

An aerial photograph of a river valley. The river flows from the top left towards the center, curving to the right. The surrounding landscape is lush green with rolling hills, fields, and clusters of buildings. The sun is low in the sky, creating a warm, golden glow over the scene.

Destination
Management
Plan 2022

**The Mighty
Waikato**

Where magic runs deep

May 2022



This report was prepared by TRC Tourism for and together with Hamilton & Waikato Tourism.

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ACKNOWLEDGEMENT

E ngā iwi, e ngā reo, e ngā karangaranga maha o tātou, tēnei te mihi atu ki a koutou katoa.

E tika ana hei poropororaki i a rātou mā. Me pēnei ake te kōrero, tukuna rātou kia okioki i runga te moenga roa. Āpiti hono, tātai hono, rātou ngā mate katoa ki a rātou, Āpiti hono tātou hono, tātou te hunga ora ki a tātou mā, Tēnā koutou katoa.

To the people, all voices, the many affiliations, greetings to you all.

It is appropriate that we acknowledge the past, those who have made things possible for us. We remember them as those who have been encompassed in the passage to the sleep of all sleeps.

May those who have passed on continue on that journey.

We who inherit the lands, bind together as one.

Greetings to you all.



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Executive Summary — *Plan on a Page*

VISION: The Mighty Waikato is celebrated for providing real New Zealand experiences—where kaitiaki runs deep, mana inspires and unforgettable discoveries are just around the bend.

GOAL: The visitor economy positively contributes to thriving Waikato communities – people, culture and the environment.

POSITIONING: The Mighty Waikato – Where magic runs deep.

Come with us, share our waka and feel the strength and passion. For this is a place beyond the expected, which constantly surprises with natural beauty, powerful history and out-of-this-world experiences. Always far from the ordinary, this is a magical region of villages to play, relax, connect and explore in. Here, our Kaitiaki runs deep, our mana inspires and unforgettable discoveries are just around the bend. A welcoming place where our people keep it real – and experience become unreal. This is the Might Waikato. It’s all yours to discover.

Taiao Ora Tangata Ora

If the natural world is healthy, so too are the people

Guiding Principles

Instilling pride through celebrating and sharing local culture	Providing connections between visitors, local residents and industry sectors	Living our brand values – surprising, magical and authentic Waikato experiences	Embracing guests – Manaakitanga	Regenerative tourism that actively contributes to the communities and the environment – Kaitiakitanga	Fostering innovation – always looking at ways to improve and adapt
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Strategic Priorities

Collaboration, partnerships and leadership	Product and Experience: protection, enhancement and development	Visitor infrastructure and investment
Capability building	Targeted marketing	Regenerative and sustainable tourism

Waikato is a region of diversity; an agricultural powerhouse, of awe-inspiring natural wonders including the mighty Waikato River, Waitomo caves, surf beaches, and is home to Tainui, Ngāti Maniapoto and Raukawa.

This Destination Management Plan (DMP) for the Waikato identifies a pathway towards a shared vision by, and for, local communities, iwi, visitors, tourism industry, wider business, and local and central government agencies.

This vision is that the Mighty Waikato is celebrated for providing real New Zealand experiences – **where kaitiaki runs deep, mana inspires and unforgettable discoveries are just around the bend.**

Building on the current activity of HWT, this DMP brings together all elements of destination management by guiding tourism development and marketing and improving visitor experience and infrastructure. The ultimate goal is to create positive benefits for Waikato communities and their environments using tourism as the enabler - social, cultural, environmental and economic.

To achieve the vision and goal for Waikato as a visitor destination, this DMP focuses on delivering Hamilton & Waikato's brand positioning as a visitor destination and has an underlying foundation of TAIAO ORA, TANGATA ORA – if the natural world is healthy, so too are the people.

There are six priority areas with accompanying actions that work towards achieving the vision, goal, and positioning. These are guided by the values and principles identified by the community, iwi and tourism stakeholders. The priority areas focus on within-sector, cross-sector and intra-regional:

- Collaborations, partnerships and leadership
- Product and experience: protection, enhancement and development;
- Support of visitor infrastructure and investment;
- Capability building;
- Targeted marketing; and
- Support of regenerative and sustainable tourism

It is important this DMP remains a living document.
As the DMP progresses and the operating environment changes, the Plan needs to be updated. Partnerships will develop and evolve, new research will come to light, new policies will be adopted, national and global events will occur, and new issues and opportunities will arise



Destination Management Planning

Effective and sustainable Destination Management involves the management of all aspects of the destination that contribute to a visitor's experience and enhances the liveability for local residents.

Destination Management is designed to identify pathways towards a common and agreed vision that will achieve a range of social, cultural, environment and economic benefits for the whole region. The four Wellbeing areas have been reinstated into the Local Government (Community Wellbeing) Amendment Act 2019. Destination management includes sustainable development of the destination experience, the management of infrastructure and visitors, and marketing to target markets.

An effective DMP must consider the perspectives and aspirations of:

- Local residents
- Visitors
- Māori/iwi/hapū/whanau
- Tourism industry
- Local industry businesses
- Local Government
- Central Government



Figure 1. Destination Management Framework

This DMP is funded by the Ministry of Business, Innovation and Employment (MBIE) to assist the tourism industry to transition from a sustainability focus to one of regeneration. MBIE has identified 16 components of destination planning. These components are all covered in this plan, with strategic priorities identified specific to the Waikato.

This DMP does not start from scratch. In 2014, Hamilton & Waikato Tourism developed and adopted the Visitor Strategy for 2015-2025 which identified an aspiration to grow the visitor economy from \$1billion in 2014 to \$1.35billion in 2025. From there, the Hamilton & Waikato Tourism Opportunities Plan (TOP) 2016 provided a framework and direction for delivering new and improved tourism experiences (activities, attractions, and infrastructure) over the next 10 years to support the long-term growth of the sector and increase the economic value and benefits of tourism to the region. Progress on the TOP’s game changer projects can be found in Appendix 1.

The development of these plans involved extensive research and stakeholder engagement. Progress has been made on many of the projects identified in these plans. Due to the long term aims and implementation of these projects, many are still relevant. This DMP updates and builds on priorities identified within these plans and widens the scope to incorporate all elements of destination planning and management.

Figure 2. 16 components of destination management (MBIE)

DEFINE THE DESTINATION	DEFINE THE VISION	DATA, RESEARCH & ANALYSIS	STRATEGIC FIT
BRAND POSITIONING	ACCESS	AMENITIES, SERVICES & INFRASTRUCTURE	TARGET MARKETS
ATTITUDES	MARKETING & PROMOTION (awareness)	ENVIRONMENTAL STEWARDSHIP	EXPERIENCE & PRODUCT DEVELOPMENT
CAPABILITY & DEVELOPMENT	LEADERSHIP & STRUCTURES	RISK & CRISIS MANAGEMENT	MEASURING SUCCESS

This DMP is an iterative process. Further opportunities, partnerships and collaborations will arise and evolve, and up-to-date research and data will continually inform the plan and its success measurements toward the four areas of Wellbeing. It is important that this document is a living document with frequent review and updates

Strategic Context



The multi-faceted nature of the tourism industry necessitates that there are numerous plans and strategies with relevance to the planning, development and management of visitor related natural, cultural, and built assets. These plans aim to balance the needs of local communities and environments with sustainable development and growth. For details on the goals and objectives of these please refer to Appendix 2.

Table 1. Relevant plans and strategies

NATIONAL TOURISM STRATEGIC CONTEXT	REGIONAL STRATEGIES & PLANS		DISTRICT PLANS & STRATEGIES
<ul style="list-style-type: none"> • Tourism 2025 and Beyond • New Zealand-Aotearoa Government Tourism Strategy • New Zealand Tourism Sustainability Commitment • Department of Conservation Heritage and Visitor Strategy 2021 • Heritage New Zealand 2020-24 • 2021 Tourism Communities: Support, Recovery and Re-set Plan (Industry Transformation Plan) • New Zealand Tourism Futures Taskforce Interim report 	<ul style="list-style-type: none"> • Hamilton & Waikato Tourism Opportunities Plan 2016* • Hamilton & Waikato Visitor Strategy 2015-25 (2014)* • Waikato Wellbeing Project • Waikato Regional Council LTP 2018-28 • The Waikato Plan 2017. A ‘one’ plan for the region • Te Waka: Anga whakamua Waikato Economic Development programme 2018-22 • Waikato Means Business -20 year Economic Development Strategy 2014 (currently being updated) • Waikato Conservation Management Strategy 2014-24, Bay of Plenty (Kaimai) Draft Conservation Management Strategy 2020 • Future Proof 30 year growth plan for Hamilton, Waipa and Waikato sub-region 	<ul style="list-style-type: none"> • Hamilton-Waikato Metropolitan Spatial Plan (incl Hamilton, Cambridge, Te Awamutu) • Waikato Regional Land Transport Plan 2015-45 (updated 2018) • Waikato Regional Major Events Strategy 2018-25* • Waikato Food and Beverage Tourism - Market Development Plan Summary April 2021* • Waikato Business Events Strategy (under development) • The Waikato-Tainui Raupatu Claims (Waikato River) Settlement Act 2010 • The Nga Wai o Maniapoto (Waipa River) Act 2012. • Waikato Regional Workforce Plan (under development) 	<ul style="list-style-type: none"> • Council Long Term Plans 2021-2031 • Local Area Blueprints, Town Concept Plans, Town Strategies, Community Plans • Hamilton Central City Transformation Plan and River Plan • Waipa 2050 Growth Strategy • Waikato District Heritage Strategy • Rangiriri Gateway to Waikato Community Plan • He Pou Manawa Ora – Pillars of Wellbeing for Hamilton • Climate Action Plan for Waikato District <p>*HWT Plans/Reports</p>



Waikato Region

DEFINE THE
DESTINATION

DATA,
RESEARCH &
ANALYSIS

ACCESS

LEADERSHIP &
STRUCTURES



Defining the region

The Waikato Region

The Waikato region covers one city and nine districts (Hamilton City, Waikato, Waipā, Waitomo, Ōtorohanga, Matamata-Piako, Thames-Coromandel, Hauraki, Taupō, and South Waikato). Three RTOs represent the Waikato Region – Destination Coromandel, Hamilton & Waikato Tourism and Destination Great Lake Taupō.

The Waikato region is one of the most productive regions in New Zealand. Its prime location and diverse economy are at the heart of the region's competitive advantage. These, coupled with a stunning environment, relatively affordable housing, educational opportunities, and community networks add up to a place of opportunity for workers, business investors, students, and visitors.

The region is an agricultural powerhouse and a key contributor to New Zealand's dairy industry. It has strengths in manufacturing and is well supported by strong science, research, and professional services sectors.

The entire Waikato region comprises approximately 8% of New Zealand's total GDP, driven largely by the agriculture and manufacturing sectors (food product manufacturing contributes over 60% of Waikato's exports).

The Waikato region's 10 districts and city sit at the heart of an area that is home to more than half of New Zealand's population. Approximately 23.5% of Waikato region's population identified as belonging to the Māori ethnic group, and with 57% of Māori less than 30 years old, and 64% less than 35 years old, more youthful than the general population in the Waikato. Refer figure 3.

Quality infrastructure and easy access to the rest of the country, including the export ports of Auckland and Tauranga, enable easy movement of goods, services, people and ideas.



The Waikato RTO Region

Hamilton & Waikato Tourism (HWT) is currently funded by six of these ten districts/city and provide destination marketing, destination management, convention bureau, industry development and major event coordination services to Hamilton City, Waikato, Waipā, Waitomo, Ōtorohanga, and Matamata-Piako Districts. These six areas account for 75% of the wider Waikato’s population.

The RTO region is referred to as “heartland Waikato” and is well known for hero visitor experiences of Hobbiton™ Movie Set, Waitomo Caves, Hamilton Gardens and Raglan surf beach. It is home to two Great Rides (Hauraki Rail Trail and The Timber Trail), the Te Awa River Ride and New Zealand’s longest river, the Waikato River, flows through the heart of the region. We have a number of unique destinations and emerging experiences such as the original spa town of the North Island, Te Aroha with natural hot soda water, and New Zealand’s only tea plantation, Zealong Tea Estate.

The Waikato RTO region has the fourth largest domestic visitor market behind Auckland, Wellington and Christchurch which makes up around 75% of visitors. Key drive markets are Northland, Auckland, Taranaki, Bay of Plenty, Rotorua, Taupo and Hawke’s Bay. Primary fly markets are Wellington and Christchurch with secondary routes from Manawatu and Nelson/Tasman.

In the international market, the region is ranked the fifth highest behind Auckland, Wellington, Christchurch and Queenstown. Key international markets pre-Covid in order of size from largest were Australia, UK/Europe, North America (USA and Canada) and China.

The impact of Covid-19 on visitation to the region has fluctuated during 2020 and 2021, particularly when there is an alert level change and lockdown instigated in Auckland which is our main drive market. Waikato has also been impacted three times during 2020-2021 which restricted the number of people able to safely attend events and forced the immediate closure of our tourism attractions. Our locals make-up one-third of our visitor market. However, Waikato’s geographic location proved a strategic asset as the region rebounded well each time alert levels changed and travel restrictions eased. The domestic travel market are still keen to travel and meet, however uncertainty plays a part. Corporates are not meeting face to face at present due to the rollercoaster of level changes, most have moved business to 2022.

	Councils	Population 2020	Population Projection to 2028	Standard of Living (Mean Household Income)	Economy GDP per capita
Waikato Region	1 x City 9 x Districts	496,700	514,600	\$96,724	\$56,139
Waikato RTO area	1 x City 5 x Districts	373,910	397,750	\$101,700	\$57,357

Access

The Waikato region is readily accessible and easy to get around.

Car



State Highway 1 passes through the region connecting it via expressway to Auckland in the north and Taupo in the south. State Highway 3 takes in Waitomo along with Otorohanga and Te Kuiti. The construction and current extensions to the expressway has meant that access to the Waikato is very easy and efficient, however it has also meant that most towns and villages are now bypassed (including Hamilton city by the end of 2021). For some towns this has improved the community feel of the place but in others it has meant a loss in revenue from people stopping.

Bus



Buses to Hamilton depart daily from locations around the North Island (including InterCity and SKIP®). InterCity also operates direct daily shuttle buses from both the international and domestic terminals of Auckland Airport to Hamilton. There are a number of privately owned shuttle companies servicing Hamilton airport and out to the districts.

Rail



From Hamilton, the main trunkline takes passengers north to Auckland and south as far as Wellington. KiwiRail operate the iconic Northern Explorer scenic rail journey between Auckland and Wellington with stops in Hamilton and Otorohanga. The service is daily for most of the year, and three days a week during the winter months. Charter rail services also operate on an ad-hoc basis into the region as well.

Te Huia is a weekday commuter passenger rail service that connects the Waikato to Auckland. Te Huia runs return services from Frankton to Papakura, stopping at Rotokauri and Huntly twice a day during the week, and once on selected Saturdays. Off-peak services and a Sunday service will be implemented in 2022. Other changes planned include terminating the service at Puhinui station in Manukau which will provide a direct airport connection, plus the addition of an Auckland to Hamilton return service, more off-peak services and new stations/stops.

Air



Air New Zealand, Originair and Sunair fly to cities and towns around New Zealand from Hamilton Airport each day – 172 flights per week and 26 flights every weekday, with direct routes to Wellington, Christchurch, Palmerston North, Hawkes' Bay and Nelson.



The Visitor Economy

DATA,
RESEARCH &
ANALYSIS

STRATEGIC FIT

TARGET
MARKETS

LEADERSHIP &
STRUCTURES

Waikato industry performance snapshot within national context

NEW ZEALAND

 International Visitor Arrivals
3,899,309 before Covid-19
↓ to 211,007 currently

Visitor arrivals came to a standstill in March 2020 as New Zealand shut its borders to international travel due to Covid-19 pandemic.

The borders were open to Australia and Cook Islands in a travel bubble – currently suspended.

International travel to New Zealand looks set to remain low for some time due to the ongoing pandemic.

SOURCE: Statistics NZ: Tourism Satellite Account (YE Mar 2020)
SOURCE: Stats NZ International Visitor Arrivals (YE Aug 2021)

 Visitor Expenditure (preCovid19)
\$41.9b (+2.4%)
\$17.5b International (+2.2%)
\$24.4b Domestic (+2.7%)

 Key Markets
Australia
USA
China
UK

 Employed in Tourism
384,186 employees before Covid-19
13.7% of NZ's workforce
225,384 directly (8%)
158,802 indirectly (5.6%)

 \$3.9b contribution to GST
9.4% contribution to GDP (pre Covid-19)

WAIKATO

 Visitor Expenditure
\$1.6b before Covid-19
↓ to \$727m currently
75% Domestic/25% Internationals

SOURCE: MBIE: Monthly Regional Tourism Estimates (YE Feb 2020)
SOURCE: MBIE: Visitor Electronic Card Transactions (YE Aug 2021)
SOURCE: Commercial Accommodation Monitor (YE Sep 2019)
SOURCE: Accommodation Data Plan (YE Aug 2021)

 Key Domestic Markets
Auckland
Waikato
Bay of Plenty

Strong demand for Domestic Holidays driven by desire to support economy and see more of New Zealand.
Boost in post Covid-19 Domestic travel to the Regions – changing alert levels on a region-by-region basis is having ongoing effects.

 Guest Nights
1.5m before Covid-19
↓ to 1.18m currently

In addition to commercial accommodation, strong peer-to-peer accommodation provisions, with 1,568 AirBnB listings in the region, achieving 47% occupancy.
Managed Isolation and Emergency Housing in commercial accommodation provides ongoing challenges.

Market demand

The Domestic Growth Insight Tool identifies that there are potentially just under 4 million domestic visitor trips for people who have an interest in and have the ability to travel to the Waikato. Of these, 2.1 million are potential day trips and 1.8 million are potential overnight trips, mostly short breaks. Just under a quarter of these visits would involve visiting friends and family. The majority would travel with adults only (71%), by road (88%), and primarily originate from the Waikato region itself (45%), Auckland (23%), and the Bay of Plenty (5%). There is a skew towards the 18-34 age bracket.

The key activities these visitors are generally interested in (not just in the Waikato), include shorts walks in the wilderness, hot pools, local farmers markets and local restaurants, and a half – full day hike. Over half would stay with friends and family, followed by motels and hotels.

The main associations they currently have of the Waikato include glowworm caves, Hobbiton Movie Set™, black water rafting, and river kayaking.

Due to Covid lockdown changes in Auckland during 2020-2021, the Waikato RTO region is now the second largest business events market in New Zealand behind Wellington. Corporate delegates make up highest number of business event visitors followed by association delegates. The majority of business events in the region are between 30 and 250 people, with 25,414 domestic visitors coming to a business event in the first half of 2022.

In terms of international visitors, the full recovery of annual visitor numbers into New Zealand to pre-COVID-19 numbers is expected to take until 2025. Following Australia, the next markets expected to recover for New Zealand are the United States and Canada, followed by Asia, and then European Countries.

