



**Mackenzie**

DISTRICT COUNCIL

# **ATTACHMENT**

**UNDER SEPARATE COVER**

**Ordinary Council Meeting**

**23 August 2022**





## Table of Contents

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7.13	Adoption of Te Manahuna Ki Uta (Destination Mackenzie)	
	Attachment 1 Web Version of Te Manahuna Ki Uta .....	4





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**The Consulting Team**



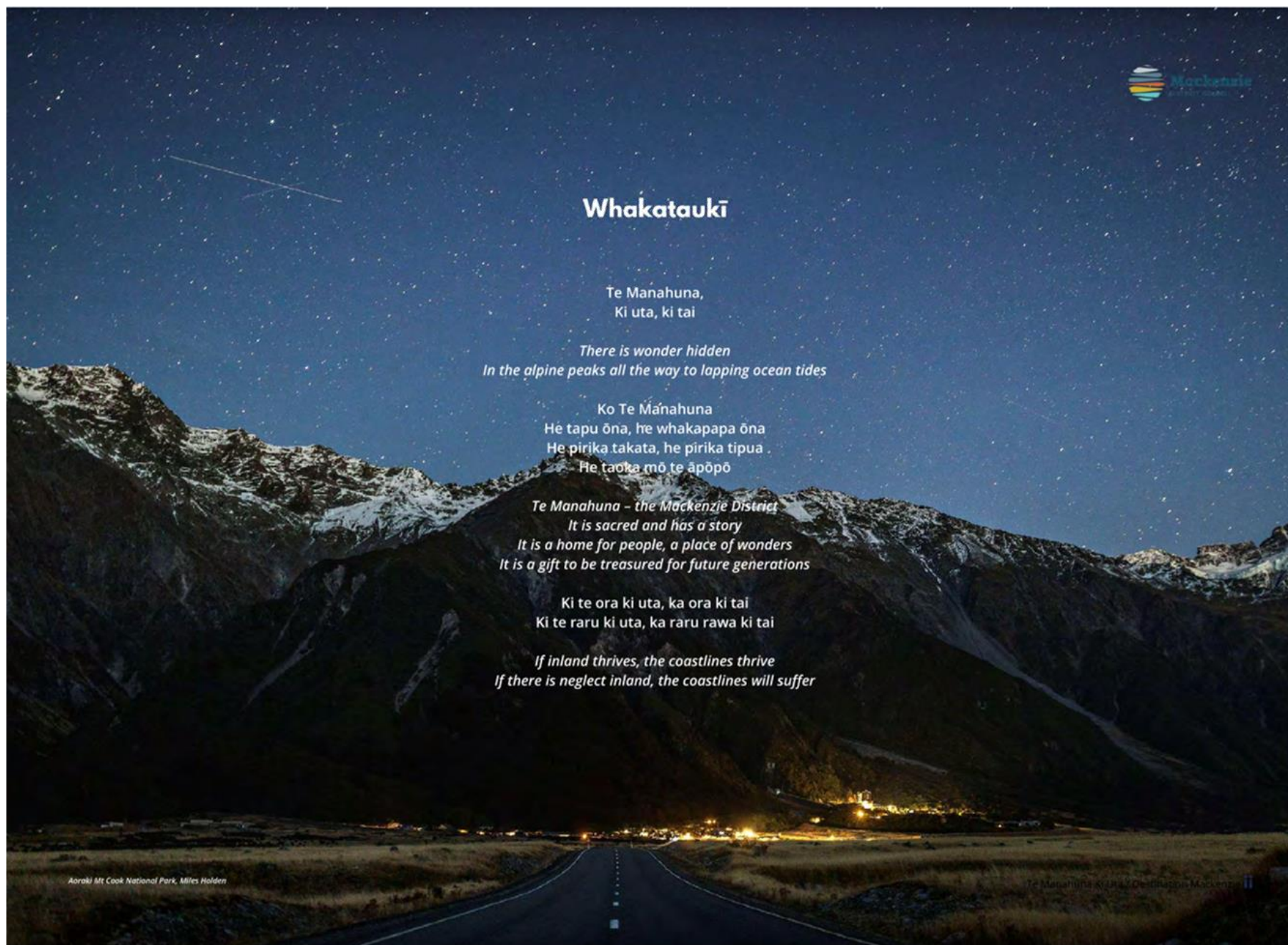
**Project Governance Group**



**Mackenzie Development Group**

Te Manahuna Ki Uta / Destination Mackenzie





## Whakataukī

Te Manahuna,  
Ki uta, ki tai

*There is wonder hidden  
In the alpine peaks all the way to lapping ocean tides*

Ko Te Manahuna  
Hē tapu ōna, hē whakapapa ōna  
Hē pirika takata, hē pirika tipua  
Hē taaka mō te āpōpō

*Te Manahuna – the Mackenzie District  
It is sacred and has a story  
It is a home for people, a place of wonders  
It is a gift to be treasured for future generations*

Ki te ora ki uta, ka ora ki tai  
Ki te raru ki uta, ka raru rawa ki tai

*If inland thrives, the coastlines thrive  
If there is neglect inland, the coastlines will suffer*

Aoraki Mt Cook National Park, Miles Holden

Te Manahuna ki te Ora o te Taiao Mackenzie





# CONTENTS

<b>FOREWORD</b> .....	<b>1</b>
<b>PART 1: EXECUTIVE SUMMARY</b> .....	<b>2</b>
1.1. About Te Manahuna Ki Uta (TMKU).....	3
1.2. Strategic Framework.....	4
1.3. Te Manahuna Today.....	5
1.4. Te Manahuna Tomorrow - The Tier 1 Projects.....	8
1.5. Where to from here?.....	10
<b>PART 2: TE MANAHUNA TODAY</b> .....	<b>11</b>
2.1. About the TMKU.....	12
2.2. An iterative, collaborative process.....	12
2.3. A collaborative methodology.....	13
2.4. Te Manahuna’s visitor profile.....	16
2.5. Te Manahuna’s tourism offering.....	18
<b>PART 3: TE MANAHUNA TOMORROW</b> .....	<b>19</b>
3.1. Vision.....	20
3.2. Guiding principles.....	20
3.3. Visitor Projections.....	21
3.4. The Scenarios.....	22
3.5. Strategic Initiatives.....	23
3.6. Project Recommendations.....	36
3.7. The “Big Moves” for Te Manahuna.....	38
3.8. Cost Benefit Analysis.....	46
<b>PART 4: HOW WILL WE GET THERE?</b> .....	<b>47</b>
4.1. Implementing the Strategic Initiatives.....	48
4.2. Implementing the “Big Moves”.....	56
<b>PART 5: APPENDICES</b> .....	<b>61</b>



## FOREWORD

**Te Manahuna/Mackenzie is an incredibly special place. It includes World Heritage Area and offers some of the best stargazing on earth. It's been recognised as an Outstanding Natural Landscape due to its expansive basins with open grassland and valleys created by braided rivers.**

For mana whenua, it is a significant cultural landscape, the home to Aoraki, a place where traditional trails meet, activities such as mahika kai have sustained whānau for generations, and tīpuna live and provide an unbreakable connection to the past.

It's not just local people who love living and working here either. This region has a unique and fragile ecosystem that's home to hundreds of species (some being threatened, at-risk or endangered) of endemic animals and plants, a portion of which are not found anywhere else in Aotearoa.

The Mackenzie District Council is the third smallest in the country in terms of ratepayers, yet we punch well above our weight when it comes to our natural landscapes. In order to protect and enhance Te Manahuna, we need a sustainable funding model that will allow the district to continue to provide tourism infrastructure that can service our premium outdoor environment.

We know our rural communities are passionate stewards of their land. We're looking to support them to develop sustainable and innovative farming practices, both improving productivity and enhancing our environment at the same time

We've worked very hard, in partnership with local rūnanga, and with our partner agencies, key stakeholder groups and the wider community, to develop a Destination Management Plan that looks to reframe the visitor economy in our District. We are moving towards a world where Te Manahuna's wonder and treasures are restored, protected, and thriving – to be loved and valued while sustaining us, our visitors, and those who come after us.

Te Manahuna will offer a world-class visitor experience based on our peaceful and tranquil natural environment, outstanding landscape, and guardianship values. Visitors will learn and celebrate the hidden wonder of the place and its people – our whakapapa, shared history, nature, and heritage, ensuring the visitor economy is resilient and can be sustained going forward.

We know that a plan is only as good as the actions it delivers, and we're focussed on getting runs on the board early – making sure that we see real change in our communities. We will continue to be adaptable and flexible as conditions evolve and tourism's future becomes more certain. This is an exciting time for our residents and those who visit here. We look forward to taking you on the journey.

**Graham Smith**  
Mayor of Mackenzie District







## 1.1. About Te Manahuna Ki Uta (TMKU)

**Te Manahuna Ki Uta (TMKU) sets out an ambitious 100-year project. Tourism has always been a key contributor to Te Manahuna’s prosperity and wellbeing. It supports jobs and businesses, provides infrastructure for communities and visitors to enjoy, generates investment and promotes regional growth and wellbeing.**

By 2019 tourism growth in the Mackenzie region was stronger than for New Zealand overall, but the benefits were not keeping pace with growing impacts on the environment and communities. Then COVID-19 delivered an unparalleled shock and has had an immense impact on New Zealand’s visitor economy because of the closure of international borders and limitations on domestic movements. However, it has provided us with a chance to pause and reimagine our visitor economy and identify strategies that will enable us to shape it into the one we want. TMKU, therefore, looks to the future. It is focused on developing strategies for Te Manahuna to achieve sustainable growth and protect our precious environment while also creating exceptional visitor experiences. We want our community to welcome visitors, but this requires ensuring the community has a say in how they would like to see tourism grow and develop.

TMKU has been borne out of extensive consultation across mana whenua, government, industry, and community. It recognises the need for a far stronger collaborative approach going forward. It is a strategy that brings all stakeholders together to ensure ongoing, sustainable success.

TMKU also provides us with a pathway to adapt to changing consumer and community expectations and build a new tourism future. It presents an opportunity to explore new ideas and markets and enhance our international destination competitiveness. As such, it recognises that we may have multiple domestic and international gateways for the future, with market demand able to enter Te Manahuna through three existing international gateways (Christchurch, Queenstown, Dunedin) and potentially additional ones in the longer term. Geographically, Te Manahuna is strategically very well advantaged.

TMKU sets out a carefully considered and debated vision and set of principles to act as compass bearings for the future. It proposes a range of short, medium, and longer-term projects that are required to support the sector’s recovery and to achieve sustainable growth going forward. It also recommends a range of overarching mana whenua, infrastructure and environmental initiatives that are largely longer-term initiatives that address pre-existing challenges, opportunities, structural trends, and community expectations to ensure Te Manahuna’s visitor economy rebuilds sustainably to ensure it is competitive, vibrant, resilient, and market driven.







## 1.2. Strategic Framework

### TE MANAHUNA KI UTA VISION

**Te Manahuna's wonder and treasures are restored, protected, and thriving – to be loved and valued while sustaining us, our visitors, and those who come after us.**



**Principle 1  
Protecting our  
Treasures**



**Principle 2  
Enduring  
Partnerships**



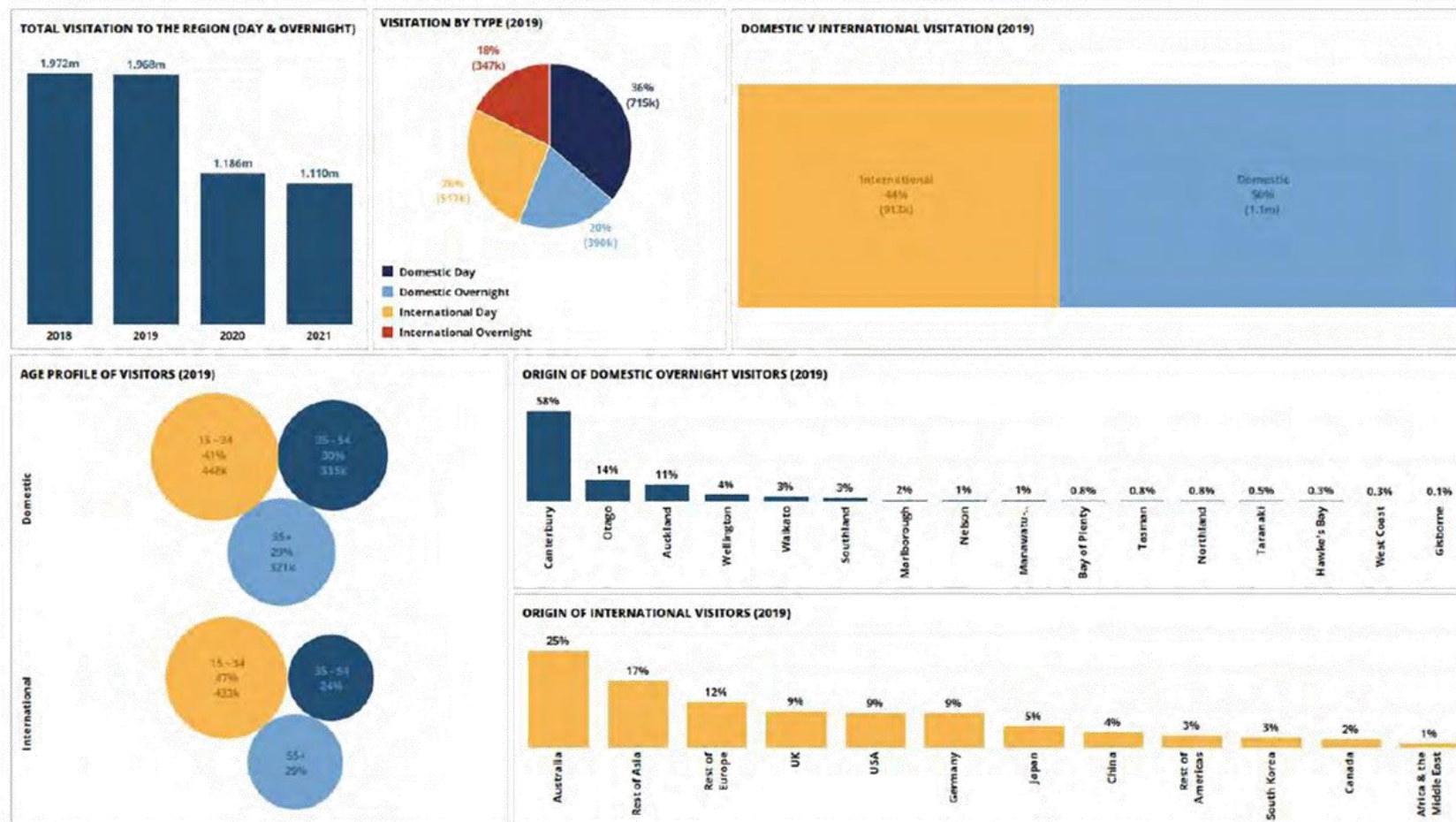
**Principle 3  
Thriving People  
and Places**



