The CBD stretches between Rotorua Central Shopping Centre (the mall) (Amohau and Tutanekai streets) and Eat Streat (lake end of Tutanekai Street) and a number of blocks on each side of Tutanekai Street. This spreads users and dissipates the focus and vibrancy of the CBD. There are a large number of absentee landlords within the CBD who do not maintain their buildings, giving the area a tired look.

Apart from the Eat Streat area, the wider CBD does not get much visitation in the evenings and is characterised by high levels of antisocial behaviour.

This is exacerbated by the fact that many of the shops are not open in the evenings, making the CBD very quiet and uninviting for visitors.

Enhancing this key public space will be significantly beneficial for the wider destination. Not only will it provide opportunities to extract more value from visitors, but it will create a place where visitors and locals want to go, it will increase investment, and it will restore a greater sense of pride in Rotorua.

Description (What)

Rotorua Lakes Council (RLC), with Ngāti Whakaue, will revitalise the inner city, guided by the following objective:

"To establish a vibrant and safe inner city known locally and throughout Aotearoa for its rich heritage, city living, entertainment, and as a great place to work."

The following are the high-level outcomes to be achieved through the implementation of a revitalisation plan:

- *Outcome 1:* A greater number of apartments are developed, increasing access to more variety/diversity of housing typologies in the district
- *Outcome 2:* District land and resources are used efficiently while reducing the impact on the environment
- *Outcome 3:* The inner city is vibrant, thriving, prosperous and accessible
- *Outcome 4:* The inner city streets, public spaces and new developments are distinct, well designed and reflect the unique Te Arawa culture and natural identity
- *Outcome 5:* The inner city supports a healthy, safe and connected community
- *Outcome 6:* The inner city is an integral part of the wider Rotorua destination and provides positive and compelling visitor experiences.

Key elements of the revitalisation plan will be as follows:

- A spatial framework with a vision – define a 3-, 10- and 30-year picture of change
- Redefined inner city extent – consolidate change and maximise impact
- Redevelopment of key corridors – Tutanekai High Street (a North-South corridor connecting the mall to the lakefront), and the park-to-park connection between the Government Gardens and Kuirau Park (an East-West corridor connecting the key city centre open spaces)
- Established network of public spaces and places along the corridors
- Develop thematic character precincts (dining, arts and retail) – to focus change and stimulate vibrancy; develop clear precinct plans for the targeted streets to spark cluster development
- Incentivise residential living – intensification plan change and incentives policy
- Roading and Sustainable Transport Plan – gives priority to pedestrians and cyclists, and a free orbiter bus service; improve multi-modal connections to wider destination features including the Rotorua Lakefront, Rotorua Museum, Government Gardens, Whakarewarewa Forest, etc.
- An urban design guide with established cultural foundations, Te Arawa values and principles, and best-practice urban design
- Activation programme to support inner city vibrancy
- Marketing and investment plan positioning the inner city as a 'destination', supported by a property developers forum
- Key packaged projects – short, medium and long (key moves)
- Established inner city profile – indicators, e.g., footfall to measure change and profile the inner city
- Connecting the inner city to the wider destination through a consideration of the needs of visitors and the incorporation of the destination brand and values in its components and design.

Prioritise the creation of a central people district:

- Pedestrian priority with easy and safe movement
- Hop-on, hop-off transport options, and integrated cycling infrastructure
- Great connections and journeys from the inner city to the lake, museum, parks and mall
- Welcoming streetscape that is distinctive to Rotorua and reflects its heritage and values

- Reflects key wellness attributes so that the area reflects the strengths of the destination.

This project will include the following elements:

- Showcase the best of Rotorua – past, present, future. The CBD needs to be an attraction, a culturally diverse entertainment experience for both locals and manuhiri
- Invest in both collective activation and focused attraction to lift excitement and quality
- Enable residential and accommodation users in the CBD to create more vibrancy during the night and day
- Work with the Ministry of Justice to move the Rotorua Court House off the Tutanekai spine
- Work with Ngāti Whakaue to ensure the town centre celebrates its cultural heritage, stories and values
- Work with RED to ensure the inner city considers the needs of visitors as well as locals.

The implementation unit will work with RLC to actively support the development, funding and delivery of the CBD strategy. This will need to be done at the governance and management level to facilitate the implementation of the strategy.

The implementation unit will also advocate for inner city design and planning that places manuhiri at the centre of the design process, including future-proofing the place for future visitors and ensuring that value generation from visitors is maximised.