Visitor perceptions

The Waikato has a high number of domestic leisure visitors with 54% of respondents stating they had visited the Waikato (many on multiple occasions), mostly for a day visit or a short break, and a smaller amount for a holiday over the past three years (2nd highest in NZ). However only eight percent claimed that the Waikato was their favourite visitor destination.

Finding a destination easy to get around and having a relaxing time are important attributes for a destination.

Overall impressions and associations with Waikato included a range of things to do, rural/agriculture, easy access, and a high awareness of Hamilton, the Waikato River and Waitomo Caves. Awareness of activities was highest for Waitomo Caves, Hobbiton Movie Set™, Raglan, Hamilton Gardens, and Hamilton Zoo.

The positives/drivers of satisfaction included the easy access, the range of things to do, and the scenery/landscape.

Favourite rated activities included the Timber Trail, Hauraki Rail Trail, Te Awa River Ride, and Good George Brewery.

Twelve percent of respondents claimed they would visit more frequently if there were more events and concerts.

Regarding competitors, based on a number of physical attributes and activities, Waikato's destination positioning is seen as most similar to Rotorua, Canterbury, Taranaki and Manawatu/Whanganui. On experiences offered, Waikato is considered most similar to Otago and Taranaki (due to outdoor cycling, ease of getting around, bushwalks, and back to nature).

Additional perception work has been commissioned by HWT to refine the region's positioning and target markets. This research will strengthen and provide further details to the positioning in this DMP.

Current visitor offering

The best-known visitor experiences in the Waikato, as shown by the perceptions research, are Waitomo Caves and Hobbiton Move Set™, in addition to the Hamilton Gardens. The region also has a wealth of nature-based experiences (walks, waterfalls, natural water springs, cycle trails, wildlife sanctuaries), many of which are on the DOC estate and council and trust land. The food and beverage offering in the region (local products and produce) is fast developing and becoming increasingly popular with visitors. Business events also feed into the Waikato's offering with the region sitting second only to Wellington with number of events held in the first two quarters of 2022.

The main iconic/anchor events that attract visitors from outside and within the Waikato region are Fieldays, Balloons over Waikato, and Rugby SEVENS. Next tier major events are the Hamilton Garden Arts Festival, and International Sports. Other popular events are the Great NZ Food Show and Feast Waikato. New events are being developed with the support of the new Thermal Explorer Regional Events fund.

Hamilton city is the heart of the Waikato RTO region. The city offers unique visitor experiences (eg: Hamilton Gardens); along with vibrant and varied hospitality offerings. A large number of commercial accommodation is offered within Hamilton city, enabling the visitor to take a 'hub-and-spoke' approach to their stay and exploration within the Waikato region. However, a large number of accommodation offerings within the city are currently used as Managed Isolation Facilities and Ministry of Social Development for emergency accommodation – this is a challenge for the immediate future.

The bulk of commercial accommodation is made up of motels and smaller hotels/apartments. The number and capacity of quality accommodation around the region is limited, especially for larger events and corporate groups. The current usage of accommodation for COVID managed isolation and for Ministry of Social Development contracts is proving detrimental to hosting events. This is likely to continue for another 12 months or more. The region also has a large range of Peer-to-Peer accommodation, in particular, AirBnB, within the region – particularly in Raglan, Hamilton and Karapiro. While commercial accommodation is operating with high occupancy rates, the peer-to-peer accommodation offering is becoming more popular, recording strengthening occupancy rates. We are yet to see whether the visitor's desire to stay in large commercial accommodation will return post-Covid, or whether there may be a preference for smaller/boutique accommodation provisions. National and international hotel and motel chains will be more likely to have a robust, thorough and industry accredited hosting, dining and cleaning policy. More research will be needed to inform our understanding and strategic thinking with regards to future needs/desires for accommodation in a post-covid market.

There are 64 Qualmark accredited businesses (including iSITES and local tour operators), but there is a lack of commissionable product for the travel trade to promote and sell including group dining options.

Partners

A Destination Management Plan is a partnership approach to effectively managing the destination. Each partner has a pivotal role to play and contribute to the success of the Waikato Destination Management Plan:

Hamilton & Waikato Tourism

HWT's role is to increase domestic and international visitor numbers, length of stay and expenditure in the region by creating and coordinating effective marketing and promotional activity. HWT markets the region as a destination for business and major events, domestic and international leisure travellers, as well as providing support to develop tourism products and build sector capability.

HWT encourages visitors to enjoy the variety of experiences throughout the Waikato region in turn contributing to the economic, social and cultural benefit of the wider community. HWT works under a private-public partnership model and is a subsidiary of a Council-Controlled Organisation, Waikato Regional Airport Limited. It has an independent commercial board, operates an Industry Advisory Group and has six investment partner councils alongside the industry.

HWT's organisational structure and annual business plan will need to reflect this broader Destination Management mandate to coordinate the delivery of the Waikato Destination Management Plan. There is a need for additional capacity and capability within the team, in particular support around product and operator development, including a focus on delivering outcomes for Maori.

Marketing by HWT

HWT undertakes a range of domestic and international marketing activities to position the region as a destination for business, events, and leisure travellers. Waikato's brand positioning as a visitor destination: Our Story – The Mighty Waikato is covered in the Brand positioning section (page 24). Marketing workstreams are in the following areas: media/PR, travel trade, business events, and consumer marketing. While the regional tourism organisation (RTO) implements singular regional marketing activations, the organisation is an active collaborator with other RTOs for wider promotional initiatives such as eXplore Central North Island (neighbouring Central North Island RTOs) and 'Meet North-South' (Dunedin RTO). HWT also works closely with Tourism New Zealand on their international and domestic activities.

Current domestic leisure traveller target markets include Auckland, Bay of Plenty, Central North Island, Wellington, and Christchurch. HWT also has a focus on promoting the regional offering to Waikato residents. Demographics targeted include couples, families, and active retirees. Marketing channels include owned, earned, and paid platforms including print, on-demand, Outside of Home advertising (non-print and non-digital), and cinema, with a focus on online such as Google Display Network, social media, search, and email marketing.

Domestic target markets for the business events activities include Auckland, Waikato, Bay of Plenty, and Wellington with a focus on the association, corporate and incentive sectors.

HWT's key owned marketing assets include the RTO's website waikatonz.com and social media including Facebook, Instagram, LinkedIn, Weibo, Twitter and YouTube.

A summary of full HWT activity and tracking against key performance measures can be found in Appendix 4.

Mana Whenua

There are three major iwi currently within HWT's boundaries who are at varying stages of their settlement, with differing views and aspirations for tourism.

Tainui have been settled since Queen Elizabeth signed their settlement passing it into law in 1995. The Waikato Raupatu Claim stemmed from the inception of Kingitanga in 1858. The iwi are already players within the tourism industry owning large tourism facilities and visitor economy enablers and aspire to assist iwi/whanau/hapū who have aspirations to develop business within the industry.

Tainui Group Holdings (TGH) is the commercial investment arm of Waikato-Tainui. The trust represents over 76,000 iwi members and 68 marae across the Waikato region. TGH have various investments within the Waikato region, including several accommodation assets.

Ngāti Maniapoto are very much aligned to their goal of achieving cultural and social wellbeing, environmental sustainability, and economic growth. They have a distinct Maniapoto way of planning and developing business opportunities that provide benefits back to the broader community, and if they decide that tourism is a mechanism for them to do this, then they will no doubt develop distinct tourism experiences that showcase what it is to be Maniapoto and showcasing their innovation and iwi matauranga to the world.

On 21 September 2011, Raukawa and the Crown initialled a Deed of Settlement, which was then ratified by the people of Raukawa and signed on 2 June 2012. The Deed will be implemented following the passage of settlement legislation. An initial korero was held with the Raukawa Settlement Trust - the post settlement governance entity of the South Waikato based iwi Raukawa who is also the governance arm of the Raukawa Group. The 2030 strategic vision for Raukawa is "Raukawa kia mau kia ora - a thriving Raukawa iwi". The key outcomes are to restore of wellbeing of its people and enhance the kaitiakitanga (guardianship) of their natural resources.

Although the majority of the Raukawa rohe (region) is in South Waikato District who are no longer an investment partner with Hamilton & Waikato Tourism, there are parts of the tribal area which include Waipa and Matamata-Piako Districts. The iconic Te Waihou Blue Springs and the Waikato River Trails are the two major visitor attractions which are located in the South Waikato District and require the development of commissionable product to develop employment opportunities for the iwi.

While there have been initial discussions with iwi (as mentioned above), it is more likely that potential development and investment would come from within hapu. Therefore, the plan is to engage with iwi in the first instance, and then to engage with hapu and individual Maori businesses.

Te Waka

Te Waka is the Waikato Economic Development Agency for the wider Waikato region (that also includes Hauraki, Thames-Coromandel and Taupō), a business-led and governed organisation established to drive economic growth in the Waikato. Te Waka works in partnership with existing economic development, iwi, business, government, and community organisations. It also works in partnership with the three RTOs of the Waikato region – Destination Coromandel, Destination Great Lake Taupo and Hamilton & Waikato Tourism. It has developed an overarching personality and tone of voice for the broader Waikato region – The Waikato Story (refer figure 6). The Waikato Story is aligned to The New Zealand Story (refer figure 7), and The Mighty Waikato Destination Brand Story is a chapter of the regional story (refer Waikato destination positioning p17 and pages 30/31).

Te Waka's objectives for the Waikato region is to:

- *Lift economic performance*
- *Attract, retain and grow investment, talent and business*
- *Champion and lead the region's collective voices for economic and business needs and opportunities*

Hamilton City Council

Hamilton City Council is the regulatory and policy unit of local government with land management and community development responsibilities governing New Zealand's fourth largest city including:

- *Sustainable well-being*
- *The provision of local infrastructure, including water, sewerage, stormwater, and roads (note: three waters reform mandated October 2021)*
- *Environmental safety and health, district emergency management*
- *Controlling the effects of land use (including indigenous biodiversity), noise, and the effects of activities on the surface of lakes and rivers*

Hamilton City Council also manage visitor assets such as Hamilton Gardens, Waikato Museum, Hamilton Zoo, event venues, the i-Site visitor information centre, parks, walking and cycle tracks and trails which can be enablers and/or investors of visitor services and operators.

District Councils

The five district councils of the Waikato RTO region are the regulatory and policy units of local government with land management and community development responsibilities including:

- *Sustainable district well-being*
- *The provision of local infrastructure, including water, sewerage, stormwater, and roads (note: three waters reform mandated October 2021)*
- *Environmental safety and health, district emergency management*
- *Controlling the effects of land use (including indigenous biodiversity), noise, and the effects of activities on the surface of lakes and rivers*

District councils also manage visitor assets such as parks, gardens, walking and cycle tracks and trails, which can be enablers and/or investors of visitor services and operators. For example, Matamata-Piako District Council own and operate the Te Aroha Mineral Spas.

It is important that the City and District Councils recognise visitors as temporary residents, adding to the vibrancy of our place. Places that are attractive to visit are attractive places to live and invest. Businesses are more likely to consider relocation to towns/cities that are vibrant and offer their employees a lifestyle of choice. Visitors provide an opportunity for an interchange of cultural awareness, beliefs, and understanding.

Waikato Regional Council

Waikato Regional Council is the regional level agency with responsibilities for the wider Waikato region (that also includes Hauraki, Thames-Coromandel and Taupō). Responsibilities include sustainably managing the region's natural resources (including water quality), and leading The Waikato Plan and regional land transport planning. The regional council has also invested in economic development including development of The Waikato Story, The Waikato Economic Action Plan, establishment of Te Waka and a regional film office under Hamilton & Waikato Tourism.

Waka Kotahi NZ Transport Agency

NZTA's role is to contribute to an effective, efficient, and safe land transport system in the public interest. This includes state highways, rail, walking, cycling and public transport. The focus for Waikato is supporting a productive and growing regional economy that creates stronger communities and delivering safe and reliable inter-regional journeys. This includes access to the Waikato, multi-region touring route signage, and connectivity and accessibility within the Waikato on State Highways (including wayfinding and official NZTA visitor attraction signage) and funding the extension of the Te Awa River Ride.

Department of Conservation

The Department of Conservation is a central government agency in the Waikato. It has management and regulatory responsibilities for a number of key visitor attractions and sites within the region. DOC runs programmes to protect, connect and restore New Zealand's species, places and heritage, and provide opportunities for people to engage with these treasures. This includes encouraging more people to participate in outdoor recreation and protecting and bringing historic heritage to life. The 2021 Heritage and Visitor Strategy has three key focus areas – protect, connect and thrive – with a three-year focus. This DMP will seek to partner with DOC to ensure the deliverability of these focus areas in the Waikato around some of our iconic waterfalls, reserves, walking tracks and significant sites.

Waikato Visitor Industry

The Waikato visitor industry is made up of transport operators, accommodation providers, event and conference venues and organisers, activity and experience operators ranging from active (eg caving and surfing), to relaxing (eg spas, sanctuaries, artist studios, and museums), and a wide range of hospitality providers all spread across rural, coastal, and urban settings.

Regional Tourism Organisations

HWT work closely and often collaborate with a number of other RTOs including:

- Neighbouring RTOs for visitor flows and source markets – Coromandel and Taupō (part of the greater Waikato region), and Auckland
- Other Central North Island RTOs – Explore Central North Island (ECNI) and other collaboration and collective opportunities
- Other RTOs for specific campaigns – Dunedin with the “Meet North South” initiative for rotational domestic business events

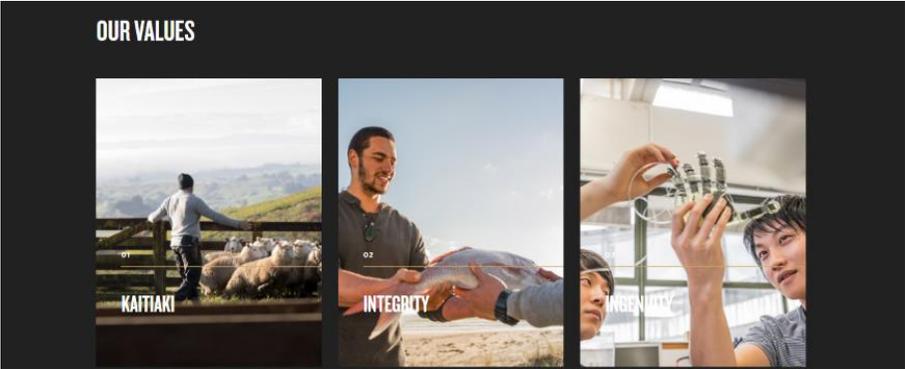
Industry partners

There are a number of industry partners that HWT work closely with in terms of advocacy, information, leads, events, and marketing. These include:

- Tourism Industry Aotearoa (TIA)
- Tourism New Zealand (TNZ)
- Tourism Export Council of New Zealand (TECNZ)
- Business Events Industry Aotearoa (BEIA)
- Convention Bureau New Zealand
- New Zealand Events Association (NZEA)
- Regional Tourism New Zealand (RTNZ)
- Ministry of Business, Innovation & Employment (MBIE)
- New Zealand Cycle Trails (NZCT)
- Qualmark NZ
- Hospitality Association of NZ
- NZ Māori Tourism (NZMT)
- Tertiary Education and Industry Training Organisations

Tourism is an economic enabler and must be considered as part of economic development. A vibrant place to visit, is a vibrant place to invest in, live, work and study. The New Zealand Story and subsequent Waikato Story acknowledge Tourism as an economic enabler.

Figure 3. The New Zealand Story



WE OFFER THE WORLD A FRESH PERSPECTIVE

New Zealand is well-known for the beauty of its landscapes and the friendliness of its people. We have a reputation for doing the right thing, even when nobody is watching.

New Zealand is a creative place – restless, adventurous, unbound by convention. We are able to work with others to find brave new ways of addressing problems that others may not have thought of.



Figure 4. The Waikato Story

The Waikato Story

The mighty Waikato region is a place of powerful possibilities.

Forged by a proud history and shared excitement about the future, we grow and celebrate world-changers, local innovators and inspiring champions. They embrace our guiding philosophy of mahia te mahi – to get the job done.

In a world hungry for new technology and pure produce, we hold prime position.

Our smart, fast-growing city and vibrant rural towns are connected in a diverse landscape that is fertile and ripe for discovery.

Waikato is our turangawaewae; the place where we stand. Here, family is nurtured. Friends are welcomed with open hearts, and life can be easily enjoyed to the full.

This is our place.
This is your place.
Welcome to Waikato, the beating heart of New Zealand.



Community and Stakeholder Aspirations

ACCESS

ATTITUDES

ENVIRONMENTAL
STEWARDSHIP

To capture the aspirations of the Waikato community, the strategic perspectives of community stakeholders, industry and iwi were captured. These aspirations help to identify the vision for the destination plan and articulate the priorities and opportunities that exist within the region.

These community aspirations were gathered utilising community consultation processes undertaken as part of each LTP process (community outcomes and investment in assets/facilities/infrastructure) Council's, community plans, and town concept plans. In addition to this there were a series of purposeful engagement sessions, which included individual consultation sessions and group workshops. This consultation built on earlier work undertaken as part of the Hamilton & Waikato Tourism Opportunities Plan 2016. A range of common and shared aspirations were identified and will be articulated in this section under the four community well-being areas of the Living Standards Framework.

Social Wellbeing

Opportunities that enabled the local communities within the Waikato region to benefit from the visitor economy was a shared aspiration from many within the community. Providing opportunities for visitors both domestic and international to engage with the local people through real and authentic engagement was identified as imperative to achieving this.

The implication from COVID 19 is that the social licence for tourism to operate is more important than ever. Tourism needs to give back to communities and their environment, not take away.

Increased Employment: Tourism is an economic enabler for communities and can provide opportunities that will enable them to continue to thrive. Iwi highlighted the desire for more employment within the region that would provide reasons for whanau who have left for educational and employment opportunities to return.

More Events: Events bring new and existing markets into the region under a common banner or interest. Providing more events throughout the year that align to the positioning pillars of the destination will bring more visitors into the region, as well as providing activities for locals to engage with their own communities. There is a strong belief within the community that there is a need for several diverse large scale and community events that are competitive and can be promoted as another reason to choose this region as the next holiday destination.

Diverse Community: Being part of a community is an essential need for people. Most are involved with numerous communities that might be related to neighbourhood, school, family, religion, or ethnic background. There was a shared aspiration for the community to be strengthened by embracing their diversity and celebrating in their multiculturalism.

Diverse Experiences: The Waikato region has a lot to offer visitors in terms of natural and cultural assets, and the depth of potential experiences available throughout the region. These opportunities enable visitors to engage with people and place throughout the region no matter what journey they may have embarked on. An aspiration to increase the level of engagement for visitors to the region was expressed.

Authentic Experiences with Real People: Domestic and international visitors alike are seeking authentic experiences that allow them to immerse themselves in a local community. By ensuring that there are experiences available, both paid and unpaid, that encourage this connection will help to build a stronger sense of social wellbeing within the region.