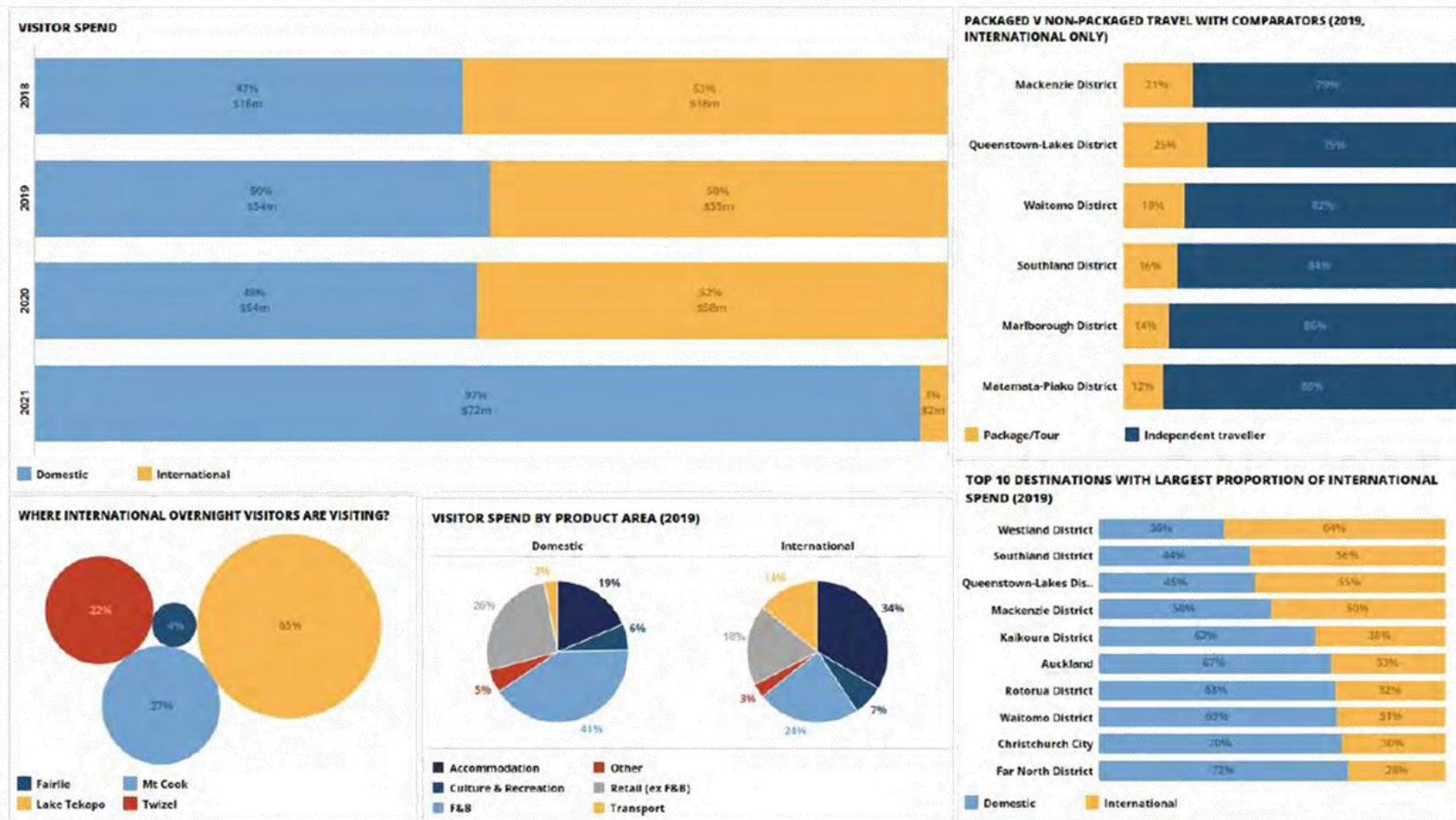
**Principle 4  
A Unique  
Experience**



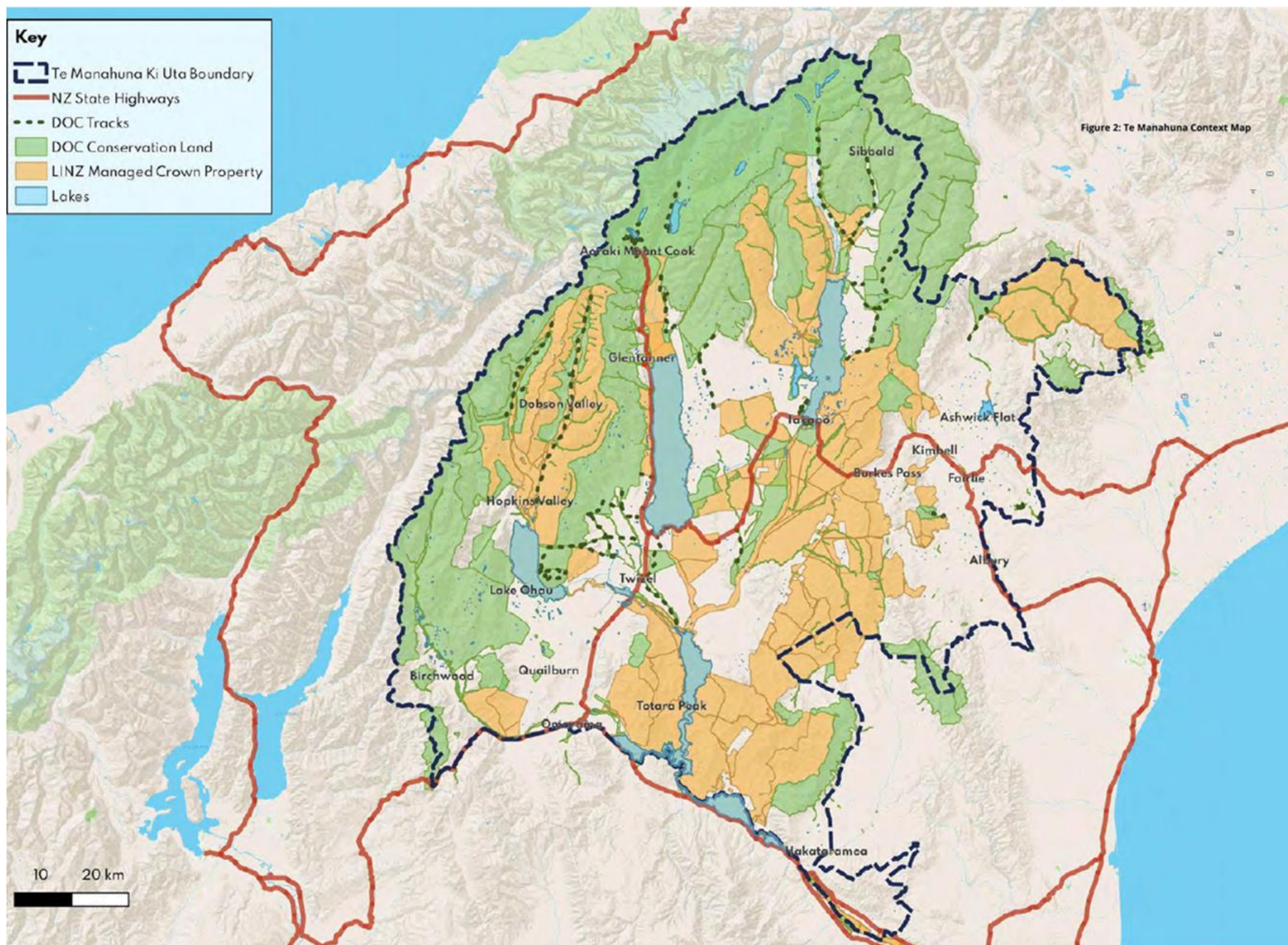
1.3. Te Manahuna 2019 Visitation (pre-COVID) Figure 1: Te Manahuna's visitor profile















## 1.4. Te Manahuna Tomorrow - The Tier 1 Projects

### 1. Water visitor experience hub with iconic design

**About**

**When:** Short Term  
**Type:** Product Development  
**Where:** Twizel  
**Estimated CAPEX:** \$30m  
**Principle alignment:** A Unique Experience

Te Manahuna has a rich and diverse history with water. To tell this story, an immersive visitor experience hub could be developed. This could include Te Manahuna's story of settlement, eels & alpine salmon, hydro, and various lakes and water bodies. Developing this would provide a paid, all-weather, and family-friendly attraction. These forms of indoor attractions are currently lacking in Te Manahuna.

**Key Action**

Work with the project proponent to assess the merit of developing a water resource experience hub with other components in a truly iconic design.

### 2. Diversified accommodation mix

**About**

**When:** Short Term  
**Type:** Accommodation Development  
**Where:** Regional  
**Estimated CAPEX:** \$85m

To encourage a broader visitor market to Te Manahuna, there is a need to focus on introducing a wider range of commercial accommodation options. These could include all-weather glamping (or eco-pods), eco chalets, boutique hotels, youth hostels and serviced apartment complexes etc.

**Key Action**

Undertake a detailed accommodation audit across Te Manahuna looking at the size, range, scale, and quality of accommodation throughout Te Manahuna and identify specific gaps that could be filled via private investment.

### 3. Agri-tourism showcase centre

**About**

**When:** Medium Term  
**Type:** Product Development  
**Where:** Fairlie  
**Estimated CAPEX:** \$7m

The agricultural sector has historically been the backbone of Te Manahuna's economy, and it is well-known nationwide as an important agricultural region. The opportunity exists to showcase this extensive history through the development of an agri-tourism showcase centre. This could include retail space, a café, a major display of produce via virtual reality area, an area for food markets and events etc.

**Key Action**

Complete a feasibility study assessing the potential to develop an agri-tourism centre to showcase the best of Te Manahuna's produce and to act as an information hub to encourage visitor dispersal throughout Te Manahuna.

### 4. Agri-tourism & aqua-tourism experiences

**About**

**When:** Medium Term  
**Type:** Product Development  
**Where:** Regional  
**Estimated CAPEX:** \$5m

Actively support the development of new and enhanced agri-tourism and aqua tourism ventures to help grow Te Manahuna's profile. Such experiences could include farmers' and food markets, destination food events, cooking schools, farm stays, and agri-tours. The region is recognised globally for its top quality merino wool fibre and strong brand recognition.

**Key Action**

Work with existing and new agri and aqua operators to identify mechanisms to grow the tourism profile of agri and aqua products throughout Te Manahuna.

### 5. Accommodation property (80+ rooms & conferencing)

**About**

**When:** Medium Term  
**Type:** Accommodation Development  
**Where:** Regional  
**Estimated CAPEX:** \$35m

To support the development of events, there is a need to introduce a new, larger-scale accommodation property (80-120 rooms) that also offers conferencing facilities.

**Key Action**

Complete an accommodation demand assessment to identify the feasibility of and most suitable location for a new, larger-scale accommodation property to support larger groups as well as a conferencing and functions market.



**6. Meridian & Genesis sites for hydro-tourism experiences**

**About**

**When:** Medium Term  
**Type:** Product Development  
**Where:** Twizel  
**Estimated CAPEX:** \$1.5m

Investigate the potential to leverage the Meridian and Genesis sites for hydro-tourism experiences. These could include self-drive tours to the various hydro facilities in Te Manahuna, online information along with profiling sites of significance etc.

**Key Action**

Identify experiences that showcase the importance of the two major hydro generating companies in Te Manahuna and leverage these for unique tourism experiences via journeys to sites of significance to better understand the hydro story.

**7. Destination branding**

**About**

**When:** Short Term  
**Type:** Marketing, Education & Events  
**Where:** Regional  
**Estimated CAPEX:** \$200k

Te Manahuna has a strong, connected, and productive local creative industry. To showcase the strength, originality, and diversity of the creative industries in Te Manahuna, a "Made in Te Manahuna" brand could be developed. This collective marketing approach could extend to art, craft, fashion, writers, media, culture, and food.

**Key Action**

Work with a nationally significant brand developer to create a Made in Te Manahuna produce brand that can feature food, produce, condiments, arts, crafts, accommodation, transport etc. It is important this is developed with the tourism sector and creative community's input to generate buy-in and support.

**8. Takapō hillside activity precinct**

**About**

**When:** Short Term  
**Type:** Product Development  
**Where:** Takapō  
**Estimated CAPEX:** \$11m

Support the development of the Takapō hillside activity precinct which could include a variety of walking and cycling trails as well as a downhill experience supported by accommodation and a food and beverage offering. This will assist in extending the length of visitor stay in Takapō and the broader Te Manahuna region.

**Key Action**

Work with the existing landholder to develop the hillside activity precinct at Takapō as a unique sustainable lakeside nature-based experience.

**9. Unique dark skies experiences**

**About**

**When:** Medium Term  
**Type:** Product Development  
**Where:** Regional  
**Estimated CAPEX:** \$3m

While Te Manahuna has led the way in the development of dark skies tourism experiences, the landscape is becoming increasingly competitive as more destinations seek dark skies certification. There is a need to identify new value-add dark skies product experiences to differentiate Te Manahuna's dark skies products.

**Key Action**

Work with existing and new tourism experience operators to identify ways to offer new and exciting dark skies experiences with value-adds that help the region maintain its position as a leader in dark skies experiences.

**10. Whare Wānaka (Pou concept & storytelling)**

**About**

**When:** Short Term  
**Type:** Sustainability & Regenerative Tourism  
**Where:** Regional  
**Estimated CAPEX:** \$1m

Whare Wānaka is the overarching concept for the promotion of mana whenua voice and presence in Te Manahuna. This offers the opportunity for Pou at entry points into Te Manahuna, designated kai, and other trails as part of storytelling for self-drive and guided tours, and a strong online story presence. These need to be carefully controlled and curated by mana whenua, so IP is respected and protected.

**Key Action**

Work with mana whenua to identify and develop experiences around mana whenua stories of Te Manahuna in a way that not only attracts visitors but also provides a deeper connection for mana whenua and encourages their participation in the visitor economy.



## 1.5. Where to from here?

TMKU offers a pathway forward for sustainably developing the regional visitor economy, for industry, community, mana whenua and government (at all levels). Stakeholder collaboration and cohesiveness are key to determining the solid building blocks required to address the challenges and start activating the opportunities, identified in this DMP.

A DMP, like any strategy or forward-looking plan, is only as valuable as its ability to show progress – that is, delivering outcomes rather than merely stating its intent to do so. TMKU, therefore, offers recommendations on a way forward, including short-term project activations, along with medium- and longer-term aspirational desires, which are going to take longer to deliver. Based on the research and analysis undertaken for this DMP in 2021-2022, several major strategic initiatives were identified which offer overarching solutions to support the vision and principles especially, and which are needed to support the various tourism development projects which have been identified.

In addition, TMKU has had to be formulated during a very complex and challenging period in tourism development and broader changes in government policy. These have meant that careful consideration has had to be given to how visitor flows in a post-COVID environment will occur, how long supply chain disruptions will limit product capacity, and how important policy changes within government to move to a low carbon and more sustainable environment generally, will impact and guide visitor behaviour and future activity. Overarching all of this is the need to move forward with a co-governance partnership with mana whenua, to protect the special values of the place, and to work closely with the wider community to ensure that the social licence provided to

the visitor economy, is maintained, and visitors are warmly welcomed.

Most importantly, there is also the need to ensure that the tourism sector’s economic and commercial viability is maintained and enhanced, so greater local employment can be generated, the sector’s productivity is greatly improved so wages can be increased, and that profit margins can be grown so existing and proposed product can be more regularly reinvested in and maintained to a higher standard, where possible.

The strategies developed in this DMP, coupled with the strategic initiatives identified and the 60+ projects for tourism development, provide the recommended direction for the way forward. They also illustrate what is required to inspire and leverage the private sector and other non-government areas of investment to help deliver the outcomes needed for the short, medium, and longer-term, noting that TMKU covers a 100-year period (2022-2122). Gaining support for the direction forward amongst a wide group of stakeholders has taken time. The harder element is the actual delivery of the initiatives and projects to see them activated.

To implement the DMP, a Tourism Governance Group will need to be formed with representation across all major stakeholder groups. Their primary task will need to focus on the delivery and activation of the strategic level initiatives, coupled with activating the various tourism development projects. These projects have been ranked to illustrate those which should be able to be activated earlier, as the top 30 priority projects (termed tier 1, 2 and 3) along with the balance of the 60+ projects, such as ongoing

development of cycle and walkways, which are still important. Getting things happening is the key.

As government policies and direction change over time, and as market conditions shift along with product demand, a flexible approach to the prioritisation of projects is required. A Tourism Governance Group will need to keep a close eye on government policies and market changes, to enable projects to be reprioritised and market opportunities to be activated quickly and efficiently. A key requirement will be the ability to find mechanisms to fund the major strategic initiatives covering mana whenua development aspirations, infrastructure and environmental improvements which are now needed.

In summary - the where to from here - is about progressing the actual delivery and activation of TMKU, with a highly collaborative approach from all public and private sector stakeholders, working in unison and partnership with mana whenua.











## 2.1. About TMKU

The purpose of TMKU is to develop a long-term strategic Destination Management Plan (DMP) for the Te Manahuna/Mackenzie District as part of a wider tourism journey that includes Aoraki/Mt Cook National Park, the upper Waitaki Valley and Burkes Pass.

**The long-term goal of TMKU is to achieve a vibrant, dynamic, and sustainable future: one that speaks to visitors and our community – mana whenua, locals, farmers, adventure seekers, artists, and conservationists.**

TMKU explores options to chart the way forward regarding Te Manahuna's visitor economy and will be used to inform investment planning across agencies to:

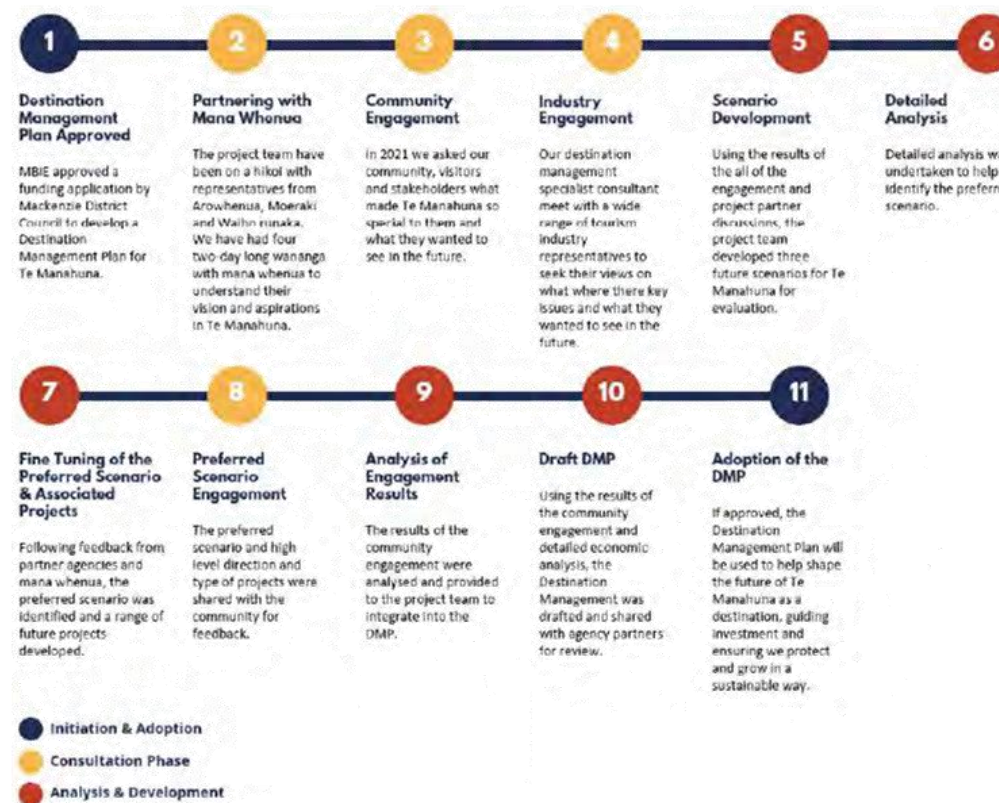
- manage pressure on infrastructure, conservation values, communities, and the environment;
- deliver on community aspirations for Te Manahuna;
- deliver on the strategic priorities of the member agencies and mana whenua;
- protect the cultural values and history within the environment; and
- recover from the COVID-19 event in the form of a reset to value-based tourism.

It needs to also be noted that the boundary of the area designated as TMKU extends beyond the Mackenzie District TLA boundary into parts of the Waitaki TLA and Waimate TLA. The Waitaki Destination Management Plan is also near completion at the time of publishing the TMKU DMP. Discussions have been held between Mackenzie District Council and Waitaki District Council to ensure that where possible, initiatives for future product development are well aligned and future synergies achieved for marketing, noting that some key products such as the A20 start in the Mackenzie and finish on the coast in Waitaki, by way of example.

## 2.2. An iterative, collaborative process

In developing TMKU, the project team worked alongside those directly involved in the visitor economy, along with the broader community and a variety of government agencies. It involved an eleven-stage process, which is summarised in Figure 3.

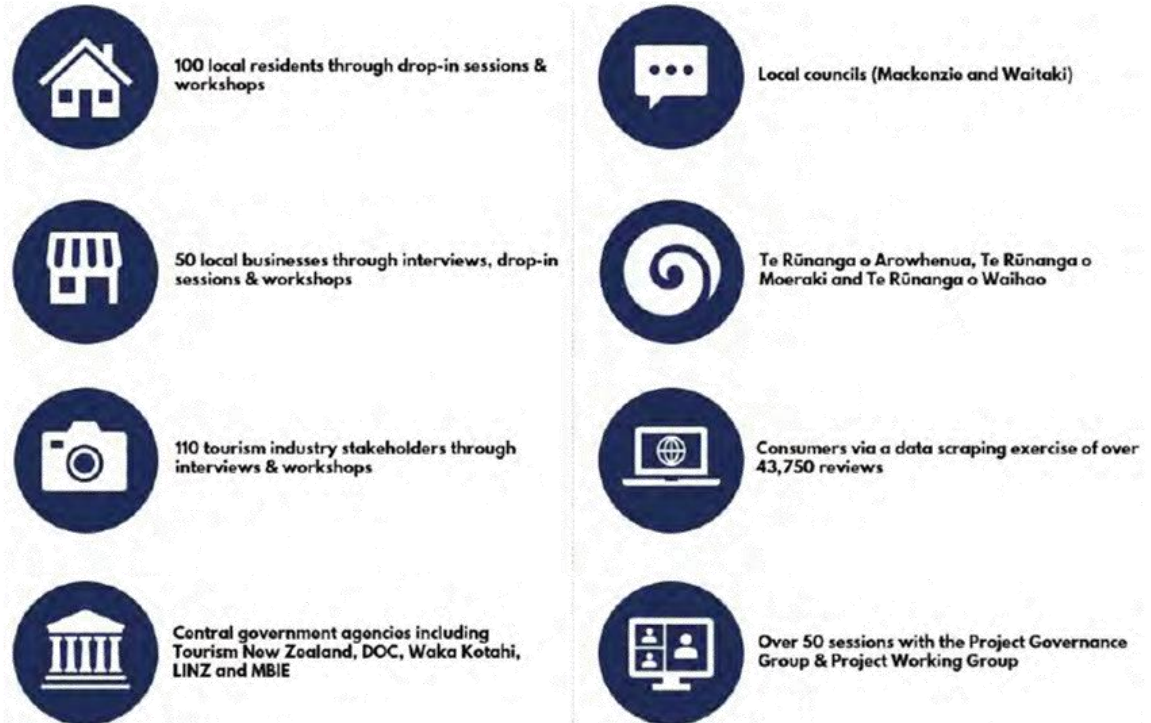
Figure 3: TMKU's process





### 2.3. A collaborative methodology

TMKU involved extensive and ongoing consultation. The engagement was undertaken with mana whenua, the local tourism industry, the broader industry as well as residents and domestic visitors. Domestic and international visitor perceptions were examined through an extensive data scraping exercise of online data sources. The consultation was undertaken through a variety of formats including face-to-face interviews, workshops, focus groups, community drop-in sessions and surveys over 15 months.