Action (How)

	Action	Timeframe	Responsibility
5.1	A plan for the inner city that is visitor friendly and showcases the values of the wider destination is developed	12 months	Rotorua Lakes Council Ngāti Whakaue
5.2	Residential and accommodation uses are established in the CBD	Five years	Rotorua Lakes Council
5.3	Te Arawa has a strong, authentic and visible presence in the CBD	Two years	Rotorua Lakes Council Ngāti Whakaue
5.4	The Rotorua Court House is moved off the Tutanekai spine	Five years	Rotorua Lakes Council Ministry of Justice
5.5	A change to the District Plan is notified for the intensification of the inner city	Two years	Rotorua Lakes Council
5.6	Advocate for the inclusion in the inner city revitalisation plan the following: 1. Initiatives that provide a reason for visitors to come into the inner city with an anchor tenant that becomes a must-do item on a visitor's itinerary; 2. Develop activations that encourage people to move through the city, discovering new places and focusing their attention on positive depictions of the place through art, culture and/or performance 3. Ensure that there are journeys and connections from the inner city to the lakefront, museum, parks and mall	12 months	Destination Implementation Unit

Key Performance Indicators

1. Visitor spend increases within inner city
2. Visitor accommodation available in the inner city
3. Footfall increases in the inner city
4. Increase of visitors' and locals' positive perception of inner city
5. Local business confidence improves

Action 6: Planning for Quality Accommodation

Priority: High

Context (Why)

It is important that the Rotorua destination is serviced by a good supply of quality visitor accommodation that reflects the destination values. This will ensure the destination can cater to the demands of the market and provide the best visitor experience.

There is currently an oversupply of poor-quality accommodation in the destination providing experiences that are not consistent with the values of the destination. While use of some motels by MSD is considered a temporary issue, it is having a significant effect on accommodation capacity and is supporting the existence of accommodation product in areas that may not otherwise be viable. While the Destination Management Plan will not solve the housing shortage, there does need to be consideration on how tourism can facilitate positive outcomes for this issue.

More centrally located, quality accommodation will ensure the destination is supported to host its visitors in a manner that reflects the values of Rotorua.

Description (What)

The hotels and motels along Fenton Street can be transitioned into areas for homes in the longer term, with visitor accommodation moving to the CBD or the surrounding area. This would not only free up land for homes close to public transportation routes and places of work, but it would also result in more people moving around the central city, contributing to its vibrancy.

Bread-and-breakfast (B&B) types of accommodation are an important part of the Rotorua accommodation supply, however they lack the same level of controls as commercial accommodation providers. It will be crucial to develop a system to support quality B&Bs being established in the right locations and providing the right experiences.

Implement tools, such as a Rotorua destination online booking system and the Rotorua Commitment that will incentivise quality accommodation.

There is strong potential within Whakarewarewa Forest for environmentally low impact and discrete type accommodation options aimed at the high end of the visitor market. Early analysis suggests there are two key opportunities catering to different markets – a boutique 'tree-house' hotel and one or more small lodges. Likewise, it was identified in the 2016 Terry Stevens report that consideration should be given to a new generation 5-starhostel (sometimes referred to as a 'posHostel') such as those being developed by Generator and Plus for the new emerging Western markets. https://staygenerator.com/?lang=en-GB

In addition to new accommodation opportunities, there is also a demonstrated need to work with existing accommodation providers who may be wanting to redevelop their businesses to better meet emerging and future markets. Such investment should be supported so that the destination can meet the future demands of visitors. RED has expertise in this area and there is an opportunity to expand RED's support to provide a more comprehensive service to those investing in a higher value accommodation product. Over time, it is anticipated that this service could form part of the offering at the Aotearoa Tourism and Hospitality Innovation Hub.

Action (How)

	Action	Timeframe	Responsibility
6.1	Development of a new Rotorua online booking system that is actively supporting quality visitor accommodation choices consistent with the destination values	Eight months	Rotorua Economic Development
6.2	Work with visitor accommodation providers to support them signing up to the Rotorua Commitment	12 months	Destination Implementation Unit Accommodation providers

6.3	A change to the Rotorua District Plan becomes operative which enables quality visitor accommodation options in the inner city	Three years	Rotorua Lakes Council
6.4	Establish an investment support team to assist visitor accommodation providers in making informed investment choices about redeveloping and refurbishing their businesses	Six months	Rotorua Economic Development
6.5	Work with potential investors to help realise the opportunities associated with forest accommodation and an upmarket hostel	12 months	Rotorua Economic Development
6.6	Positively advocate for the implementation of He Papakāinga, He Hāpori Ttaurikura – A Strategy for Homes and Thriving Communities strategic framework	Ongoing	Rotorua Economic Development

