


The Southland Murihiku Destination Strategy has been developed through a process of extensive consultation, including a large number of interviews, workshops and discussions, surveys completed by more than 390 people with an interest in Southland's future, as well as detailed research and analysis. The resulting document is a blueprint for the future, which will enable Southland's visitor economy to grow with alignment to a variety of social, cultural, infrastructural and environmental considerations.

This process has been initiated by Southland Regional Development Agency (SRDA) and guided by a Strategic Advisory Group. SRDA is the guardian and driver of this Destination Strategy in partnership with the region's councils and other major stakeholders, so there are a variety of agencies and groups that have a key role to play in its effective implementation.

Importantly, this Destination Strategy aligns strongly with the Southland Regional Development Strategy (SoRDS) and the New Zealand-Aotearoa Government Tourism Strategy as guiding documents.

This Strategy and Vision document is a summary of the overall Southland Destination Strategy Report and needs to be read in conjunction with this. The vision, goals and activation areas are contained in this succinct summary document. The explanation of the rationale for this and the detail surrounding it are contained in the Supporting Document.



MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT
HĪKINA WHAKATUTUKI

GREAT SOUTH



STAFFORD
STRATEGY

This Strategy was developed with support from the Ministry of Business, Innovation and Employment



A woman in a purple jacket and a man in a black vest are hiking on a gravel path. In the background, there are rugged mountains with patches of snow under a blue sky with white clouds.

Southland Regional Development Agency is particularly grateful for the time and effort put in by the Strategic Advisory Group established to guide this project. The purpose of the Strategic Advisory Group has been to guide the development of Southland Murihiku Destination Strategy, ensuring that the overall project objectives as per the Project's Terms of Reference are delivered. The Strategic Advisory Group consisted of people with relevant skills and experience relating to the development and management of Southland as a visitor destination.

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- Aaron Joy (Stewart Island Promotions Association, Business Owner)
- Alison Broad (Community Representative)
- Alistair McDermott (McDermotts Coachlines)
- Angee Shand (Invercargill Licensing Trust)
- Bobbi Brown (Great South)
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- Hannah Whyte (HWR Richardsons)
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- Linda Moore (Clutha Development)
- Lyndal Ludlow (Environment Southland - when Nicol Horrell could not attend)
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DESTINATION SOUTHLAND

Southland is situated in the southern part of New Zealand's South Island (see Figure 1). The area covered by the region is geographically large – stretching over 32,000 square kilometres – and encompasses three territorial local authorities including Gore District, Invercargill City and Southland District.

Southland offers traditional values, a slower pace of life and provides a 100% authentic Kiwi experience that is no longer available in many other parts of New Zealand.

The region is home to some of New Zealand's most dramatic, awe-inspiring and iconic wilderness and wildlife. A large part of Southland (58%) is designated as Conservation Estate that is managed by the Department of Conservation (DOC). The Conservation Estate includes Fiordland National Park and Rakiura National Park, as well as several other smaller protected areas. Fiordland National Park falls within the larger Te Wāhipounamu UNESCO World Heritage Area.

Southland has five of New Zealand's ten Great Walks: the Rakiura Track, Kepler Track, Milford Track, the Routeburn Track and the recently awarded Hump Ridge Track. These are internationally recognised, premier tracks that pass through and showcase the diverse and spectacular scenery of the region. The number of Great Walks in Southland, along with many other high-quality walking experiences,

reinforces the dominance of Southland as a high-quality trekking destination in a wider New Zealand context.

Southland also has one of New Zealand's Great Rides, the Around the Mountains Cycle Trail, which extends from Southland through to Otago.

One of the most recognised tourism products in the region is Milford Sound (situated within Fiordland National Park) which is a globally recognised product and one of New Zealand's tourism jewels.

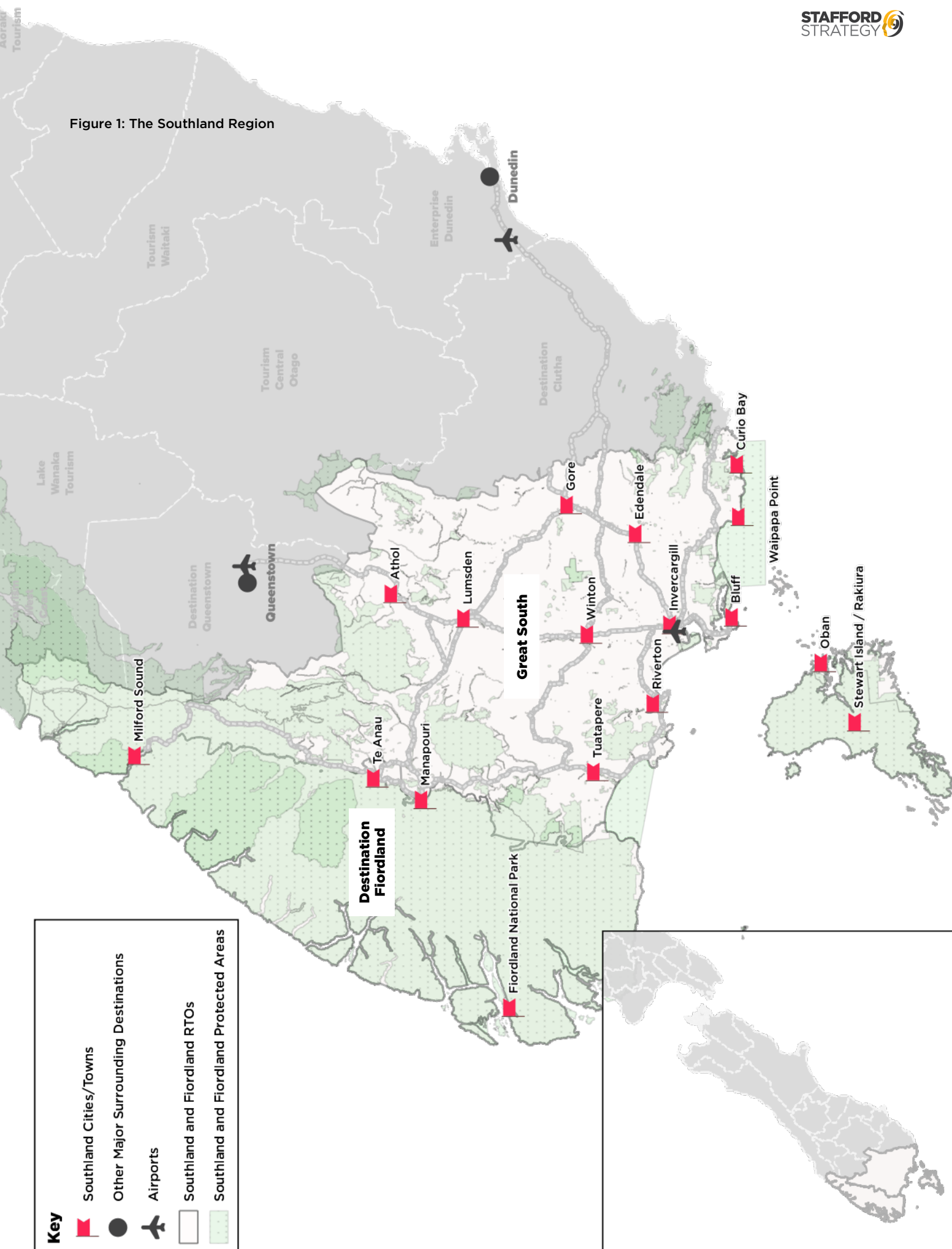
Stewart Island, the third largest island of New Zealand, is also situated within Southland and is almost entirely DOC estate. The Island is well-known within the domestic New Zealand market and is considered, for many Kiwis, a "bucket list" item.