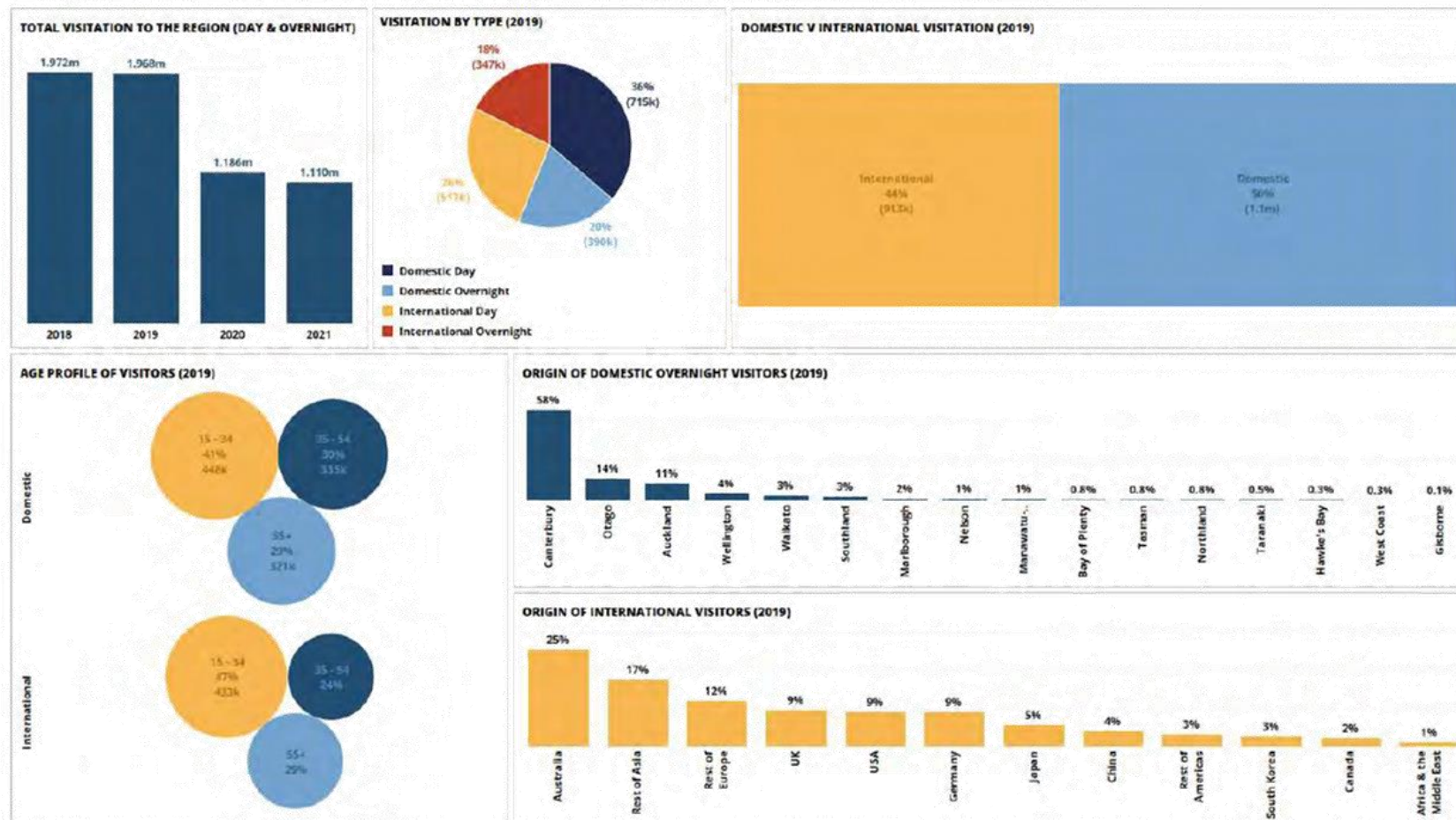


Te Manahuna Ki Uta / Destination Mackenzie | Te Manahuna Today 13

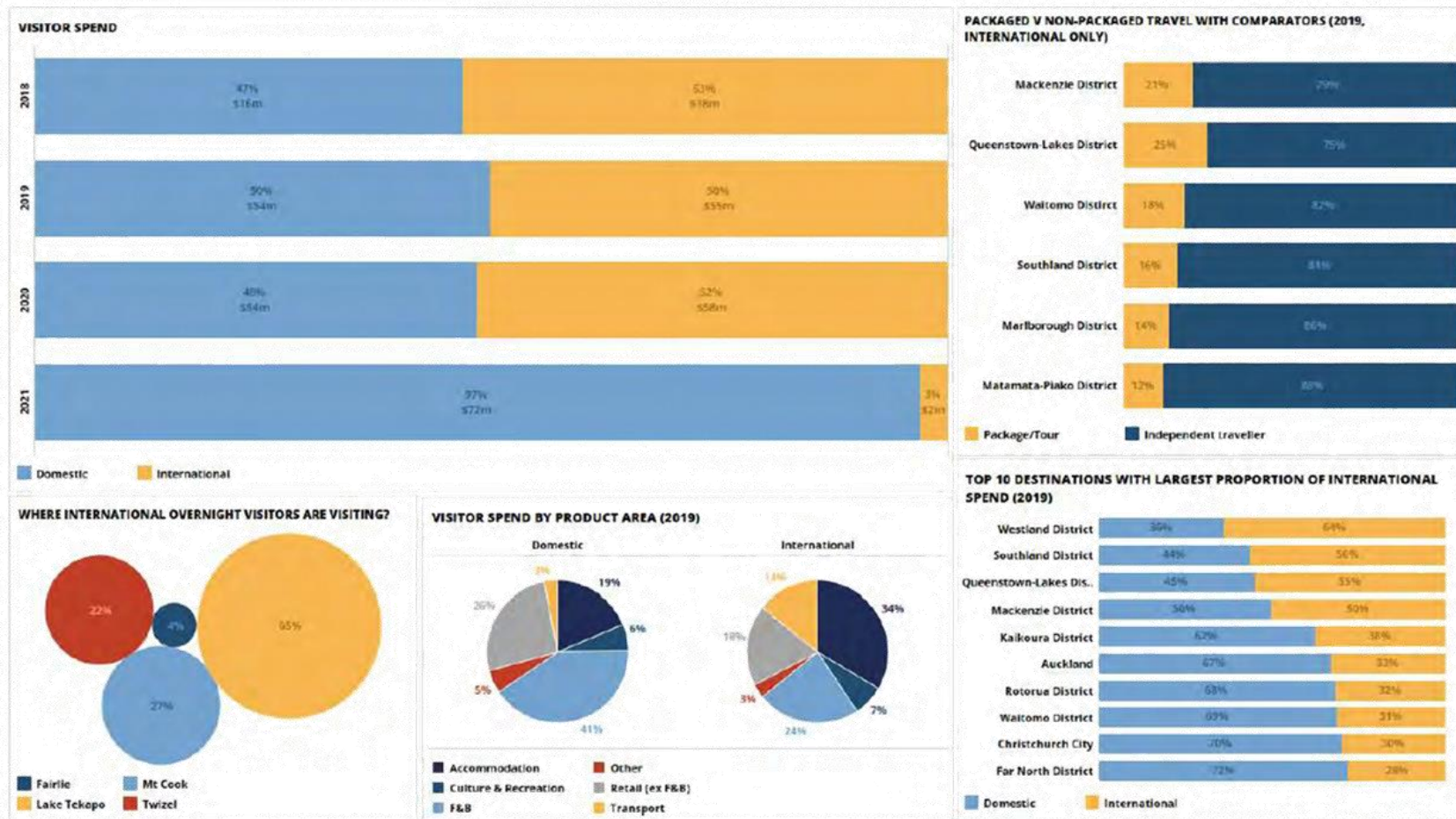




Figure 4: Te Manahuna Visitor Profile Summary<sup>2</sup>



<sup>2</sup> Source data are included in Appendix 1.



## 2.4. Te Manahuna's visitor profile

**The visitor economy plays a vital role for Te Manahuna. Stimulated by the major tourism drawcards within its boundaries (Aoraki/Mount Cook and Lake Takapō), the region has historically enjoyed ongoing visitor growth, particularly from the international visitor market.**

COVID-19, however, has had a major impact on tourism throughout the country and particularly impacted those destinations that typically attracted a strong international market; Te Manahuna is one of these destinations.

Figure 4 provides a summary of the visitor profile for Te Manahuna. Source data for this summary as well as more detailed data are included in Appendix 1 and Appendix 4.

Before COVID-19, visitation to Te Manahuna was growing, spurred on, in part, by the success of the 100% Pure campaign, the global tourism boom<sup>3</sup> and social media profiling of New Zealand's tourism icons (such as Aoraki/Mount Cook and Lake Takapō). In 2019, 1.97 million visitors undertook a trip to Te Manahuna, 36% of whom were domestic day trippers<sup>4</sup>. COVID-19 saw visitation to Te Manahuna decline, falling to a low of 1.1 million visitors in 2021 – a decline of 44% (or 862,000 visitors) between 2018 and 2021.

Total day trip travel (domestic and international) made up 62% of total visitation to Te Manahuna. While this is an important market, the overnight visitor market tends to contribute far more to the local economy (through spending on accommodation, additional food and beverage (F&B), transport etc.) while having a similar social and environmental impact footprint to the day market. To support the desire to focus on a higher-yielding visitor market, there needs to be an increased emphasis on ways to convert day trip visitors into overnight travellers.

Lake Takapō and Aoraki/Mount Cook have traditionally been the focus of the international visitor markets, with these destinations being strongly profiled online and via social media. Of the 1.97 million visitors to Te Manahuna, 65% stopped in Lake Takapō, followed by Aoraki/Mount Cook (27%), Twizel (22%) and Fairlie (4%).

Figure 5 provides a summary of international visitor flows in Te Manahuna in 2019. It shows that: half of Te Manahuna's international visitor market only travelled to Lake Takapō; and only a small proportion of international visitors stopped in Fairlie and Twizel.

To help spread the economic benefits of the visitor economy more widely, there is a need, over time, to disperse visitors throughout Te Manahuna rather than just concentrating visitation in traditional visitor hubs, and when new product options are available throughout the region to support this.

The Australian and Asian markets made up the largest share of international visitors to Te Manahuna. In 2019, one-quarter of international travel to Te Manahuna was by Australians and a further 17% was by those from the "Rest of Asia". While the Chinese market makes up only 4% of visitation, the spend profile of this market cannot be ignored, with Chinese visitor spending comprising 19% of total visitor spending.

Before COVID-19, Te Manahuna had one of the highest proportions in the country of its visitor spending originating from the international market – the only TLAs above were Westland, Southland, and Queenstown.

COVID-19 has shifted the focus many regional destinations had, with most pivoting to a stronger domestic market out of necessity. The domestic market also has a greater propensity to visit in the shoulder and low seasons, as opposed to the international market which tends to be heavily focused on peak visitation periods.

Importantly, COVID has offered Te Manahuna the opportunity to recalibrate total visitation and plan for the rebound in international visitation especially, which should have a far stronger focus on attracting overnight rather than day visitors. The same should also apply to domestic visitor markets.

To achieve this, however, will necessitate the introduction of new accommodation and attractions experiences along with enhancing a number of existing products so the appeal of the region grows.

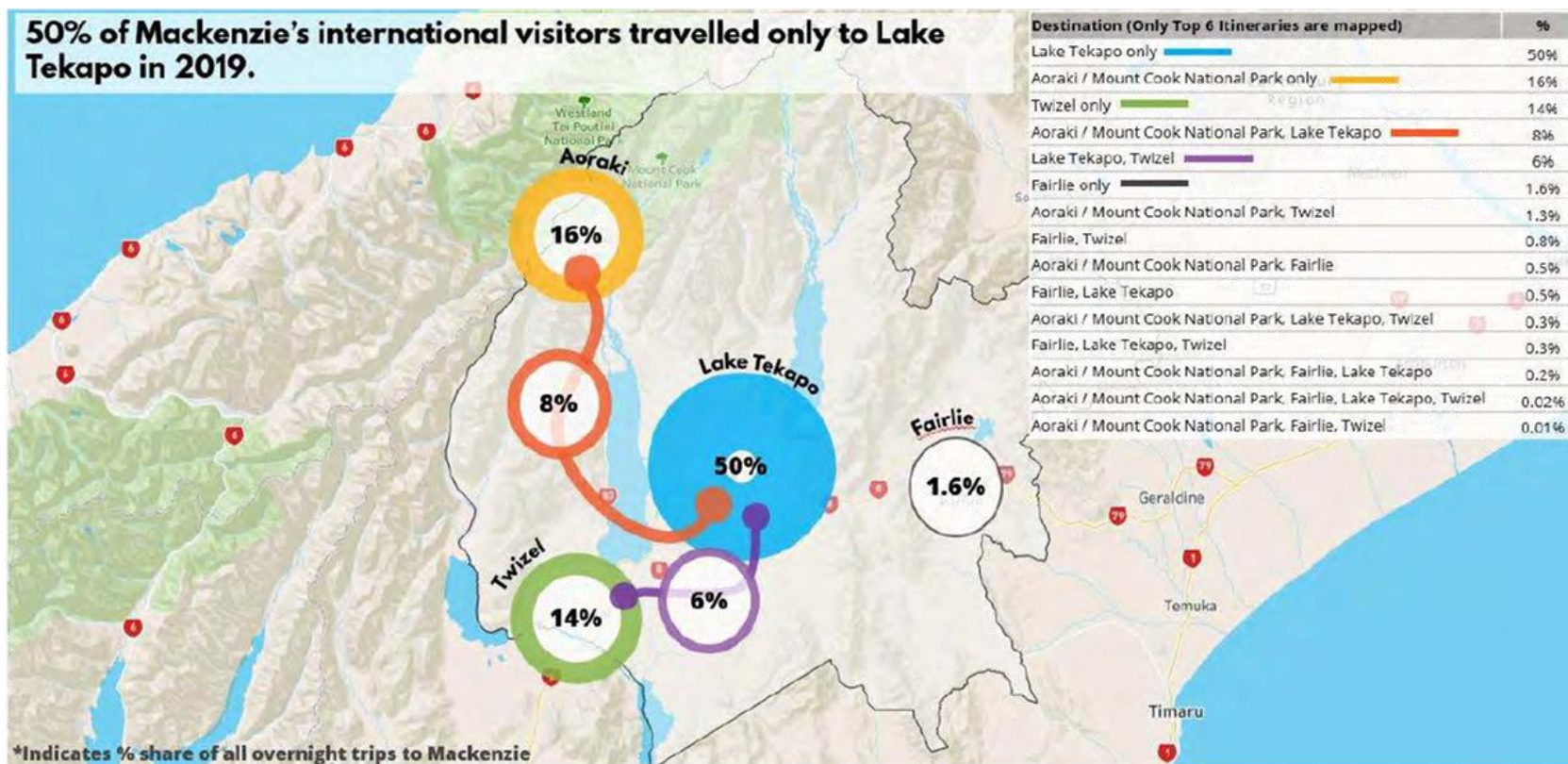
<sup>3</sup> Tourism's boom is not universally welcome, The Economist, February 20, 2019, <https://www.economist.com/graphic-detail/2019/02/20/tourisms-boom-is-not-universally-welcome>

<sup>4</sup> A domestic day trip is defined by MBIE as a trip made within 1 day, outside the area in which the respondent usually lives or works day to day, involving travel of at least 40km one way from home, or travel by aeroplane or ferry service. By way of example, a resident from Christchurch who travels to Aoraki /Mount Cook for 5 hours and then returns home is considered a domestic day tripper to Mackenzie region.





Figure 5: International visitor stops and flows (2019)<sup>3</sup>



<sup>3</sup> NZ International Visitor Survey



## 2.5. Te Manahuna’s tourism offering

Figure 6 provides a summary of Te Manahuna’s tourism offering. More detailed supporting data are available in Appendix 2 and Appendix 3.

Figure 6: Te Manahuna’s tourism offering







# PART 3: TE MANAHUNA TOMORROW









### 3.1. Vision

**Te Manahuna’s wonder and treasures are restored, protected, and thriving – to be loved and valued while sustaining us, our visitors, and those who come after us.**

### 3.2. Guiding principles

To guide the delivery of the vision, four guiding principles have been developed. These underpin TMKU and have also guided the recommendations identified (Table 1).

Table 1: Guiding Principles

 <p><b>Principle 1 - Protecting our Treasures</b></p> <ul style="list-style-type: none"> <li>▪ We acknowledge the role of mana whenua as kaitiaki for the wonders of Te Manahuna that Māori have a whakapapa connection to and have responsibility for</li> <li>▪ Our guardianship over the natural environment – from the mountains to the sea - protects, restores, and regenerates Te Manahuna to support generations now and in the future.</li> <li>▪ Use innovation, science, and technology to provide sustainable management of water, energy, natural and built environment whilst mitigating climate change risks.</li> <li>▪ Holistic system management of Te Manahuna that protects our Dark Sky, water, flora, and fauna.</li> </ul>	 <p><b>Principle 2 - Enduring Partnerships</b></p> <ul style="list-style-type: none"> <li>▪ A living Treaty based partnership between Mana whenua and MDC and all agencies in Te Manahuna.</li> <li>▪ A relationship where Mana whenua, Community, the rural sector, and the Tourism Industry have a shared worldview and collaborate.</li> <li>▪ An integrated, collaborative, and sustainable approach to visitor and destination management.</li> <li>▪ A sustainable revenue and funding model that delivers the vision and aspirations and outcomes for Te Manahuna Ki Uta, community, and stakeholders.</li> </ul>	 <p><b>Principle 3 - Thriving People and Places</b></p> <ul style="list-style-type: none"> <li>▪ Thriving people and cohesive communities create a welcoming and inclusive place.</li> <li>▪ An enriching and authentic experience that benefits well-being and contributes to the place.</li> <li>▪ Re-establish mana whenua pride, connection and presence in the stories, whakapapa, and landscape of Te Manahuna.</li> <li>▪ In supporting the visitor system, the people who live in Te Manahuna are enabled to build a cohesive community and have equitable access to quality services.</li> <li>▪ All infrastructure servicing the community and visitor system is sympathetic to the landscape and supports resilient communities and improves the visitor experience.</li> </ul>	 <p><b>Principle 4 - A Unique Experience</b></p> <ul style="list-style-type: none"> <li>▪ A world-class visitor experience based on our peaceful and tranquil natural environment, outstanding landscape, and guardianship values.</li> <li>▪ Visitors learn and celebrate the hidden wonder of the place and its people – our whakapapa, shared history, nature, and heritage.</li> <li>▪ Visitors develop a meaningful connection to the Te Manahuna story and create future generations of Kaitiaki and Guardians.</li> <li>▪ Visitor activities and tourism infrastructure are adaptive to change and resilient to risks.</li> <li>▪ Innovative technology and approaches to support the visitor experience and protects our taoka and whakapapa.</li> <li>▪ Te Manahuna’s treasures are accessible and can be enjoyed by all.</li> </ul>
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### 3.3. Visitor Projections

Figure 7 provides visitor projections for Te Manahuna out to 2121 (more detailed data are included in Appendix 5). Projecting visitation over an extended period is challenging. While these projections attempt to consider anticipated trends and changes, they are unable to factor in any future major macroeconomic events such as new pandemics etc. They do, however, provide a picture of what visitation could look like based on historic and current trends. They are also modelled on recommendations in TMKU being adopted, particularly those focused on converting day trip visitors to overnight visitors.