Key Performance Indicators

1. 15% of accommodation providers are signed up to the Rotorua Commitment within three years
2. Visitor accommodation available in the inner city
3. The positive perception of accommodation offerings in Rotorua increases annually

TIER 3 ACTIONS – CREATING STRONGER FOUNDATIONS

Action 7: Workforce Development

Priority: High

Responsibility

Rotorua Economic Development and the Destination Implementation Unit

Context (Why)

Nationally and regionally, tourism workforce capability and availability are well known constraints to a sustainable and effective tourism workforce. The issues are complex and include: tourism as an undervalued career option; technology competency; tertiary training; employment conditions including wages; lack of quality short-course training, especially in the areas of IT and middle management; sufficient and affordable housing for workers; and low wages.

This is a crucial issue for the Rotorua destination and is identified at a national level by Service IQ, Ministry of Business, Innovation and Employment (MBIE), Tourism Industry Aotearoa (TIA) and Māori Tourism, and regionally by TRC Tourism in the Wider Bay of Plenty Regional Tourism Strategy (2018), as well as the work undertaken by Terry Stevens in 2016, and Toi Ohomai Institute of Technology.

The Rotorua Destination Management Plan engagement process also identified a need for the promotion and provision of relevant hospitality (including food management) and tourism training courses to be made more available and accessible, especially to the local community. This includes tourism career awareness options in Rotorua schools.

Description (What)

Ensure relevant training courses are available for those in the Rotorua tourism workforce or those wishing to enter the workforce. To achieve this, there will be a need to develop and run a programme of short-term

hospitality and training courses. This would be led by a tourism training taskforce made up of representatives from Rotorua Tourism Investment Partnership (RTIP), training providers including Service IQ, Go with Tourism, Toi Ohomai and the Rotorua Community Youth Centre Trust (Pūtake Nui).

Have a range of suitable industry courses developed and delivered in the next one to two years and then continued. These courses could include online courses, e.g., manaaki hospitality programmme, short courses or in-house training.

Undertake the development of a tourism and hospitality training needs analysis that addresses the way forward for capability in the Rotorua tourism and hospitality sector and a 10-year workforce strategy. This would also address funding options.

Support and incentivise tourism and hospitality businesses to pay the living wage to their staff and reflect this in the Rotorua Commitment.

Advocate to local and central government for the implementation of He Papakāinga, He Hāpori Taurikura – A Strategy for Homes and Thriving Communities strategic framework.

Action (How)

	Action	Timeframe	Responsibility
7.1	Develop and deliver Rotorua-focused training courses	12 Months	Rotorua Economic Development Local training providers
7.2	Work with local education providers to deliver nationally recognised tourism training courses in Rotorua within three years	Three years	Rotorua Economic Development Local training providers
7.3	A long-term Rotorua tourism and hospitality training needs analysis and workforce strategy is completed and an associated implementation strategy is developed to address actions identified	18 months	Destination Implementation Unit
7.4	Positively advocate for the implementation of He Papakāinga, He Hāpori Taurikura – A Strategy for Homes and Thriving Communities strategic framework	Ongoing	Rotorua Economic Development

Key Performance Indicators

1. Staff turnover within the Rotorua tourism and hospitality sectors decreases
2. Percentage of tourism and hospitality businesses paying the living wage increases
3. The number of locals employed by tourism and hospitality businesses increases annually
4. Average wage for tourism and hospitality staff increases
5. Completion rates of training courses for tourism and hospitality staff increase
6. GDP per person employed in tourism and hospitality increases

Action 8: Creating a More Connected Destination

Priority: Medium

Context (Why)

The stronger the destination's connections with surrounding locations and similar destinations within Aotearoa (i.e. Queenstown), the easier and more logical it will be for manuhiri to visit Rotorua. The same logic applies within Rotorua where it is important that the destination is easily experienced, through accessible experiences linked together by a consistent and compelling theme. Enhancing such connections will facilitate the effective functioning of the destination.

Action 9 sets out work to be undertaken to better identify those markets (domestic and international) that are likely to provide greater value to the destination. The destination needs to actively connect to these markets to maximise the benefits they will bring to the destination.

Throughout the destination management planning process, there has been ongoing korero with central government and national agencies. This has facilitated an understanding of the destination and its issues within these agencies and resulted in enhanced working relationships. Such relationships are beneficial in seeking solutions to issues that may sit outside of the mandate or powers of the local industry and local government.