Murihiku, the lower South Island, is loosely translated as "the tail end of the land"¹. Iwi has always had a strong and important presence in Southland, historically through fishing, hunting and trading with European settlers and, in more recent times, through diverse economic activity. They have a keen interest in being at the forefront of tourism development going forward and have a key role to play in activating the narrative of what makes Southland unique and special.



¹ <https://teara.govt.nz/en/southland-region/page-5>

Figure 1: The Southland Region



OUR VISITOR ECONOMY

Tourism context

The region currently comprises two Regional Tourism Organisations (RTOS) including Southland (Southland Regional Development Agency RTO, known as Great South) and Destination Fiordland RTO.

Several RTOs are adjacent to the northern boundary of the region, including Destination Clutha, Tourism Central Otago, Destination Queenstown and Tourism West Coast. These neighbouring regions offer numerous benefits for marketing and related partnerships, as well as being important additional gateways into the Southland region.

The size of our visitor economy

Despite tourism not being the largest sector in Southland in terms of economic value, there is a growing desire to diversify the region's economy to assist in achieving the region's goal² of attracting 10,000 new residents to live in the region. Tourism is identified as one of three sectors (including aquaculture and international students) which can assist in achieving this.

While New Zealand is a well-known global tourism destination, the Southland region (except for Milford Sound) is considered an emerging visitor destination. This

is considered a bonus, as Southland can mould how it develops its visitor economy as it continues to flourish into a more well-known and visited destination.

Currently, the Southland region welcomes 1.8m visitors into Fiordland RTO and 1.3m into the Southland RTO. In 2018, these visitors contributed almost \$660m to the local economy. It is Southland's goal to grow this to \$1b by 2025³. To achieve this, however, requires the activation of several opportunities and recommendations identified in this Destination Strategy. The region cannot sit still and expect this goal to happen without increasing its product range and particularly offering more commissionable pay for experiences.

Figure 2 offers a summary of visitation to the Southland region. It demonstrates the size of the domestic and international markets into the region, total spend, the origin of international visitors as well as visitation to Milford Sound.

In summary, it illustrates the strength of the domestic market for Southland RTO (both in terms of visitor markets and spend), while the international market is far more prominent for Fiordland.



² As per the Southland Regional Development Strategy (SoRDS)

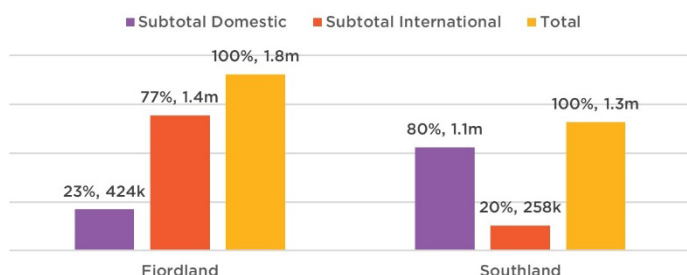
³ Ibid

Figure 2: Visitation to Southland & Fiordland RTOs⁴

Visitation to Southland & Fiordland RTOs

VISITOR NUMBERS (2018)

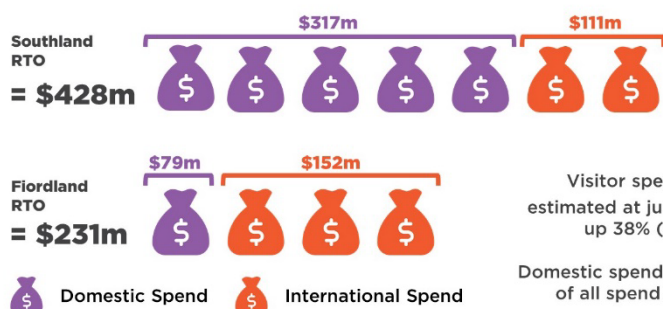
In 2018, 1.8m visitors travelled to Fiordland, the vast majority (77%) were international visitors. Southland, on the other hand, received 1.3m visitors, and 80% of these were trips undertaken by domestic travellers.