Placemaking: Places that encourage local people to connect are also welcoming places for visitors. Capitalising on the region's local assets (physical, cultural, and social identities) unlock its potential and assists with visitors engaging authentically with the destination. The community identified an aspiration to see both an inspirational and innovative approach to the design, management and use of public spaces that have the intention of developing areas within the community that promote social wellbeing, health, and happiness. Access to walking and cycling paths in natural areas and along riverbanks adjacent to townships throughout the Waikato was mentioned by many communities, as was unlocking the history of the place and creating a unique sense of identity for their town.



Environmental Wellbeing

A desire for environmental wellbeing was shared throughout the consultation period. Many aspired for the relationship between people and the natural environment to be placed above anything else. At the very heart of this aspiration was the desire for locals and visitors to the region to respect the environments they are in, and to educate people on how to engage with them in the least harmful way possible (or to give back). It should be noted that this was not about limiting access to natural assets throughout the region (such as rivers, caves, wetlands, and coast), but rather enhancing the experiences available within them.



The Rivers are Our Lifeblood: Water is essential for life. A shared acknowledgement that the rivers within the region are integral to the success and health of the region's future was shared by many. The Waikato region is blessed with many water access points that include the coastline, wetlands, rivers and lakes. Each with their own scenic views and stories to tell but with a certain fragility which means that they can fall victim to several negative external impacts that will affect the quality of the experience and the very water that runs through them. For the environmental wellbeing of the region to be upheld, there is potential for tourism to deliver direct positive impacts on the environment where visitors play a role in its protection and regeneration. It's about aligning our experiences and interactions with our rivers, waterways and coast that are aligned to the aspirational outcomes for each of our awa. For example, actively contributing to restoring the mana, supporting the eradication of koi carp and riparian planting for the Waikato River.

Sustainability is Key: The region holds a wealth of natural land assets that could provide benefit to the tourism industry and the community as a whole. A shared aspiration emerged to ensure that these assets were able to benefit the region economically whilst at the same time be protected and preserved for future generations. Opportunities were identified where visitors could be educated and encouraged to journey through the region in a sustainable manner. There was also a desire to move to the next stage of sustainability - instead of doing less damage to the environment, it is necessary to learn how one can participate with the environment by using the health of ecological systems as a basis for design. A place-based approach is one way to achieve this understanding which is central to the regenerative tourism philosophy. By understand how the systems of life work in each unique place, the role of stakeholders and communities is to create a whole system of mutually beneficial relationships. It moves tourism beyond sustaining the environment to one that can regenerate its health – as well as our own.

Utilising the Waterway Assets: The inland waterways were identified as potential opportunities. The rivers were highlighted as a resource that could be harnessed into a tourism context to create experiences, employment and environmental enhancement in the region. Rivers were often used by early Māori to travel, communicate and trade through the region and into other areas, and this story would provide a compelling experience for the destination. There was an expectation that any operations on waterways would have a purpose brand element that supported the environmental wellbeing of the region.

Building Purpose into Brands: Building a brand-purpose element into tourism operations (other than economic) would also allow for education and regeneration programmes to be developed that will provide mutual benefit to the operator and the broader community. These might be predator control within native forests that the operator might visit, or riparian planting programmes near water.

Mitigating and adapting to Climate Change: It is important to understand the impact increased visitation can have on the environment due to increased visitation. Climate change (mitigation) will need to be encouraged within the tourism sector and wider region. In addition, awareness of the Government's climate change adaptation plan (adopting to circumstances/results) will need to be considered in our activities ie; Raglan surf tower moved due to shore erosion.

Each of the districts within the Waikato region have strategies and plans that focus on climate change, mitigations and adaption, plus there is a specific workstream under The Waikato Plan.

Cultural Wellbeing

Cultural aspirations for the region came through from an engagement perspective but also in terms of visitor experiences. The Waikato region is home to a rich tapestry of cultural stories that breathe life into the histories and landscapes of the region. The ability for visitors to engage with these stories will be important to the future success of the visitor industry.



Māori Tourism Experiences: Experiences that connect the natural and cultural assets of the region would provide a unique proposition for the Waikato. It would enable visitors to engage with mana whenua and hear the right stories told the right way, by the right people. There are broad stories that help to connect the different communities within the region and would provide employment opportunities for iwi and hapū that would bring whanau back to the region, a strong aspiration for iwi.

Hamilton & Waikato Tourism are also a foundation partner of Ahikomako – the Maori business entrepreneur centre based at Mangakōtukutuku Campus (Glenview) of Te Wananga o Aotearoa. A number of Maori tourism ventures participate in this programme to help define their idea and hopefully bring them to reality, including support through the Kokiri business start-up programme.

Early European History: Early European settlers were traders and missionaries who cleared and settled the lands in the region. Agriculture quickly became the largest industry within the region, and small towns began to form near dairy factories. There are opportunities to expand on these stories and histories, told through the primary industry suppliers within the region to help residents and visitors alike connect to this regional strength. This could add value to or diversify existing agricultural businesses. The stories and food chain also connect rural to urban, or farm to plate.

The Battle for Land: The Waikato played a strategic role in how New Zealand was shaped post-settlement and the signing of the Treaty of Waitangi. Following the battle at Ruapekapeka Pa in Northland, the Governor’s focus turned to acquiring land for a growing migrant population in Auckland. The first battle of the New Zealand Land Wars began at Rangiriri Paa in North Waikato and the final battle was held at Orakau in Waipa District. The confiscation of land, loss of life and livelihoods and the people of Tainui fleeing the region to seek refuge within Maniapoto defines our regional story. Restoration of the injustices that were experienced by the people of Waikato remain with long-term, intergenerational change now being led by the three main tribal authorities. As a country, Aotearoa New Zealand is now mature enough to begin to tell these stories, confront their past and acknowledge the significant events, sites and key figures across Waikato. The restoration of Rangiriri Paa and its trenches and the development of Te Ara Wai Journeys and museum in Waipa District are key to beginning to openly express and experience the narrative of our past. Heritage NZ originally developed a “Waikato Wars’ driving app for self-drive exploration of our significant battle sites.

Kingitanga: The story and history of Kingitanga was presented as an aspiration by the broader community on many occasions, and it is believed that it would provide an opportunity to position the region in a unique way. The establishment of Kingitanga was to unify in a time of turmoil. For this aspiration to become a reality, work would need to be done with all iwi in the region to define what elements of the story would be told, by whom, and in what way. It’s also an opportunity to openly discuss how it could be expressed, experienced or educated.

Better Engagement with Iwi: A shared aspiration among stakeholders and the community was to ensure there was better engagement with iwi in the region. Stronger collaborative relationships would lead to greater benefits for communities as a whole. There is a shared desire from iwi to see these collaborative relationships forming, and to play an active role in the management of the destination and delivery of the experience within the region. It is also important to see iwi and hapu lead the cultural narrative, visitor experience and educational opportunities which tourism could offer. An opportunity which has regularly been mentioned is to provide a cultural hub/centre for the region where all facets of Maori culture can be experienced or start from – whether it be a journey, an event, expression and exhibition of contemporary and traditional art, educational opportunities or celebration of kai (food). This could be the catalyst which could unite and kickstart our Maori tourism business entrepreneurs as well. For our operators and events, it's about embedding tikanga Maori and local traditions into everything they do, supporting kaitiakitanga initiatives at a local level and ensuring partnership is practiced with their local hapu to support local aspirations.

Heritage, Arts and Events: A region that celebrates its heritage, is vibrant with arts and events, is an attractive place to live, work and visit. The Waikato is host to a wide variety of events that attract visitors to come to our region, stay and then engage with our visitor attractions.

A multi-cultural lens: The Waikato has a number of cultures represented who have also helped to shape our region over its history. It's important that all cultures are acknowledged, embraced and celebrated such as our diverse events from the Chinese Lantern Festival to Diwali through to telling the stories of the cultural contributions to Waikato.

Economic Wellbeing

Tourism provides the opportunity to create quality secure employment for all ages and build community wealth within the region. For iwi it can also lead to bringing whanau home, a leading aspiration for iwi within the region. As with all the community well-beings, economic strength within the community can help to bolster and support the other three well-beings providing multiple positive impacts and benefits throughout the region.



Economic Benefit Derived from Natural and Cultural Assets: The Waikato region is home to a diverse range of stunning natural assets and strong cultural stories that can bring them to life. Connecting these assets through the development of paid experiences that visitors can engage with will provide economic benefits into the community. An aspiration from many was to see a range of authentic experiences that provide visitors with the opportunity of meeting local people and engaging in real experiences.

Primary Production Cross Sector Collaboration: The global agritourism market was valued at USD69.24 billion dollars and is projected to reach USD117.37 billion by 2027. The MPI and ANZ report “NZ Food and Agri Tourism” (2018) indicates NZ food and beverage sectors of dairy, meat, processed foods, produce, beverages and seafood equate to \$34.5 billion of exports. This report suggests 3-11% expected growth. Central and local governments around the world are adopting relevant strategies to boost economic return through the collaboration of the two sectors, with a focus on long term sustainable practices. The Waikato region has an abundance of food and beverage primary production and added value suppliers in the region (eg dairy, meat products, tea, beer, wine) with strong links to innovation and education providers.

Events as Economic Enablers: Sports, cultural and business events are viewed as a key economic enabler for Waikato, with opportunity to host more. Events provide a reason to visit a place, with visitors potentially staying on in the region or returning to visit at another time. Business Events, in particular, bring visitors who will spend more and stay longer. They are an important ‘seed’ market who have a favourable experience of the region by attending a conference, exhibition, sports event/tournament or incentive, and then for a leisure holiday with their friends and family at a later date. Business events also provide opportunity for our key sectors to exchange knowledge and expose our rangatahi (youth) to inspirational leaders in their field of expertise.

Not only do events provide visitation to venues and accommodation providers, they deliver benefits to wider businesses (such as hospitality and food producers, retail, and transport providers). If well managed, events can add a vibrancy to smaller communities, enhance pride in place and can often be held in the off-peak visitor season.

Education: There is currently a shortage of workers in the hospitality sector, exacerbated by COVID 19 and the shutting of New Zealand’s borders to international workers. Tourism, and hospitality in particular, is viewed as a low skilled, low paid industry. The education sector, particularly tertiary, typically seeks to attract international students. These students explore the region while here; often seek casual/parttime employment in our hospitality/tourism sector; and often have their family visit them while here studying or to attend their graduation.

There are aspirations to see closer links between the tourism industry and education providers, focusing training on specific areas of need, and providing training incentives. The sector is also represented by Hamilton & Waikato Tourism on the Government's Regional Skills Leadership Group to identify and support better ways of meeting future skills and workforce needs in our region. They are part of a joined-up approach to labour market planning which will see our workforce, education and immigration systems working together to better meet the differing skills needs across the country. The key outcome is the development of a Regional Workforce Development Plan by mid-2022 which brings together current labour market data and insights, plus prioritises future skills, training and workforce needs. This will then inform Workforce Development Council (WDCs) for Te Pukenga – the NZ Institute for Skills and Technology. Hamilton & Waikato Tourism also regularly participate in curriculum reviews and development for the region's tertiary institutions (University of Waikato, Wintec and Te Wananga o Aotearoa) and NZ School of Tourism. The organisation is also an active promoter for the national 'Go With Tourism' programme which incorporates workforce retraining, job matching and career expos to promote tourism as a positive career choice.



Vision and Guiding Principles

DEFINE THE
DESTINATION

DEFINE THE
VISION

BRAND
POSITIONING

A destination vision statement is essential for engaging stakeholders with a common direction for destination management. It's an aspirational statement that provides an agreed focus amongst stakeholders for the future state of Waikato as a visitor destination. The goal is a target set towards achieving the vision.

Vision The Mighty Waikato is celebrated for providing real New Zealand experiences – where kaitiaki runs deep, mana inspires and unforgettable discoveries are just around the bend.

Goal The visitor economy positively contributes to thriving Waikato communities – people, culture and the environment.

Guiding Principles

Stakeholders, including iwi and the general community are generally positive about tourism and the opportunities it brings to the region, provided that this is undertaken in a certain manner. A number of guiding principles were crafted based on feedback from stakeholders including results from previous consultation undertaken for the development of the Hamilton & Waikato destination brand.

These principles are inherent in the Vision, they act as a guide to the formation of and implementation of the DMP for Waikato.

- Instilling pride through celebrating and sharing local culture
- Providing connections between visitors, local residents and industry sectors
- Living our brand values - surprising, magical and authentic Waikato experiences
- Embracing guests – Manaakitanga
- Regenerative tourism that actively contributes to the communities and the environment – Kaitiakitanga
- Fostering innovation; always looking at innovative ways to improve

The Underlying Foundation: Taiao Ora, Tangata Ora – If the natural world is healthy, so too are the people.

If all aspects of the natural world are healthy, then the people who are connected to it are healthy too. The need to ensure that the natural environment is a beneficiary of the visitor economy was an expectation of many, and this was articulated through the request for more regenerative tourism opportunities for visitors and local community members to contribute to.



Positioning the Region

ATTITUDES

MARKETING &
PROMOTION
(awareness)

ENVIRONMENTAL
STEWARDSHIP

EXPERIENCE &
PRODUCT
DEVELOPMENT

CAPABILITY &
DEVELOPMENT

Increasingly, aspects of a destination like its reputation, the perceived quality of life, and the brand of the region is determining tourism demand. Factors that drive businesses, talent, and visitors to choose one destination over another have begun to align.

The geographical size and the diverse nature of the communities within the Waikato region present both a challenge and an opportunity. A challenge as the region is a sum of many parts, but an opportunity because it is the diverse nature of the region that adds to its uniqueness. Combine this with the natural assets of the region, the strong cultural connections available, and the resonance of the stories the region has to offer. The potential for compelling positioning for the region then starts to emerge.

Perceptions of Waikato

The perception and image of a place is a key variable in creating a compelling destination for visitors. These perceptions are formed through multiple layers of interaction, research and knowledge and influenced by many different factors both positive and negative, and often external to the visitor industry. The current belief within the Waikato community is that the perception of Waikato as a destination is not as positive as they would like. Descriptions used in past positioning statements, for example the word 'classic', were now seen as outdated and did not match the way the local community saw the destination.

There is also a strong feel in the community that there is a lack of general awareness of the experiences available in the destination beyond Hobbiton Movie Set™ and the Waitomo area. Consumer research identified that there is a strong association with the rural aspects of the Waikato (farming and horticulture), the Waikato River, Waitomo caves, and Hobbiton Movie Set™. The region is viewed as easy to get around and relaxing but has a comparatively low net promoter score and only eight percent of previous visitors claim the Waikato to be their favourite destination.

Additional perception work has been commissioned by HWT to refine the region's positioning and target markets. This research will strengthen and provide further details to the positioning in this DMP. This work will be completed during 2022.

Brand Positioning

Hamilton & Waikato Tourism has developed a brand identity that articulates a compelling visitor destination. The brand identity has been developed through comprehensive consultation and research to determine how best to position and market the region. A desired perception, or positioning story was developed as part of this process:

Story: The Mighty Waikato – Where magic runs deep

Come with us, share our waka and feel the strength and passion. For this is a place beyond the expected, which constantly surprises with natural beauty, powerful history and out-of-this-world experiences.

Always far from the ordinary, this is a magical region of villages to play, relax, connect and explore in. Here, our Kaitiaki runs deep, our mana inspires and unforgettable discoveries are just around the bend.

*A welcoming place where our people keep it real – and experience become unreal.
This is the Might Waikato. It's all yours to discover.*

Destination Positioning Pillars

The opportunity now is to bring the powerful brand and positioning to life through the delivery of on-ground experiences and journeys that will enable visitors to engage with the unique, powerful natural assets, meet the local people and learn of their stories connecting them to the land, and connect with the culture and heritage shaped by this land and its people.

Perception and Positioning work is currently being undertaken by HWT to develop pillars that profile the strengths and uniqueness of the destination, appealing to new and existing target markets.

Figure 5. Destination positioning pillars





Target Markets

Stakeholder consultation identified that the ideal visitor for Waikato is one that resonates with the values held by the local communities. That is, visitors who respect, engage and want to contribute to the environment and local people, and have the time and means to explore what the region has to offer.

The move towards tourism requiring a social licence to operate within communities has become even more pronounced since the COVID19 pandemic. This makes the targeting of specific visitor segments more important than ever.

Nine domestic visitor segments have been identified within the domestic market for New Zealand. The core pillars of the Waikato visitor experience offers something to each of these segments, and there is a lot of overlap/similarities in terms of experiences sought by these segments. These segments would not be targeted individually, but grouped together, with consistent key marketing messages to develop a clear and strong positioning. The visiting friends and family segment is significant - in terms of size nationally, and especially to the Waikato.

Local residents as visitors fall within a number of these segments (e.g. family fun, sports and events, visiting friends and family, explore nature, knowledge seeking, shopping), but in some instances would require separate marketing initiatives. Local residents being proud of their region and having experienced what the region has to offer will also have positive flow on to their visiting friends and families.

Prior to Covid-19, the Waikato was a significant on-shore excursion destination for the cruise market from the Ports of Auckland and Tauranga. Popular cruise excursions in Waikato included Hobbiton Movie Set, Waitomo Caves, farm experiences and the Taste of Waikato lunch at The Red Barn. As a destination, Waikato supports NZ's future strategic approach for this market; and encourages the return of cruise ships in a sustainable and collaborative manner.

Market segments that seek the experience Waikato has to offer (or has the potential to develop) are summarised in Table 2. The current level of interest in Waikato as a visitor destination from the domestic leisure market segments indicates the market segments that would be easier to convert to travel.