Similarly, there has been good involvement in this planning from Te Arawa, resulting in richer korero around the strengths and opportunities associated with the destination. Te Arawa are an integral part of the destination and it is vital to the ongoing success of the destination that they remain an active and connected partner.

Connections between the tourism industry and the community will also curate a greater understanding of the destination by the local community and in turn grow support and pride in what Rotorua has to offer. A positive connection between the community and the industry will increase the social licence of the industry to operate and be supported by local and central government. Community connection will also mean the community is more likely to actively support activities and experiences.

There is opportunity for the industry itself to ensure it is working as a community so that it is living the destination brand and values. This will reinforce a more positive destination that presents a consistent, positive and strong brand to visitors.

Description (What)

Explore opportunities to develop stronger connections between destinations within the Te Arawa rohe and wider. This can include options to develop transport links, working relationships and joint marketing initiatives.

Maintain strong active relationships with central government and national bodies to ensure the issues and strengths of the destination are understood and actively considered by these groups.

Ensure Te Arawa are well represented in all aspects of destination governance, development and operations.

Explore opportunities to ensure there are positive and active connections between the tourism and hospitality industries and the local community.

Develop channels and events to facilitate ongoing collegial dialogue within the industry to share and celebrate best practice and destination developments and challenges.

Develop an online booking tool for the destination that provides visitors with an easy way to book from the RotoruaNZ.com website and will deliver additional value back to the destination (rather than commission to OTAs) and supports an affiliate marketing model to encourage local businesses to support each other with referral bookings. This tool will be a first step in a joined-up digital economy that provides end-to-end solutions and improved value for visitors, incentivising them to share their data for improved destination analytics.

Action (How)

	Action	Timeframe	Responsibility
8.1	Advocate for connecting flights between Rotorua and Queenstown	Ongoing	Rotorua Economic Development
8.2	Develop a Bay of Plenty (incl. Taupō) destination / tourism forum to actively discuss and share destination issues and opportunities, and explore options to work more closely together for the benefit of all destinations	Six months	Destination Implementation Unit
8.3	Te Arawa is represented on the destination advisory group and the Destination Implementation Unit	Immediately	Rotorua Economic Development
8.4	A quarterly destination forum is established with all destination stakeholders	Three months	Destination Implementation Unit
8.5	Prioritise marketing to high-value visitors from the key markets identified under 8.2	18 months	Rotorua Economic Development
8.6	Work more actively with key value markets to grow visitation from them and increase the associated value to the destination	18 months	Rotorua Economic Development
8.7	The feasibility and effectiveness of a Local's Card and associated benefits will be explored and, if found to be feasible, implemented	18 months	Destination Implementation Unit
8.8	Develop an online booking tool for Rotorua	Eight months	Rotorua Economic Development
8.9	Review the location of visitor centres to ensure that they are in or close to key visitor locations within the destination	Two years	Rotorua Economic Development

Key Performance Indicators

1. Queenstown and Rotorua are jointly marketing overseas within three years
2. Industry satisfaction with RED increases

Action 9: Markets and Visitation

Priority: Medium

Context (Why)

Rotorua has a long history of hosting international visitors and some of the iconic tourism businesses such as Te Puia, Tamaki Māori Village and Agrodome relied strongly on international markets.

However, by the start of 2019 the city was also comparatively under-represented in the Australian and US guest sectors, which are the highest yielding segments, and over-represented in the tour and group travel segment.

COVID-19's impact on a range of Rotorua businesses has certainly highlighted the benefit of having a range of domestic and international markets. Domestic tourism pre-COVID-19 accounted for about 60% of Rotorua's overall visitor spend.

National and Rotorua tourism organisations had a strong understanding of the nature and impact of international markets and trends on New Zealand pre-COVID-19. There are many variables in understanding future international tourism markets at a national and local level.

Tourism New Zealand (TNZ) undertakes research into this at a very high level.

RED collates statistics and research findings by tracking visitor numbers for each month, and by contracting research into the domestic travellers' perceptions of Rotorua.

Traditionally Rotorua has segmented its visitor market by demographic information, focusing its marketing efforts on attracting families and 'young savvies' travelling without children to the destination.

However, there is now a need to be more focused on attracting a visitor based on characteristics other than demographics to ensure the right fit between the destination and the future visitor. Aligning the needs of visitors with the city's values ensures that tourism will add to the destination rather than detract from it.

There is currently a lack of understanding within the industry, both within Rotorua and throughout Aotearoa, of what international visitors will want from their experience once they can travel again. There is also a lack of understanding of what the domestic traveller wants from cultural products.