DOMESTIC VS INTERNATIONAL VISITATION (2018)

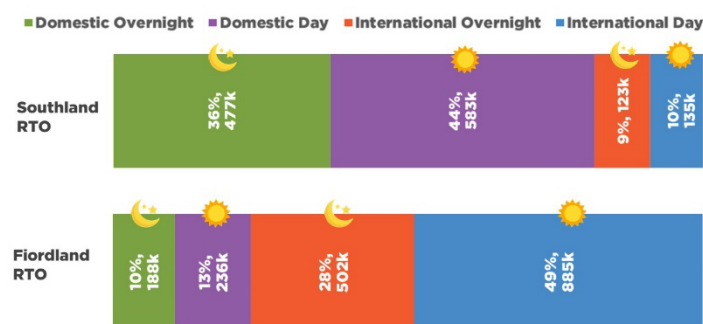


TOTAL VISITOR SPEND (2018)

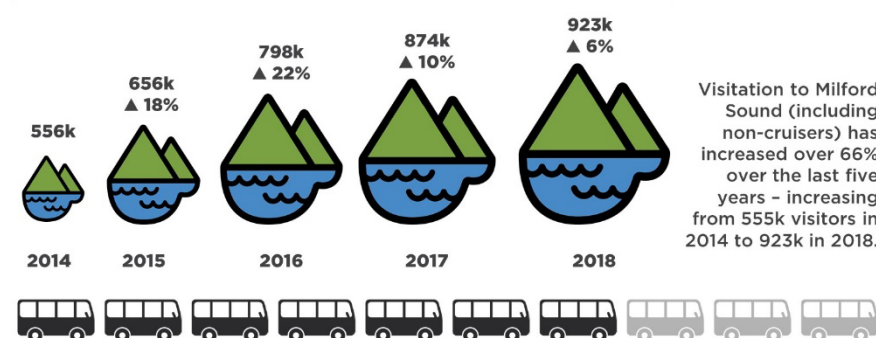


Visitor spend in the region is estimated at just under **\$659m**, up 38% (\$181m) since 2011. Domestic spend accounts for 60% of all spend across the region.

VISITOR TYPE (2018)



VISITATION TO MILFORD SOUND (2014-18)



Visitation to Milford Sound (including non-cruisers) has increased over 66% over the last five years – increasing from 555k visitors in 2014 to 923k in 2018.

An estimated 66% of visitors to Milford Sound travel there by coach (provided by a major coach/tour operator to Milford Sound).



⁴ Note: because of rounding, figures may not total exact amounts.

Visitor Numbers: International overnight numbers are based on the IVS. Domestic overnight numbers are based on a special data collection compiled for the South Island DMP. This is based on a major survey of AA members (over 200k responses have been received).

Domestic vs International Visitation: Ibid.

Total visitor spend: MBIE Monthly Regional Tourism Estimates

(<https://www.mbie.govt.nz/immigration-and-tourism/tourism-research-and-data/tourism-data-releases/monthly-regional-tourism-estimates/>)

Visitor Type: International overnight numbers are based on the IVS. Domestic overnight numbers are based on a special data collection compiled for the South Island DMP. This is based on a major survey of over 4,000 AA members.

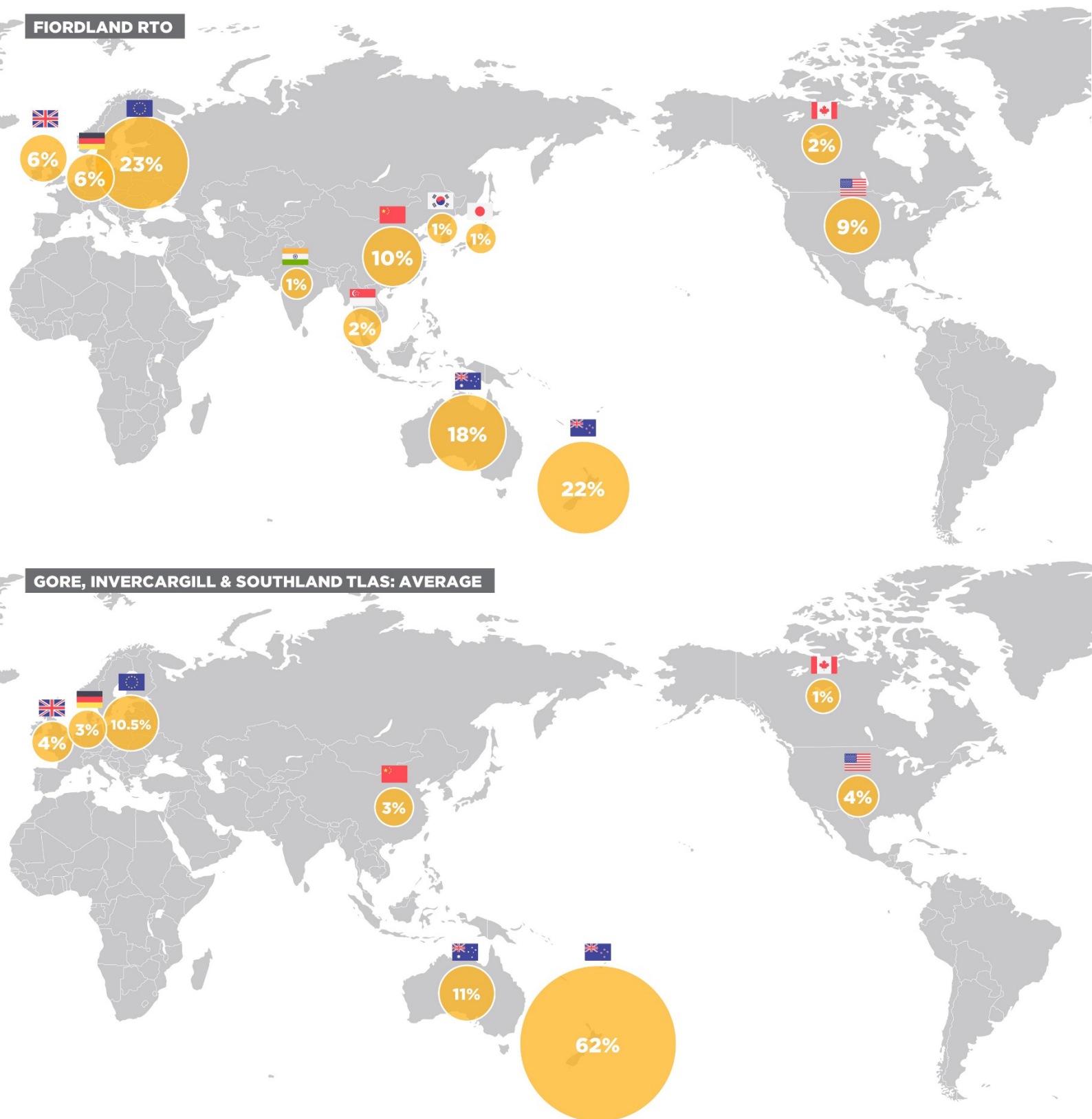
Origin of International Visitors: International Visitor Survey

Visitation to Milford Sound: Milford Sound MDA PAX Monthly Update (with 10% non-cruisers), Crowe Horwath (supplied by Southland Regional Development Agency)

Where Southland's visitors come from

While Southland's visitors come from all over the globe, the largest market for the region is the domestic Kiwi visitor market. This is particularly the case when looking at visitation to the three TLAs: domestic visitation is estimated to average 62% of all trips across the entire region (Gore District, Invercargill City and Southland District). While Fiordland RTO also has a large domestic market (comprising 22% of all trips), international trips make up 78% of all visits to the RTO. It is important to note that Milford Sound and Rakiura (Stewart Island) are primarily international visitor destinations.