The projections demonstrate that in the short term, visitation is anticipated to slowly recover from COVID-19 impacts. The domestic market is anticipated to rebound quicker because it has been less impacted by COVID-19 border closures than the international market and because interest in domestic travel by New Zealanders is very strong due to uncertainty surrounding border closures.

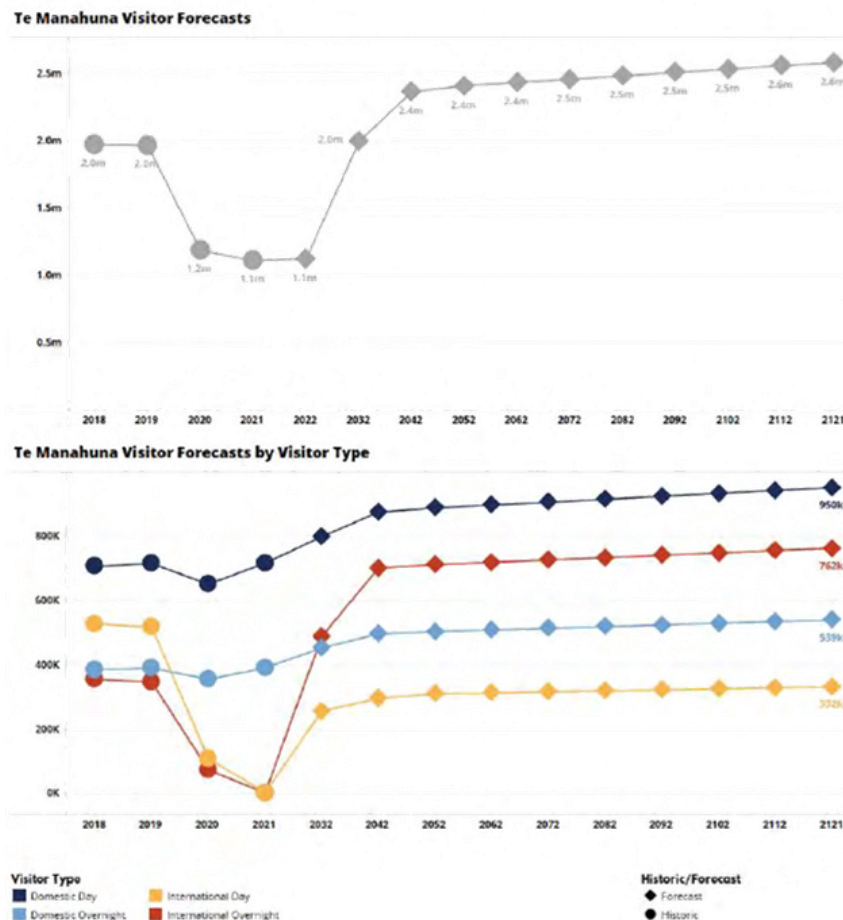
The international market is projected to recover over the medium term, driven largely by the Australian market followed, in time, by the Southeast Asian, Japanese, UK, Europe and USA markets. The Chinese market is unlikely to recover to pre-COVID-19 levels because:

- Tourism New Zealand and New Zealand tourism policy generally is targeting lower volume, higher-yielding tourism which may have an impact on the number of larger, structured tours that are popular with the Chinese market; and
- of hesitancy within the Chinese market to travel as free independent travellers due to COVID-19 border closures and restrictions.

Over the period assessed, visitation to Te Manahuna is anticipated to grow, reaching an estimated 2.5m visitors by 2121 assuming that growth can be sustainably managed. This growth is driven by:

- increased interest in Te Manahuna due to global warming having a significant impact on the glaciers (Franz and Fox Glaciers in particular) and the ability for visitors to access glaciers from TMKU more easily
- recommendations provided in TMKU which include enhancements to existing infrastructure, accommodation, and attractions; improved destination marketing; and the introduction of a more diverse range of visitor experiences; and
- changes in the way visitors travel, with tourism anticipated to continue to shift from a packaged market to free independent travellers who are more inclined to travel off traditional tourism routes.

Figure 7: Te Manahuna Visitor Projections to 2121  
(historic data is annual growth, forecast data is shown in 10 year projections)



### 3.4. The Scenarios

#### 3.4.1. The scenarios assessed

Using the results of the community, industry, mana whenua, agency and previous studies, the project team developed three future scenarios for Te Manahuna for evaluation. These were then scored by the project team, partner agencies, mana whenua and other stakeholders, based on their alignment to the vision and principles, to identify the preferred scenario to be adopted for TMKU.

- **Scenario 1: Status Quo – plus.** The first scenario was a ‘demand driven’ scenario that represents life as it was pre-COVID-19, but one which is more mindful of avoiding sustainability issues and peak seasonal pinch points. This scenario retains issues of uncertain, uneven demand, with development largely initiated by public sector initiatives.
- **Scenario 2: Growth.** This scenario is more ambitious and sees demand rebound and private investment follow. Sustainability principles are widely accepted and there is greater certainty post-2030 with consistent demand. Developments are initiated through a partnership approach between the public and private sectors.
- **Scenario 3: Aspirational.** This scenario sees a strong return of visitors but with a focus on higher-value visitors. The adoption of this scenario would see Te Manahuna become an exemplar of regenerative tourism<sup>5</sup>, with mana whenua and pakeha stories woven together. It would involve increasing the length of stay opportunities and appealing to a broader market with a focus on visitor experience and sustainable practices. This scenario also sees the earlier activation of projects leveraged by public sector funding strongly linked to private sector investment initiatives and the development of key infrastructure ahead of time.

Ultimately, the scenario selected to guide the development of TMKU was Scenario 3.<sup>7</sup>

<sup>5</sup> Regenerative tourism is being embraced in New Zealand as it seeks to re-frame its tourism offering. In short it encourages and facilitates visitors to ‘give back’ to the places they visit by direct and indirect engagement in environmental and social initiatives.

#### 3.4.2. The Preferred Scenario – Scenario 3

Figure 8 provides a summary of the preferred scenario and its aspirations. Detail on each element in the preferred scenario is included in Appendix 6.

Figure 8: The preferred scenario



<sup>7</sup> The scenarios, their implications, and abilities to be activated were discussed and debated by the Working Group and the Governance Group. It was unanimously agreed that an aspirational approach was needed to deliver the outcomes and changes which stakeholders wanted to see, especially noting that the DMP has a 100 year timeframe.





### 3.5. Strategic Initiatives



The following outlines specific initiatives which have application across Te Manahuna, and which are recognised as major drivers to deliver on the principles identified for TMKU. They have been separated from the list of specific projects (Section 3.5), as for many, they are yet to be fully formalised into projects and funding is going to be required from government sources that will enable their activation.

Most of these initiatives are unlikely to generate a commercial return, so private investment to activate these is likely to be challenging to secure. However, these initiatives are recognised as important drivers to help offer a more sustainable and, at times, interesting visitor experience, which may assist in leveraging private sector investment into various projects.

These initiatives relate specifically to:

- **mana whenua partnership** and aspirations for delivery;
- **infrastructure gaps** that need to be addressed over time; and
- **environmental initiatives** that are important to protect the special values of the place, deliver a sustainable visitor experience and support the ongoing viability of local communities.

The Implementation of the majority of these is founded on actions within public sector entities (e.g., DOC, NZTA and TLAs), albeit with strong private sector engagement and support. The individual initiatives will take some time to develop as they require feasibility testing and fully costed business cases before they can garner resources to activate them. Some may require statutory or legislative change before they could be implemented, and many will require effective collaboration and partnership. A number sit within broader debates about national priorities, co-governance and co-management and legislative changes.

Notwithstanding, each of these provide clear compass bearings for both short- and long-term actions, as they attend to the foundation elements in destination development and management.

**Importantly they speak directly to the vision and first principle of ‘Protecting Our Treasures’, and indirectly to ‘A Unique Experience’, ‘Enduring Partnerships’, ‘Thriving People and Places’.**

A critical area that needs to be addressed is how these various initiatives could be funded. Initial research and analysis indicate the following as possible pathways for funding.

- **User pays models:** Introduction of user-pays models, and potentially differential pricing for domestic visitors, which could range from a levy on all visitors, to a fee (or additional fee) for using various services, infrastructure, transport, or experiences.
- **A higher International Visitor Levy (IVL):** Seeking funding for specific initiatives that meet the criteria for the IVL, as tourism numbers increase, and the fund is replenished.
- **Grant funding:** Applying for specific grants from programs in Central Government that are for environmental improvements, rather than tourism per se.
- **Business and tourism operator fees:** Taxes or fees that businesses would pass on to visitors, e.g., tourism operators or accommodation providers.
- **Direct contributions from visitors** to environmental projects, ranging from donations to actions (see Appendix 7).



**3.5.1. Mana whenua initiatives**

MBIE’s destination management guidelines<sup>8</sup> draw attention to the special role of mana whenua in DMPs. The mana whenua work stream, incorporating Arowhenua, Waihao, and Moeraki Rūnanga, has provided a set of recommendations to give a voice to mana whenua history and aspirations<sup>9</sup> - see Table 2. This DMP summarises the mana whenua Voice and Physical Manifestation Document (Version 7), which has been developed in partnership with mana whenua. This document should be referenced to support the feasibility and development of the concepts referred to in this DMP.

These in turn are set against each of three core concepts.

- Mana whenua being equal partners in any governance structure.
- That Te Manahuna is recognised as a Wāhi Taoka – a special and treasured place (containing numerous sacred sites - Wāhi Tapu).
- Whare Wānaka (a sacred place for learning) is an overarching concept for the promotion of Māori voice and presence – and an essential framework for narrating sites, journeys, and experiences for all (see Figure 9).

**Table 2: Overarching mana whenua strategic initiatives**

Initiative/Recommendation	Description	Category
Equal share (mana whenua/wider community) participation in future Governance Structure for the delivery of this 100-year DMP.	<ul style="list-style-type: none"> <li>▪ Determination of a co-governance model which meets criteria established by mana whenua and agreed to at a national level by the government.</li> </ul>	Governance
A commitment to the core concepts of Protection, Presence and Pride for Mana whenua in Te Manahuna.	<ul style="list-style-type: none"> <li>▪ Promotion of cultural narratives developed and controlled by local rūnanga/mana whenua.</li> </ul>	Presence
Mana whenua should have to opportunity to invest in the Te Manahuna economy moving forward and should be given opportunities and support to do so	<ul style="list-style-type: none"> <li>▪ A co-governance model for DMP delivery to provide opportunities for mana whenua to invest (IP, physical product development etc) in tourism opportunities.</li> </ul>	Presence
Demonstrate the Whare Wānaka in partnership. It should be a principle that any approvals by Government Agencies giving access or use to crown land where storytelling is involved should include mana whenua support. Mana whenua support should be documented as a requirement in the consents or concessions.	<ul style="list-style-type: none"> <li>▪ Work with mana whenua to co-design implementation of the Whare Wānaka concept</li> <li>▪ Mana whenua, agencies and community stakeholders collaborate on a framework to support storytelling projects using a range of methods,</li> <li>▪ Education program to support local rūnanga on cultural narratives.</li> <li>▪ Mana whenua are supported to protect their cultural narratives and intellectual property and tell their stories</li> <li>▪ Mana whenua are encouraged to engage in: visitor management, environmental protection, regenerative tourism, and climate change mitigation and adaptation.</li> </ul>	Story Telling
As a matter of course mana whenua should be able to provide guided storytelling in Te Manahuna.	<ul style="list-style-type: none"> <li>▪ Viewpoints/story boards.</li> <li>▪ All interpretation boards delivered by council or other agencies should be done in partnership with mana whenua.</li> <li>▪ All stories involving mana whenua IP will require prior agreement.</li> <li>▪ All agreements should acknowledge the time and resources required by mana whenua experts and should have reasonable timeframes and incorporate appropriate fee structures.</li> </ul>	Story Telling/Cultural IP

<sup>8</sup> <https://www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-projects/destination-management-guidelines/>  
<sup>9</sup> NAIA and EQMde 'Mana whenua Voice and Physical Manifestation' report to DMP governance and working groups. December 2021



Initiative/Recommendation	Description	Category
	<ul style="list-style-type: none"> <li>▪ Pou Whenua visual representation of mana whenua.</li> </ul>	
Translation errors in place names get rectified as soon as practical with the support of MDC and Toitū Te Whenua/Land Information New Zealand (LINZ) Engage with the broader work before the New Zealand Geographic Board Ngā Pou Taunaha o Aotearoa process.	<ul style="list-style-type: none"> <li>▪ Priorities.</li> <li>▪ Corrections.</li> <li>▪ Dual Place Names.</li> <li>▪ Other place names /naming conventions.</li> </ul>	Place Names
An interagency approach should be taken on this project for identified key sites within Te Manahuna with NZTA, DOC, MBIE, MDC and the Mana whenua Rūnanga. Design process to be mana whenua led.	<ul style="list-style-type: none"> <li>▪ Visible representation of mana whenua history, and access routes for journey mapping.</li> <li>▪ Public realm design with mana whenua elements.</li> </ul>	Pou Whenua
For any major works involving design elements from mana whenua, these are discussed, and importance is placed on design elements and inclusion of interpretation at an appropriate level.	<ul style="list-style-type: none"> <li>▪ Visible representation of Mana whenua history.</li> <li>▪ Public realm design with mana whenua elements.</li> </ul>	Public Realm Design
MDC, the partner Government Agencies and the Te Manahuna Rūnanga explore an appropriate location and process to give effect to specific aspirations for a learning centre, and other mana whenua specific community needs identified.	<ul style="list-style-type: none"> <li>▪ Digital extension to site interpretation by AR, VR, and other innovative techniques.</li> <li>▪ Whare ako.</li> </ul>	Visitor Journey
Continue cooperative work with Mana whenua and MDC to define those areas and the protection processes in the District Plan to identify wāhi tapu areas, and sites and identify where mana whenua approval on activity is required.	<ul style="list-style-type: none"> <li>▪ The tourism governance model includes mana whenua as a partner as part of co-governance.</li> <li>▪ Areas that are wāhi tapu are delineated and protected from undesired development.</li> <li>▪ Ongoing review of the co-governance model to ensure aspirations for mana whenua are being met.</li> </ul>	Wāhi Tapu Sites





Figure 9: Whare Wānaka

**What is a Whare Wānaka / Place of Learning**

The Destination Mackenzie plan is seeking to make enduring change and move to a regenerative tourism system through adding a 'depth of meaning' to the landscape. It is a concept which will guide the decision making, and support the change to a regenerative tourism system and model, promote the mana/honour voice and presence in Te Manahuna, connect the visitor with the natural environment to learn the concepts of stewardship and kaitiaki. These align with the vision and principles established for the project.

Whare wānaka are shared learning spaces - they allow visitors to experience and build understanding of a place - We want the visitor to see the importance of Te Manahuna, its natural wonders and of the stories and histories unique to this place. We want to tell the story of the shared whakapapa of the region. And we want the visitor to understand and share our values, connect to the values of Te Manahuna and take the concept of being a guardian of a place back to their own communities.





**3.5.2. Infrastructure Initiatives**

Table 3 outlines the infrastructure initiatives that have been identified as part of TMKU, but which are not included in the project recommendations matrix (Section 3.5) because they are core “building block” elements required to leverage private sector investment. If these infrastructure elements can be delivered on a timely basis, they will help ensure that private sector projects can be leveraged in a realistic timeframe.

These initiatives also highlight areas where policy clarity and enabling actions can reduce investment risk for the private sector investors and advance sustainable tourism development. This will help ensure that private sector projects can be leveraged within a realistic timeframe.

Implementing most of these initiatives will require securing funding from various government funding programs, Central government Departmental vote budgets specifically for different government agencies, via funding secured by MDC, and/or via forms of user-pays models.

Infrastructure and access to environmental resources are essential elements in destination management and building a sustainable visitor economy going forward. Since 2017, The World Economic Forum has included various elements of infrastructure as one of the core components of their destination competitive index: “infrastructure ... plays a vital role in travel and tourism competitiveness, serving as the arteries of the industry.”<sup>10</sup>

To assist the tourism sector, Ko Tātou LGNZ has identified “public infrastructure” as part of its recently released 30-year strategy which considers the “long-term issues [New Zealand’s] infrastructure is facing - including climate change, population growth and changing technology”.<sup>11</sup> This public infrastructure<sup>12</sup> is typically funded by the government (primarily local government but sometimes by or in partnership with Central Government).

Specific infrastructure initiatives identified as part of TMKU are summarised in Table 3 (note: where specific tourism project initiatives can be monetised or have a commercial element, these have been identified in the full tourism development project list in Section 3.5).

As these are infrastructure requirements that cut across short-, medium- and longer-term periods, funding options are not identified as options will change over time and as infrastructure requirements and priorities change as well.



<sup>10</sup> <https://www.weforum.org/agenda/2019/09/why-infrastructure-is-crucial-to-tourism-growth-and-competitiveness/>  
<sup>11</sup> <https://www.lgnz.co.nz/assets/PDFs/NZ-infrastructure-strategy.pdf>  
<sup>12</sup> Which can include which includes car parks, potable water supply, wastewater delivery and management, storm water, public toilets, footpaths, public information (digital and in person), access ways and urban public spaces, public roads, public transport, cycleways, conference

and multipurpose community use facilities, cruise facilities, freedom camping facilities, and recreation and sport facilities. They also include “mixed use” infrastructure where tourism demand impacts local residents and communities, who also typically use the infrastructure and a more specific “local tourism infrastructure” that supports tourism activity and is important to the visitor experience at individual locations.