Gaining a greater insight into future visitation and the type of visitors desired will better enable the destination to pursue and target these visitors. This should be done in consideration of the need to have a resilient destination so that it is less vulnerable to future destination shocks which could again severely disrupt the industry and the associated benefits to the community.

TNZ, MBIE, TIA, RED and some private firms provide key data, trends and insights on this. At a Rotorua destination level within RED, there is an excellent team that provides the local industry with relevant data and trend information.

RED will continue to plan and operate led by research and data, and will share this research and data with the private sector to support informed business decisions.

Description (What)

An understanding of who the priority (high value) visitors are for Rotorua – based on their lifestyle and values rather than demographics – and what they will be wanting in the future is needed. There is a need by those working at national, regional, local and business level for good data and insights to ensure we are all working collaboratively to bring people to the destination. This visitor understanding should also be used to inform business decisions and to ensure Rotorua is providing products that cater to the wants and needs of these visitors.

There is also a need to monitor Rotorua residents for the social licence for tourism to operate. Buy-in and support from the community is essential, as is the need for the tourism sector to benefit rather than detract from the destination.

Further work is required to better understand the ideal profile of future visitors for Rotorua to ensure a high-value return for the destination from visitation. This is important in considering both domestic and international visitation, however it is acknowledged that international markets may be more complex in a post-COVID-19 environment.

Visitors are more likely to be motivated by passion points (such as cycling, fishing, wellness, cultural learning) and these needs sit across all countries and visitor demographics. Therefore, we need to ensure destination products provide the right experience for the right visitor. Support for new and existing tourism and hospitality businesses will be important in ensuring the destination is delivering what is required.

Rotorua needs a new segmentation strategy to identify future visitation based on visitor values, passion points and the value visitors deliver to the destination. This will cover both New Zealand and international markets, acknowledging that the destination's specific needs may not always be aligned to TNZ's marketing strategy.

The private sector will benefit from using the research and analysis from RED to make informed decisions around providing a 24/7 destination for visitors.

Action (How)

	Action	Timeframe	Responsibility
9.1	Conduct a biennial survey locally to gain an understanding of the social licence for tourism to operate in Rotorua	Ongoing	Destination Implementation Unit
9.2	Identify the key high-value Rotorua visitors that will benefit the destination; create a segmentation and marketing strategy; and undertake a gaps analysis of the destination based on these visitors' experience requirements	12 months	Destination Implementation Unit
9.3	Work with TNZ and conduct other necessary research to gain an understanding of what the domestic traveller wants from cultural products in Aotearoa	Ongoing	Destination Implementation Unit
9.4	Establish an investment support team to assist tourism and hospitality businesses in making informed investment choices to align with high-value visitors	12 months	Destination Implementation Unit
9.5	Research and analysis is shared with the private sector to support a 24/7 visitor destination	Ongoing	Rotorua Economic Development

Key Performance Indicators

1. Visitor spend within the destination increases, leading to the overarching goal
2. Community support for tourism is measured through the biennial survey and is maintained or increases annually
3. Private investment in tourism and hospitality increases

Action 10: Rotorua Cultural Presence

Priority: High

Context (Why)

During the Rotorua Destination Management Plan consultation process, it was identified that Rotorua needs to more strongly demonstrate pride in its Māori heritage and strong Te Arawa culture by making authentic expressions of Te Arawa culture more visible throughout the destination.

The Rotorua Lakes Council Vision 2030 identifies the opportunity the destination has with Māori cultural presence, stating that it aims to "Make our culture more visible and accessible through design and making our stories visible" (Rotorua Lakes Council, 2017, p.8).

The Te Arawa 2050 vision also places emphasis on cultural visibility, stating that "Our future has Te Arawa reo, tikanga and values woven into the everyday of our people, our partners and the communities in our rohe." A stronger visible presence of the Te Arawa culture throughout the destination will create a deeper connection for the community.

Authentic expressions of Te Arawa culture that are visible to all will also produce a greater feeling of connection to the important heritage of the destination for visitors. This cultural heritage is a key strength of the destination and making it more visible will grow visitors' cultural experiences. Article one of the Global Code of Ethics for Tourism by The World Tourism Organization mentions tourism's contribution to understanding and respecting other people's cultural and social traditions. By having authentic expressions of Te Arawa culture more visible, the understanding of the culture by manuhiri and the local community will be enhanced. This will in turn lead to richer experiences for all.