Table 2. Potential Market Segments for Waikato

SEGMENT/ DESCRIPTION	EXPERIENCE DRIVERS RELEVANT TO WAIKATO	DEMOGRAPHICS	CURRENT INTEREST IN HAMILTON WAIKATO COMPARED WITH OTHER NZ DESTINATIONS
DOMESTIC			
Friends and Family – going to visit friends and family (including students) (largest market segment)	Eat at local restaurants, shopping for local food, farmers markets, concerts, garden visit	45+	Med-High
Explore Nature – exploring the outdoors as a way to relax	Cycle trails, wildlife/nature sanctuaries, walking/hiking, caves	Active Boomers and Independent Professionals (couples, no kids)	Med
Wine, Food and Scenery – indulge or reward themselves with friends or visiting friends	Local food producers/ trails/ farmers markets Arts/ cultural events Craft Breweries	Couples, no kids, 50+	Med
Knowledge seeking – discover and learn things about history and heritage	Heritage trails, museums, art galleries, exhibitions, parks and gardens, places significant to Māori, music performance, walking, special events	Couples no kids Predominantly 65+ Some younger families	Med-High
Shopping – catch up and connect with friends and family while escaping daily routine	Local food and art, farmers markets, short nature walks, hot pools, gardens	50-60+	Med-High
Sports and Events - watching/participating - in sport/cultural event with friends and family (smallest market segment)	Sporting events and games, arts and cultural events, concert, cycling, golf, brewery tour, wine and food festival	Active Boomers and Independent Professionals (couples, no kids) Families for sporting trips	Low-Med
Family Fun – bond with family	Hamilton Zoo, Hobbiton, hot pools, glow worms, wildlife sanctuaries, beach, parks, cycle trail, walks	Couples 35-44 with school age kids or younger	Med-High
Relaxation and wellbeing – get away and engage in low effort activities or wellbeing	Visiting beaches, yoga, forest walks, local food, café's, breweries, boutique shopping, art	Active Boomers and Independent Professionals (couples, no kids)	Med
Treat Myself – short breaks to indulge	Hot pools, food and wine, relaxing activities (yoga)	Younger couples (18-39)	Low-Med
Business events	Accessible, meeting, accommodation and hospitality capacity, somewhere unique/ different Fun group activities	Corporates and Associations	N/A
Local Waikato Residents	Explore new things, events, support local food and wine producers		N/A
INTERNATIONAL			
International Leisure travellers	Hobbiton, cycle trails, food and produce trails, history and heritage trails	Free and Independent travellers Aust/UK/Europe/US	N/A
International VFR	Visiting friends and family Local food/ trails Coming for an event at specific times of the year	Free and Independent Travellers mainly from Australia	N/A

Risks and Mitigation

LEADERSHIP &
STRUCTURES

RISK & CRISIS
MANAGEMENT

MEASURING
SUCCESS

Managing risk in tourism is vital for tour operators. However, it is just as important for destinations and the agencies that manage them. Crisis or situations that can have adverse effects on industry, community and the physical destination itself can occur when least expected, but through planning for different scenarios and mitigating identified risks, a more resilient destination can be built.

This section of the plan identifies a range of risks that have become evident throughout the consultation process for this destination management plan. These risks could have varying degrees of impact on the destination and the industry, and each will offer a range of complexities that should be understood in order to mitigate them effectively. This plan will identify some potential opportunities to do this (in the following section that looks at the strategic priority areas for effective destination management of the Waikato region). This is not an exhaustive list, and not all potential mitigating factors are identified. Further investigation into current and future issues and potential mitigations are required on an ongoing basis.

RISK 1: Climate Change

Climate change is a significant risk for tourism – for the landscape, ecosystems cultural assets, infrastructure tourism is reliant on, and in tourist demand patterns (supply of visitors).

Pathways forward are unclear at this stage at an international and national level. Action will need to be undertaken to both adapt to and mitigate climate change in order to ensure resilience within the Waikato tourism sector.

Climate adaptation (adjusting to the physical impacts due to climate change such as sea-level rise, rising temperatures, more frequent extreme weather events including droughts and floods). The National Adaptation Plan (NAP) due for release in August 2022 will set out Government’s policies and strategies that respond to climate risks.

Climate mitigation (reducing carbon emissions). NZ’s Climate Change Response (Zero Carbon) Amendment Act commits to reduce emissions to zero by 2050.

Electricity, gas, water, and waste services accounted for 11% of total regional industry emissions and increased 9.3 percent in 2019. Waikato is the largest contributor of greenhouse gas emissions in New Zealand, accounting for 47 percent (3,780 kilotonnes) of electricity, gas, water, and waste services industry emissions in 2019.

Taking action on climate change is a key priority of The Waikato Plan. In its role as facilitator and connector, a key workstream of The Waikato Plan is to work on integrating the region’s climate change response. Hamilton & Waikato Tourism are a key stakeholder and contributor in this workstream. Find out more at waikatoplan.co.nz Each district council also has produced Climate Action Plans to outline local government’s response to climate change as well as initiatives to support their district, city and its communities.

Travel itself is a significant contributor of emissions. While major changes will need to occur at an international and national level (eg aviation fuel alternatives), regions need to incorporate carbon reduction at all levels from regional transport infrastructure to individual operators (with carbon off-setting used as a last resort). Hamilton & Waikato Tourism will work with tourism and event operators to advocate for the measurement of impacts and emissions, align to the NZ Tourism Sustainability Commitment and provide support on actions for the industry to mitigate, build resilience and adapt to climate change.

This Risk is addressed in HWTs Strategic Priority Areas: **1 – Collaboration, Partnerships and Leadership** **3 – Visitor Infrastructure and Investment**
6 – Regenerative and Sustainable Tourism

RISK 2: Walk the Talk – Regenerative Tourism

It is no longer enough to sustain the natural environment; we need to enrich and regenerate it. Regenerative tourism is the principle/philosophy of leaving the environment better than we found it; ensuring that visitation adds value and does not detract. Communities and industry need to take steps to ensure our natural assets, our people and its communities have the ability to regenerate. There are opportunities for the tourism industry to actively support and participate on this journey while providing opportunities for visitors to be engaged. There is also a risk in inactivity within parts of key sectors that will impact the visitor experience and the environments they rely on e.g. wetland draining, intensification of dairy land and the declining water quality in the Waikato.

HWT are currently undertaking a survey to ascertain what sustainability initiatives tourism operators within the region are undertaking. This survey will set our industry benchmark, identify successes, challenges, and opportunities. We also need to find out more and gather evidence about the impact of visitors into the Waikato region which may help us identify new market segments, supporting infrastructure required and user-pays methods to help contribute to our regenerative tourism future. These are key actions on how HWT will lead and support change across the region and sector, as well as ensuring alignment to national initiatives.

This Risk is addressed in HWTs Strategic Priority Areas: **1 – Collaboration, Partnerships and Leadership** **6 – Regenerative and Sustainable Tourism**

RISK 3: Global Travel Disruptors

The global disruptor COVID-19 was indiscriminate and rocked many industries to their core. The adverse effect on the tourism industry is still being felt around the world, and the toll it will take at the end is still unclear. Destinations who relied on singular positioning pillars or a visitor mix that was heavily reliant on only one market suffered even heavier losses. It is clear that there will be another global travel disruptor, it might be another pandemic, or a natural disaster (more than likely climate change related). Destinations will need to have a broad range of markets and appeal, multiple access options, and work with the local community and industry to help build resilience in the sector to avoid business failure. Visitors are looking to connect with local communities and hear real local stories, they will look to spend longer in NZ when they come and will be more environmentally conscious. It will be important we have this information easily available and understood/taken seriously by our industry and that our understanding for our community is the same, for them when travellers are decision making.

This Risk is addressed in HWTs Strategic Priority Areas: **1 – Collaboration, Partnerships and Leadership** **4 – Capability Building**
5 – Targeted Marketing

RISK 4: Iwi Stories

The power of storytelling and the stories that are unique to mana whenua in a region add a unique and compelling element to a destination. These stories are owned by iwi and should be shared by iwi. A risk exists for iwi around these stories and the need to determine what is private and unable to be shared, and those that can be shared.

If they are not done correctly (with iwi leading what can and cannot be shared, and by whom), or are appropriated by other operators, regions, or agencies, the detrimental effects it can have on relationships with iwi can set back forward movement.

The Kingitanga movement and the stories that stem from that time in the region's history were identified as a distinct opportunity in the Tourism Opportunities Plan from 2016. Although this remains as true now as it was then, there would need to be an opportunity for all iwi who hold the rights to different chapters of that story to discuss what elements they would like shared, how that would look, and who would be the storyteller. These conversations would take time, but it is definitely worth starting on the journey to come to those decisions.

This Risk is addressed in HWTs Strategic Priority Areas:

**1 – Collaboration, Partnerships and Leadership
3 – Visitor Infrastructure and Investment**

**2 – Product and Experience Development
4 – Capability Building**

RISK 5: Community Impacts

The social licence of tourism in destinations is integral to the success of a destination. Visitors are temporary residents who support the viability of business and the economy. The community sits at the heart of the destination and tracking their acceptance of the industry and where the pain points might be will assist with effective management into the future. Tracking through a community survey would assist in benchmarking and monitoring. It would also enable the destination to catch hot spot areas that might be facing over-tourism status earlier. This expands the work from the United Nations World Tourism Observatory (UNWTO) site with the University of Waikato in Raglan which annually surveys residents and visitors during the peak summer season. This longitudinal study will ensure not only social licence is maintained in the community, how it will improve the social, economic and environmental value that tourism and events contribute to the community and as well as ensuring the long-term brand equity of Raglan as a destination is protected. The Raglan Visitor Plan is aligned to the Raglan Naturally Plan, community board aspirations, the Raglan Neighbourhood and the Waikato District Plans. It is recommended that robust community engagement around the future of tourism and events in hot-spot and emerging destinations around the region is undertaken, as required.

This Risk is addressed in HWTs Strategic Priority Areas:

**1 – Collaboration, Partnerships and Leadership
5 – Targeted Marketing**

**3 – Visitor Infrastructure and Investment
6 – Regenerative and Sustainable Tourism**

RISK 6: Potential inability to adopt a region-wide Destination Management approach

While visitors do not define regional boundaries, the Waikato is a complex and diverse region when it comes to the boundaries of HWT's destination management partners. The economic development agency Te Waka, DOC Waikato, iwi, Regional Council, and other partners all have boundaries different to the RTO. Added to this complexity is the comparatively large number of local councils that make-up the HWT region. These two factors make it complex to achieve a cohesive vision and integrated destination management approach for Waikato.

The advantage of a co-designed plan is to agree on a combined vision for destination management and work towards integrating work programmes to achieve this vision. The plan is intended for the destination, and not owned by one particular stakeholder over another.

The Waikato Destination Management Plan will be a living document as the sector makes a commitment to collaborate across the region to build an understanding of the sector and its needs, as well as the tourism ecosystem within the region including the RTO, i-SITEs, key attractions, education & training providers and supporting services. HWT's role is to maintain the regional relevance of the sector, drive collaboration and lead partnerships.

This Risk is addressed in HWTs Strategic Priority Areas: 1 – Collaboration, Partnerships and Leadership

RISK 7: Lack of larger-scale commercial accommodation

The lack of larger scale, quality accommodation currently available in the Waikato is a limiting factor to retaining visitor's overnight stays in the Waikato, especially in Hamilton, Waitomo, Cambridge, Raglan, Matamata, Te Aroha and North Waikato. Hamilton is the key accommodation, hospitality and entertainment hub for the region, with Cambridge developing as a secondary destination.

Prior to Covid-19, Hamilton was ranked ninth in hotel inventory in the country – a significant challenge for New Zealand's fourth largest city and regional visitor economy. From June 2020, three of our largest hotels were requisitioned by the Government for Managed Isolation Facilities (MIFs) taking out 42% of the accommodation supply and around 55% of our motel inventory has been taken off the market for use by the Ministry of Social Development's (MSD) social housing requirement. These two challenges have only exacerbated the accommodation shortage for the region. It is a continual challenge as we continue to attract larger scale events and conferences, plus eventually host group bookings again, to help lead the social and economic recovery of the region.

For Hamilton, one to two new 4.5-star hotels are required with 160 rooms, including in-house conference facilities of 250pax and smaller. The future demand factors estimate that by 2023, the city will need an additional 160 serviced apartment and hotel rooms, 380 by 2025, 750 by 2030 and rising to 850 by 2033 (ref?). These hotels would need to be located within the CBD or close to the Claudelands Events Centre and be built to 5-star standard to futureproof the change in the market.

Mid-range hotels are required in Cambridge, Matamata, Waitomo and North Waikato with between 65 to 120 rooms. Smaller, boutique style accommodation motel or hotel development would be beneficial to the Raglan and Te Aroha market, 4-4.5 star level with between 35 to 55 rooms.

The main barriers for investment is the high cost of building and construction in New Zealand. Ideally, developers are looking for a brownfields site where a conversion of an existing building or property is desired. For example, the Lakeside Resort & Spa on the shores of Lake Karapiro south of Cambridge has 45-chalets, tennis court, swimming pools, conference rooms and ancillary facilities. It never officially opened to market for over a decade and currently half of the property is leased by Resolution Retreat. Hillside Hotel on the hills at the back of Taupiri and Huntly and the iconic Waitomo Hotel are other existing closed properties which requires significant investment to bring it up to current market standards.

HWT will continue to support development proposals, provide key market data and insights, partner with local government and Te Waka, co-fund an investment case and lobby for commercial accommodation across the region.

This Risk is addressed in HWTs Strategic Priority Areas: 1 – Collaboration, Partnerships and Leadership 3 – Visitor Infrastructure and Investment

RISK 8: Skills/labour market/training

There is a national shortage of hospitality and tourism workers. Tourism and hospitality is often viewed as a low skilled, low paid industry with poor working conditions and an undesirable career path – very similar to the dairy sector. Reliance on foreign staff (often transient) for hospitality has become more evident with New Zealand’s COVID 19 related border closures, plus issues with attraction and retention within the sector – from young workers through to those returning or retiring from the sector.

Issues with profitability and productivity of the sector has been identified at a national level. There is currently a number of workstreams underway to improve business models at all levels, perceptions of the sector, and relevant training opportunities (potentially incentivised).

A two-day Go With Tourism Workforce Wānanga was held in mid-November 2021 where representatives from the industry, associations, educators, unions, students, local and central government worked together to discuss the challenges that currently face the Tourism & Hospitality workforce and how we can overcome them. Four key themes were apparent in the solutions presented to the Minister of Tourism Hon Stuart Nash and the co-chairs of the new Industry Transformation Plan for the Tourism Industry which included a need to change perceptions, to amplify education, provide resources for employers, and creating a partnership culture. Rebranding Tourism to the “Experience Economy”.

HWT are members of the Waikato Regional Skills Leadership Group and represent the ‘Service’ sector which includes tourism, events, hospitality, retail, professional services, real estate, call centres and the public sector. This group is one of 15 Regional Skills Leadership Groups (RSLGs) in New Zealand set up by the Government to identify and support better ways of meeting future skills and workforce needs in our region.

This Risk is addressed in HWTs Strategic Priority Areas: 1 – Collaboration, Partnerships and Leadership 4 – Capability Building

RISK 9: Ageing/lack of infrastructure

There are public facilities and services in popular visitor spots around the region that struggle to cope with the influx of visitors – especially during the peak summer season. The pressure in these areas due to a lack of or ageing infrastructure can have an impact on the quality of the visitor experience, adding extra stress on to small communities, and can negatively affect tourism’s social license to operate (e.g. waste water treatment (Waitomo and Raglan), road access to Raglan, toilet facilities and parking at Wairēinga/Bridal Veil Falls, Wairere Falls, coastal designated freedom camping areas).

RTOs need to work with local government, the Department of Conservation and NZ Transport Agency (where applicable) around ensuring the visitor impact on some of our most popular hot-spots are identified, measured and improvements prioritised. This is not about duplication of effort as there are spatial plans, neighbourhood plans, 10 Year Plan and district plan reviews which will incorporate infrastructure upgrades, replacements or new capital works.

This Risk is addressed in HWTs Strategic Priority Areas: 1 – Collaboration, Partnerships and Leadership 3 – Visitor Infrastructure and Investment

RISK 10: Impact of potential negative reputation of Hamilton City

Hamilton is our main urban centre and is our regional hub for accommodation, transport, hospitality, entertainment, events and venues. We need a vibrant city that is part of the “hub-and-spoke” visitor offering which Hamilton currently delivers for the region. Those that live in Hamilton, know it is a great city to live, work, study and play. However, the national reputation of the city has waned in the past and it regularly is targeted by negative opinion pieces and comedy sketches.

However, the city’s reputation is improving and growing nationally. HWT tracks Net Promoter Score (NPS) for the region and we have seen a marked improvement over the past 10 years. The city is also attracting nationally iconic major events, international sporting tournaments and a higher visitor profile due to the new developments at Hamilton Gardens (eg. the Surrealist Garden).

The food and beverage tourism opportunity is also significant for the city. It is time to shine a light on and celebrate the food and beverage of the city, including crafting a narrative that is authentic and compelling. From Duck Island ice cream, Rocket Coffee and Good George Brewing through to the thriving hospitality scene at Riverbank Lane including Mr Pickles and Bahn Mi Caphe, plus destination restaurants like Palate and Gothenburg. Food has the potential to be one of the city’s great cultural markers which can be used to define and celebrate the city.

We see improved transport connectivity to the city as an enabler – from additional flight services from Hamilton Airport through to the completion of the Waikato Expressway and an enhanced leisure offering as part of the Te Huia rail service between Auckland and Hamilton, as well as Hamilton to Auckland.

As well as maintaining the positive visitor profile, tourism needs to align to the growth sectors such as technology, high performance sport and the primary sector to continue the development of future experiences which will be unique to Waikato and leveraging our regional strengths.

This Risk is addressed in HWTs Strategic Priority Areas:

1 – Collaboration, Partnerships and Leadership
4 – Capability Building

2 – Product and Experience Development

RISK 11: Impact of Covid-19 on New Zealand tourism and the Waikato

The biggest challenge facing the Waikato tourism region post-Covid is the protection of our iconic/hero regional visitor destinations – Waitomo Caves, Hobbiton Movie Set, Raglan and Hamilton Gardens. Prior to Covid-19, these regional ‘heroes’ were significant attractors for the international traveller.

All four regional ‘heroes’ were previously on international travel itineraries, and we are yet to assess the long-term impact on these destinations once international borders reopen. We need to assess the changing needs of the international traveller, which may seek smaller, boutique-sized experiences, bespoke offerings, smaller group bookings, etc

Due to Covid-19, we have seen an acceleration in the conscious traveller movement which will require a rethink on visitor products, accommodation and transport offerings, plus an active community, cultural or social impact component. Participation and acceleration of the regenerative tourism programme across the Waikato will support industry capability and create the opportunity to lead around ‘good’ visitor experiences.

Covid-19 also resulted in central government investment into the work that RTOs undertake. HWT benefited from \$1.7m funding through the Strategic Tourism Asset Protection Plan and the Tourism Reset funding. In addition, Waikato were appointed Lead Entity for the Thermal Explorer Regional Events Fund for Waikato,

Ruapehu, Rotorua and Taupo. This additional funding support has accelerated projects that enabled focus beyond marketing activity. This activity needs to be able to continue post-covid, post-Central Government investment.

This Risk is addressed in HWTs Strategic Priority Areas:

1 – Collaboration, Partnerships and Leadership
5 – Targeted Marketing

4 – Capability Building
6 – Regenerative and Sustainable Tourism

Leadership Challenges

Sustainable Funding for RTOs

Funding stability is a risk for all Regional Tourism Organisations and Hamilton Waikato Tourism is no exception. With multiple councils and industry partners contributing financially to the organisation, there is the risk that one or more of the funders decides to reduce or remove their support completely. This case is highlighted by the recent decision by South Waikato District Council to discontinue their financial support for HWT in FY22. To be eligible for central Government funding such as the Tourism Communities: Support, Recovery and Reset Plan, RTOs need a commitment of funding from local government, among other criteria.

The industry contribution mandate that HWT has is difficult to sustain during times when the industry is in crisis (and when HWT most need the funds to mitigate the crisis).

The work spearheaded by the additional \$1.7m from the Strategic Tourism Assets Protection Programme (STAPP) and the \$3.75m Regional Events Fund needs to be able to continue. This additional funding support has accelerated projects that enabled focus beyond marketing activity. This activity needs to be able to continue post-covid, post-Central Government investment.