Figure 3: Origin of visitors to Fiordland and Southland RTOs



What growth is likely to look like

Figure 4 and Figure 5 summarise total visitation and spend to Southland and Fiordland under a stretch scenario. This stretch scenario is based on the adoption of the recommendations in this Destination Strategy. It demonstrates that the regional goal of achieving \$1b in visitor spend by 2024 is possible under this stretch scenario only.

Figure 4: Visitor growth

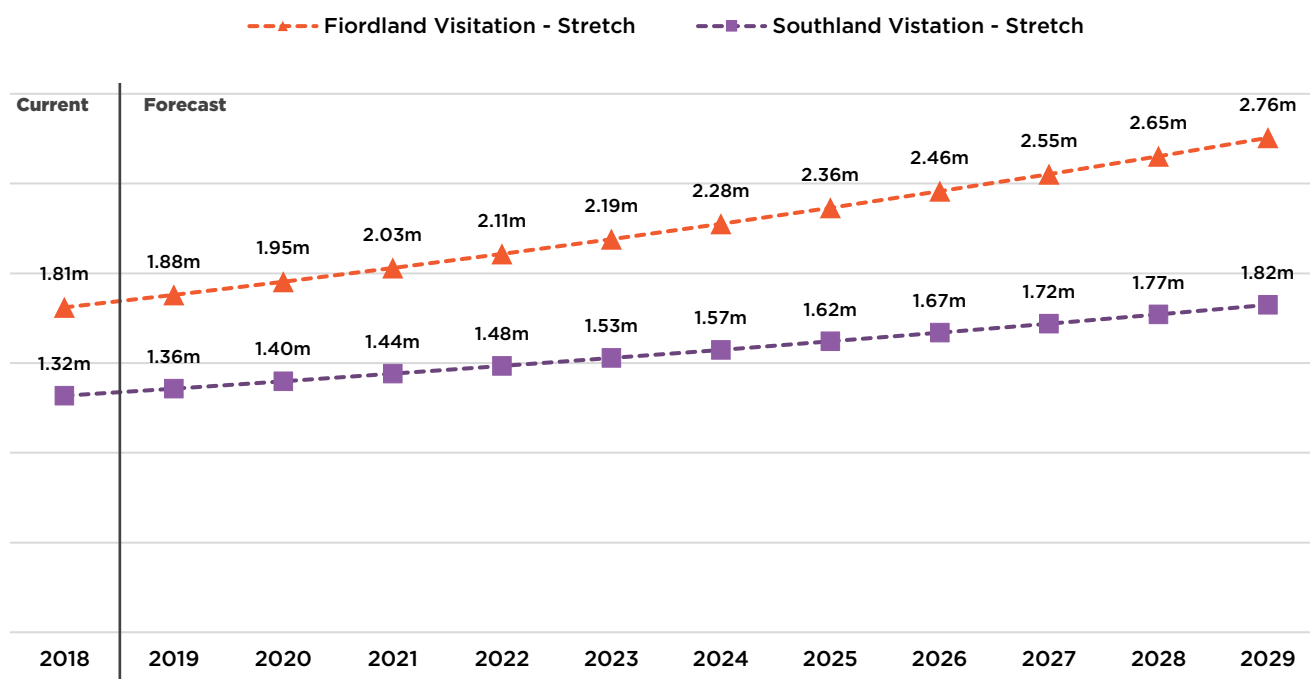
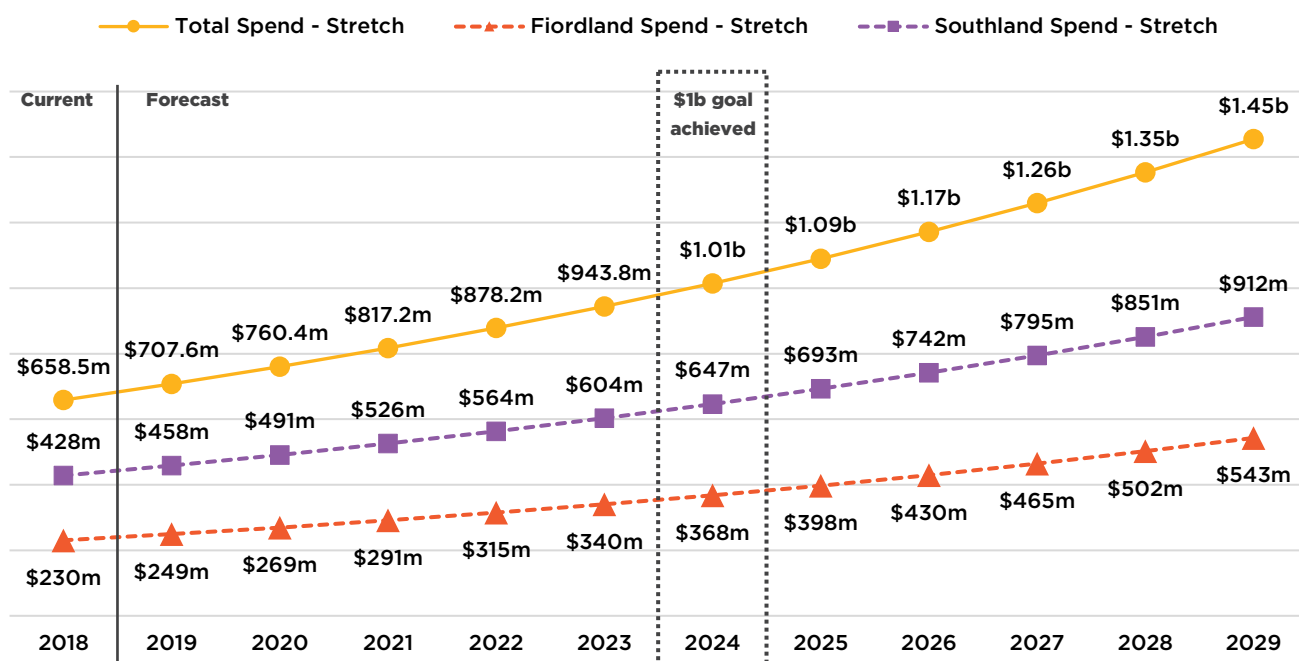