Table 3: Overarching infrastructure strategic initiatives

Initiative/Recommendation	Description	Area (and environs)	Category	Timeframe
Integrated spatial plan (rural)	<p>An 'Integrated Spatial Plan (Rural)' that encompasses the entire Mackenzie district is required to provide landscape protection while identifying areas for tourism and recreational amenity and providing greater certainty to investors. The plan will need to set out pragmatic ways to protect the expansive landscapes and viewing corridors of Te Manahuna.</p> <p>Options for funding landscape protection will need to be considered which could focus on a user pays model with all relevant parties who impact the environment being contributors</p> <p>A focus on clustering tourism activities is created to support better management of rural lands and to reduce the risk of negative effects. Infrastructure support needs to be provided to act as a catalyst to encourage and support private sector investment</p> <p>The intent of this integrated spatial plan for TMKU includes helping to create workable planning mechanisms within the current and future legislative framework to help activate private sector investment in rural areas of the region and to provide greater certainty for investors and developers of tourism products. The outcomes will enable Mackenzie District Council, its residents, and ratepayers, to support appropriate forms of tourism development, based on an assessment of locations and natural processes and features, ensuring Council's responsibilities under various pieces of resource management legislation and government policy are met.</p>	Regional	Infrastructure	Short Term (2022-2031)
Development of view corridors & parking bays to Aoraki/Mount Cook	To improve the visitor amenity, visitor safety and overall experience.	Aoraki/Mount Cook	Urban Enhancements	Short Term (2022-2031)
Additional public toilet facilities throughout Te Manahuna	Additional public toilet facilities throughout Te Manahuna and with applying green technology for the best biodiversity outcomes.	Regional	Infrastructure	Short Term (2022-2031)
Address funding shortfalls in infrastructure implementation and shorten timeframes	Address funding shortfalls in infrastructure implementation and shorten timeframes, especially for critical urban centre infrastructure in Takapō, Twizel and Fairlie and relating to waste management, potable water, and sewerage systems.	Regional	Infrastructure	Short Term (2022-2031)
Tourism and rural community infrastructure	Including water, wastewater, road, broadband, and power capacity improvements to better match community and visitor demand levels.	Regional	Infrastructure	Short Term (2022-2031)
Wayfinding & connectivity.	To encourage visitor dispersal and improved journey mapping for self-drive circuits, cycle touring and walking tours, and spreading of visitor economy benefits more widely. To support this, The DMP supports the development of product to expand the cycle trails network as outlined in the MDC Parks and Trails Strategy.	Regional	Infrastructure	Short Term (2022-2031)
New expanded waste and sewerage management for Takapō.	Development of new/expanded waste and sewerage management for Takapō specifically as current demand is exceeding supply capability at times, and introduction of best practice green technology sustainable options.	Takapō	Infrastructure	Short Term (2022-2031)



Initiative/Recommendation	Description	Area (and environs)	Category	Timeframe
Parking study capacity assessment	Undertake a parking study to relocate car parking and expand capacity to better meet peak periods. Likely to require re-alignment of road network in Takapō commercial centre.	Takapō	Infrastructure	Short Term (2022-2031)
Traffic planning and management	Introduce traffic planning and management improvements to enhance pedestrian safety and improve pedestrian movements in town centres.	Takapō + Twizel	Infrastructure	Short Term (2022-2031)
Improved highway signage to Twizel	Develop improved highway signage to Twizel to encourage passing traffic to pull into the township to stop and visit as the township is off the highway and too easy to bypass.	Twizel	Infrastructure	Short Term (2022-2031)
Development of view corridors & parking bays to Aoraki Mount Cook	To improve the visitor amenity, visitor safety and overall experience.	Aoraki Mount Cook	Urban Enhancements	Short Term (2022-2031)
Infrastructure for motor homes/camper vans, camping generally	<p>Management of camping is complicated by the apparent availability of open space in the District, a patchwork of land tenure, and inconsistent tools and resources amongst land managers to respond to changing visitor behaviour. In the past, this has resulted in impacts on the environment, communities, and the visitor experience.</p> <p>Responsible camping needs to occur, and a user pays model should be implemented to recover costs. Competitive neutrality should also not disadvantage commercial caravan park operators who are trying to generate economic benefits for Te Manahuna, including local employment.</p> <p>To support higher environmental standards, address issues of ongoing maintenance costs for campsites, and improve the experience for visitors and the community, agencies and stakeholders will need to collaborate on an integrated approach to the management of camping. This work should consider the optimum supply and distribution of dedicated areas for different types of camping, advocacy and enforcement activity, and different charging models.</p> <p>To support higher environmental standards and address issues of ongoing maintenance costs for camping and caravanning sites, improved dedicated areas are suggested for Te Manahuna, with cost recovery via a user-pays model. Sites for caravan and camping should be caravan and camping holiday parks operated by commercial operators, or on designated caravan and camping areas managed by DOC.</p> <p>Freedom camping sites should be gradually phased out and/or user-pays systems introduced to allow for cost recovery to occur. Far higher environmental management standards need to be introduced and rate payers and the general taxpayer should not be required to subsidise those visiting and staying for free, as currently. It should be noted that DOC holds a contrary view and is not in favour of phasing out freedom camping.</p>	Regional	Infrastructure	Short - Medium Term (2022-2051)





Initiative/Recommendation	Description	Area (and environs)	Category	Timeframe
Worker accommodation for tourism and other sectors	<p>To actively encourage more workers for the tourism and hospitality sector specifically along with other industry sectors generally, specific worker accommodation units are proposed for Twizel, Takapo and Fairlie. In more remote locations such as the ski fields, onsite worker accommodation is likely to be needed to avoid daily commutes away from ski fields for accommodation.</p> <p>A model to help fund this requirement is being developed to support the ongoing need for worker accommodation and the growth in this need over the full length of this DMP but most especially for the next 30-year period. This is also seen as a key requirement to support attracting more workers to the region noting that the absence of adequate staff for the sector is expected to be prevalent for several years due to global staffing pressures and lack of adequate supply.</p>	Regional	Infrastructure	Short - Medium Term (2022-2051)
Expanded trails and tracks network	<p>Plan for and develop various trail and track networks to offer separate routes for mountain bikers, hikers, and trail runners. Some individual trail projects are noted separately within the project list.</p> <p>As a broader overarching initiative, is the need to create a regional wide series of trails to support current and future niche activity demand including linking sites of interest, ensuring all levels of difficulty can be catered for, to offer different trail and track lengths so multi-day options and day options, and identify and support new seasonal products which may include lake kayaking, mountain biking and/or hiking as part of guided experiences. The region has many opportunities on private land as well as public lands to be considered.</p>	Regional	Infrastructure	Short – Long Term (2022 – 2122)
Public infrastructure improvements at Lake Ruataniwha	Public infrastructure improvements are needed to encourage a stronger urban connection to the lake edge and higher urban design scape standards. This could include a pedestrian promenade along the lake edge, public seating and lighting, landscaping, a clear separation from vehicle movements (so pedestrian needs dominate), the development of an attractive urban edge to encourage retail and hospitality venues, and strong connectivity via cycleways and walking trails back to Twizel town centre.	Twizel	Infrastructure	Medium Term (2032-2051)
SH8 Pedestrian Management Plan	To link Takapō village to the commercial centre and improve pedestrian safety to encourage less use of private vehicle movements across SH8.	Takapō	Infrastructure	Medium Term (2032-2051)
Parking for tourist buses and mini vans in Takapō	Parking for tourist buses and mini vans in town, to avoid parking on the lake edge and/or too close to the Church of the Good Shepherd on the Lake Takapō foreshore. Drop-off areas are required while longer-term parking should ideally be off-site, so pedestrian movements dominate, not vehicles	Takapō	Infrastructure	Medium Term (2032-2051)



Initiative/Recommendation	Description	Area (and environs)	Category	Timeframe
Infrastructure at Lake McGregor and Lake Alexandrina	Noting that these are highly attractive lake environs with the potential for small-scale and gradual development of walking trails around the lakes and environs. This area has the potential, over time, to become an important visitor node, but where visitor numbers are able to be carefully controlled and managed to protect the wildlife and community values, potentially be capped at daily limits, akin to best practice carrying capacity levels so the careful balance between locals and visitors is not exceeded, and the environment is able to be better maintained for the future.	Takapō	Infrastructure	Medium Term (2032-2051)
Improved pedestrian connectivity & walkability	Most areas in urban centres are dominated by vehicle movements over pedestrian needs. This emphasis should be reversed to actively encourage more cycling and walking activities and to make all areas more pedestrian-friendly especially for those with young children, those with disabilities and those older residents and visitors.	Regional	Infrastructure	Medium Term (2032-2051)





**3.5.3. Environmental Initiatives**

As with the infrastructure initiatives mentioned above, the following environmental initiatives (Table 4) are essential for the delivery of TMKU's vision and guiding principles and should be treated as a core underpinning to guide the sustainable development of Te Manahuna's visitor economy over the next 100 years. Fundamentally, all projects proposed in this plan need to be designed, implemented, and operated to be culturally and environmentally sustainable.

Several of these initiatives relate specifically to Aoraki/Mount Cook National Park and are presented here to reflect the importance of finding short-, medium- and longer-term solutions for sustainability and regenerative tourism development. Aoraki/Mount Cook National Park is a major iconic destination for New Zealand. As a result, what is eventually developed in the park will have a significant impact on visitor flows, market demand, length of stay and visitor spending within Te Manahuna.

The partnership agreement between mana whenua and DOC for the future management of Aoraki/Mount Cook National Park may take some time to develop. It is not the role of TMKU to pre-

determine outcomes of partnership or statutory processes. This is work that needs to progress to support some initiatives in Table 4. The potential timeframe for determination of activations to address these environmental initiatives will likely take some time to get resourced to activate them. However, it is important that TMKU does not become impeded.

It also needs to be noted that there are some projects within the project recommendations matrix (see Section 3.5) that include environmental elements, but which are retained within the matrix because they contain commercial components and thus offer a mechanism for covering their costs.

Table 4: Overarching environmental strategic initiatives

Initiative/ Recommendation	Description	Area (and environs)	Category
<b>Assessment of transport options into Aoraki Mount Cook National Park</b>	<p>Transport presents a key opportunity to improve the visitor experience in the Park while managing the potential for impacts on cultural values and the natural environment. The determination of what is desired for improving transport options into Aoraki/Mount Cook rests with DOC and its partnership with Ngāi Tahu/mana whenua, which is still being developed, and the Park planning process. This initiative is presented now not with the intent of helping to determine a preferred outcome, but rather, to reflect the importance of this for Te Manahuna.</p> <p>Options that could be considered may include a park and ride facility possibly on SH8 near Twizel, to help reduce peak season private vehicle congestion within the Mount Cook Village, or possibly at Glentanner, or other sites yet to be identified. Looking longer-term, other options that might offer alternatives may include some type of people mover (a rail-based experience – monorail, hydrogen, or electric-powered buses) or creating a private vehicle entry model into the park where only electric, hydrogen, and other forms of renewable energy vehicles can enter. Many possible solutions to managing transport into the Park originate in the wider District and therefore need to be considered and integrated with other workstreams resulting from this plan.</p>	Aoraki/Mount Cook	Sustainability and Regenerative Tourism



Initiative/ Recommendation	Description	Area (and environs)	Category
<p><b>Best practice Visitor Management Solutions (to avoid negative impacts)</b></p>	<p>Pre-COVID large numbers of people visited the district during peak periods, resulting in congestion on key tracks and at popular locations such as the Church of the Good Shepherd, the start of the Hooker Valley Track, and various campsites. Infrastructure, including toilets and carparks, was put under pressure. The increased popularity of informal camping in vehicles led to many more people spending time in places that were not set up to cope. All these effects led to impacts, some compounding, on cultural values, the environment (including wildlife and ecosystems), and local communities, as well as diminishing the quality of the visitor experience. We need to investigate and implement best practice visitor management solutions to avoid future impacts, particularly once international visitor numbers start to come back to Te Manahuna.</p> <p>Options that could be investigated include: actively encouraging overnight stays in the District, including the National Park, to encourage a far better quality visitor experience; trying to spread visitation throughout the day, and avoiding the current trend of higher numbers from 10 am – midday especially; creating additional trails, places of interest and other experiences so visitors can be encouraged to stay longer (over 2 days or more) and visit more of the District, and determination of maximum daily numbers for experiences under pressure to ensure a quality visitor experience and to help protect and sustain the environment.</p>	<p>Regional</p>	<p>Sustainability and Regenerative Tourism</p>
<p><b>Natural quiet settings for the long-term</b></p>	<p>The natural quiet that can be experienced in many parts of the District is a hallmark of its appeal. Different natural quiet settings are needed for different locations within the Mackenzie District depending on the role they play and the noise pressures on that location. The introduction of ‘unnatural’ (human-caused) sounds from powered aircraft – including overflights, watercraft, vehicles, and other human activities – affects the naturalness of the soundscape. Noise can reduce the benefits people receive from being in a tranquil natural environment. It is noted that some visitor experiences are also enabled through motorised vehicles.</p> <p>Understanding the longer-term noise policy will be important. Future options could include electric aircraft and other low-noise options which need to be considered in the long term. The potential for designated aircraft corridors so their visual presence is tightly controlled and noise is noted.</p>	<p>Regional</p>	<p>Policy and Governance</p>
<p><b>Investigate issues and options for the long-term future of visitation to Aoraki/Mount Cook Village</b></p>	<p>Within the protected area network, operators and investors require certainty to enable them to invest and operate with confidence. Ongoing attention is required to determining satisfactory business timelines for existing operators.</p> <p>The impacts of climate change will influence the level of risk presented by natural hazards and likely consequences for both infrastructure and people. We need to understand these and the range of options that will be available in the future to manage these impacts and establish trigger points for any actions.</p> <p>The next severe earthquake on the Alpine Fault is likely to occur within the lifetime of most of us, or our children. This event is likely to result in a cascade of other hazards (such as landslides and flooding) for decades afterwards. It will have impacts across the South Island that could mean, despite disruption locally, that Aoraki experiences even more demand as a location to experience glaciers and snow. This suggests that it could be a trigger for changes to be initiated at Aoraki.</p> <p>Aoraki is highly significant to mana whenua and Ngāi Tahu, and all New Zealand for conservation and recreation, as well as being a location where people and businesses have invested heavily for decades. Any investigation needs to understand and take these factors into account.</p>	<p>Aoraki/Mount Cook</p>	<p>Policy and Governance</p>





Initiative/ Recommendation	Description	Area (and environs)	Category
<b>Climate change mitigation and adaptation</b>	<p>Climate change will have significant impacts on Te Manahuna in the long term, and the District can manage this best by proactively planning and preparing for likely changes. This could include developing resilient transport and communications options, visitor experiences that can be adapted and moved to different locations temporarily or over time and understanding the locations that will offer the most resilient future for significant investments.</p> <p>Glacier tourism is under threat from climate change and continued growth in carbon emissions will only accelerate these impacts. Stakeholders and agencies need to work together to mitigate the effects of climate change where they can. Every sector will have its part to play. In the future, Mackenzie District could be known for being on the leading edge of low emissions transport, accommodation, and experiences, and growing a sector that actively contributes to the protection, restoration, and regeneration of the natural environment.</p>	Regional	Sustainability and Regenerative Tourism
<b>Identification of macro disruptive changes</b>	<p>Major macro disruptive forces include events such as a rift of the alpine fault, which is likely to result in major changes to the mountain landscape and natural hazards due to rock movements and rockslides, river siltation and blockages, and subsequent destruction of roads, bridges, and other key supporting infrastructure.</p> <p>Another example is climate change impacts which are likely to see the reduction in snowfall, likely shrinkage of glaciers and ski fields, and associated impacts on flora and fauna due to an expected drier and warmer winter period and a wetter summer period, all of which may impact the visual amenity and scenic attractiveness of the region.</p> <p>Yet others include fast-moving global technological and social trends; widespread economic crises; pandemics; geopolitical events and wars; extreme weather events; and eruptions (elsewhere but with atmospheric effects). Often these events cascade or compound each other, and their timing and scale are hard to predict.</p> <p>Such events will most likely change the visitor economy and may necessitate very different product offerings for the longer term, all determined by the impact of macro disruptive forces. We can plan for these based on recent history and by recognising our inherent vulnerabilities.</p>	Regional	Sustainability and Regenerative Tourism



Initiative/ Recommendation	Description	Area (and environs)	Category
<p><b>Regenerative tourism opportunities</b></p>	<p>Regenerative tourism encourages and facilitates visitors to 'give back' to the places they visit and will be key to achieving the vision of this plan. Te Manahuna is home to precious species and ecosystems, many not found anywhere else, which are under pressure from multiple threats, and climate change will only increase this problem. A range of conservation projects is underway to combat this, including some at landscape scale. Cultural values are under similar pressure, often from the same threats, and the mana whenua initiatives in this plan aim to turn that around. Visitors' engagement with the challenges and a contribution to solutions could turn the situation around. The challenge is working out ways to make this happen at an operational or system level.</p> <p>Regenerative forms of tourism participation are not new, and Appendix 7 lists some examples of how visitors can contribute. While some have a natural affinity with nature and appreciate the need to help support its sustainability by personally undertaking initiatives and or donating to programs, others view nature more as a backdrop to their activities. If Te Manahuna is to become an exemplar of a regenerative tourism destination, different strategies will need to be used for a wider range of visitors, and interventions will need to be multi-layered.</p> <p>Opportunities for encouraging all visitors (domestic and international) to contribute directly to regenerative tourism programs whilst in the region need to be developed and encouraged by operators so their visitor markets see the benefit and need to be contributors. Success will require strong collaboration, the ability to pilot and learn from experience over time, and innovative business models. A range of supporting funding sources is likely to be required, particularly in the short term.</p>	<p>Regional</p>	<p>Sustainability and Regenerative Tourism</p>





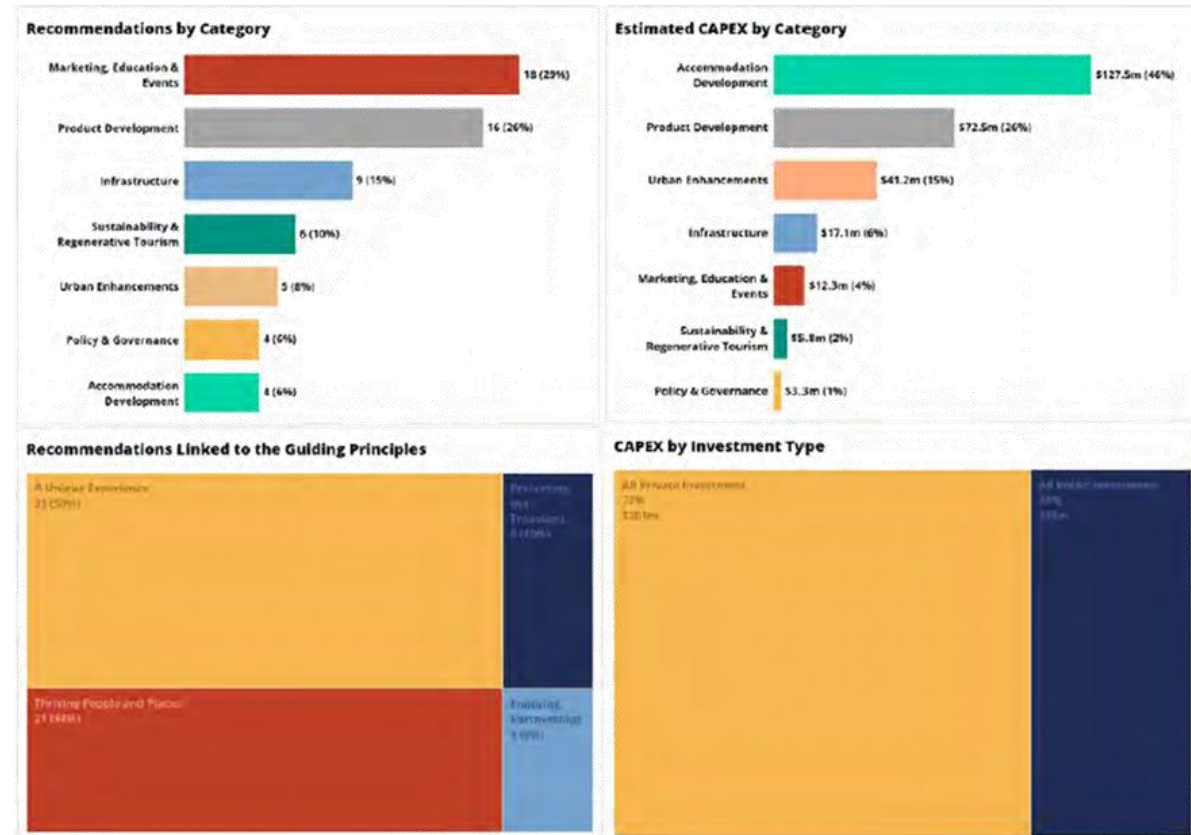
### 3.6. Project Recommendations

In total, 62 project recommendations have been identified as part of TMKU. They are tourism-focused and cover:

-  **Accommodation Development**
-  **Infrastructure**
-  **Marketing, Education & Events**
-  **Policy & Governance**
-  **Product Development**
-  **Urban Enhancements**

Many of the recommendations are supply-led and are aimed at introducing more commissionable products and private investment into Te Manahuna's tourism offering. Figure 10 provides a summary of all the recommendations identified, followed by the full list of projects linked to the guiding principles (Table 5).