Sustainable Funding for Destination Management

It's important to ensure that all funding entities are taken on the journey with the team to understand the importance of managing the destination effectively and outlining the benefits to the entire region in detail. With limited resources and the STAPP funding only for two years, the effective long-term delivery of the destination management plan is a major challenge. Some of the projects identified can be integrated into business-as-usual, however a number of new initiatives will require new investment partners and existing funders increasing their investment.

There are also broader environmental factors that impact on positive future outcomes for destination management. It is likely that DMPs will be used to identify where future funding should be channelled at a national level such as a review of the International Visitor Levy (IVL).

The fact that a DMP incorporates four community wellbeing outputs (not just economic) aligns well with council-community based outcomes. However, local government across Waikato have challenges managing growth and are regularly tapped for community funding.

An opportunity is the broader focus of the DMP opens up opportunities to access non-tourism specific funds. For example, looking to other non-tourism sector partners or Trusts to work with (eg arts, heritage, agriculture industries, iwi, Regional Council), or other funding initiatives such as Jobs for Nature might be able to assist where initiatives are aligned to the regeneration of the natural environment.

Sustainable funding mechanisms at local and regional level which also supports investment to maintain and deliver quality experiences, particularly in high visitor areas and communities with low-rate bases, is an area which needs to be investigated nationally. A possible solution could be super-charging the Tourism Infrastructure Fund (TiF) and providing coordinated leadership from the RTO, particularly with so many councils and communities of interest.

The long-term focus needs to move from a “demand led” approach to a more holistic, integrated and regenerative framework.

A couple of case studies could be developed which support this approach and challenge, such as the affordability of the Waitomo Village wastewater management system and Raglan with the robust infrastructure to manage high visitor numbers during peak periods. International and national examples could be identified to help resolve these challenges such as user-pays infrastructure and access, local visitor levies and differential pricing models.

It is hoped the funding challenges will be addressed as part of the Tourism Industry Transformation Plan (ITP).

Effective Destination Management of the Region

The organisational structure of the RTO should be reviewed to ensure that adequate focus and resource can be given to effective management and development of the destination. If there has been a historic focus on awareness building this can result in a team that is weighted toward destination marketing. To ensure the destination is resilient and capable of achieving the aspirations of the community and delivering on all four of the Wellbeing areas, there needs to be an increased focus on destination development and destination management. Collaboration with partners (resource and infrastructure managers, Te Waka etc) will play a significant part, as will the defining of roles and responsibilities.

The six priority areas determined through this report (articulated in the following section) identify that well managed destination development should be the priority focus for success to be achieved. Four of the six priorities identified are aligned toward developing and managing the destination. This would involve a process of understanding the resources that will be required to achieve each imperative, collaborating with partners where relevant, and resourcing the organisation appropriately.

As some of the Strategic Actions included in this plan are beyond HWTs remit, to fully activate the destination management plan, HWT will develop a Governance Group with representatives from key stakeholders – this is likely to include: representative of the funding councils, representative of iwi, Department of Conservation, Te Waka, Waikato Wellbeing Project, Waikato Plan, Industry, NZTA. The aim of the Governance Group is to ensure principles of the destination management plan is included in their own strategic plans and actions. The Governance Group would focus on building resilience to address and mitigate the identified risks.

These Leadership challenges are addressed in HWTs Strategic Priority Areas:

**1 – Collaboration, Partnerships and Leadership
4 – Capability Building**

**3 – Visitor Infrastructure and Investment
6 – Regenerative and Sustainable Tourism**



Strategic Priority Areas and Action Plan

Vision The Mighty Waikato is celebrated for providing real New Zealand experiences – where kaitiaki runs deep, mana inspires and unforgettable discoveries are just around the bend.

Goal The visitor economy positively contributes to thriving Waikato communities – people, culture and the environment.

Strategic Priority Areas

Six priority areas have been identified to achieve the vision for Waikato as a visitor destination.

- 1 Collaboration, Partnerships and Leadership
- 2 Product and Experience: protection, enhancement and development
- 3 Visitor Infrastructure and investment
- 4 Capability Building
- 5 Targeted Marketing
- 6 Regenerative and Sustainable Tourism

Within each of these priority areas are a number of actions that provide direction for stakeholders and partners of tourism in Waikato to assist in achieving the vision and goal. Measures of success for these actions are based on the four Wellbeings (social, economic, environmental and cultural) of the Local Government Act and the targets of the Waikato Wellbeing Project (refer Appendix 5).

Data for these measures will come from a variety of sources – for example, community sentiment measured via councils, environmental data from DOC and Waikato Regional Council, visitor data from MBIE and commissioned surveys.

PRIORITY AREA 1:

STRATEGIC FIT

AMENITIES,
SERVICES &
INFRASTRUCTURE

ENVIRONMENTAL
STEWARDSHIP

LEADERSHIP &
STRUCTURES

MEASURING
SUCCESS

Collaboration, Partnerships and Leadership

The success of a sustainable destination is in the holistic management of a destination. Success of destination management involves a range of stakeholders; to manage “supply & demand” along with resource management and allocation of resources; and supply chains that satisfy customer journeys. The visitor industry is made up of many facets including core infrastructure, visitor experiences including events, supporting services and amenities, and natural and cultural resources which are owned and/or managed by a range of partners. Regional unity across sectors and resource managers, and across district, regional, and rohe boundaries, will provide a well-integrated visitor experience that builds on the unique strengths and competitive advantage of a regional visitor destination. Destination planners and managers need to understand current and future visitor desires, needs and expectation; seek data to support this and then agree on priorities, roles and responsibilities; and then have resources to implement agreed activities. For this DMP to be successful it needs to be supported and integrated into local government planning, be aligned with wider regional and national strategies (including climate change policy), supported by local tourism operators and the community in general, and have ongoing resource to continue this work into the future.

Hamilton & Waikato Tourism has established relationships with local councils, an Industry Advisory Board, existing intra-regional partnerships (Explore Central North Island), some newly established intra-regional initiatives (eg regenerative tourism programme) and tourism industry. Based on the direction of this DMP, there is scope for further collaborations and partnerships with for example, iwi, the agriculture and food production sector, Te Waka, the Department of Conservation, the arts community, Waikato Screen, surrounding regions (RTOs, Trusts, private sector), and cross sector regenerative collaborations (community and environment based) relevant to tourism.

As some of the Strategic Actions included in this plan are beyond HWTs remit, to fully activate the destination management plan, HWT will develop a Governance Group with representatives from key stakeholders – this is likely to include: representative of the funding councils, iwi, Department of Conservation, Te Waka, Waikato Wellbeing Project, Waikato Plan, Industry, and Te Waka Kotahi. The aim of the Governance Group is to ensure principles of the destination management plan is included in their own strategic plans and actions. The Governance Group would focus on building resilience to address and mitigate the identified risks.

WHY IS THIS A PRIORITY? HOW DOES IT ACHIEVE THE VISION?	MEASURES OF SUCCESS
<ul style="list-style-type: none"> • Central to a successful and sustainable destination • Makes the most out of a region's strengths and core sectors (eg productive sectors, natural and cultural assets, technology and innovation in other sectors, film) • Tourism can be used as a tool to profile other sectors (eg creative, agri/horticulture, film, etc) • Tourism is an economic enabler and can assist with building community wealth • Additional residents creating scale and adding value • Stakeholders roles/responsibilities clarified to enhance leadership for the sector • Structures to support with funding to be effective 	<ul style="list-style-type: none"> • Enhanced natural, cultural and heritage experiences • Recognition of the sector and the value/benefits provided • Enhanced leadership and partnership structure established • Tourism recognised through regional/national strategies, plans, and initiatives • Sustainable funding plan for the RTO • Robust governance structure and strategy • Visitor spend (proportion spent on activities and food and beverage around the region versus fuel/transport) • Develop partnerships for the support and deliver of the goals (Waikato Wellbeing work in progress)

PROGRAMME	ACTIONS	RATIONALE	Facilitated by	Partners	Priority / Timing
1.1 Effective leadership and management of the destination	<ul style="list-style-type: none"> • Establish an Advisory Group • Redefine the role and structure of HWT from a marketing focus to reflect an expanded role in wider destination planning, development and management • Investigate all funding options for destination management, - local, central govt. partnerships etc. • Clear roles and responsibilities for each group, each with clearly defined outputs and outcomes that they can contribute to. 	<p>An advisory group to provide stronger linkage to regional organisations to implement destination management functions within Waikato. The structure of HWT should be aligned in order to deliver the DMP components. HWT requires on going funding to undertake Destination Management.</p>	HWT	All six councils DOC Iwi Sector representatives (tourism and non-tourism) Iwi	High / Immediate
1.2 Focus on the environmental wellbeing of natural assets	<ul style="list-style-type: none"> • Alignment of, or integration with cross sector regenerative initiatives and programmes (eg the Waikato āta regenerative collaboration) • Encourage new/existing operators to actively engage with their community to assist delivering environmental & community aspirations. 	<p>The tourism industry has and always will be reliant on the natural environment. Investment in regenerative programmes will help to maintain these natural assets, and ensure that they are there for future generations.</p>	HWT	Industry DoC Community Iwi Te Waka Enviro Trusts Waikato Regional Council	Medium / Medium term

PROGRAMME	ACTIONS	RATIONALE	Facilitated by	Partners	Priority / Timing
	<ul style="list-style-type: none"> Undertake an audit of operator to identify gaps, opportunities and strengths within our existing offerings Investigate a carbon emission measurement framework for operators and the sector 	We also need to measure to be able to understand where we are today to benchmark and track progress and improvements over the coming years.		TA's	
1.3 Develop strong and mutually beneficial relationships to ensure positive impacts for the community and growth of the visitor economy for Waikato	<ul style="list-style-type: none"> Utilise diverse representation on the industry advisory group to collaborate with non-tourism specific sectors Collaboration with Ruapehu and Taranaki RTOs to extend journeys and visitor experiences in line with the positioning across regional boundaries Cycle and walking route partnerships (Coromandel, Bay of Plenty, Ruapehu, Rotorua, Taupō, Te Araroa) Partnerships with Waikato Screen to target films that will profile Waikato in line with brand positioning Food Tourism sector collaboration to develop a regional food story, experiences, journeys and celebrate the provenance of our food producers Continue partnership with Explore Central North Island International Marketing Alliance (IMA) in international markets, and domestic when required 	<p>Wide representation on the industry advisory group will provide stronger collaborative opportunities and aligning of goals to deliver across all four of the wellbeing pillars.</p> <p>Cross sector and inter-regional partnerships can lead to compelling destination packages and opportunities to develop itineraries that assist the journey through the destination.</p>	HWT	Tourism Industry DOC Iwi Waikato Food Inc Te Waka Creative sector Education providers Surrounding RTOs Screen Waikato Explore Central North Island members Cycle/ Walking Trusts	High / Immediate Medium / Medium Medium / Medium High / Immediate Medium/ Immediate
1.4 Iwi engagement	<ul style="list-style-type: none"> Maintain and continue engagement with iwi in relation to their aspirations for tourism, involvement in the sector, support with new development & experiences and defining which stories can be told, by whom, and how. 	Tourism can be an economic enabler for iwi. The stories of Waikato iwi can bring together natural and cultural assets and provide a unique proposition for the region. The potential to engage with the natural environment, meet local people and hear the stories that connect	HWT	Iwi tribal authorities Hapu Marae Whanau	High / Immediate

PROGRAMME	ACTIONS	RATIONALE	Facilitated by	Partners	Priority / Timing
		the two from the those who own them is a very compelling reason to visit.			
1.5 Measuring progress	<ul style="list-style-type: none"> Develop a set of standardised questions to be distributed via council’s annual community sentiment Identify measurement tools to assist with measuring non-traditional tourism metrics – social, cultural, environmental (eg Planet Happiness/the Happiness Index). 	To be able to measure and report back on success in relation to tourism’s contribution to the four well beings (and the DMP’s goal), questions relevant to the impact of tourism should be formulated and incorporated into community surveys across the region’s councils. A number of companies now exist to assist with measuring alternative metrics.	HWT Councils	Private companies Tourism Evidence and Insights Centre	High / Immediate Medium / Medium

PRIORITY AREA 2:

BRAND
POSITIONING

TARGET
MARKETS

EXPERIENCE &
PRODUCT
DEVELOPMENT

CAPABILITY &
DEVELOPMENT

Product and Experience: protection, enhancement, and development

There is significant scope to build on existing assets and experiences to establish Waikato’s positioning as a destination: hidden gems...powerful history...villages to play...keeping it real...connections to nature...etc

The Tourism Opportunities Plan identified four key Hero Experiences that drive significant visitation to the region – Hobbiton Movie Set, Waitomo, Hamilton Gardens and Raglan. It is imperative that we protect these hero experiences to ensure recovery post Covid-19 in sustainable manner. A region needs experience capacity in order to attract visitors and extend their length of stay. A large majority of the visitor experiences that existed prior to the Covid-19 pandemic have been impacted – some have refocussed their product to attract the domestic visitor, some have downsized, some have hibernated. We will be working with these experiences as much as possible to ensure their survivability and enhancement post Covid in a sustainable manner.

Likewise, prior to Covid-19, local and central Government had invested funding in establishing and substantially rejuvenating key visitor attractions. These projects need to continue and then be elevated to ensure that the previous investment is protected, enhanced and the value is fully realised. This is particularly relevant for Te Aroha, Rangiriri and Otorohanga Kiwi House developments.

This involves the development, diversification, and improvement of places, products and experiences for visitors (and locals) across the three positioning pillars - Mighty Land, Mighty People, Mighty History.

Placemaking within communities utilises the built and natural assets of a community and has the potential to help communities establish a unique yet complementary identity that feeds into the overall positioning of Waikato and the journeys visitors take through the region.

Developing additional paid experiences will have the benefit of being attractive to third party travel sellers which will assist in promoting the region. New products need to be aligned to customer desires, wants, needs and expectations. Important to develop resilience within tourism businesses to ensure viability, productivity, capability, sustainability, taking an active role in tackling climate change and transitioning to a regenerative tourism operating framework.

Tourism will be different post-COVID and our sector needs to transition to operating and learning to live with Covid. Domestic and international travellers will have different degrees of comfort and need to travel and experience the Waikato in a safe manner.

WHY IS THIS A PRIORITY? HOW DOES IT ACHIEVE THE VISION?	MEASURES OF SUCCESS
<ul style="list-style-type: none"> To have product, experiences and places to establish the desired positioning for Waikato as a destination To increase visitor length of stay, spend, and regional distribution of visitors/spend To increase visitor satisfaction through providing deeper connections To increase sense of identity and belonging amongst communities Aligned to customer needs - changing world of COVID Developing resilience, ensuring viability, productivity, capability, sustainability 	<ul style="list-style-type: none"> Connection with communities Regional distribution of visitors and spend Spend on activities, services, food and beverage Quality of experience (Net Promoter Score & Visitor & Resident Perceptions Survey) Good health and Wellbeing – live in an environment conducive to cultural, creative and artistic activities Industry Innovation and Infrastructure (Waikato Wellbeing work in progress)

PROGRAMME	ACTIONS	RATIONALE	Facilitated by	Partners	Priority / Timing
2.1 Protection and enhancement of current experiences and investment	<ul style="list-style-type: none"> Support existing experiences to survive post-Covid; exploring diversification where appropriate Support existing experiences to enhance their product in a sustainable manner Ensure Targeted Marketing (strategic area 5) continues to drive visitation to current experiences Support developments that have received central government investment 	<p>Protect current hero experiences that draw visitors to our region, and to NZ.</p> <p>Enhance existing experiences in a sustainable manner.</p> <p>Ensure previous government investment is protected, enhanced and the value is fully realised.</p>	HWT	Industry Councils	High / Immediate
2.2 Develop product and experiences for the journeys that enhance the positioning of the region	<ul style="list-style-type: none"> Initiate the development of at least one iconic experience for Waikato Refine and develop the draft curatable journeys (refer Appendix 6) Undertake a gap analysis against pillars Identify opportunities within the agri/horticulture sector which could provide, or diversify into visitor experiences Identify opportunities for connecting natural and cultural assets (existing and potential experiences) via interpretation/story telling unique to the area and including environmental components 	<p>Visitors to a destination need to be able to connect with the people and place, the assets that bring these to life, and the stories that help to connect all this together.</p> <p>There are strong industry sectors that could work together to provide opportunities for visitors to engage with these industries</p>	HWT Iwi Tourism industry LTAs DOC	Te Waka Councils IBOs Iwi Ruakura Agriculture Research Centre Industry sectors - DairyNZ (agri/hort, arts)	High / Medium High / Medium High / Medium Medium / Medium High / Medium

PROGRAMME	ACTIONS	RATIONALE	Facilitated by	Partners	Priority / Timing
	<ul style="list-style-type: none"> Development and packaging of experiences to become an iconic, unique and seamless visitor experience/ journey (especially relating to the river experience and cycle ways) Revitalisation of hot springs/spas around the region to become a significant and high-quality offering Support case for inclusion of a 'great short walk' in the Waikato 			Surrounding region RTOs Private sector partners Trusts	High / Medium Medium / Medium Medium / Medium
2.3 Identify placemaking opportunities for communities	<ul style="list-style-type: none"> Identify LTA/community board plans for community placemaking Support council placemaking goals HWT to provide the Waikato context via brand story and potentially help to facilitate a community's position and point of difference in the visitor journey Link to the Ambassador programme 	Taking a strategic and multi-faceted approach to planning, design and management of public spaces to create co-designed areas that promote health and wellbeing, provides a connection between people and places, visitors and residents.	Community Councils	HWT	Low-Medium / Longer term
2.4 Develop opportunities for communities to come together in their unique spaces	<ul style="list-style-type: none"> Identify opportunities with significant appeal to both locals and visitors and provide advice where relevant (eg events, arts, recreation opportunities, intertwining of local/iwi stories in line with positioning) 	Communities that can come together for events, art, or recreational activities that define who they are, are strong and resilient.	HWT Local business groups	Community Councils	Low-Medium / Longer term
2.5 Invest in an events programme that builds on the positioning for the region	<ul style="list-style-type: none"> Align event fund criteria with positioning themes (food based, natural environment, cultural events), regional and seasonal spread Attract and develop Business Events which align to regional positioning 	Events strengthen the appeal of a destination as they can appeal to new and existing markets and create a compelling reason to visit a region across different seasons. They can also help to strengthen the unique positioning of a destination and allow visitors to connect	HWT	Event organisers Iwi DoC Venues BEIA TNZ Business Events	High / Immediate – Medium term

PROGRAMME	ACTIONS	RATIONALE	Facilitated by	Partners	Priority / Timing
		with real people and engage authentically.			
2.6 Develop food tourism product, journeys and events	<ul style="list-style-type: none"> Implement the Food & Beverage Tourism Strategy Establish an industry advisory group for F&B Tourism Confirm 2-3 priority projects to deliver as a collective over next 2-3 years 		HWT	Waikato Food Inc Te Waka MPI Waikato food producers Hospitality NZ Restaurant Assn of NZ Wintec Hospitality School	High / Immediate – medium term
2.7 Develop infrastructure and services to support the experiences and product being developed	<ul style="list-style-type: none"> Assessment first. Focus on key locations with higher visitation. Development of infrastructure and services in conjunction with the cycle trails (Te Awa, Waikato River Trails, Timber Trail, Hauraki - eg a hub at the SH1/29 Piarere intersection upgrade). 	Having appropriate infrastructure and services to support the region’s unique experiences provides for a seamless visitor experience.	DoC Cycle Trails Trusts Private Sector	HWT Industry Iwi Private Sector NZTA Te Waka LTAs NZCT	High / Immediate

PRIORITY AREA 3:

DATA, RESEARCH
& ANALYSIS

ACCESS

AMENITIES,
SERVICES &
INFRASTRUCTURE

ATTITUDES

Visitor Infrastructure and Investment

Local and central government is a significant enabler of tourism through the provision of infrastructure for both local residents and visitors, such as fresh water supply, waste management, local roads, toilets, carparks, rest areas, public transport, signage and wayfinding and access to visitor attractions (such as beaches, parks and bush walks).