Figure 5: Visitor spend growth



A DESTINATION MANAGEMENT FOCUS

Why the Destination Strategy was developed

The Destination Strategy was developed as a recommendation from the Southland Regional Development Strategy (SoRDS) Action Plan. SoRDS identified:

- tourism as a key sector for helping to grow the region's population by 10,000 by 2025;
- tourism's ability to grow the liveability and attractiveness of Southland as a place to visit but also to work and live; and
- tourism's ability to contribute positively to the social and economic well-being of Southland.

To maximise the potential of the region's tourism sector, SoRDS identified the need for a Destination Strategy to guide this opportunity.

A shift from destination marketing to destination management

This Destination Strategy represents a shift in tourism planning in Southland. It focuses on destination management which is a holistic approach to planning for and sustainably growing the visitor economy. Unlike traditional tourism strategies (which tend to be focused on marketing), destination management is much broader and focuses on product development, investment attraction, planning requirements, industry development, visitor management, infrastructure development as well as destination marketing (see Figure 6).

To adopt a destination management focus for Southland has necessitated broad-ranging consultation. This recognises that destination management does not happen in isolation: it involves a wide range of sectors, stakeholder groups and delivery partners — such as government agencies (local, regional and central), communities and business groups — working collaboratively.

Figure 6: What is Destination Management?



OUR VISION & GUIDING PRINCIPLES

The vision



The Southland Destination 2029 vision is for Southland to be recognised as a distinct visitor destination (and a place to live, work and invest) guided by strong sustainability principles and values.

Guiding principles

Underpinning this vision are five guiding principles. These are indicated in Figure 7. These guiding principles were identified by the Strategic Advisory Group at the commencement of this project and have been updated to align with the recently released New Zealand-Aotearoa Government Tourism Strategy Tikanga Values. The guiding principles have been used to help shape this Destination Strategy.

Figure 7: Destination Strategy Guiding Principles



WHANAUNGATANGA/TOGETHER

We believe that it is essential there is a regional, coordinated, collaborative and inclusive approach reflecting our unique situation and ensuring the benefits of tourism are shared throughout.



ŌHANGA/WHAIRAWA

We want to strive for the wellbeing and economic prosperity of our region and community.



KAITIAKITANGA

We see ourselves as guardians of our special place and have a responsibility to protect our land, sea, air, living creatures, traditions and communities - for the Southland communities of the future



DIVERSITY

We believe that our diversity is a strength and our uniqueness should be highlighted and celebrated but also clearly defined.
















































MANAAKITANGA

We want to welcome visitors and share our region and its unique stories while at the same time we understand that as good hosts we need to make sure visitor's needs are addressed as well as our own.

Activation areas alignment with guiding principles

Table 1 demonstrates the strong alignment between the various destination management activation areas and the principles which guide this Destination Strategy's development.

Table 1: Destination Management Activation Areas Alignment with Guiding Principles

		Whanaungatanga/ Together	Ōhanga/ Whairawa	Kaitiakitanga	Diversity	Manaakitanga
	PRODUCT DEVELOPMENT					
●	Investment Attraction (private, public & PPP)					
●	Accommodation					
●	Experiences/attractions (commissionable & free)					
●	Events					
	INFRASTRUCTURE					
●	Investment Attraction (private, public & PPP)					
●	Transport, Connectivity and Access					
●	Jetties, Wharves and Cruise Infrastructure					
●	Toilets, Amenities and Other Infrastructure					
	GOVERNANCE					
●	Policy					
●	Tourism Structures					
●	Leadership					
●	Support and training					
	SUSTAINABILITY					
●	Environment					
●	Carrying Capacities & Value Versus Volume					
●	Social license					
●	Host community engagement					
	MARKETING & PROMOTION					
●	Destination branding and positioning					
●	Destination marketing					
●	Visitor information					
●	Packaging					
●	Content creation					

HOW WE KNOW WE HAVE SUCCEEDED

This Destination Strategy has two overarching bold goals:

1 Reach \$1b visitor spend by 2025 and \$1.4b by 2029



2 Grow overnight visitation to 1.3m visitors by 2029



To track progress in achieving these goals, and how Southland is aligning with the guiding principles, a new set of measures is provided (see Table 2), for which SRDA will publish a scorecard annually of progress in achieving these.

Table 2: Measuring Our Success



WHANAUNGATANGA/TOGETHER

- + Formation of a Tourism Leadership Group
- + Growth in visitor sector employment numbers
- + Ease of finding skilled staff for tourism businesses
- + Development and adoption of a Southland destination brand
- + Work with surrounding regions to form a Destination Tourism Organisation (aligning with the South Island DMP and New Zealand-Aotearoa Tourism Strategy)



ŌHANGA/WHAIRAWA

- + Growth in visitor spend, visitor numbers, length of stay and commercial accommodation nights.
- + Delivering new events and commissionable tourism product widely throughout Southland
- + Community support for the tourism sector is grown and its social license secured
- + Achieving stronger employment in Southland's visitor economy



KAITIAKITANGA

- + Identifying and managing carrying capacities in select locations as part of destination management activation
- + Community support for the tourism sector is grown and its social license secured
- + Protection and preservation of sensitive habitats



DIVERSITY

- + Development and adoption of a Southland destination brand and sub-regional brands which reflect each sub-region's uniqueness and point of difference
- + Expanding the diversity of product which showcases the region and its stories



MANAAKITANGA

- + Improved perception of Southland's identity and positioning
- + Greater visitor and local community satisfaction are achieved



RECOMMENDED ACTIONS

A comprehensive range of recommendations has been developed. These align with the destination management activation areas and will contribute to Southland achieving its visitor economy ambitions while also aligning with the guiding principles.