Description (What)

Support Te Arawa and Rotorua Lakes Council to ensure the Te Arawa culture has a stronger visible presence throughout the destination. Support the Te Arawa Rautaki Reorua, including developing an action plan with

Te Arawa that will support their own plan on matters such as wayfinding, bilingual signage, public sculpture and installations, supporting businesses to be more bilingual, workshops and training for operators and businesses, etc.

Action (How)

	Action	Timeframe	Responsibility
10.1	A Te Arawa reo and cultural toolkit is developed and utilised by tourism and hospitality businesses	12 months	Te Arawa
10.2	All Rotorua Lakes Council, Government and Te Arawa signage in the CBD is bilingual (and complies with Te Taura Whiri I te Reo signage guidelines)	Two years	Te Arawa Rotorua Lakes Council
10.3	The CBD revitalisation project includes plans for greater physical expressions of the district's authentic Te Arawa cultural identity	Two years	Te Arawa Rotorua Lakes Council
10.4	Urban design guidelines are developed by Rotorua Lakes Council that include the integration of authentic cultural elements into new and existing development in the CBD and wider city	Two years	Te Arawa Rotorua Lakes Council
10.5	Cultural gateway features are established at the Ngongotahā and eastern entrances to the city	Three years	Te Arawa Rotorua Lakes Council
10.6	Initiate a programme to work with local artists, sculptors and creatives to bring the Māori culture to life throughout the destination in a compelling and interactive manner	Two years	Te Arawa

Key Performance Indicators

1. The perception of Rotorua as a Māori cultural hub increases
2. The amount of bilingual signage in the inner city increases
3. All Rotorua Lakes Council, Government and Te Arawa signage in the CBD is completed

Action 11: Tiaki Taio (The Environment)

Priority: High

Context (Why)

The health of the natural environment is vitally important to the success of Rotorua as a visitor destination. Foremost is the quality of the lake water and the important indigenous habitats that form a key part of the destination's character. Climate change is also an important environmental issue that the tourism industry needs to be actively involved in addressing. The tourism industry is well placed to be actively and positively involved in responding to these issues.

The destination is home to operators who are exemplars in creating experiences that result in positive environmental change, and there is opportunity to expand this activity to the benefit of the destination. There are a range of existing environmental initiatives including the Rotorua Sustainable Charter, the Rotorua Te Arawa Lakes Strategy Group and other community and iwi-based groups within the destination that have a strong focus on restoring the lakes and the wider environment. There is an opportunity for the tourism and hospitality industry to be resourced to support existing initiatives or drive positive environmental outcomes within their own businesses.

Description (What)

Ensure the tourism and hospitality industry is incentivised and facilitated to develop their own, and support existing, environmental initiatives that lead to the protection and enhancement of the wider Rotorua environment.

Develop an inventory of environmental initiatives around the destination that tourism and hospitality businesses can be part of and/or support.

In conjunction with Te Arawa, the Rotorua Lakes Strategy Group and other environmental groups, develop a tool kit for businesses to identify practical options for them to be involved in or to contribute to environmental enhancement initiatives (provide choice so people can design options that work for them), including lakeshore and riparian restoration activities, predator control, and more.

Facilitate the Rotorua Sustainable Charter to expand its work by growing the number of tourism and hospitality businesses signed up to the charter.

Support tourism and hospitality businesses to become carbon neutral.

Support actions from the district's Climate Action Plan to reduce the impact of climate risks on the visitor economy.

Action (How)

	Action	Timeframe	Responsibility
11.1	A sustainable environmental toolkit is developed and utilised by tourism and hospitality businesses through the Rotorua Commitment	Six months	Destination Implementation Unit
11.2	Facilitate the Rotorua Sustainable Charter to expand its work by growing the number of tourism and hospitality businesses signed up to the charter under the Rotorua Commitment and becoming carbon neutral	Ongoing	Destination Implementation Unit
11.3	Develop an inventory of environmental regenerative initiatives around the destination that manuhiri and tourism and hospitality businesses can be part of and/or support	12 months	Destination Implementation Unit
11.4	Delivery of the vision and strategy for the Rotorua Lakes District	10 years	Rotorua Te Arawa Lakes Strategy Group
11.5	RED becomes a net-zero carbon organisation	12 months	Rotorua Economic Development
11.6	Consider and create a mitigation plan for climate risks to the visitor economy such as extreme weather events or the impact of changes in rainfall on our lakes and rivers	18 months	Destination Implementation Unit

Key Performance Indicators

1. The number of tourism and hospitality businesses signed up to the Rotorua Sustainable Charter increases
2. The percentage of tourism and hospitality businesses within Rotorua which are carbon neutral increases annually
3. Within three years, Rotorua has two more tourism product offerings that contribute back to the environment during the experience
4. The perception of Rotorua as a city defined positively by its natural environment is maintained or increases