The region has visitor hot spots where local infrastructure has and continues to struggle to meet local and visitor demand due to the increased pressure from visitors and ageing infrastructure (eg Waitomo waste water, Wairere Falls access, Raglan waste water, road access, freedom camping, parking, and displacement of locals in rental accommodation for visitor use).

Understanding patterns of visitor use at individual places, destinations and travel routes informs future planning for this infrastructure and mitigates negative impacts for both local residents and visitors. District and spatial planning, regional plans and strategies need to consider visitor flows and volumes.

Transport infrastructure and connectivity is another enabler which is delivered by Council Controlled Organisations (CCOs) such as Waikato Regional Airport Limited, airlines which service our region such as Air New Zealand and Origin Air, Te Huia rail service in partnership with KiwiRail and Waikato Regional Council, Northern Explorer scenic rail journey operated by KiwiRail, the Waikato Expressway and state highway network operated by NZ Transport Agency, wharves and jetties by local government and electric vehicle charging stations delivered by our power companies.

Accommodation infrastructure is a mix of national, international and independent commercial hotel, motel and apartment chains (Accor, Distinction, Ramada, Quest, etc), holiday parks and camping grounds, tertiary education providers (Wintec and University of Waikato), high performance sport (Lake Karapiro, National Velodrome, etc), boutique (bed and breakfast), non-commercial providers (Air BnB, Book-a-Bach, etc) and Department of Conservation/tramping club huts on walking trails. We also have a network of Motorhome Friendly Towns with the NZ Motor Caravan Association across the Waikato, plus freedom camping sites provided by local councils and the Department of Conservation.

Digital infrastructure such as ultra-fast fibre and regional mobile phone coverage is just as important for visitors as they are for local residents.

Attracting investment in infrastructure that supports tourism and the visitor experience (such as accommodation and access) will enable better utilisation of existing infrastructure (eg event venues). Planning and investment, with a mix of public and private investment, levers to support, enable or incentivise, plus user-pay options are also worth considering to assist in developing new visitor infrastructure.

This priority area feeds back into Strategic Priority 1 (collaboration and partnerships) in relation to tourism having a strong advocacy role in local government decision making that affects tourism.

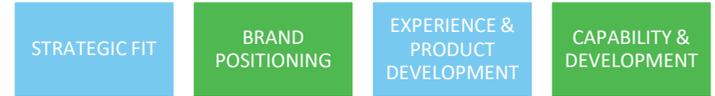
WHY IS THIS A PRIORITY? HOW DOES IT ACHIEVE THE VISION?	MEASURES OF SUCCESS
<ul style="list-style-type: none"> • Tackles the current undersupply of a range of accommodation options required for large visitor assets such as event centres, sporting stadiums, visitor attractions and in regional hot-spots • Enhancement of Hamilton as regional hub for major visitor infrastructure, with Cambridge as secondary hub • Facilitates access to and within the region (regional distribution of visitors) • Increases visitor satisfaction • Continues social licence amongst communities for tourism to operate • Mitigate and manage potential problem areas • Vital for maintaining a sustainable destination • Ensuring a long-term focus with alignment to regional and district plans which supports the sector’s future development • Avoids duplication and clarifies roles of each entity in development and maintenance of visitor infrastructure • Development of a circular economy which aligns to sustainable and regenerative principles 	<ul style="list-style-type: none"> • Host community experience of tourism • Quality of experience (net promoter score) • Enhanced natural resource use and management • Environmental care, protection and restoration • Reduction of waste and increase of recycling and reuse • Increase the number of swimmable rivers and lakes in the Waikato from 30% (rivers) and 73% (lakes) in 2019 to both waterbody, types achieving more than 80% by 2030. (Waikato Wellbeing – indirect through educating visitors, visitors and operators giving back eg tree planting) • Improved social licence to operate within the Waikato region • Improved visitor and resident perceptions of the Waikato • Responsible visitors and engaged operators who embed, express and enact the values of the Tiaki Promise • Industry Innovation and Infrastructure (Waikato Wellbeing work in progress).

PROGRAMME	ACTIONS	RATIONALE	Facilitated by	Partners	Priority / Timing
3.1 Identify accommodation needs throughout the region	<ul style="list-style-type: none"> Build/support a business case for larger scale, quality accommodation where there are market gaps. 	Through the development of this plan, a gap in the range and number of accommodation providers throughout the region is identified. Understanding what this looks like, and identifying a potential solution is imperative. Establish viability of investment now and into the future as business, leisure, event and trade visitor numbers build	Councils HWT	H3 Private Investors Te Waka Howarth HTL Waikato Motel Association Hospitality NZ NZ National Fieldays Society Local government	High / Immediate
3.2 Invest in data insights to help inform all activity across the region.	<ul style="list-style-type: none"> Identify options for visitor flow tracking data Utilise visitor journey mapping tools to identify what the visitor journey looks like for people in the Waikato. Utilise the UNWTO longitudinal study of residents and visitors in Raglan to understand impacts at a community level 	A clear understanding of what success looks like for the region, with appropriate metrics identified, and data collected to monitor and report on those metrics.	HWT	MBIE TIA Communications service suppliers Neighbouring RTOs ECNI UNWTO/ University of Waikato	Medium / Immediate – medium term
3.3 Identify areas of constraint for the visitor economy (and local communities) within the region	<ul style="list-style-type: none"> Identify hot spots with current or potential issues (eg Raglan, Waitomo) and incorporate/advocate for upgrades/inclusions in future planning (incl central govt. funding). Continually update. Determine the impacts on roading, pull overs, wayfinding and brown tourism signage and parking within the region and advocate for what is best for visitors without impacting the local community Invest and encourage appropriate wayfinding and interpretation signage throughout the region to assist with visitors taking individual journeys through the destination 	The social licence of the industry can be fragile and needs to be taken into account as the region develops. The tourism sector can be a strong advocate for the development of infrastructure that can ease constraints and make it a better place to live and visit. The tourism sector needs to work with partners communities to identify solutions to issues that are exacerbated by visitors Development of cultural assets that can show visitors where they are, and the importance of that place can add to the unique positioning of the region.	HWT LTAs	NZTA DoC Heritage NZ Iwi Tourism Sector Community groups Community boards	High / Immediate – medium term

PROGRAMME	ACTIONS	RATIONALE	Facilitated by	Partners	Priority / Timing
	<ul style="list-style-type: none"> Identify the need for new or maintenance of existing ablutions areas throughout the region, and on particular journey routes Designate a number of self-contained freedom camping overnight spots around the region. Pull all LTA freedom camping maps into one for Waikato. Investigate local community DMPs like the 2017 Raglan Visitor Plan 	Freedom camping can be a polarising issue for communities. Understanding the full impacts and benefits of this sector and managing them appropriately, such as through the provision of designated sites, will help.			
3.4 Improve connectivity within the region	<ul style="list-style-type: none"> Support cases for increased leisure rail passenger services into and out of the region. Support cases for increased air connectivity via existing and new operators Advocate to broaden the Te Huia train service from solely commuter to include visitor transport and provide efficient links to visitor hubs around the region Mobile connectivity should be available in all remote and urban areas of the region, understand any gaps and work to close them Stocktake and plans for publicly available electric charging stations around the region for E-cars and bikes Advocate for better quality/safer roads along visitor routes (also refer 3.3) Additional, low carbon, public transport options from Hamilton City to visitor hot spots eg Ngarunui beach Raglan. 	<p>Visitors to the region need to be able to travel easily and safely to the region and throughout the journeys they have opted to take to experience the region. Smooth transport connections make up part of this experience.</p> <p>Mobile connectivity is expected by visitors and will benefit the community.</p>	HWT	<p>Waikato Regional Council Te Waka Waikato Regional Airport LTD Kiwirail NZTA Communication service providers</p>	Medium / Medium term

PRIORITY AREA 4:

Capability Building



Capability building of new and established businesses includes upskilling in the areas of storytelling (cultural, historical and environmental connections), environmental practices, carbon management, use of innovation and technology, quality accreditation, customer service and hosting, and an all-round sustainable business model.

HWT and partners already provide access to a variety of capability building programmes and workshops. There are also a number of cross sector (non-tourism specific) business support and development initiatives that tourism operators, events and venues can link into as well. The Thermal Explorer Regional Event Fund also run event capability programmes.

Tourism and event staff shortages are an issue New Zealand wide. Youth, Maori and Pacifica were disproportionately affected by COVID related job losses. Work creation schemes and career guidance are often skewed away from the tourism sector for high school students and other work seekers. We need to reset and rebuild the tourism sector to attract new and returning talent to the workforce. A core philosophy of tackling climate change in every role, in every organisation across Waikato is an aspirational target creating a purpose-led workforce. We need to be seen to act, attract, develop and retain our workforce from all levels – school leavers through to the ‘grey’ workforce who have value and experience to contribute.

WHY IS THIS A PRIORITY? HOW DOES IT ACHIEVE THE VISION?	MEASURES OF SUCCESS
<ul style="list-style-type: none"> Increases visitor satisfaction Feeds into regional, national and global wellbeing goals Increases business resilience, sustainability and profitability Creates a strong visitor experience ecosystem aligned to regional proposition Improves staff engagement and creates rewarding, fulfilling and sustainable employment Attracts workforce across all levels – school leavers, mid-career returnees and our ‘grey’ talent pool Improved awareness of the ‘Go With Tourism’ programme across Waikato schools 	<ul style="list-style-type: none"> Quality of experience (net promoter score, satisfaction rating) Natural resource use and management Environment care, protection and restoration Improved waste management and reduction goals achieved Reduce carbon emissions by a minimum of 25% by 2030 (on the path to carbon zero by 2050). Increase number of businesses who reduce waste, leading to a 50% reduction to landfill by 2030 Reduce (particularly for Māori and Pasifika*) the number of young people (aged 15–24) in the Waikato who are not in employment, education or training (reduce inequality, quality education, decent work and economic growth) Reduced reliance on migrant workforce to fill entry-level roles across sector Industry Innovation and Infrastructure (Waikato Wellbeing work in progress) Achievement of targets set in the NZ Tourism Sustainability Commitment

PROGRAMME	ACTIONS	RATIONALE	Facilitated by	Partners	Priority / Timing
4.1 Ensure connectivity between destination marketing and individual operators	<ul style="list-style-type: none"> Run brand workshops (include as part of existing workshops and symposiums etc), with operators – how to tell and incorporate ‘The Mighty Waikato’ regional brand story and how individual operators can fit within that story – their story. Promote ‘The Mighty Waikato’ regional brand and proposition to the business events sector and ensure regional destination marketing is included in all bids 	Destination marketing is at its strongest when the region and individual operators are able to tell the same story and connect their chapter to it seamlessly.	HWT	Te Waka Tourism industry Business Events Waikato	High / Immediate
4.2 Tourism and event businesses are encouraged and supported to develop their capability	<ul style="list-style-type: none"> Provide strong advocacy for the accreditation programmes available to tourism operators Support these operators through programmes that will enable them to lift the quality of the visitor experience, their environmental impact (including carbon reduction), social impact and also their commercial and business acumen Health and Safety training for operators that includes those sectors diversifying into tourism through collaborative partnerships. Bring peer to peer accommodation providers (eg AirBnB) into the tourism industry for positioning, training and promotional purposes Ensuring regular training and workshops are provided for operators who bid and host business events, major events and incentives Host quarterly Major Events and Venues Forum to share industry best practice and provide a regional response to event sector challenges and opportunities 	Experiences, conferences and events must deliver on the marketing promise being made. Visitors and event goers are actively looking for experiences that are of a high quality and have the ability to benefit the local community or environment. Participation in these programmes will support and enhance the outcome.	HWT Te Waka	Qualmark Regional Business Partner Programme MBIE Regeneration Programmes Ekos Worksafe AdventureMark Civil Aviation Authority BEIA Maritime NZ Waikato DHB NZ Police FENZ H3 NZ National Fieldays Society EVANZ NZE TIA	Medium / Immediate – medium term

PROGRAMME	ACTIONS	RATIONALE	Facilitated by	Partners	Priority / Timing
4.3 Education providers within the region providing career pathways into tourism	<ul style="list-style-type: none"> Collaborate with Waikato tertiary education institutions to ensure courses provided meet the needs of the industry (Tourism as a career option, local training / upskilling). Partner with Waikato secondary school gateway and work experience programmes to promote tourism and event careers Offer annual famils and presentations to career guidance counsellors Support and promote internships, graduate programmes and apprenticeships with microcredentials within the sector Regularly provide guest lectures on tourism and events to tertiary education providers and private training institutions 	Tourism is often seen as a low paying, low value sector to be involved in. Education providers can have a role in changing these perceptions through the programmes that they offer, and the link through to potential career pathways developed.	HWT	Waikato Institute of Technology Te Wananga o Aotearoa University of Waikato Institute of Skills: Te Pukenga NZ School of Tourism Waikato secondary schools network Regional Skills Leadership Group Te Waka ESL Schools	High / Immediate - long term

PRIORITY AREA 5:

Targeted Marketing



Waikato does not suffer from an awareness issue – more so a lack of awareness of what there is to see and do in the region. Residents of Waikato do not always have a strong sense of pride in their own region - when local residents should be advocates for their region. Waikato has one of the lowest net promoter scores in New Zealand (especially amongst VFRs and business visitors). A strong brand has been developed for Waikato that now needs to be supported by an equally strong experience offering in order to re-set the perception of Waikato in the minds of target segments.

Building on current activity (refer page 11 and appendix 4), marketing and communications should be focused on the positioning pillars and aligned to the identified visitor segments. Diversity of markets geographically is also important to minimise risk from travel disrupters.

WHY IS THIS A PRIORITY? HOW DOES IT ACHIEVE THE VISION?	MEASURES OF SUCCESS
<ul style="list-style-type: none"> • To establish the region’s positioning with target markets • Encourages regional and seasonal dispersal of visitors • Provides local residents with a sense of pride • Enhancing the region as a premium Business Events and Major Events destination 	<ul style="list-style-type: none"> • Diversity of markets (proportion from each) • Seasonal distribution of visitors • Regional distribution of visitors • Increased spend on activities, food and beverage • Quality of experience (net promoter score) • Increase length of stay in region

PROGRAMME	ACTIONS	RATIONALE	Facilitated by	Partners	Priority / Timing
5.1 Develop the journey and travel routes positioning outlined within this plan and appendix 6	<ul style="list-style-type: none"> Development and promotion of journeys/ travel routes based on the positioning pillars (not mutually exclusive), including hidden gems of the region. Creation of a customisable, interactive map to plan the journeys Develop promotional material that can help to articulate and market these journeys. 	The concept of navigating through the region utilising different travel modes and taking your own unique journey is extremely compelling. These journeys need to be articulated well for visitors to be able to curate their journey and reap the rewards.	HWT	Tourism Industry Neighbouring RTOs	High / Medium term
5.2 Develop campaigns specific to the positioning pillars	<ul style="list-style-type: none"> Campaigns to profile seasonal differences across the travel journeys Continue/extend the application of the 'Mighty Local' programme in some form Specific business and major event campaigns (including incentives). Track campaign effectiveness 	Destination marketing is about lifting the awareness of the destination and providing strong and compelling reasons for visitors to visit. Aligning campaigns with the pillars, and development of product to engage with these pillars in more depth will allow both.	HWT ECNI	Tourism industry Iwi Te Waka TNZ – trade, PR/Media and Business Events BEIA	High – Medium term
5.3 Develop higher profiles for hero/iconic experiences within the positioning pillars	<ul style="list-style-type: none"> Strategies that lift the awareness of the region's cycle trail experiences as they are developed, and any newly developed or packaged iconic experience Waikato has the potential to lead the country in celebrating the power of the storyteller, and these iconic storytellers could be used as a focus for powerful marketing campaigns 	A higher profile for hero and developing hero experiences will create greater awareness of the Waikato's positioning as a destination, provide a connection to visitor values and expectations, and increase length of stay and spend in the region.	HWT	Iwi Tourism Operators Community	Medium – Medium term
5.4 Attracting and curating value-add business events aligned to our positioning pillars	<ul style="list-style-type: none"> Attracting business events, conferences, meetings, exhibitions and incentives aligned to our positioning pillars Develop and activate the Waikato Business Events Strategy Host an annual buyer mega-famil and industry showcase and a business events symposium for the region 	Business events are lucrative. Attendees are an important seed market as they are likely to return for a holiday with friends and family based on their experiences and positive perceptions of the region.	HWT	H3 Fieldays Society Tourism Operators BEIA Business Events Waikato partners TNZ Business Events	High / Immediate

PRIORITY AREA 6: Regenerative and Sustainable Tourism



The pandemic has created a unique opportunity to rethink the visitor sector's purpose, the principles by which we operate and how we measure success in Waikato. While each priority area within this plan has the goal of providing a more sustainable, regenerative and resilient destination, there are some specific programmes and actions.

The region holds a wealth of natural land, water and coastal assets that could provide benefit to the tourism industry and the community as a whole. The three rivers of Waikato, Waipa and Waihou are the lifeblood, our land is rich in resources and highly productive and our coast provides the bounty of kai moana, fishing, surf and recreation.

Covid-19 has accelerated the regenerative tourism movement in New Zealand, with Hamilton & Waikato Tourism being a pioneering RTO region who participated in an operator capability and leadership programme under the guidance of international guru Anna Pollock.

Opportunities were identified where visitors could be educated and encouraged to journey through the region in a sustainable manner. There was also a desire to move to the next stage of sustainability - instead of doing less damage to the environment, it is necessary to learn how one can participate with the environment by using the health of ecological systems as a basis for design. While tourism success has largely been measured in economic terms to date, we are moving into a new era of thinking. How to create value more broadly for the benefit of our people, our place, and collective prosperity.

A place-based approach is one way to achieve this understanding which is central to the regenerative tourism philosophy. By understanding how the systems of life work in each unique place, the role of stakeholders and communities is to create a whole system of mutually beneficial relationships. It moves tourism beyond sustaining the environment to one that can regenerate its health – as well as our own.