There are some recommendations which have strong applicability across multiple activation areas and have been marked with a double asterisk (**).

When mapped (see Figure 8), it is possible to be seen that there are multiple recommendations for sustainable tourism marketing and development options throughout Southland. There are also several recommendations which will occur throughout the entire region and not just in one location.

Table 3: Recommended Actions

 PRODUCT DEVELOPMENT		
●	Investment Attraction (Public, Private and PPP)	<ul style="list-style-type: none"> ■ Southland Tourism Investment Prospectus**
●	Accommodation	<ul style="list-style-type: none"> ■ Boutique Regional Accommodation (with Staff Accommodation) ■ Destination Holiday Park(s) (with Staff Accommodation) ■ Development of Accredited Farm Stays ■ Eco-Lodges in Remote Locations (with Staff Accommodation) ■ Commercial Accommodation & Conferencing Facilities in Invercargill ■ Upmarket Lodges in Prime Locations (with Staff Accommodation)
●	Experiences/attractions (commissionable & free)	<ul style="list-style-type: none"> ■ Agri-Tourism Regional Showcase Centre ■ All-Weather Visitor Experience(s) for Invercargill ■ Bluff Ferry Terminal Tourism Development Hub ■ Bluff Southern Marine Discovery Centre ■ Conservation HQ at Te Anau ■ Dark Skies Interpretive Centre (Rakiura) ■ Gore Activation Opportunities ■ Invercargill Water Tower Attraction Activation ■ Iwi-Based Visitor Experiences and Narrative ■ Kiwi Guardians Initiative ■ Lake Manapouri and Lake Te Anau Water-Based Tourism Product ■ Low emission itineraries and tourism experiences ■ Maruawai Precinct Development (including distillery) ■ Positioning Lumsden as the Cycling Hub for Southland ■ Queens Park (Invercargill) and Dolamore Park (Gore) Enhancements ■ Regional Museums/Heritage Centres Trail/Circuit ■ Self-Guided Heritage, Art, Architecture and Food Walking Tours in Invercargill ■ Stirling Point Visitor Experience Enhancements ■ The Catlins Experience Cluster ■ Western Southland Tourism Attractions Circuit Development
●	Events	<ul style="list-style-type: none"> ■ Aviation Events at Te Anau Airport Manapouri ■ Destination Events Calendar for Major Events** ■ Destination Events Strategy** ■ Enhancement of the Regional Events Toolkit**
 INFRASTRUCTURE		
●	Investment Attraction (Public, Private and PPP)	<ul style="list-style-type: none"> ■ Regional Infrastructure Investment Plan ■ Heritage Tourism Strategy for Southland
●	Transport, Connectivity and Access	<ul style="list-style-type: none"> ■ Catering for Multi-Modal Road Users ■ Extended Operating Hours for Invercargill and Te Anau Airports ■ Introduction of Passing Lanes to Enhance Road Safety ■ Maintaining Road Network Quality ■ New Flights into Southland (Invercargill, Rakiura and Te Anau)