Action 12: Events Strategy

Priority: High

Context (Why)

Rotorua has a long history of cultural and sporting events including kapa haka events, Crankworx Rotorua and the iconic Rotorua Marathon. Events are a beneficial component to the destination and, with its central location within the North Island and its natural assets, it is well placed as an events destination. However, during the Rotorua Destination Management Plan consultation process, it was identified that there is a lack of strategic thinking about events in Rotorua. It was noted that there are multiple entities looking after different types of events and Rotorua lacks a future-proofed infrastructure to support the events industry. In addition to this, other destinations are investing in events infrastructure such as conference centres.

While there is currently some work being done on this, i.e., the upgrade of the Sir Howard Morrison Performing Arts Centre, there is an identified opportunity to have a closer look at the destination's infrastructure and assess whether it meets future needs.

Description (What)

RED has recently commissioned SVG Unlimited to review the Rotorua events infrastructure and, in collaboration with key stakeholders, create an events strategy to ensure Rotorua has a thriving events industry. This strategy will support the place brand for Rotorua and the destination values.

Complete a Rotorua events strategy and develop an action plan to meet any recommended outcomes.

Review the ability of the destination's convention and conference facilities to deliver high-value events in line with those opportunities identified in the Rotorua events strategy, and develop options to address any shortcomings.

Conduct a survey with prominent professional conference organisers on what they are looking for from a conference and convention facility in order to inform future investment in business events facilities.

Support future investment in Rotorua's convention facilities and hotel conference venues where they will deliver outcomes consistent with the destination values.

If recommended by the events strategy, support the development of a measurement and reporting tool that will consistently assess future event opportunities, report on events delivery and report on return on investment in events.

Actions (How)

	Action	Timeframe	Responsibility
12.1	A Rotorua events strategy is completed, and an action plan has been developed to deliver the strategy's recommendations	12 months	Rotorua Lakes Council
12.2	Investigate the opportunity to hold an indigenous food festival during the Matariki holiday	Six months	Rotorua Economic Development
12.3	A review of the destination's conference, facilities, with specific focus on the role, value and future proofing of the Energy Events Centre, has been undertaken and options have been presented to the Destination Advisory Group for any additional investment	Two years	Rotorua Economic Development
12.4	A measurement and reporting tool developed to consistently assess future event opportunities, and report on outcomes of investment in events and their delivery, has been developed and is actively used by RED	Two years	Destination Implementation Unit

Key performance Indicators

1. Average daily spend from events increases
2. Rotorua maintains or improves its relative position as a preferred location for business events in New Zealand

Action 13: Rotorua Trails Strategy

Priority: Medium

Context (Why)

Recreational trails for walking and biking are a strength of the Rotorua destination and are used by many locals and visitors. Its mountain bike trails are responsible for Rotorua being awarded Gold-Level Ride Centre status through IMBA (International Mountain Bicycling Association). Trail development (especially for bikes) is increasing throughout Aotearoa and in Australia with more and more competition for riders looking for riding holiday destinations. Rotorua needs to maintain its strong competitive advantage in this space in the face of this increased competition.

Additional trail ideas are being proposed for the wider destination. It is important to ensure that potential trail development proceeds in a coherent and planned manner that provides rich, high-value experiences to locals and visitors alike.

Whakarewarewa Forest is the subject of more capital development on the basis of the success of existing trails. There are currently three main visitor hubs in the the forest: the Long Mile Road, the Waipa hub, and the newest hub, Te Pūtake o Tawa. Previously, there have been discussions on creating a mountain biking centre of excellence in Rotorua, utilising and showcasing the variety of biking trails (including in Whakarewarewa and at Skyline Rotorua) throughout the destination. There are opportunities to improve connections from the Whakarewarewa Forest hubs to the wider Rotorua trail network, the central city and surrounding trail networks to support a greater trail offering in the wider Te Arawa rohe.

Guided and independent Great Walks in New Zealand have been very successful, particularly over the last 20 years. Most of these walks are in the South Island and there has been interest in developing new Great Walks, especially one in the North Island that is iwi-operated. Having a Great Walk in the Rotorua district will add another quality attraction for the enjoyment of visitors to Rotorua. It will also mean there will be an attraction outside of the Rotorua Caldera that showcases the wider lakes area.