An overall aspiration is for the region to achieve carbon neutral status as a visitor destination and that as travellers explore our region, they actively contribute to a carbon positive future for Waikato.

WHY IS THIS A PRIORITY? HOW DOES IT ACHIEVE THE VISION?	MEASURES OF SUCCESS
<ul style="list-style-type: none"> • Waikato’s tourism and events sector needs to act immediately to tackle climate change and reduce carbon emissions • Tourism operators need to measure their carbon emissions • The visitor sector needs to lead the regenerative tourism movement in Waikato • The visitor sector needs to show improvements to meet district and community Climate Action Plan aspirations • The way future visitors will travel and the type of experiences they wish to undertake while on holiday will be anchored in improving the well-being of people, the environment, culture and its host community • Ensures delivery and alignment to the NZ Tourism Sustainability Commitment and regional strategies 	<ul style="list-style-type: none"> • The visitor sector actively contributes to the enhancement and protection of their host environment and its community • Industry wide adoption of the Living Wage Framework • Positive partnerships and collaborations are delivered with the Department of Conservation, Waikato Regional Council and local care groups • Embedded tikanga Maori principles across the sector and a lift in the use of Te Reo Maori within tourism businesses • Engaged tourism operators living and acting on the Tiaki Promise • Introduction of regenerative and sustainable tourism principles as part of tourism accreditation programmes • Development of ‘good guides’ and ‘good experiences’ across the region for the conscious traveller • Using the destination management approach to leverage the benefits of regenerative tourism across the Waikato

PROGRAMME	ACTIONS	RATIONALE	Facilitated by	Partners	Priority / Timing
6.1 Create a movement of regenerative tourism pioneers within Waikato	<ul style="list-style-type: none"> Undertake a regenerative tourism leadership programme with Anna Pollock Hold a bi-annual regenerative tourism hui Actively participate in national regenerative tourism initiatives Share success stories and the need to adopt a regenerative approach (eg sharing statistics) 	Providing leadership, best practise case studies and assistance with regenerative tourism models with the intention that eventually this should become integrated into all businesses – business as usual	HWT	TIA Other RTOs TNZ Social Impact Hub Waikato Waikato Regional Council	High/ Immediate
6.2 Develop products and experiences aligned to regenerative tourism principles	<ul style="list-style-type: none"> Undertake a product audit across the Waikato tourism region Build industry capability to help innovate and develop 'good' products and experiences 	Understanding where the industry is currently at and providing a benchmark for further measurements. There needs to be an upskilling in sustainable/ regenerative practises to ensure we 'walk the talk' and are not 'greenwashing'	HWT		Medium / Medium
6.3 Tackle climate change head-on for Waikato's visitor sector	<ul style="list-style-type: none"> Investigate and implement a regionwide carbon measurement tool for the visitor and event sectors Undertake an annual audit to measure progress towards carbon neutrality and positive 	Providing a measurement will ensure the visitor industry is actively working towards, and can see progress towards carbon reduction	HWT	TIA	Medium / Medium



APPENDIX ONE - Progress on Tourism Opportunities Plan

Game Changing Projects

Game Changer		New Product
Waikato River - activate the Waikato River across the region	☑	<ul style="list-style-type: none"> • Lake District Adventures • River Festival • Waikato 101 • Open Up Ngaruawahia • Te Awa River Ride extension • River Riders • Victoria On The River • Mercer Jet Boat • Waikato River Festival and HAKA Festival
Home of Kingitanga – create a region-wide plan and support for delivering a suite of Māori visitor experiences that tell the distinctive story of the Kingitanga in a range of ways and places		<ul style="list-style-type: none"> • Māori Cultural Tour – Waireinga/Bridal Veil Falls • Soldiers Road Portraits • Hakarimata Walk app • Tours with Te Rakau Humarie o Te Kingitanga • Taniwha Ventures • Rangiriri Paa restoration and battle re-enactments • Development of Te Ara Wai Journeys in Waipa District
Brand Strategy – continue the process started in this plan to create a strong positioning for Hamilton & Waikato that provides the focus and underpins creative delivery and marketing campaigns to target markets	☑	Our regional visitor brand – ‘The Mighty Waikato – where magic runs deep’ was launched in December 2018 following two years of research, stakeholder consultation and development
Hamilton City Riverfront – implement the plans to revitalize the Waikato River to create a vibrant visitor hub in Hamilton		<ul style="list-style-type: none"> • Platinum Transfers “Hamilton Hidden Secrets” tour • Stand Up Paddleboard in Hamilton CBD (The Boat Shed) • Waikato River Explorer additional boat
Regional Major Events Strategy – develop a Regional Major Events Strategy that further secures, develops, promotes and encourages events which generate financial and social benefits to Hamilton & Waikato	☑	The region’s first Major Events Strategy was adopted in July 2018 with a focus to grow our current events to increase length of stay and expenditure, as well as attract new events to our region during our shoulder season.

Discover Your Own Backyard

Game Changer		New Products	New Products
Hero: Hamilton Gardens	☑	<ul style="list-style-type: none"> New Gardens opened including Mansfield, Tropical, Tudor, Picturesque, Concept and Surrealist Guided tours available 	<ul style="list-style-type: none"> Picnic packages available Platinum Tours “Hamilton Hidden Secrets” tour Leisure Time Travel Group Tour of Waikato Gourmet in the Gardens
Emerging: Raglan	☑	<ul style="list-style-type: none"> Destination Action Plan adopted New DMO established Raglan Rock Māori Cultural Tour – Waireinga/Bridal Veil Falls 	<ul style="list-style-type: none"> Ozone Kitesurfing Raglan Mountain Bike trail Raglan R&R Raglan Shuttle & Tours
Emerging: Themed-drive itineraries		<ul style="list-style-type: none"> Nourish article focused on west coast & Waikato Foodie Trail 	
New: Agri-Tourism	☑	<ul style="list-style-type: none"> Dairy & Deer tours from Cambridge i-Site The Red Barn Waitomo ATV Farm Tours 	<ul style="list-style-type: none"> Luxury Under Canvas Waitomo Hilltop Glamp Alexander Organics

Inspiring Pathways

Game Changer		New Products	New Products
Emerging: Home of Cycling	☑	<ul style="list-style-type: none"> Waikato Cycle Trail Network Raglan Mountain bike trail Te Awa Ngaruawahia to Horotiu section, including the new Perry Bridge 	<ul style="list-style-type: none"> Western Rail Trail River Riders – tours and e-bike hire Cycle Cambridge RIDE Festival
Emerging: Waikato Walks		<ul style="list-style-type: none"> Nature & Nosh 	
New: Sports Tourism	☑	<ul style="list-style-type: none"> Podium Sports Lodge Te Aroha Adventure 	<ul style="list-style-type: none"> Canoe Centre of Excellence NZ Golf Centre of Excellence (at St Peters)

Middle Earth and Beyond

Game Changer		New Products	New Products
Hero: Hobbiton			
Hero: Waitomo	<input checked="" type="checkbox"/>	<ul style="list-style-type: none"> • Troll Cave @ Waitomo Adventures • Café @ Waitomo Adventures • Timber Trail Lodge • Waitomo Hilltop Glamping 	<ul style="list-style-type: none"> • Waitomo ATV Farm Tours • Waitomo Great Walk • Waitomo Zipline
Emerging: Conservation		<ul style="list-style-type: none"> • Sanctuary Mountain Maungatautari Tourism Options Report 	<ul style="list-style-type: none"> • Otorohanga Kiwi House development strategy
Emerging: Health & Wellbeing Cluster	<input checked="" type="checkbox"/>	<ul style="list-style-type: none"> • Sakura Lodge • The Monastery • STM Fitness 	<ul style="list-style-type: none"> • Adventure Te Aroha • Te Aroha PGF application

APPENDIX TWO - Goals and Objectives of Relevant National Strategies and Plans

New Zealand Tourism Futures Taskforce Interim report

In June 2020, the Minister of Tourism set up the independent New Zealand Tourism Futures Taskforce following the significant change to global travel and tourism in New Zealand as a result of COVID-19. The main purpose of the Taskforce was to advise on what changes New Zealand can make to the tourism system, so that tourism enriches both New Zealand and the wellbeing of New Zealanders.

The Taskforce has identified 5 Future States which describe the ideal future and will, if pursued together, achieve the future we want:

Future state 1: Industry thriving

Future state 2: Te Taiao – Regenerating

Future state 3: Empowering communities

Future state 4: Aotearoa Whakapapa

Future state 5: Navigating our future.

Tourism 2025 and Beyond

Tourism 2025 and Beyond is the New Zealand tourism industry's growth framework. It has been created by industry, for industry and keeps the tourism industry's focus firmly on growing our value to individuals, communities, the environment, the economy and our visitors. Its development is led by Tourism Industry Aotearoa. It has a vision of 'Growing a sustainable tourism industry that benefits New Zealanders.'

Tourism 2025 and Beyond has four key goals – one for each of the main framework elements. The strategy takes a balanced scorecard perspective to:

Make sure our visitors are having great experiences

Make sure our communities are happy with and benefitting from tourism

Make sure our environment benefits from tourism

Bring economic success.

New Zealand-Aotearoa Government Tourism Strategy

The Government sets out a more deliberate and active role for government for tourism growth to be productive, sustainable and inclusive. The goals of the *New Zealand-Aotearoa Government Tourism Strategy* are:

Tourism supports thriving and sustainable regions

Tourism sector productivity improves

New Zealand-Aotearoa delivers exceptional visitor experiences

Tourism protects, restores and champions New Zealand-Aotearoa's natural environment, culture and historic heritage

New Zealanders' lives are improved by tourism.

The top priority actions for the Government's stewardship role that will deliver across multiple outcomes are:

Coordination across the tourism system

Long-term sustainable funding mechanisms
Destination management and planning
Better data and insights
Sustainable growth.

New Zealand Tourism Sustainability Commitment

As part of implementing the tourism strategies, Tourism Industry Aotearoa has developed the *Tourism Sustainability Commitment* to enable tourism operators to voluntarily work towards achieving the four pillars of sustainability.

The *Tourism Sustainability Commitment* has been developed by industry for industry to progress the vision of New Zealand leading the world in sustainable tourism. It comprises 12 commitments across the four pillars of environment, community, visitor, and economy that individual businesses sign up to. Over 1400 tourism businesses have already committed to this programme which is becoming an industry standard. Commitment requires:

Having a sustainability plan with goals for all 12 Commitments
Making measurable progress towards the goals
Embedding sustainability into business systems, processes, and plans
Providing an annual update on progress
Telling communities and visitors about our sustainability efforts.

As a result, this programme enables the tourism industry and individual operators to demonstrate their performance to potential visitors as well as the community within which the industry operates.

Department of Conservation Heritage and Visitor Strategy 2021

The *Heritage and Visitor Strategy* sets out the long-term outcomes and strategic direction that DOC wants to achieve from its heritage and visitor system and the approaches it will take to achieve them.

Protect: New Zealand's natural, cultural and historic resources are preserved and protected to maintain cultural and historic values, biodiversity, ecosystem health, landscapes and natural quiet

Connect: Visitors are enriched and better connected to New Zealand's natural, cultural and historic heritage

Thrive: Tangata whenua, regions and communities benefit from protecting, and connecting visitors with their natural, cultural and historic heritage.

Heritage New Zealand 2020-24

Strategic priorities established by the Heritage New Zealand Pouhere Taonga Board are to:

- (a) promote significant heritage places recorded on the New Zealand Heritage List/Rārangī Kōrero and delivery programmes
- (b) conserve, protect, acknowledge and understand heritage through collaboration
- (c) promote and advance the vision of Tapuwae to conserve, protect, acknowledge and revitalise Māori heritage

APPENDIX THREE - Situation Analysis

Trends

The 2020 global pandemic has had an impact on future travel trends and travel decisions with visitors seeking:

- more meaningful interactions with locals and their environment
- recreation in the outdoors – eg cycling and camping
- genuine engagement, to learn something and to contribute back
- a regenerative experience
- a feeling of safety and confident that their health is a priority
- smaller, more intimate experiences over large scale operations
- recommendation of others at the point of decision making
- travel outside of traditional seasons and destinations that are closer to home
- more accessible destinations (versus places with constrained transport options)
- a more purposeful and measured approach to destination choice (eg supportive communities, sustainable/regenerative).

TNZ research – domestic trends

- Shifting away from a value for money mindset more to a value for experience mindset
- Exploring and re-connecting to places already been to but with a new, more in-depth angle
- Discovering new and hidden gems
- Seeking history, culture, community, personal, - deepen and enrich the experiences
- Telling stories around the unique qualities of the region
- Greater alignment between regions - higher value journeys
- Regional positioning vs individual businesses
- Telling the conservation story - not just natural beauty
- Activities that consistently came up to encourage people to experience the region - cycling and walking, food and bev, events



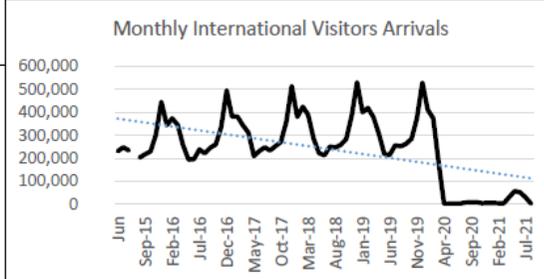
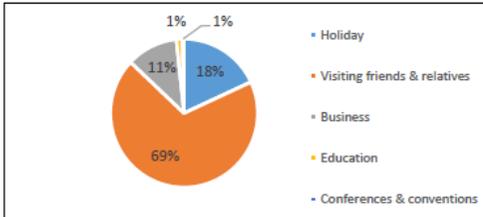
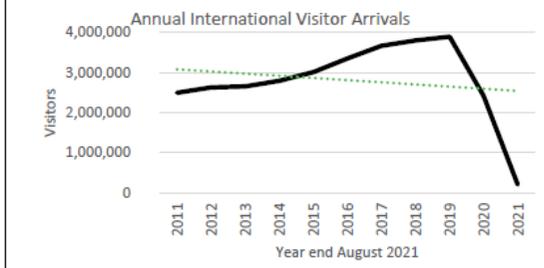
Visitor statistics & insights

October 2021

National Stats - International Visitor Arrivals

MBIE: International Visitor Arrivals (YE August 2021)

Visitor #s	211,007	-91.3% change
Australia	163,627	-82.4% change
USA	7,289	-95.9% change
China	6,339	-97.5% change
UK	4,016	-53.2% change
Germany	2,015	-98.9% change
Japan	1,610	-71.7% change
Holiday	32,026	-97.4% change
VFR	121,882	-82.9% change
Business	19,905	-89.2% change
Education	2,343	-93.5% change
Conference	643	-98.7% change
Other	34,208	



National Stats - Tourism Electronic Card Transactions

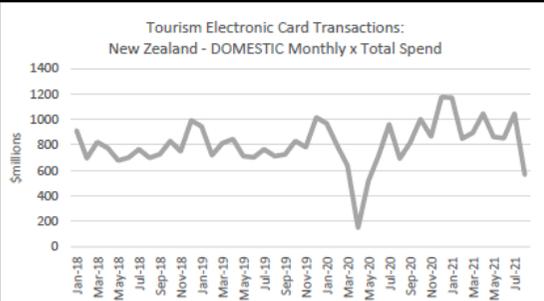
MBIE: Tourism Electronic Card Transactions (YE August 2021)

Total \$ **12,079** **6.0%** change
(NOTE: Visitor spend all 'millions)

NOTE: MBIE have changed method of reporting visitor expenditure. This is now based on **electronic card transactions ONLY**. There is no longer any estimates to include online/cash payments.

NOTE: MBIE have advised the TECT data does not correctly reflect International spend, therefore reporting on **TOTAL** or **DOMESTIC** spend only

[MBIE TECT Data](#)



Regional Stats - Tourism Electronic Card Transactions

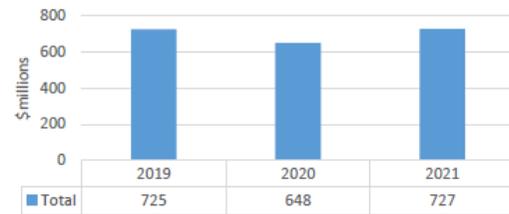
MBIE: Tourism Electronic Card Transactions (YE August 2021)

Total \$ 727 10.9% change
(NOTE: Visitor spend all 'millions)

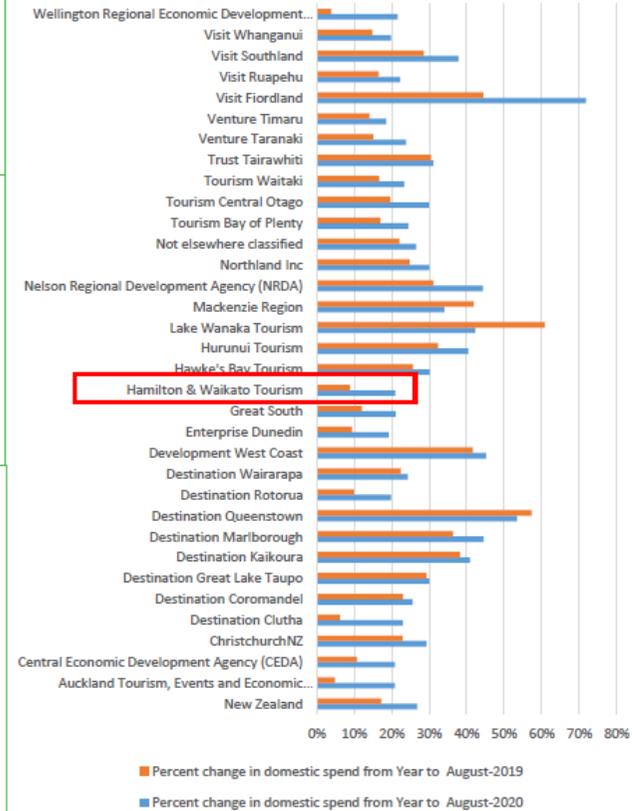
NOTE: MBIE have changed method of reporting visitor expenditure. This is now based on **electronic card transactions ONLY**. There is no longer any estimates to include online/cash payments. [MBIE TECT Data](#)

NOTE: MBIE have advised the TECT data does not correctly reflect International spend, therefore reporting on **TOTAL** or **DOMESTIC** spend only

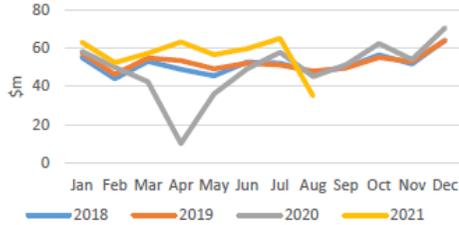
Tourism Electronic Card Transactions: Hamilton & Waikato Tourism - Visitor Spend