Figure 10: Spatial overview of opportunities





TMKU and its outcomes are founded on an integrated approach. As such, any project can be seen to align with most of the guiding principles, albeit they may have an emphasis on some more than others. Table 5, therefore, indicates the primary alignment only.

Table 5: The full list of projects



### Principle 1 - Protecting our Treasures

- Place names - corrections and dual place names
- Whare Wānaka (Pou concept & storytelling)
- Improve the provision of community services
- Reassess location for Pukaki Airport
- Integrated management of camping across the District
- Sustainable travel and transport options
- Electric aviation



### Principle 2 - Enduring Partnerships

- Build stronger marketing partnerships with the two gateway destinations (Queenstown & Christchurch)
- Centralised experience hub (booking & information centre)
- Digital app and QR codes for visitor information and movement tracking
- Storytelling via viewpoints/storyboards



### Principle 3 - Thriving People and Places

- Address the lack of seasonal workers across Te Manahuna
- Assist smaller-scale operators with aspirations to grow
- Commercial centre expansion & upgrades for Takapō
- Community tourism awareness campaign
- Developer forum to guide urban improvements
- Enhanced, future-proofed visitor information services
- Ensure zoning changes in District Plan to encourage tourism
- Greater provision of community services
- Improve pedestrian safety and accessibility across SH8 to link Takapō village to the commercial centre
- Improved sense of arrival into Takapō
- Industry operator digital upskilling & service quality upskilling
- Integration of Fairlie with regional cycle & walking trail network
- A major presence for MDC in Twizel
- New/enhanced F&B experiences
- Position Fairlie as a visitor information gateway
- Redesign and build a new lakefront promenade and landscaping at Takapō
- Robust visitor data collection for Te Manahuna
- Simplify compliance process, regulations, and cost of implementing development for the industry
- Stronger destination link for Fairlie to some of the surrounding ski fields
- Sustainability in building code/urban form design guidelines
- Urban form improvements for Twizel



### Principle 4 - A Unique Experience

- Accommodation property (80+ rooms & conferencing)
- Agri-tourism & aqua-tourism experiences
- Agri-tourism showcase experience centre
- Assess growing A2O access from Takapō
- Cycle-walking trails linking Lakes Pukaki and Ruataniwha
- Destination branding
- Destination events toolkit
- Diversified accommodation mix
- Eco-huts on private or Crown Land outside of Aoraki/Mount Cook National Park linked to new trails
- Electric & solar house boats
- Experiences/attractions for youth and 18-35-year-olds
- Guided storytelling and digital application
- Lake Takapō on-lake recreational experiences
- Leverage the Te Araroa Trail as a national asset
- Links to cycleways and a hub for the A2O
- Mackenzie Great Walk (longer term if supported by DOC)
- Major fishing & hunting destination festival
- Max Smith storytelling experience
- Meridian & Genesis sites for hydro-tourism experiences
- New half- and full-day walking experiences
- New recreation/adventure destination events such as triathlons, ultras etc.
- New trails for accessing Aoraki/Mount Cook National Park
- Regional events calendar to promote regional events
- Series of seasonal fishing competitions
- Ski touring experiences (packaging & profiling)
- Takapō hillside activity precinct
- Trail running development
- Trails trust establishment to grow trail networks
- Unique dark skies experiences
- Visitor attraction and a lakeside promenade (to better link Twizel with Lake Ruataniwha)
- Water visitor experience hub with iconic design



### 3.7. The “Big Moves” for Te Manahuna

To determine the “Big Moves” for Te Manahuna, a weighted criteria has been developed and each project has been assessed against this. The methodology is further explained in Appendix 8 and the full results are included in Appendix 9.

Table 6 summarises the projects that achieved top-10, 20 and 30 scores. These are part of a larger list of 62 tourism development projects. Many of these should be able to be developed by the private sector and other non-government parties. As the projects are gradually activated, the next priority projects should be activated until eventually, each of the top 30 projects are underway and activated. Some of these projects are likely to be developed within the shorter term (next 10 years) while others are likely to take until the medium term (out to 2051) to be fully activated. Some projects will commence in the short term and remain ongoing through the medium term and potentially even longer.

In addition to these priority 30 projects, there are a further 32 projects which are offered for activation; as different priorities occur and government policies change, some of these later projects may need to be alleviated into the category of priority projects. The list should therefore be considered fluid, and subject to change.

Table 6: The Big Moves for Te Manahuna

#### Tier 1 (Top 10)

- Water visitor experience hub with iconic design
- Diversified accommodation mix
- Agri-tourism showcase experience
- Agri-tourism & aqua-tourism experiences
- Accommodation property (80+ rooms & conferencing)
- Destination branding
- Meridian & Genesis sites for hydro-tourism experiences
- Takapō hillside activity precinct
- Unique dark skies experiences
- Whare Wānaka (Pou concept & storytelling)

#### Tier 2 (Top 11-20)

- New/enhanced F&B experiences
- Eco-huts on private or Crown Land outside of Aoraki/Mount Cook National Park linked to new trails
- Electric & solar house boats
- Lake Takapō on-lake recreational experiences
- Max Smith storytelling experience
- New trails for accessing Aoraki/Mount Cook National Park
- Guided storytelling and digital application
- New half- and full-day walking experiences
- Sustainable travel and transport options
- Commercial centre expansion & upgrades for Takapō

#### Tier 3 (Top 21-30)

- Ski touring experiences (packaging & profiling)
- Centralised experience hub (booking & information centre)
- Series of seasonal fishing competitions
- Storytelling via viewpoints/storyboards
- Major fishing & hunting destination festival
- Improve the provision of community services
- Mackenzie branded multi-day walk
- Experiences/attractions for youth and 18-35-year-olds
- Stronger destination link for Fairlie to some of the surrounding ski fields
- Visitor attraction and a lakeside promenade (to better link Twizel with Lake Ruataniwha)



Tourism Mackenzie / Destination Mackenzie

Te Manahuna Tomorrow 38



**3.7.1. Tier 1 Projects (the Top 10)**

**3.7.1.1. Water visitor experience hub with iconic design**

Te Manahuna has a rich history of produce gathering associated with water, from extensive hydro schemes to historic and modern-day eel and salmon farming. There are also several very important and popular lakes and water bodies within Te Manahuna that are used for a variety of recreational and utility purposes.

The concept to create an immersive, all-weather visitor experience that tells Te Manahuna's water story has been proposed by a private operator/investor.

Concept design drawings have been developed to help explain the project vision and to demonstrate its quality. The project potentially could tell stories relating to:

- The historic stories of food-fish-eel harvesting by mana whenua and the significance of this over hundreds of years
- The development of the hydro schemes in the broader region (covering Mackenzie and Waitaki) and offering information and possibly dioramas to explain how the various hydro stations and hydro lakes link and their significance for New Zealand's hydroelectric generation capacity
- The modern-day story of high-quality salmon farming and its significance and growth potential with the option of being able to purchase fresh produce
- Space available for a future area dedicated to mana whenua and broader stories of significance and as a hub for guided tours to sites of significance
- Space potentially available for DOC if a new DOC relocated visitor centre was to be collocated with other major visitor experiences-attractions.

We consider this project could be a major game-changer for Te Manahuna, by offering an all-weather and high-quality attraction experience that can link the essence of the stories of Te Manahuna in one location and by applying innovation and technology. It is therefore important that these are private sector driven and funded projects (which government can support) and are activated to ensure that they act as catalysts to encourage other private sector investment and government funding initiatives to occur.

Though only at a concept stage of development, the project could potentially include elements such as the following.

- A shared information kiosk offering details to support many forms of visitor activity.
- An audio-visual experience to offer a range of experiences (hydro stories, mana whenua stories, aqua-tourism, fish farming, national park, and conservation etc.)
- A series of virtual and/or augmented reality attractions enabling the visitor to immerse themselves in various experiences (possibly as a paid entry experience).
- A retail and display area to offer visitors the opportunity for purchasing local produce.
- A café to offer all-day dining.

We are also aware that the project proponent is also considering other locations in neighbouring regions should the location within Te Manahuna be too challenging to activate.

**3.7.1.2. Diversified accommodation mix**

Te Manahuna does have a higher percentage of older-style commercial accommodation properties which appear to be marked down by consumer sentiment at times due to the value proposition they offer.

To encourage a broader visitor market to Te Manahuna, there is a need to focus on introducing a wider range of commercial

accommodation options. These could include all-weather glamping (or eco-pods), eco chalets, boutique hotels, youth hostels and serviced apartment complexes etc.

As a region with stunning landscapes and significant cycling and walking trails etc, a broader accommodation mix needs to be encouraged to offer products to encourage a wider range of visitor markets including:

- Mid-to-upper range lodges with a potential focus on fly fishing, hunting, trekking, and other lifestyle options.
- Glamping pods to offer all-year-round accommodation, especially on properties where the landowner may only wish to have 1-3 accommodation units.
- Eco cabins and huts to offer comfortable accommodation to support more walking and cycling trails and which may be able to link to the national park.
- Destination holiday parks offering a mix of powered RV and caravan sites, unpowered camping sites, cabins, and various amenities to particularly appeal to a family market.

It is assumed that over time, those existing accommodation properties which need refurbishment and updating will undertake this and collectively help Te Manahuna offer a more compelling overnight accommodation experience, especially as the region has a high percentage of day travellers coming through but not staying in Te Manahuna overnight.

It is also noted that many private landowners have sites, vistas and landscapes which are as appealing as higher-quality public-crown land. As such, the potential exists to develop new walking and cycling trails on private land and to include attractive commercial accommodation to enable visitors to stay on-site for 2- to 4-day walking-cycling experiences etc.

New forms of commercial accommodation should be considered throughout Te Manahuna including in the major towns along with various remote locations including on rural-farming properties





and around various waterways, as these are features of Te Manahuna and offer options for on-water and land-based activities.

In addition to commercial accommodation, we note the growth in Airbnbs which do offer an alternative form of accommodation, and often during peak holiday periods rather than all year round. While they are noted as an important element of the visitor economy, the direct and indirect employment they support is far lower than commercial accommodation options, so the economic benefits are far smaller for Te Manahuna.

**3.7.1.3. Agri-tourism showcase experience**

The agricultural sector has historically been the backbone of Te Manahuna's economy, and it is well-known nationwide as an important agricultural region. Te Manahuna generates a range of quality produce covering various seafood products to beef, dairy, lamb, venison, and many related products. As such, Te Manahuna has the potential to encourage greater wholesale, retail, and consumption (via restaurants, cafes etc) sales. For many visitors, finding a one-stop-shop experience that can showcase and provide the produce is an important asset. Fairlie, which is growing its reputation as a food hub could be the location for an agri-tourism showcase centre.

The concept, which could potentially commence as a pop-up facility, could involve using a higher profile main street location and could offer the following.

- Showcasing Te Manahuna's seasonal produce.
- Offering a retail space to offer the chance to purchase goods.
- Potentially offering a café to enable visitors to consume local produce.
- Being a hub for a variety of food trails so these could generate self-drive options to visit farm gate experiences (on a seasonal basis).
- Potentially as a hub for a farmers' market.

- Providing information on the range of cafes and restaurants within Te Manahuna and encouraging these to illustrate in their menus, product grown locally (to build on the notion of paddock to plate and slow food dining)
- Potentially being a hub for cooking competitions and cooking classes.
- Showcasing the major merino wool production companies which use the fibre grown in the region.

There may be existing food and beverage operators within Fairlie who have an interest in expanding their current business to include a showcase facility and which may be able to be developed on a staged basis.

**3.7.1.4. Agri-tourism & aqua-tourism experiences**

Te Manahuna already has several quality agriculture and aquaculture producers and is well-known as an agri-region. The region is recognised globally for its top-quality merino wool products and strong brand recognition. The potential exists to expand this profile by considering the following.

- Creating several food operator hubs throughout Te Manahuna to offer clusters of opportunity and to share information and ideas.
- Creating food trails to encourage visitors to disperse more widely throughout Te Manahuna and to encourage farm gate sales where possible.
- Development of farmers' markets in different locations throughout Te Manahuna.
- Encourage growers and producers to look to diversify their offering where this is possible and desirable.
- Develop the potential for paddock to plate experiences that can be marketed widely to domestic and international niche markets.

- Support sustainable agricultural practices as part of the wider need for environmental improvements for Te Manahuna.
- Finding ways of linking in the top fibre production companies using the merino wool from the region to build on the agri-tourism strength of the region and brand association.

Sustainability principles are noted as key drivers for TMKU which include the need to consider farming practices more generally and ways to improve their environmental impacts on land, waterways etc. This initiative is expected to be developed and expanded over the full period of TMKU being 2022-2120, reflecting potential changes in sustainability requirements and framing practices.

The marketing for this opportunity may provide for several different food experiences and food-based trails that could offer the visitor drive trail experiences, and cycle and walking options as well. The sector is expected to grow over time as more food experiences and produce suppliers come on stream. This in turn will make this initiative an evolving one as consumer demands change and potential environmental challenges also require changes to elements of agricultural production along with aquaculture development and changing products.

**3.7.1.5. Accommodation property (80+ rooms & conferencing)**

To support the development of events, there is a need to introduce a new, larger-scale accommodation property that also offers conferencing facilities.

Business tourism including functions, conferences, workshops, meetings, corporate retreats, and incentive travel provides a far higher yield when compared with most leisure holiday markets to Te Manahuna if there are facilities that are state-of-the-art to meet the needs of this very discerning market.





A medium-sized property offering circa 80-120 twin share rooms with conferencing and other facilities has the potential to grow a business market wishing to come for many of the reasons noted above.

This initiative may take some time before demand is sufficiently strong to support its viability but as this niche market prefers having all attendees stay within the one facility, there are very few options currently to attract this important and high-yielding niche market.

**3.7.1.6. Destination branding**

Te Manahuna has a variety of makers, creators, and producers. The opportunity exists to create a cohesive destination brand for Te Manahuna to profile the following.

- The quality of locally grown and made produce across Te Manahuna.
- The various arts, crafts, and creators within Te Manahuna.
- The activities and attractions that are available, including amazing treks, trails, and ski fields.
- The big landscapes on offer that cover significant waterways of national importance, and icons such as Aoraki/Mount Cook.

These elements provide the content for a quality destination brand, which can utilise and build on some stunning images and experiences for promotional and broad marketing purposes, and which can also offer a standard to which those wanting to use the brand in product marketing, need to reach. The use of the brand needs to be tightly managed, so quality isn't compromised.

The outcome of this initiative should be the creation of brand collateral, so quality regional products and experiences can become brand ambassadors so that in time, Te Manahuna's brand is synonymous with high country landscapes, high-quality experiences (and service standards) and top-quality products

including farming produce, aquaculture products, dining experiences, woollen fabrics etc.

The brand needs to transcend economic sectors and go beyond just a destination brand for tourism promotional purposes but needs to be tightly controlled and managed, so its value is protected.

**3.7.1.7. Meridian & Genesis sites for hydro-tourism experiences**

These are the two major hydro generating companies within Te Manahuna that control many waterways and surrounding areas for hydro generation. The potential exists to investigate ways to leverage the Meridian and Genesis sites for hydro-tourism experiences. These could include self-drive tours to the various hydro facilities in Te Manahuna, online information along with profiling sites of significance etc.

Telling the story of the creation of the hydro lakes and connected waterways could be undertaken within the proposed discovery centre, noted as project 1 above. In addition, a drive or cycle trail to visit key elements of the hydro experience could be created to encourage visitation to various sites around the hydro lakes and linked waterways.

**3.7.1.8. Takapō hillside activity precinct**

The current landholder has indicated a desire to create various visitor activity experiences to take people up to the top of the ridge line and allow them to mountain bike down using various trails and/or to introduce various downhill ride experiences (possibly a state-of-the-art zip line or similar options).

The precinct is expected to offer a mix of paid experiences and some free (walk-up) experiences to the ridgeline. With the potential for a people mover to enable those wishing to avail of the views from the top (including allowing those with disabilities or with young children and the elderly) amongst others to take an

environmentally friendly attraction experience potentially up and/or down.

**3.7.1.9. Unique dark skies experiences**

Te Manahuna has been a leader in dark skies experiences for several years. In more recent times, other regions have also introduced dark skies experiences so the uniqueness of the Takapō experience has been somewhat lost.

New value-added experiences are required to help reposition the dark skies experience as a leader nationally. This may include new under-dark skies dining, glamping pods allowing for under-star, all-weather and weatherproofed accommodation, and new interactive virtual and or augmented reality experiences to offer a more immersive experience into dark skies experiences.

**3.7.1.10. Whare Wānaka (Pou concept & storytelling)**

The potential Whare Wānaka experience could include a variety of elements including significant gateways into Te Manahuna with Pou erected in appropriate locations to guide visitors into the region and to offer a starting point for Māori storytelling. This needs to be developed by mana whenua to ensure they tell their stories in the manner they wish to and to ensure that their intellectual property is protected, and authenticity is maintained.

The mechanisms for evolving storytelling may take many forms including:

- Guided tour experiences with qualified and accredited guides to take visitors to places of interest and significance for mana whenua.
- Online information including apps, QR codes, websites etc to provide information for those doing self-guided tours.
- Introduction of Pou on arrival points into Te Manahuna.
- Use of Māori place names on regional locations.
- Other initiatives as determined by local Iwi.



**3.7.2. Tier 2 Projects (the Top 11-20)**

The following provides the Tier 2 projects identified and are offered to reflect those projects which can be focussed on once the initial Tier 1 projects have been commenced. There may also be circumstances where specific project funding and/or policy changes enable some of these projects to be activated more quickly.

A flexible approach is therefore required to ensure projects can be activated when resources and demand for these are well aligned.

**3.7.2.1. New/enhanced Food and Beverage (F&B) experiences**

An enhanced range of food and beverage experiences throughout Te Manahuna is needed to help meet ongoing local and visitor demand for a wider range of options.

These are expected to occur gradually and are most likely to be centred around the primary urban centres of Fairlie, Takapō, Twizel and possibly Aoraki/Mount Cook village.

A more flexible development approval process is going to need to be considered if options to allow for seasonal pop-up food and beverage outlets in both urban and rural locations are going to be considered.

Like other sites of potential future smaller-scale development are contemplated (areas around Lake Alexandrina and Lake MacGregor for example), ensuring options for food and beverage outlets (seasonal and permanent) need to be planned for and processes simplified to support their introduction.