Description (What)

A trail strategy that sets out future trail opportunities for the destination and key hubs such as Whakarewarewa Forest. The strategy will include a prioritised development plan, opportunities for cultural and environmental initiatives, and key local and regional connections. The strategy should also consider funding for development and maintenance as well as an effective model for trail governance and management to ensure Rotorua remains a world-leading trail destination.

Actions (How)

	Action	Timeframe	Responsibility
12.1	A Rotorua trails strategy is developed in collaboration with the community including landowners and managers, trail users and iwi	18 months	Rotorua Lakes Council
12.2	A business case for a Great Walk has been completed	18 months	Iwi, DOC and Rotorua Lakes Council

Key Performance Indicators

1. Economic impact of all trails increases
2. Bed nights associated with trail users increases
3. Repeat visitation from trail users increases
4. Perception of Rotorua as a world-class mountain biking destination increases

Appendix 3. Plan Alignment

Action	Destination Issues	Destination Values	Strategic Directions
Implementation	Social deprivation Destination definition Environmental stewardship Reliance on international markets Capability and development Industry support	Tiaki Taiao Kotahitanga Ōhanga Ōranga Manaakitanga Auaha / Tu Maia Pono	All
Rotorua Commitment??	Social deprivation Destination definition Environmental stewardship Reliance on international markets Capability and development Industry support	Tiaki Taiao Kotahitanga Ōhanga Ōranga Manaakitanga Auaha / Tu Maia Pono	Product Development Destination Management Capacity and Capability Regeneration and Revitalisation Social Development
Inner City Revitalisation	Social deprivation Accommodation Destination Definition Central Business District Amenities, Services and Infrastructure Industry support	Kotahitanga Ōhanga Ōranga Manaakitanga Auaha / Tu Maia Pono	Product Development Destination Management Regeneration and Revitalisation Infrastructure
Aotearoa Tourism and Innovation Hub	Social deprivation Environmental Stewardship Destination Definition Central Business District Human Resources Amenities, Services and Infrastructure Industry support	Tiaki Taiao Kotahitanga Ōhanga Ōranga Manaakitanga Auaha / Tu Maia Pono	Product Development Destination Management Capacity and Capability Regeneration and Revitalisation Social Development

Wellness	Social deprivation Destination definition Environmental stewardship Reliance on international markets Capability and development Industry support	Tiaki Taiao Kotahitanga Ōhanga Ōranga Manaakitanga Auaha / Tu Maia Pono	Product Development Destination Management Capacity and Capability Regeneration and Revitalisation Social Development Infrastructure
Rotorua Cultural Presence	Social deprivation Destination definition Central business district Human Resources Amenities, services and infrastructure Industry support	Pono Manaakitanga Kotahitanga	Product Development Destination Management Regeneration and Revitalisation
Quality Accommodation	Social deprivation Destination Definition Central Business District Amenities, Services and Infrastructure Industry support	Kotahitanga Ōhanga Ōranga Manaakitanga Auaha / Tu Maia Pono	Product Development Destination Management Regeneration and Revitalisation Social Development Infrastructure
Tiaki Taiao	Social deprivation Environmental Stewardship Destination Definition Amenities, Services and Infrastructure Industry support	Tiaki Taiao Kotahitanga Ōhanga Ōranga Manaakitanga Auaha / Tu Maia Pono	Product Development Destination Management Regeneration and Revitalisation
Markets	Accommodation Destination Definition Human Resources Industry support	Kotahitanga Ōhanga Ōranga Manaakitanga Auaha / Tu Maia	Product Development Destination Management Capacity and Capability Regeneration and Revitalisation
A Connected Destination	Destination Definition Overreliance on international markets Amenities, Services and Infrastructure Industry support	Kotahitanga Ōhanga Ōranga Manaakitanga Auaha / Tu Maia	Product Development Destination Management Infrastructure

Workforce Development	Social deprivation Accommodation Destination Definition Human Resources Industry support	Kotahitanga Ōhanga Ōranga Manaakitanga Auaha / Tu Maia	Destination Management Capacity and Capability Regeneration and Revitalisation Social Development
Events Strategy	Destination definition Amenities, services and infrastructure	Ōhanga Ōranga – economic prosperity Auaha (innovation) / Tu Maia (courage)	Product Development Destination Management Infrastructure
Trails Strategy	Environmental Stewardship Destination Definition Central Business District Amenities, Services and Infrastructure	Tiaki Taiao Kotahitanga Ōhanga Ōranga Manaakitanga	Product Development Destination Management Infrastructure

ROTORUA
Economic Development
Te Whanaketanga Ōhanga o Rotorua

ROTORUA
LAKES COUNCIL
Te kaunihera o ngā roto o Rotorua