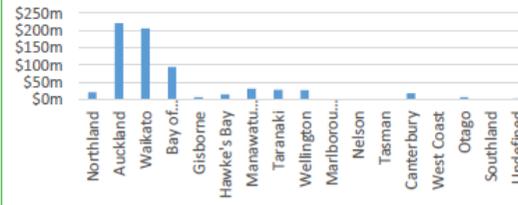
Tourism Electronic Card Transactions: % Increase/Decrease DOMESTIC spend Year ended August 2021



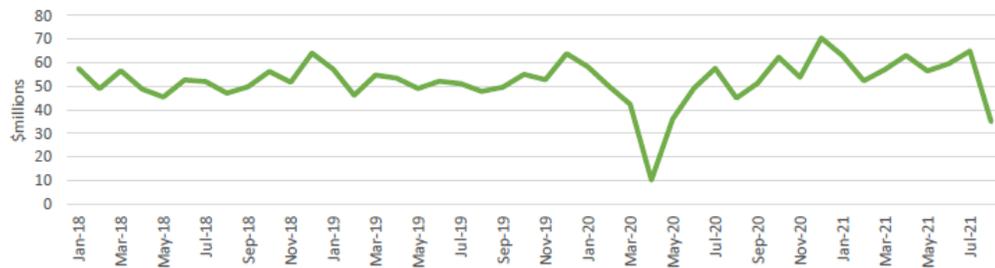
Tourism Electronic Card Transactions: SEASONALITY



Tourism Electronic Card Transactions: Waikato - Domestic spend (YE August 2021)



Tourism Electronic Card Transactions: Waikato Tourism - DOMESTIC Monthly x Total Spend



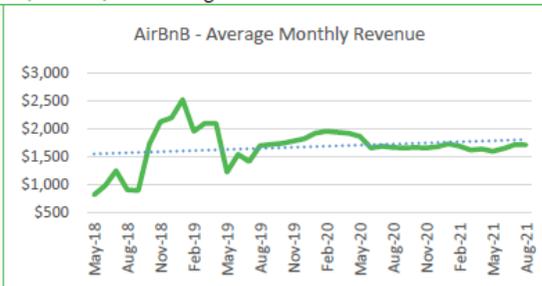
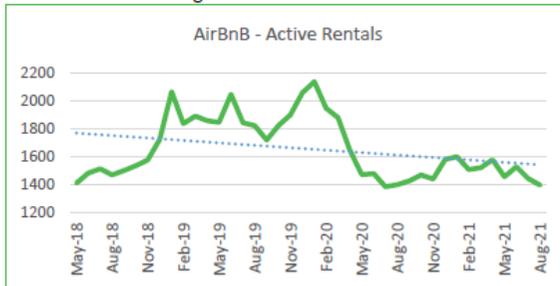
AirBnB Regional Overview

AirDNA (August 2021)

1394 Properties listed
 -48 change from previous MONTH
 -4 change from same time last YEAR

49% Occupancy Rate
 -2% change from previous YEAR
 49% Average annual occupancy %

\$ 1,707 Average MONTHLY revenue
 \$ 49 change from same time last YEAR
 \$ 19,939 Average ANNUAL revenue



Regional Stats - Accommodation Data Programme - Visitor Nights

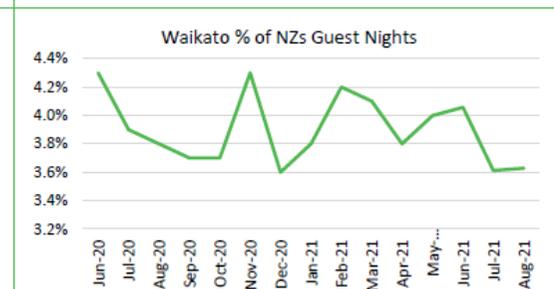
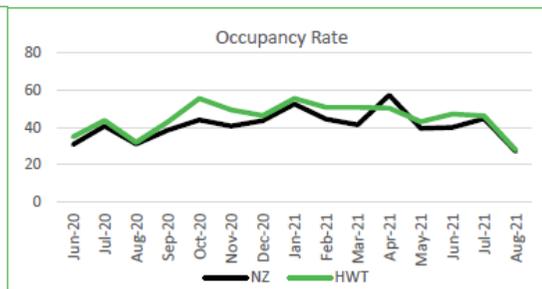
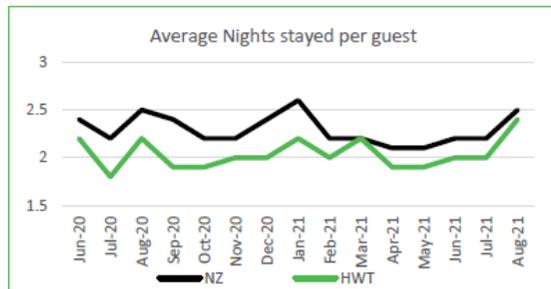
Accommodation Data Programme (August 2021)

Waikato
 137 Establishments registered with ADP
 4.8% Waikato RTO as percentage of NZ Guest Nights
 50,800 Waikato RTO as percentage of NZ Average nights stayed
 3.6% Occupancy %
 2.4
 27.9%

New Zealand
 2868
 1,400,000
 2.5
 27.1%



www.accommodationdata.nz



waikatonz.com

11% market share of all NZ events

403 Events hosted in the mighty Waikato:

- 339 single day events
- 64 multi day events (43 events 2 days, 9 events 3 days, 13 events 5+ days)
- 242 meetings; 59 conferences; 3 expos; 96 'other'
- 313 events for 30-100pax; 63 events for 101-250pax; 25 events for 251-1000pax

10% market share of delegates

35,763 Delegates hosted in the Waikato:

- 29,154 attended Single Day events
- 6,609 attended Multi Day events

46,546 Delegate Days

19,591 delegates were from outside of the region



APPENDIX FOUR - Current HWT Activity

Operational activity and funding overview

Overview of 2021-2022 work programme including baseline activity and the extra STAPP/Govt funded projects

Domestic Marketing	International Mkt	Business Events	Industry Development	Major Events
<p>BASELINE</p> <ul style="list-style-type: none"> ▪ Mighty Local campaign ▪ It's Just Magic – domestic marketing campaign ▪ AA campaign ▪ Welcome Back to Waikato operator videos ▪ Christmas Gift Guide ▪ Digital marketing ▪ WaikatoNZ website & social ▪ PR/media – content curation & travel media hosting ▪ Photography & video ▪ Regional Visitor Guide <p>STAPP FUNDED</p> <ul style="list-style-type: none"> ▪ Tourism NZ 'Do Something New, NZ' campaign partner ▪ Events promotion ▪ Auckland JV campaign ▪ ECNI domestic campaign – 'Get Out More NZ' <p>RESET PLAN FUNDED</p> <ul style="list-style-type: none"> ▪ Mighty Local campaign ▪ Food tourism marketing ▪ Event promotion ▪ Fly & drive marketing ▪ Special interest marketing ▪ Leverage TNZ campaigns ▪ Upweight PR/media activity 	<p>BASELINE</p> <ul style="list-style-type: none"> ▪ Travel trade – webinars & virtual famils with TNZ ▪ Messages from New Zealand ▪ ECNI webinars & travel trade training ▪ ECNI eXplore trade show ▪ TRENZ trade show ▪ RTO / ITO trade show ▪ Tour of the North – Australia campaign with Tourism NZ <p>RESET PLAN FUNDED</p> <ul style="list-style-type: none"> ▪ Travel trade training – all markets ▪ Collab with ECNI partners – North America & UK ▪ JV Trail Towns Australia ▪ TNZ media/PR – Australia ▪ Touring routes marketing with ECNI - Australia 	<p>BASELINE</p> <ul style="list-style-type: none"> ▪ Business Events Waikato website & social media ▪ BEIA & TNZ partnership ▪ MEETINGS trade show ▪ AuSAE trade shows ▪ Buyer hosting & famils ▪ Hosted events & sales ▪ Christmas Corporate Event Guide ▪ Business Events Directory ▪ International conference bids with Tourism New Zealand ▪ Business Events Data Programme (BEDP) ▪ Meet-North South partnership with Dunedin ▪ National Convention Bureaux <p>STAPP FUNDED</p> <ul style="list-style-type: none"> ▪ Upweight Mega-Famil ▪ Upweight Industry Showcase <p>RESET PLAN FUNDED</p> <ul style="list-style-type: none"> ▪ Business Events campaign – NZ & Australia 	<p>BASELINE</p> <ul style="list-style-type: none"> ▪ Industry Symposium ▪ Industry training ▪ Operator engagement ▪ New business development ▪ Ambassador programme – Kirikiriroa/Hamilton ▪ Qualmark pre-assessments ▪ Data & insights – monthly ▪ Cycle trails & Great Rides ▪ Sustainability Commitment ▪ Accommodation Data Programme (ADP) <p>STAPP FUNDED</p> <ul style="list-style-type: none"> ▪ Destination Management Plan development ▪ West Coast Journey ▪ Touring route review ▪ Tourism Insights Dashboard ▪ Ambassador programme rollout <p>RESET PLAN FUNDED</p> <ul style="list-style-type: none"> ▪ Implement DMP ▪ Food tourism development ▪ Maori product development ▪ Hotel investment case ▪ Sustainability programme ▪ Perceptions & positioning ▪ Capability building - operators & HWT 	<p>BASELINE</p> <ul style="list-style-type: none"> ▪ Major Events Strategy ▪ Coordinator Major Events & Venues Forum ▪ Bid support for major events ▪ Regional major events calendar ▪ Major event feasibility ▪ Major event measurement ▪ Stakeholder management with Major Events NZ & NZ Event Association <p>REGIONAL EVENTS FUND</p> <ul style="list-style-type: none"> ▪ Lead Entity for Thermal Explorer Regional Events Fund for Waikato, Ruapehu, Rotorua & Taupo <p>STAPP FUNDED</p> <ul style="list-style-type: none"> ▪ Domestic Events Fund ▪ Regional Events Fund – Lead Entity & Secretariat ▪ Event sector capability development, training & workshops ▪ Waikato River event activation

APPENDIX FIVE - Waikato Wellbeing Project

The SDGs have been grouped into three clusters - Environment, Community and Economy - with the central pou acting as our cultural compass to incorporate Te Ao Māori throughout the Waikato Wellbeing Project.¹

Sustainable Development Goal (SDG)	Waikato Wellbeing Target (WWT)	Achieving our target means that...
<p>1 NO POVERTY</p> <p>2 ZERO HUNGER</p>	<p>About one in six children live below the poverty line*. By 2030, about one in six children will live below the poverty line*. By 2030, less than 1% will.</p> <p>*This is the before-housing cost relative poverty measure, it is 1 in 4 once housing costs are accounted for.</p>	<p>...our children can thrive because none are hungry at school or cold at home. They can afford to participate in social, artistic, cultural and sporting activities.</p> <p>...none of our children are hungry.</p>
<p>3 GOOD HEALTH AND WELLBEING</p>	<p>By 2030, reduce rates of non-communicable diseases* and mental illness and improve associated health equity outcomes for target groups e.g. Māori.</p> <p>(*Specific disease rates to be tracked are to be determined in consultation with the DHB.)</p>	<p>... our people are healthy and well. We live in an environment that is conducive to good health, and we keep active with a range of sporting, cultural, creative and artistic activities which is a gateway to emotional happiness.</p>
<p>4 QUALITY EDUCATION</p> <p>8 DECENT WORK AND ECONOMIC GROWTH</p> <p>10 REDUCED INEQUALITIES</p>	<p>Reduce (particularly for Māori and Pasifika*) the number of young people (aged 15-24) in the Waikato who are not in employment, education or training (NEET) from 12.6% in 2019 to less than 5% by 2030.</p> <p>*In 2019, the overall NEET rate for the Waikato is 12.6%, but the rate is 19.3% for Māori and 16.8% for Pasifika.</p>	<p>... ALL of our young people are engaged and productive, they are learning or earning a livelihood, their mana is enhanced, and they are on a positive pathway to have many life options.</p> <p>... our employers can find motivated staff with the knowledge and skills they need to get started, and the means to learn more.</p>
<p>6 CLEAN WATER AND SANITATION</p>	<p>Increase the number of swimmable* rivers and lakes in the Waikato from 30% (rivers) and 73% (lakes) in 2019 to both waterbody types achieving more than 80% by 2030.</p> <p>*In this context "swimmable" for rivers is defined as per the E. coli Attribute table in the NPSFM (2014; amended 2017). "Swimmable" for lakes is defined as per the Planktonic Cyanobacteria Attribute table in NPSFM (2017).</p>	<p>... our waterways contribute to the health of our regions, (like the veins of a healthy body).</p> <p>"I am the river, and the river is me. If the river is unwell, I am unwell".</p>
<p>7 AFFORDABLE AND CLEAN ENERGY</p>	<p>Reduce the number of people experiencing energy hardship* in the Waikato from 18,000 in 2019 to zero by 2030.</p> <p>*A working definition of energy hardship is those spending more than 10% of their income on energy in a month.</p>	<p>... all our people, including those on fixed incomes (like the elderly and unemployed), can live in a warm energy efficient home, with reliable affordable clean energy.</p>
<p>13 CLIMATE ACTION</p>	<p>Reduce carbon emissions by a minimum of 25% by 2030 (from 13.8 mega tonnes CO₂e to 10.3 mega tonnes CO₂e), on the path to net carbon zero by 2050.</p>	<p>...our people will be doing their part to transition to a cleaner, healthier, climate - resilient region.</p> <p>We think we could reduce by more and will check this in two years time to see if we can make a more ambitious target.</p>
<p>11 SUSTAINABLE CITIES AND COMMUNITIES</p>	<p>Reduce the housing shortfall* in the region from approximately 7,500 homes in November 2019 to a point where all our people are well housed by 2030.</p> <p>*According to the 2019 Regional Housing Initiative Stocktake, the majority of the shortfall is in community/social housing.</p>	<p>... all our people will be well housed.</p> <p>"Every person and every family in our region will be well housed". Waikato Regional Housing Initiative</p> <p>"We have used the UN Rights to Adequate Housing Entitlements in our definition for 'well housed'. 'Well housed' means timely access to habitable, affordable, accessible, culturally appropriate, appropriately located, housing with security of tenure.</p>
<p>12 RESPONSIBLE CONSUMPTION AND PRODUCTION</p>	<p>Increase the number of households, schools, businesses and farms who reduce their waste, leading to a 50% reduction of waste to landfill by 2030</p>	<p>... our region is producing less waste through designing waste out of our daily lives; we're reusing things where we can, and we're using innovative and effective systems for recycling.</p>
<p>14 LIFE BELOW WATER</p>	<p>Maintain or enhance the mauri of our coastal and marine waters to ensure healthy ecosystems so that we can also enjoy mahinga kai and swimming.</p>	<p>Our coastal ecosystems are healthy, reflecting the mauri from the mountains to the sea and providing for the enjoyment by people for swimming, collecting food and other activities.</p>
<p>15 LIFE ON LAND</p>	<p>To prevent loss of existing indigenous vegetation and increase indigenous habitat in biodiversity depleted environments to a minimum of 10% land cover by 2030.</p>	<p>... our land is restored, our water is clean, and our native vegetation and flora and fauna are thriving.</p>



Further targets are being developed for the following SDGs:



¹ <https://static1.squarespace.com/static/5abc7a87e0b875a7412df0446e/1591740946723/6538+-+Waikato+Wellbeing+Project+DL+flyer+DR3.pdf>

APPENDIX SIX - Curatable Journeys and Themes

A point of difference and integral destination strength for the Waikato is the ability to take multiple bespoke journeys through the region. These journeys enable visitors to move through and immerse themselves in everything the region has to offer.

The ability to curate a journey, utilising multiple travel methods and engaging with everything the region has to offer in a visitor's own way and own time is an extremely compelling proposition for visitors. Each journey theme could involve multiple transportation methods and accommodation options that allow a more rounded journey through the region. Potential journeys include:.

A **coastal journey** would allow people to venture along the western coastline and enjoy the surf, the communities, bush walks and scenic views, and explore the three large harbours along the way. Raglan offers one of the world's best surf breaks due to its long wave rides, has a leading waste minimisation programme, a strong wellness offering, and is a fast developing foodie haven.

A **rural journey** would highlight the whenua of the region to the world. With its large fertile plains, traveling by road, or cycle trail, visitors will see real people engaging with the land in an authentic manner and have an opportunity to sample some of the locally grown produce (traditionally crafted through to leading edge technology). A quintessential Aotearoa, New Zealand experience with so much to offer visitors no matter where they come from.

A **bush journey** allows visitors to engage and connect with everything within Te Taiao, our natural world, both above ground and below, by boat, cycle or on foot. It is another opportunity to unplug and reconnect with nature. The stories that can be told by local guides that bring these

natural icons to life providing visitors with the chance to feel connected to the region and the world.

A **river journey**, and a chance to see, travel beside, travel on and learn more about the mighty Waikato River or any of the inland waterways is a compelling reason for visitors to choose this region as their holiday destination. This journey could involve multiple transportation methods both on and off the water. It is impossible to journey through the region without seeing any of the inland waterways, and people will naturally look for opportunities to engage with them.

An **urban journey** would showcase and pull together the connections between the city and its region. The city of Hamilton on the banks of the Waikato River (plus other metropolitan areas such as Cambridge) allow visitors the chance to eat at award winning restaurants, shop in the many boutique stores, enjoy local produce from any one of the five markets available throughout the area, and everything a vibrant night economy has to offer.

These journeys offer the opportunity to engage with the positioning pillars in multiple ways, and provide visitors with the opportunity to align the way they like to travel, with easy movement throughout the region. Wayfinding and interpretation would present experience development opportunities both for self-guided and fully guided experiences that allow the natural landscapes of the region to be brought to life through the stories of the people who call this land home.

APPENDIX SEVEN - Consultation List

- Attendees of the Hamilton Waikato Tourism Symposium October 2020
- Attendees of the Hamilton Waikato Tourism Symposium May 2020 – DMP summary and implementation workshop
- Hamilton Waikato RTO Board workshop November 2020
- Hamilton Waikato RTO staff workshop November 2020
- Tainui Waikato
- Tainui Group Holdings
- Maniapoto
- Mystery Creek Events Centre
- Department of Conservation, Waikato region, Waikato area, Bay of Plenty area
- Hamilton City Council
- Waikato District Council
- Waipa District Council
- Waitomo District Council
- South Waikato District Council
- Matamata Piako District Council
- MBIE
- RTONZ
- Tourism Industry workshop November 2020 attendees (invite list was larger):
 - Franklin Tourism Group
 - H3
 - Hamilton Airport Ltd
 - Hamilton City Council
 - Hamilton Gardens
 - Hobbiton Movie set
 - Sanctuary Mountain Maungatautari
 - Raglan Business Chamber
 - Regional i-SITES
 - Sky City Hamilton
 - Tourism Holdings Ltd
 - University of Waikato
 - Waikato River Trails
 - Ōtorohanga Community Board
 - Destination Cambridge
 - Te Awamutu i-SITE
 - Te Kuiti i-SITE
 - Morrinsville i-SITE
 - Te Waka
 - HWT staff



**The Mighty
Waikato**

Where magic runs deep

TRC TOURISM
RECREATION
CONSERVATION