**3.7.2.2. Eco-huts on private and Crown Lands outside of Aoraki/Mount Cook National Park**

The option exists for encouraging more half-day, day, and overnight walks outside of the national park and including the introduction of a new hut system to support this. New huts to offer a higher quality level of amenity to appeal to a far wider tramping market should be investigated. These should also include options for locating overnight huts just outside the national park boundary, which allow private operators to become investors in these forms of accommodation (and as part of self-guided and guided walking experiences).

**3.7.2.3. Electric & solar houseboats**

Te Manahuna has some stunning waterways, but these are currently underutilised. They offer the potential for kayaking, boating, and on-water accommodation. Houseboats already exist in the neighbouring Waitaki region, and we understand can offer an attractive form of accommodation.

While we appreciate that weather conditions on some of Te Manahuna's lakes can make for challenging on-water experiences, there are sufficient waterways and enough sheltered coves and inlets to offer seasonal houseboat accommodation options.

**3.7.2.4. New trails for accessing Aoraki/Mount Cook National Park and regional conservation lands**

While interest already exists on private land to create these opportunities, the opportunity should be investigated for potential trails which start outside of the national park and either end within the national park or which utilise parts of the national park for the experience along with external land holder sites.

This would create the potential need for different access points into the park but in the process, could provide a wider diversity of

products and offer possible future proving for the medium to longer-term especially.

**3.7.2.5. Lake Takapō on-lake recreational experiences**

Lake Takapō, with its unique colouring and magnificent mountain backdrops, forms a critical element of the appeal for not only the Takapō lakeside township but also as a key feature of Te Manahuna.

Options should be investigated for recreational experiences such as kayaking and boating etc. to offer options for trail networks around parts of the lake and to provide a diversity of products (cycling, trail running, tramping, kayaking etc).

While local feedback suggests that, at times, the water can be choppy and uncomfortable for travelling on due to weather conditions, it is noted that during other parts of the year, calmer conditions on the water can be experienced and which may offer different seasonal experiences.

**3.7.2.6. Max Smith storytelling experience**

Max Smith, the project engineer for the Upper Waitaki Hydroelectric Power Scheme in the 1970s, was the creator of the South Island's top rowing venue, Lake Ruataniwha, near Twizel which is an international quality rowing course. His work included a series of dams and canals across Te Manahuna.

The potential for a rowing sports centre of excellence, which can also tell the rowing story, could be considered for the location, or collocated with other experiences as proposed in the water visitor experience hub as a combined project.

**3.7.2.7. Guided storytelling and digital application**

Te Manahuna has a fascinating history which includes mana whenua stories along with colonial and more recent stories. Offering these as separate guided experiences and/or through



self-guided digital means will help provide a far better understanding of the richness of Te Manahuna, and the factors which make it, and its peoples, unique within a wider Aotearoa/New Zealand context.

Too often, storytelling-based experiences have been relegated to social history and museum display experiences. The opportunity exists to bring these alive within the natural environment, so visitors can follow historic journeys (to source produce, or to venture to sites of significance etc) and get out and experience the similar natural and man-made attributes, which Te Manahuna is famous for.

**3.7.2.8. New half- and full-day walking experiences**

Most visitors are often preferring to undertake shorter ½ day and day walks rather than overnight experiences.

There are sufficient higher quality locations throughout Te Manahuna on privately owned land, on Crown Land managed by LINZ and others, and within land managed by DOC.

These also avoid the necessity for huts, lodges, or glamping pods so the capital development costs can be far lower allowing numerous property owners to introduce new walking experiences. In turn, some of these may also be able to be packaged as various biathlon events etc to offer further product diversity for Te Manahuna.

**3.7.2.9. Sustainable travel and transport options**

The opportunity exists to reduce private vehicle dependency and introduce a mix of public transport options including the possibility of the following:

- Potential for park and ride to get people into the national park from a transit hub concept which could be close to Twizel.
- Public transit stations with car parking in Takapō.

- A network of electric charging stations in all town centres throughout Te Manahuna.
- A network of cycleways (not mountain biking trails) including road cycling pathways for safe (off-highway) travel between key locations throughout Te Manahuna.
- Identification of areas as safe pull-over stopping areas for capturing views and vistas through Te Manahuna and with signage to advise motorists of the amenity.
- Identification of other forms of sustainable travel and transport options that may extend into forms of aviation etc.

As new forms of sustainable energy are developed over the next 20-80 years, options for hydrogen-fuelled vehicles and the next generation of electric vehicles will open further options for sustainable transport to be explored and introduced.

What is important is the gradual reduction and dependency on private motor vehicle use throughout Te Manahuna and the ability to offer sufficient cost-effective alternatives, so visitors (coming for all purposes) are encouraged to get out into the region and stay longer.

The pre-COVID dominance of day visitors driving through Te Manahuna and not staying overnight, but only taking the occasional selfie, needs to be reversed.

**3.7.2.10. Commercial centre expansion & upgrades for Takapō**

The current urban design for the commercial centre of Takapō needs attention with pedestrian connectivity, road networks, buildings often facing away from the lake and generally poor lake edge amenities.

Over time, Takapō will grow and its tightly contained commercial centre will need to expand to cater for growth in general retail outlets, food and beverage, new forms of accommodation and attractions and experiences.

From a design aesthetic currently, Takapō does not resemble a high country or alpine town and needs to have urban design improvements to achieve higher design outcomes and appeal rather than only relying on the natural environment which is dominated by the lake and surrounding mountain ranges.

A forward focussing plan for urban expansion is needed to introduce better design guides for achieving a far more attractive and well-integrated urban feel. This should offer guidance on how the town should expand and grow over the next 100 years.

The same design principles should also apply for improvements in urban form and built style for all the other urban centres throughout Te Manahuna.

**3.7.3. Tier 3 Projects (the Top 21-30)**

The following set of projects reflects the Tier 3 projects which bring up the top 30 for Te Manahuna. While other projects (31-62) are still important, it is the top 30 which are seen to provide the best mix of catalyst projects to stimulate additional forms of tourism-based investment and development to occur.

**3.7.3.1. Ski touring experiences (packaging & profiling)**

Te Manahuna has several ski fields; some are smaller club fields and others are more expansive in facilities and terrain offered. There are also surrounding ski fields such as Ohau which are on the boundary with Mackenzie but technically in the Waitaki region.

While the larger and better well-known ski fields are in the Queenstown Lakes area, the international and domestic market is less familiar with the ski field opportunities within Mackenzie including Mount Dobson, Roundhill and Ohau.

Opportunities exist to package up the various local ski fields to offer a 5-7-day ski touring experience with options for accommodation in Takapō, Ohau Village and potentially other towns in Te Manahuna.





We note that the Australian inbound ski market is already a mature market that enjoys flying into Queenstown directly from Sydney, Melbourne, and Brisbane so they avoid the need to take longer flight options via Auckland and Christchurch. This makes the ski fields within Queenstown Lakes far more accessible than the 5.5-hour drive to Australian ski fields from Sydney or the 6-7-hour trip from Melbourne.

Mackenzie ski fields are therefore between 5.5-6.5 hours travel from Sydney, Melbourne, and Brisbane, and roughly 3.5-4.5 hours flight and drive from Auckland and Wellington.

Packaging up the ski fields into a composite product with accommodation is important to raise Te Manahuna's profile and encourage a ski market ex all the above major generating markets.

This also recognises the important existing Canterbury and Otago markets which have been the mainstay for ski visitors to Te Manahuna's ski fields historically.

**3.7.3.2. Centralised experience hub (booking & information centre) for Takapō**

The potential exists to create a booking and information centre in Takapō and ideally in a high-profile location close to the lakefront. The centre is needed as a hub for:

- Booth-office space for industry tour operators and others.
- A centralised information hub to share information but in a modern model where online data and information dominates.
- Chance for an audio-visual space to allow visitors to see footage of areas and their attractiveness, options for self-guided touring and areas where guided tours are far more desirable. This space can also double as a local cinema space for locals so should have multiple benefits.

- As a hub for tours to go from so a centralised starting point that is easy to find.
- Potential to offer a café or small retail outlet to support visitor needs.
- Potential for hire facilities for cycling, etc.

Over time, the centralised hub could also become the base for park and ride options to encourage the use of public transport and where renewable energy transport options are actively promoted from.

**3.7.3.3. Series of seasonal fishing competitions**

It is noted that over 40,000 recreational fishing licenses are sold each year within Te Manahuna, reflecting the scale of market interest in fishing.

To raise the profile of Te Manahuna as a recreational fishing destination, a series of fishing competitions could be introduced. This initiative is important to help raise the profile of Te Manahuna and to actively encourage more visitors to stay overnight rather than supporting the drive-through day visitor market which is currently dominant.

**3.7.3.4. Storytelling via viewpoints/storyboards**

Over time, different stories have the potential to be promoted to illustrate the depth of cultural and historic diversity of Te Manahuna and with links to surrounding regions as well.

The food trails which mana whenua historically followed to access eel and other aquatic and natural products etc is a good inter-regional example of this. And different forms of farming and stock route trails used over many years by different pre- and post-colonial communities, are further examples of storytelling.

Storyboards (digital and purpose-built as part of journeys) are useful ways to encourage a greater understanding of Te Manahuna and to enrich the benefits which the region offers.

They are also valuable in helping to promote the importance of environmental principles including the chance for quiet spaces, which are a feature of Te Manahuna.

Importantly, it is also important to recognise that while these storytelling opportunities are important value adds for the region, there are very few options for monetising these other than via guided tour experiences.

**3.7.3.5. Major fishing & hunting destination festival**

Te Manahuna has a plethora of hunting and fishing opportunities and already has several highly experienced and well-regarded guiding companies to help offer bespoke tours. Options exist to promote Te Manahuna for various fishing and hunting activities with the potential to establish a major festival that could offer:

- Various food offerings (fish, eel, venison etc.) as part of a food-based festival.
- Cooking courses and competitions on offer.
- Information on hunting and fishing.
- Potentially linking to competitions for different forms of game capture.
- The option of encouraging shooting via camera so visitors get to view game.

The potential should exist for a destination festival to be held in various parts of Te Manahuna so the economic benefits from it can be shared more widely.

**3.7.3.6. Improve the provision of community services**

Community feedback has highlighted the need for improved services and amenities to support not only a visitor market but also to support the growth of the local community. This may need to include services relating to the following.

- Pharmacy outlets.
- Medical services more generally.



- Links to various tertiary training institutions for upskilling and encouraging more youth to stay in Te Manahuna to study.
- Additional entertainment amenities for local families etc.

The challenge for Te Manahuna is that its local population base is limited (circa 5.5k) and its visitor markets pre-COVID were over 1m, so the region may need to rely more heavily on a returning visitor market to support the commercial viability of additional services which benefit the local community year-round.

**3.7.3.7. Mackenzie Branded Multi-Day Walk**

New Zealand has been very successful at developing and promoting its designated multi-day around the country. With a highly scenic and relatively undeveloped landscape, potential over the medium to long term may exist for a unique multi-day tramping experience to be created for Te Manahuna.

If a multi-day walk were to be developed consideration should be given to planning for its location, where overnight stays would need to be contemplated, and the need to ensure it was a unique experience so could be easily differentiated from existing great walks in other parts of New Zealand. Other considerations include appropriate management of risks for the user group, the costs of maintaining facilities, and the likely distribution of benefits

This initiative could potentially be a cross-regional trail linking parts of the Waitaki with Te Manahuna, like the Alps to Ocean and Te Araroa trails. With many different landowners (private and public), the potential may exist to offer all or part of the walk on private land holdings or a mix of public and private land holdings. The hydro lakes, tributaries, high country pastoral areas, and land managed by DOC all offer elements of potential appeal.

This initiative is something that may also have the potential to be driven as a partnership with mana whenua and various other

parties applying the overlying principles of TMKU for regenerative tourism and greater mana whenua involvement in Te Manahuna’s visitor economy

**3.7.3.8. Stronger destination link for Fairlie to some of the surrounding ski fields**

The opportunity to support a stronger link between Mount Dobson ski field and other fields with Fairlie needs to be explored, so Fairlie can develop as a further regional hub for both skiing and other outdoor pursuits.

This will also help to avoid too much visitor pressure on Takapō and allow for the economic benefits of the visitor economy to be spread more widely.

**3.7.3.9. Experiences/attractions for youth and 18-35-year-olds**

Community feedback, along with the audit undertaken, indicates there are limited family market options for Te Manahuna’s visitor markets, especially for the younger market and extending to the under-35s.

There is a need to introduce facilities to support a local under 35 market including different amenities to support younger and older age groups with options including:

- An indoor climbing centre to support local recreational needs, to offer a wet weather option for younger visitors and potentially as part of an elite/high-performance training venue for NZ athletes and possibly international athletes wishing to train in NZ
- A possible pump track to offer cycle training for those of all ages
- A larger gym facility with potential for parkour and other sports such as trampolining etc

- An entertainment centre (based in Twizel) to offer locals and visitors a cinema venue
- Potential for an equestrian facility to encourage horse treks and a training venue and noting that there are several riding clubs within the broader region who are often after venues to support not only training but also as a venue for dressage and other equestrian events
- Opportunities for rowing on Lake Ruataniwha which is well recognised as a nationally significant rowing course and encouraging the development of the sport locally.

**3.7.3.10. Visitor attraction and a lakeside promenade (to better link Twizel with Lake Ruataniwha)**

There is a need to create a strong link between Twizel town centre and Lake Ruataniwha which offers an exciting and attractive natural asset to help support the positioning of Twizel as a more attractive destination hub for Te Manahuna.

Options for the development could include:

- the creation of a major lakeside boardwalk to create a promenade for locals and visitors to use;
- play and activity spaces;
- the introduction of quality landscaping, seating, and lighting; and
- development of spaces for pop-up seasonal retail and hospitality outlets.

A feasibility study should also be undertaken to assess the potential to develop a Rowing Centre of Excellence high-performance centre to encourage far more rowing regattas, events, and training (noting that this location is one of only two recognised national and international quality rowing venues in New Zealand, the other being at Lake Karapiro in the North Island).



### 3.8. Cost Benefit Analysis

A robust economic assessment was integrated into TMKU's process. The economic assessment considered the historic trends, and a 'do nothing future' as well as three growth scenarios. Underlying economic issues, like labour constraints and the need for productivity growth, must be incorporated into the DMP as well as other development programmes to ensure that the true potential of the area is reached.

The assessment highlighted the need to integrate productivity into the overall economic development narrative for the district. The scenario analysis clearly pointed towards scenario 3 as the preferred option, showing alignment between the economic value of shifting towards the higher value visitor sector and the wider principles that the DMP is working towards.

The DMP is a long-term initiative, with the delivery and implementation of individual projects contributing towards achieving the goals and aspirations. The project list was assessed and compared against that anticipated shift in visitor numbers and spending estimates to determine if the DMP would leave the community better off. A social cost-benefit assessment (CBA) framework was used to shed light on the relationships between the costs and benefits. The projects were assessed collectively, and not one-by-one basis<sup>13</sup>.

The CBA integrates a range of costs and benefits, ranging from deadweight losses associated with public funding to the consumer and producers' surplus arising from the additional (new) activity and spending patterns.

The Cost-Benefit Ratio (CBR) provides a useful way to show if the projects deliver benefits that will outweigh the cost (>1 means that the benefits are greater than the costs) and if this is the case, then the community would be better off. A range of discount rates were used to vary the time value (or preference) of money. The default discount rate is 5%<sup>14</sup>.

**The CBA returns a solid ratio of 1.65.** The ratio remains positive even under several pessimistic settings (higher costs, slower growth, and higher discount rates and so forth). This highlights the **robustness of the cost-benefit outcomes.** Over the long term, the DMP would deliver annual gains to the local and NZ community to the value of \$12.4m (average per annum). These estimates exclude the potential gains in important values associated with cultural and environmental improvements that are difficult to express in monetary terms.

**Securing the overall gains and positive outcomes will require successful implementation and delivery over the short, medium, and long terms.**

Implementation challenges could be encountered but the modelling simulation shows that some volatility in the cost-to-benefit relationship can be expected over the short term. This can be expected and is related to the market changing and responding to change in delivery approaches, how the market recovers and positioning for the long-term activities and the overall change. Next a period of high annual net positions is identified, capturing the move towards high(er) value activities. It is important to look past the short-term pressures and acknowledge that the true benefits of the DMP and the repositioning will only be truly felt over the long term.

**The analysis returns a solid cost benefit ratio ranging between 1.63 and 1.67. This underscores the important point that the DMP is not a quick fix, but a transitioning, and restructuring of the visitor economy that would deliver the outcomes over the long term.**

<sup>13</sup> Such an assessment would be needed for the projects as they are designed in more detail and to inform delivery.

<sup>14</sup> This is in line with NZ Treasury and Waka Kotahi's rates. Considering the projects and the duration, it is be argued that this rate is towards the upper end of the spectrum.







## 4.1. Implementing the Strategic Initiatives

Table 7 - Table 9 provides the suggested pathway for the implementation of the strategic initiatives identified in Section 3.5. Some can be initiated through agency planning and prioritisation systems as resource allows, others may need further testing via statutory or legislative processes to determine if and how they happen. The second group require a long-term view, but this does not mean that work to test and shape them should not commence in the short term. Often, they link to national policy initiatives for which Te Manahuna can take a leadership role and potentially act as both a pilot area to test options and an exemplar region to help government apply initiatives nationwide when an agreed approach is confirmed. Policy links include the following.

- **Decarbonising the New Zealand economy**<sup>15</sup> (including the tourism sector): Focusing activities on transport systems and mobilities, and the agricultural sector
- **Mitigating environmental damage from tourism**<sup>16</sup> – funded via polluter/user pays mechanisms, with recommendations including greater use of user-pays mechanisms, better management of freedom camping, and better infrastructure design.
- **Giving back – to nature and people – via Regenerative Tourism initiatives**<sup>17</sup>: With future tourism development and management focussed on regenerative tourism that contributes to the unique essence, culture and health of local communities and their places” as well as generating durable financial returns to support further regenerative development”. These principles are embodied in MBEI’s Destination Management Guidelines<sup>18</sup> which provide specific guidance to this project.
- **Partnership with Mana whenua to fulfil the requirements of Te Tiriti o Waitangi**<sup>19</sup>, as guidance to the above, and enhancements to Māori culture and the visitor experience.
- **Climate Change Adaptation**<sup>20</sup>: Building resilience to our changing climate will mean we can better protect our communities, homes, and livelihoods. Our natural and cultural treasures are also at risk. Adaptation planning is essential at national, regional, and local levels, and we all have a role to play.