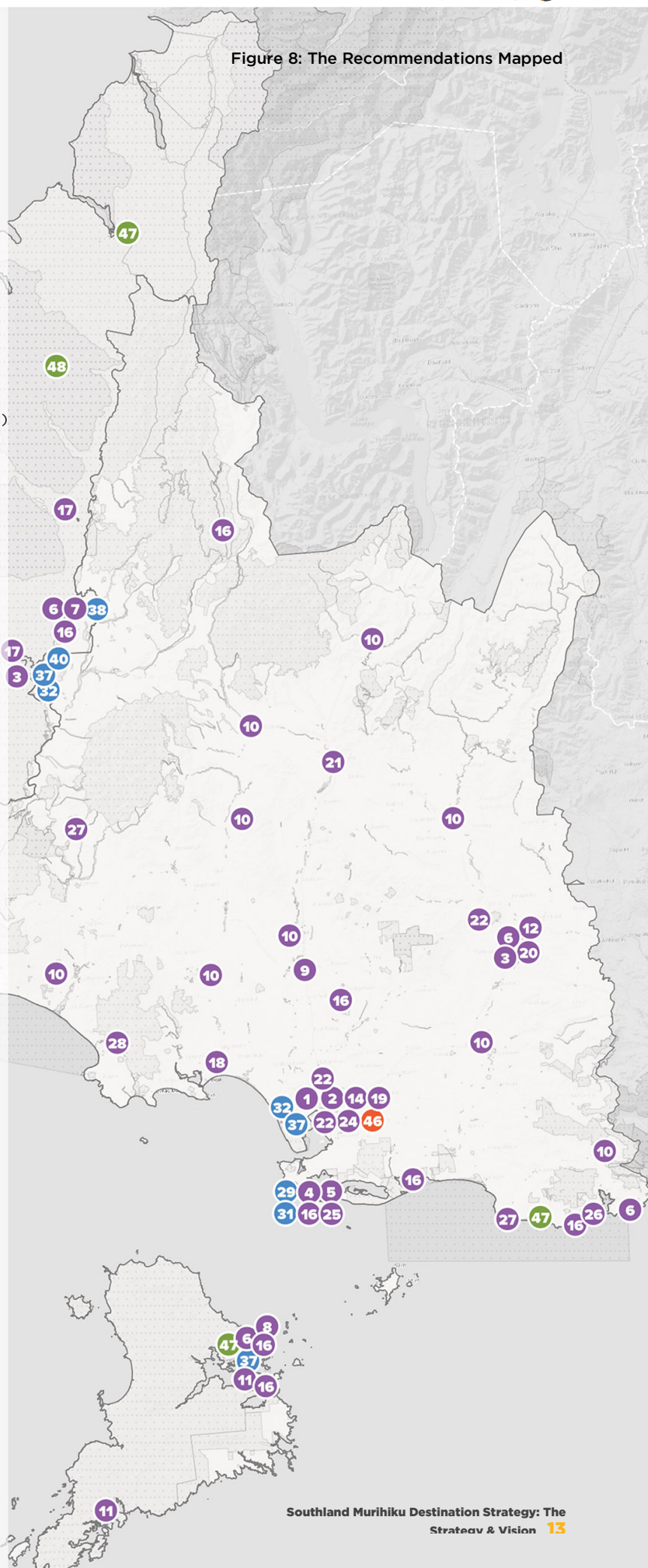
		<ul style="list-style-type: none"> Options for Milford Sound/Te Anau Te Anau Airport as Additional Aviation Access to Fiordland
●	Jetties, Wharves and Cruise Infrastructure	<ul style="list-style-type: none"> Expansion of Cruise Vessel Facilities at South Port (Bluff) Jetty and Wharf Audit, Upgrades and Expansion
●	Toilets, Amenities and Other Infrastructure	<ul style="list-style-type: none"> Bluff Master Plan Regional Infrastructure Investment Plan Wayfinding Strategy**
	GOVERNANCE	
●	Policy	<ul style="list-style-type: none"> P2P Accommodation Policy Freedom Camping Policy**
●	Tourism Structures	<ul style="list-style-type: none"> Destination Tourism Organisation
●	Leadership	<ul style="list-style-type: none"> Tourism Leadership Group Southland Tourism Investment Prospectus
●	Support and training	<ul style="list-style-type: none"> Industry Workshops (social media and digital literacy up-skilling) Tourism Training Facility Ongoing Collation and Distribution of Tourism Data**
	SUSTAINABILITY	
●	Environment	<ul style="list-style-type: none"> Fiordland National Park Management Plan Wildlife Management
●	Carrying Capacities & Value Versus Volume	<ul style="list-style-type: none"> Visitor Management
●	Social license	<ul style="list-style-type: none"> Freedom Camping Policy
●	Host community engagement	<ul style="list-style-type: none"> Local community visitor economy awareness campaign Destination Promotion to Locals: "Things to Do in Your Own Backyard"***
	MARKETING & PROMOTION	
●	Destination branding and positioning	<ul style="list-style-type: none"> Branding (Destination-Focused)
●	Destination marketing	<ul style="list-style-type: none"> Culinary Marketing Campaign: Foveaux Strait to Fork! Destination Events Calendar for Major Events Destination Events Strategy Destination Promotion to Locals: "Things to Do in Your Own Backyard" Enhancement of the Regional Events Toolkit Fishing and Hunting Marketing and Development Strategy Food Tourism Coordination and Strategy Ongoing Collation and Distribution of Tourism Data Regional Destination Marketing Plan Off peak/shoulder season marketing campaign
●	Visitor information	<ul style="list-style-type: none"> Digital Media for Southland Trails Driver Safety Promotion Visitor Services (i-SITES) Assessment Wayfinding Strategy
●	Packaging	<ul style="list-style-type: none"> Product Packaging
●	Content creation	<ul style="list-style-type: none"> Destination content creation

Figure 8: The Recommendations Mapped

- 1 ● Agri-Tourism Regional Showcase Centre
 - 2 ● All-Weather Visitor Experience(s) for Invercargill (X2)
 - 3 ● Aviation Events at Te Anau Airport Manapouri
 - 4 ● **Bluff Ferry Terminal Tourism Development Hub** ★
 - 5 ● **Bluff Southern Marine Discovery Centre** ★
 - 6 ● **Boutique Regional Accommodation (with Staff Accommodation)** ★
 - 7 ● Conservation HQ at Te Anau
 - 8 ● Dark Skies Interpretive Centre (Raikura)
 - 9 ● Destination Holiday Park(s) with Staff Accommodation.
 - 10 ● Development of Accredited Farm Stays
 - 11 ● Eco-Lodges in Remote Locations (with Staff Accommodation.)
 - 12 ● Gore Activation Opportunities
 - 13 ● Hub & Spokes
 - 14 ● Invercargill Water Tower Attraction Activation
 - 15 ● Iwi-Based Visitor Experiences and Narrative ➡
 - 16 ● Kiwi Guardians Initiative Promotion
 - 17 ● Lake Manapouri & Te Anau Water-Based Tourism Product
 - 18 ● Low emission itineraries and tourism experiences
 - 19 ● Commercial Accommodation & Conferencing Facilities in Invercargill (X1)
 - 20 ● **Maruawai Precinct Development (including distillery)** ★
 - 21 ● Positioning Lumsden as the Cycling Hub for Southland
 - 22 ● Queens Park, Anderson Park & Dolamore Park Enhancements
 - 23 ● Regional Museums/Heritage Centres Trail/Circuit ➡
 - 24 ● Self-Guided Heritage, Art, Architecture and Food Tours
 - 25 ● Stirling Point Visitor Experience Enhancements
 - 26 ● The Catlins Experience Cluster
 - 27 ● Upmarket Lodges in Prime Locations (with Staff Accommodation.)
 - 28 ● Western Southland Tourism Attractions Circuit Development
 - 29 ● Bluff Master Planning
 - 30 ● Catering for Multi Modal Road Users ➡
 - 31 ● Expansion of Cruise Vessel Facilities at South Port (Bluff)
 - 32 ● Extended Operating Hours for Invercargill & Te Anau Airports
 - 33 ● Heritage Tourism Strategy for Southland ➡
 - 34 ● Introduction of Passing Lanes to Enhance Road Safety ➡
 - 35 ● Jetty and Wharf Audit, Upgrades and Expansion ➡
 - 36 ● Maintaining Road Network Quality ➡
 - 37 ● New Flights into Southland (Invercargill, Rakiura & Te Anau)
 - 38 ● **Options for Milford Sound/Te Anau** ★
 - 39 ● Regional Infrastructure Investment Plan ↗
 - 40 ● Te Anau Airport as Additional Aviation Access to Fiordland
 - 41 ● Destination Tourism Organisation ➡ ↗
 - 42 ● Industry Workshops ➡
 - 43 ● P2P Accommodation Policy ➡
 - 44 ● Southland Tourism Investment Prospectus ➡ ↗
 - 45 ● Tourism Leadership Group ➡ ↗
 - 46 ● Tourism Training Facility
 - 47 ● Visitor Management
 - 48 ● Fiordland National Park Management Plan
 - 49 ● Freedom Camping Policy ➡
 - 50 ● Local Community Visitor Economy Awareness Campaign ➡ ↗
 - 51 ● Wildlife Management ➡
 - 52 ● Branding (Destination-Focused) ➡ ↗
 - 53 ● Culinary Marketing Campaign: Foveaux Strait to Fork! ➡
 - 54 ● Destination Content Creation ➡
 - 55 ● Destination Events Calendar for Major Events ➡ ↗
 - 56 ● Destination Promotion to Locals ➡
 - 57 ● Destination Events Strategy ➡
 - 58 ● Driver Safety Promotion ➡
 - 59 ● Digital Media for Southland Trails ➡
 - 60 ● Enhancement of the Regional Events Toolkit ➡
 - 61 ● Fishing and Hunting Marketing and Development Strategy ➡
 - 62 ● Food Tourism Coordination and Strategy ➡
 - 63 ● Regional Destination Marketing Plan ➡ ↗
 - 64 ● Ongoing Collation and Distribution of Tourism Data ➡
 - 65 ● Product Packaging ➡
 - 66 ● Visitor Services (i-SITEs) Assessment ➡
 - 67 ● Wayfinding Strategy ➡
 - 68 ● Off Peak/Shoulder Season Marketing Campaign ➡
- ➡ Recommendation is cross-regional is not location-specific opportunities
- ★ Tier 1 Recommendation ↗ Building Block Recommendation



PRIORITY RECOMMENDATIONS

This Destination Strategy has identified 68 recommendations. 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 activate these recommendations 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 region to work collaboratively to grow the visitor economy.

The building blocks

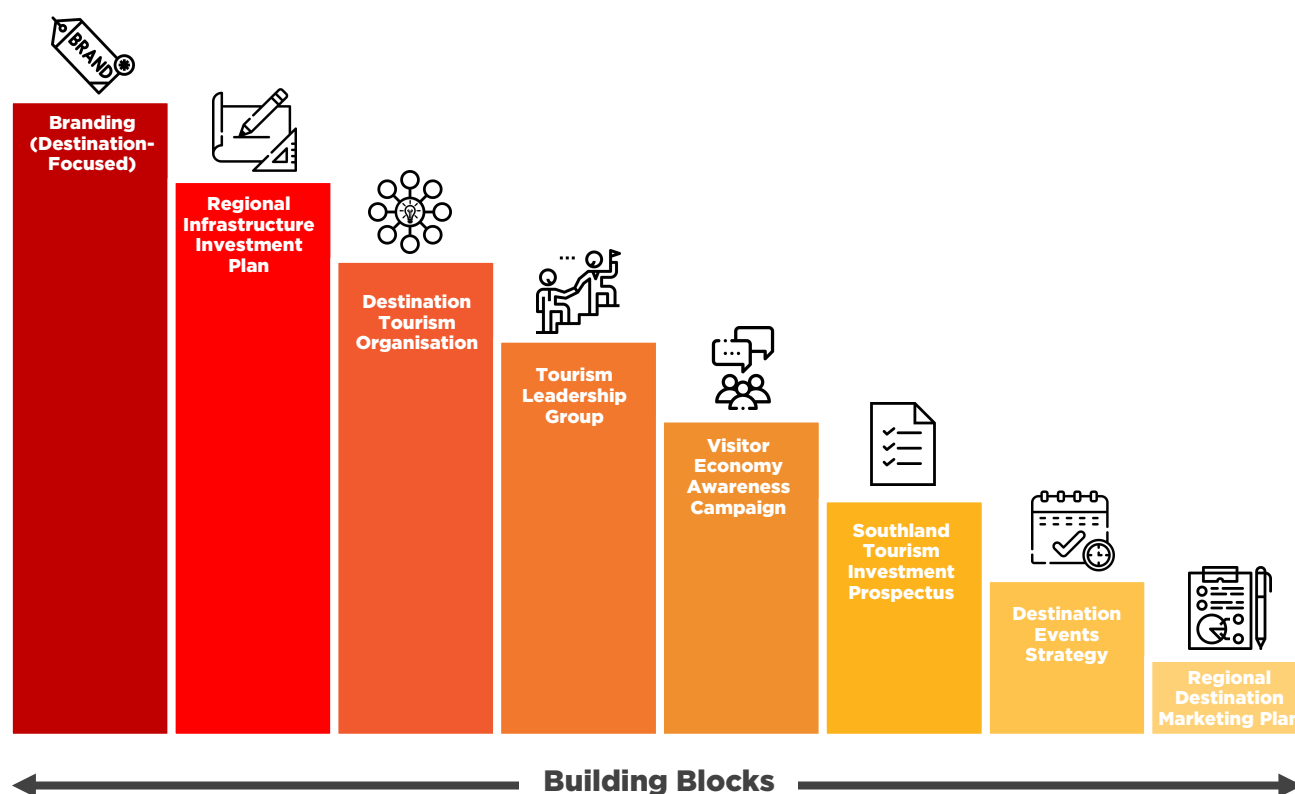
A number of the recommendations identified in this Destination Strategy are considered essential “building blocks” which are required to sustainably manage and grow the visitor destination (see Figure 9).

While not being major “ribbon-cutting” projects, they are necessary to ensure a successful destination management

approach is achieved. These eight recommendations are outlined below and are in priority order.

The Action Plan in the Supporting Document identifies how these recommendations (as well as all the other recommendations identified) should be implemented.

Figure 9: Building block recommendations



High-priority investment recommendations

Figure 10 summarises the recommendations which achieve a Tier 1 ranking (projects are separated into three tiers).

They should be focused on as the priority projects to be activated to grow Southland's visitor economy and assist in meeting Southland's tourism goals. These projects present a significant opportunity to:

- position the region as a stronger destination in its own right;
- generate significant investment (private and public) into the region;

- introduce new, commissionable (paid) project into the region;
- attract a higher yielding visitor market to the region; and
- generate new and ongoing employment opportunities for locals.

The Tier 1 priority projects are considered "game changers" for Southland and should be investigated and implemented alongside the building blocks.

Figure 10: High-priority investment recommendations