Table 7: Pathways to implement the strategic initiatives – mana whenua initiatives

Initiative/Recommendation	Actions	What	Timeframe	Budget
Equal share (mana whenua/wider community) participation in future Governance Structure for the delivery of this 100-year DMP.	<ul style="list-style-type: none"> <li>▪ Determination of a co-governance model which meets criteria established by mana whenua and agreed to at a national level by the government.</li> </ul>	Governance	Short term	< \$50k
A commitment to the core concepts of Protection, Presence and Pride for Mana whenua in Te Manahuna.	<ul style="list-style-type: none"> <li>▪ Promotion of cultural narratives developed and controlled by local rūnanga/mana whenua.</li> </ul>	Presence	Short term	To be scoped and costed in future stages
Mana whenua should have to opportunity to invest in the Te Manahuna economy moving forward and should be given opportunities and support to do so	<ul style="list-style-type: none"> <li>▪ A co-governance model for DMP delivery to provide opportunities for mana whenua to invest (IP, physical product development etc) in tourism opportunities.</li> </ul>	Presence	Short -long term	To be scoped and costed in future stages

<sup>15</sup> Ināia tonu nei: a low emissions future for Aotearoa, NZ Climate Change Commission, Wellington, (31 May 2021) and Te Hau Mārohi Ki Anamata towards A Productive, Sustainable And Inclusive Economy: Aotearoa New Zealand’s First Emissions Reduction Plan, Ministry For The Environment Manatō Mō Te Taiāo, Po Box 10362, Wellington 6143, New Zealand (Ref Me1639), 16 May 2022

<sup>16</sup> Not 100% Pure – but four steps closer to sustainable tourism, Parliamentary commissioner for the Environment, February 2021

<sup>17</sup> We are Aotearoa, The Tourism Futures Taskforce, Interim Report, MBEI, Wellington NZ December 2020

<sup>18</sup> Destination Management Guidelines, MBEI, 2020

<sup>19</sup> <https://teara.govt.nz/en/principles-of-the-treaty-of-waitangi-nga-matapono-o-te-tiriti>

<sup>20</sup> Ref - Climate adaptation » Climate Change Commission (climatecommission.govt.nz)





Initiative/Recommendation	Actions	What	Timeframe	Budget
Demonstrate the Whare Wānaka in partnership. It should be a principle that any approvals by Government Agencies giving access or use to crown land where storytelling is involved should require Mana whenua support and be documented in the consents or concessions.	<ul style="list-style-type: none"> <li>Work with mana whenua to co-design implementation of the Whare Wānaka concept</li> <li>Mana whenua, agencies and community stakeholders collaborate on a framework to support storytelling projects using a range of methods.</li> <li>Education program to support local rūnanga on cultural narratives.</li> <li>Mana whenua are supported to protect their cultural narratives and intellectual property and tell their stories</li> <li>Mana whenua are encouraged to engage in: visitor management, environmental protection, regenerative tourism, and climate change mitigation and adaptation.</li> </ul>	Story Telling	Short-medium term	To be scoped and costed in future stages
Mana whenua should be able to provide guided storytelling in Te Manahuna.	<ul style="list-style-type: none"> <li>Viewpoints/story boards.</li> <li>All interpretation boards delivered by council or other agencies should be done in partnership with mana whenua.</li> <li>All stories involving mana whenua IP will require prior agreement.</li> <li>All agreements should acknowledge the time and resources required by mana whenua experts and should have reasonable timeframes and incorporate appropriate fee structures.</li> <li>Pou Whenua visual representation of mana whenua.</li> </ul>	Story Telling/Cultural IP	Short-long term	>\$1m
Translation errors in place names get rectified as soon as practical with the support of MDC and Toitū Te Whenua/Land Information New Zealand (LINZ) Engage with the broader work before the New Zealand Geographic Board Ngā Pou Taunaha o Aotearoa process.	<ul style="list-style-type: none"> <li>Priorities.</li> <li>Corrections.</li> <li>Dual Place Names.</li> <li>Other place names /naming conventions.</li> </ul>	Place Names	Short term	<\$1m
An interagency approach should be taken on this project for identified key sites within Te Manahuna with NZTA, DOC, MBIE, MDC and the Mana whenua Rūnanga. Design process to be mana whenua led.	<ul style="list-style-type: none"> <li>Visible representation of mana whenua history, and access routes for journey mapping.</li> <li>Public realm design with mana whenua elements.</li> </ul>	Pou Whenua	Short term	<\$0.5m
For any major works involving design elements from mana whenua, these are discussed, and importance is placed on design elements and inclusion of interpretation at an appropriate level.	<ul style="list-style-type: none"> <li>Visible representation of Mana whenua history.</li> <li>Public realm design with mana whenua elements.</li> </ul>	Public Realm Design	Short-medium term	Est. \$1m
MDC, the partner Government Agencies and the Te Manahuna Rūnanga explore an appropriate location and process to give effect to specific aspirations for a learning centre, and other mana whenua specific community needs identified.	<ul style="list-style-type: none"> <li>Digital extension to site interpretation by AR, VR, and other innovative techniques.</li> <li>Whare ako.</li> </ul>	Visitor Journey	Short-medium term	Est. \$10m





Initiative/Recommendation	Actions	What	Timeframe	Budget
Continue cooperative work with Mana whenua and MDC to define those areas and the protection processes in the District Plan to identify wāhi tapu areas, and sites and identify where mana whenua approval on activity is required.	<ul style="list-style-type: none"> <li>The tourism governance model includes mana whenua as a partner as part of co-governance.</li> <li>Areas that are wāhi tapu are delineated and protected from undesired development.</li> <li>Ongoing review of the co-governance model to ensure aspirations for mana whenua are being met.</li> </ul>	Wāhi Tapu Sites	Short term	To be scoped and costed in future stages

Table 8: Overarching infrastructure strategic initiatives - infrastructure initiatives

Initiative/Recommendation	Action	Where	Timeframe	Budget
Integrated spatial plan (rural)	<ul style="list-style-type: none"> <li>An 'Integrated Spatial Plan (Rural)' that encompasses the entire Mackenzie district to provide landscape protection while identifying areas for tourism and recreational amenity and providing greater certainty to investors.</li> <li>The plan will need to set out pragmatic ways to protect the expansive landscapes and viewing corridors of Te Manahuna.</li> <li>Options for funding landscape protection will need to be considered which could focus on a user pays model with all relevant parties who impact the environment being contributors</li> <li>A focus on clustering tourism activities is created to support better management of rural lands and to reduce the risk of negative effects</li> <li>Infrastructure support needs to be provided to act as a catalyst to encourage and support private sector investment</li> <li>The intent of this integrated spatial plan for TMKU includes helping to create workable planning mechanisms within the current and future legislative framework to help activate private sector investment in rural areas of the region and to provide greater certainty for investors and developers of tourism products. The outcomes will enable Mackenzie District Council, its residents, and ratepayers, to support appropriate forms of tourism development, based on the assessment of locations and natural processes and features, ensuring Council's responsibilities under various pieces of resource management legislation and government policy are met.</li> </ul>	Regional	Short Term (2022-2031)	Est. \$0.3m
Development of view corridors & parking bays to Aoraki/Mount Cook	<ul style="list-style-type: none"> <li>To improve the visitor amenity, visitor safety and overall experience.</li> </ul>	Aoraki/Mount Cook	Short -medium Term (2022-2031)	<\$1.5m
Additional public toilet facilities throughout Te Manahuna.	<ul style="list-style-type: none"> <li>Additional public toilet facilities throughout Te Manahuna and with applying green technology for the best biodiversity outcomes.</li> </ul>	Regional	Short Term (2022-2031)	Est. \$5m



Initiative/Recommendation	Action	Where	Timeframe	Budget
Address funding shortfalls in infrastructure implementation and shorten timeframes.	<ul style="list-style-type: none"> <li>Address funding shortfalls in infrastructure implementation and shorten timeframes, especially for critical urban centre infrastructure in Takapō, Twizel and Fairlie and relating to waste management, potable water, and sewerage systems.</li> </ul>	Regional	Short Term (2022-2031)	>\$10m
Tourism and rural community infrastructure.	<ul style="list-style-type: none"> <li>Including water, wastewater, road, broadband, and power capacity improvements to better match community and visitor demand levels.</li> </ul>	Regional	Short Term (2022-2031)	To be scoped and costed in future stages
Wayfinding & connectivity.	<ul style="list-style-type: none"> <li>To encourage visitor dispersal and improved journey mapping for self-drive circuits, cycle touring and walking tours, and spreading of visitor economy benefits more widely</li> </ul>	Regional	Short-medium Term (2022-2051)	>\$5m
New expanded waste and sewage management for Takapō.	<ul style="list-style-type: none"> <li>Development of new/expanded waste and sewage management for Takapō specifically as current demand is exceeding supply capability at times, and introduction of best practice green technology sustainable options.</li> </ul>	Takapō	Short Term (2022-2031)	To be scoped and costed in future stages
Parking study capacity assessment.	<ul style="list-style-type: none"> <li>Undertake a parking study to relocate car parking and expand capacity to better meet peak periods. Likely to require re-alignment of road network in Takapō commercial centre.</li> </ul>	Takapō	Short Term (2022-2031)	\$100k
Traffic planning and management.	<ul style="list-style-type: none"> <li>Introduce traffic planning and management improvements to enhance pedestrian safety and improve pedestrian movements in town centres.</li> </ul>	Takapō + Twizel	Short Term (2022-2031)	<\$5m
Improved highway signage to Twizel	<ul style="list-style-type: none"> <li>Develop improved highway signage to Twizel to encourage passing traffic to pull into the township to stop and visit as the township is off the highway and too easy to bypass.</li> </ul>	Twizel	Short Term (2022-2031)	<\$100k
Infrastructure for motor homes/camper vans, camping generally	<ul style="list-style-type: none"> <li>Responsible camping needs to occur, and a user pays model must be implemented to recover costs. Competitive neutrality should also not disadvantage commercial caravan park operators who are trying to generate economic benefits for Te Manahuna, including local employment.</li> <li>Sites for caravan and camping should be caravan and camping holiday parks operated by commercial operators, or on designated caravan and camping areas managed by DOC. Freedom camping sites should be gradually phased out and/or user-pays systems introduced to allow for cost recovery to occur.</li> <li>Far higher environmental management standards need to be introduced and rate payers and the general taxpayer should not be required to subsidise those visiting and staying for free, as currently.</li> <li>Competitive neutrality should also not disadvantage commercial caravan park operators who are trying to generate economic benefits for Te Manahuna, including local employment.</li> </ul>	Regional	Short - Medium Term (2022-2051)	To be scoped and costed in future stages



Initiative/Recommendation	Action	Where	Timeframe	Budget
Worker accommodation for tourism and other sectors	<ul style="list-style-type: none"> <li>To actively encourage more workers for the tourism and hospitality sector specifically along with other industry sectors generally, specific worker accommodation units are proposed for Twizel, Takapō and Fairlie. In more remote locations such as the ski fields, onsite worker accommodation is likely to be needed to avoid long journeys away from ski fields for accommodation.</li> <li>A model to help fund this requirement is being developed to support the ongoing need for worker accommodation and the growth in this need over the full length of this DMP but most especially for the next 30-year period.</li> </ul>	Regional	Short - Medium Term (2022-2051)	\$20m
Expanded trails and tracks network	<ul style="list-style-type: none"> <li>Plan and assess trail and track options to link into existing trails and tracks where appropriate and for accessing new areas of the region</li> <li>Assess the potential for multi-trail/track activities to support guided tours (linking lake kayaking, walking tracks and mountain biking trails etc.)</li> <li>Determine ratings of difficulty to match various markets</li> <li>Focus on opportunities to develop on private land where possible and where appropriate, linking onto public lands</li> <li>Encourage day and overnight track and trail options with a focus on encouraging stronger overnight visitation</li> <li>Use towns in the region as base hubs for accommodation at the start and end of trails where possible</li> <li>Ensure ongoing maintenance budgets to protect trail quality and avoid environmental impacts</li> </ul>	Regional	Short – Long Term (2022 – 2122)	>\$10m
Public infrastructure improvements at Lake Ruataniwha.	<ul style="list-style-type: none"> <li>This could include a pedestrian promenade along the lake edge, public seating and lighting, landscaping, a clear separation from vehicle movements (so pedestrian needs dominate), the development of an attractive urban edge to encourage retail and hospitality venues, and strong connectivity via cycleways and walking trails back to Twizel town centre.</li> </ul>	Twizel	Medium Term (2032-2051)	<\$20m
SH8 underpass at Takapō village	<ul style="list-style-type: none"> <li>To link Takapō village to the commercial centre and improve pedestrian safety to encourage less use of private vehicle movements across SH8.</li> </ul>	Takapō	Medium Term (2032-2051)	To be scoped and costed in future stages
Parking for tourist buses and mini vans in Takapō	<ul style="list-style-type: none"> <li>Parking for tourist buses and mini vans in town, to avoid parking on the lake edge and/or too close to the Church of the Good Shepherd on the Lake Takapō foreshore.</li> <li>Drop-off areas are required while longer-term parking should ideally be off-site, so pedestrian movements dominate, not vehicles</li> </ul>	Takapō	Medium Term (2032-2051)	<\$10m





Initiative/Recommendation	Action	Where	Timeframe	Budget
Infrastructure at Lake McGregor and Lake Alexandrina	<ul style="list-style-type: none"> <li>This area has the potential, over time, to become an important visitor node, but where visitor numbers and local community numbers can be managed to protect the wildlife and community values, potentially be capped at daily limits, akin to best practice management levels</li> <li>Walking tracks, signage, seating, small-scale jetties</li> </ul>	Takapō	Medium Term (2032-2051)	<\$10m
Improved pedestrian connectivity & walkability	<ul style="list-style-type: none"> <li>Most areas in urban centres are dominated by vehicle movements over pedestrian needs. This emphasis should be reversed to actively encourage more cycling and walking activities and to make all areas more pedestrian-friendly especially for those with young children, those with disabilities and those older residents and visitors.</li> </ul>	Regional	Medium Term (2032-2051)	>\$20m

The following strategic environmental initiatives do not have a timeframe allocated as they are expected to be actioned over the 100-year lifespan of this DMP.

Table 9: Pathways to implement the strategic initiatives – environmental initiatives

Initiative/ Recommendation	Actions	Where	Budget
<b>Assessment of transport options into Aoraki Mount Cook National Park</b>	<ul style="list-style-type: none"> <li>The determination of what is desired for improving transport options into Aoraki/Mount Cook rests with DOC and its partnership with Ngāi Tahu/mana whenua, which is still being developed, and the Park planning process. This initiative is presented now not with the intent of helping to determine a preferred outcome, but rather, to reflect the importance of this for Te Manahuna.</li> <li>Options that could be considered may include a park and ride facility possibly on SH8 near Twizel, to help reduce peak season private vehicle congestion within the Mount Cook Village, or possibly at Glentanner, or other sites yet to be identified.</li> <li>Looking longer-term, other options that might offer alternatives may include some type of people mover (a rail-based experience – monorail, hydrogen, or electric-powered buses) or creating a private vehicle entry model into the park where only electric, hydrogen, and other forms of renewable energy vehicles can enter. Many possible solutions to managing transport into the Park originate in the wider District, and therefore need to be considered and integrated with other workstreams resulting from this plan.</li> </ul>	Aoraki/Mount Cook	TBA



Initiative/ Recommendation	Actions	Where	Budget
<p><b>Best practice Visitor Management Solutions (to avoid negative impacts)</b></p>	<ul style="list-style-type: none"> <li>Pre-COVID large numbers of people visited the District during peak periods, resulting in congestion on key tracks and at popular locations such as the Church of the Good Shepherd, the start of the Hooker Valley Track, and various campsites. Infrastructure, including toilets and carparks, was put under pressure. The increased popularity of informal camping in vehicles led to many more people spending time in places that were not set up to cope. All these effects led to impacts, some compounding, on cultural values, the environment (including wildlife and ecosystems), and local communities, as well as diminishing the quality of the visitor experience. We need to investigate and implement best practice visitor management solutions to avoid future impacts, particularly once international visitor numbers start to come back to Te Manahuna.</li> <li>Options that could be investigated include: actively encouraging overnight stays in the District, including the National Park, with the aim of encouraging a far better quality visitor experience; trying to spread visitation throughout the day, and avoiding the current trend of higher numbers from 10 am – midday especially; creating additional trails, places of interest and other experiences so visitors can be encouraged to stay longer (over 2 days or more) and visit more of the District, and determination of maximum daily numbers for experiences under pressure to ensure a quality visitor experience and to help protect and sustain the environment.</li> </ul>	<p>Regional (where required)</p>	<p>TBA</p>
<p><b>Natural quiet settings for the long-term</b></p>	<ul style="list-style-type: none"> <li>The natural quiet that can be experienced in many parts of the District is a hallmark of its appeal. Different natural quiet settings are needed for different locations within the Mackenzie District depending on the role they play and the noise pressures on that location. The introduction of ‘unnatural’ (human-caused) sounds from powered aircraft – including overflights, watercraft, vehicles, and other human activities – affects the naturalness of the soundscape. Noise can reduce the benefits people receive from being in a tranquil natural environment. It is noted that some visitor experiences are also enabled through motorised vehicles.</li> <li>Understanding what the longer-term noise policy will be important. Future options could include electric aircraft and other low-noise options which need to be considered in the long term. The potential for designated aircraft corridors so their visual presence is tightly controlled and noise is noted.</li> </ul>	<p>Regional</p>	<p>TBA</p>
<p><b>Investigate issues and options for the long-term future of visitation to Aoraki/Mount Cook Village</b></p>	<ul style="list-style-type: none"> <li>Within the protected area network, operators and investors require certainty to enable them to invest and operate with confidence. Ongoing attention is required to determining satisfactory business timelines for existing operators along while enabling DOC to discharge its regulatory and mana whenua obligations.</li> <li>The impacts of climate change will influence the level of risk presented by natural hazards and likely consequences for both infrastructure and people. We need to understand these and the range of options that will be available in the future to manage these impacts and establish trigger points for any actions.</li> <li>The next severe earthquake on the Alpine Fault is likely to occur within the lifetime of most of us, or our children. This event is likely to result in a cascade of other hazards (such as landslides and flooding) for decades afterwards. It will have impacts across the South Island that could mean, despite disruption locally, that Aoraki experiences even more demand as a location to experience glaciers and snow. This suggests that it could be a trigger for changes to be initiated at Aoraki.</li> <li>Aoraki is highly significant to mana whenua and Ngāi Tahu, and to all of New Zealand for conservation and recreation, as well as being a location where people and businesses have invested heavily for decades. Any investigation needs to understand and take these factors into account.</li> </ul>	<p>Aoraki/Mount Cook</p>	<p>TBA</p>



Initiative/ Recommendation	Actions	Where	Budget
<b>Climate change mitigation and adaptation</b>	<ul style="list-style-type: none"> <li>▪ Climate change will have significant impacts on Te Manahuna in the long term, and the District can manage this best by proactively planning and preparing for likely changes. This could include developing resilient transport and communications options, visitor experiences that can be adapted and moved to different locations temporarily or over time and understanding the locations that will offer the most resilient future for significant investments.</li> <li>▪ Glacier tourism is under threat from climate change and continued growth in carbon emissions will only accelerate these impacts. Stakeholders and agencies need to work together to mitigate the effects of climate change where they can. Every sector will have its part to play. In the future, Mackenzie District could be known for being on the leading edge of low emissions transport, accommodation, and experiences, and growing a sector that actively contributes to the protection, restoration and regeneration of the natural environment.</li> </ul>	Regional	TBA
<b>Identification of macro disruptive changes</b>	<ul style="list-style-type: none"> <li>▪ Major macro disruptive forces include events such as a rift of the alpine fault, which is likely to result in major changes to the mountain landscape and natural hazards due to rock movements and rockslides, river siltation and blockages, and subsequent destruction of roads, bridges, and other key supporting infrastructure.</li> <li>▪ Another example is climate change impacts which are likely to see the reduction in snowfall, likely shrinkage of glaciers and ski fields, and associated impacts on flora and fauna due to an expected drier and warmer winter period and a wetter summer period, all of which may impact the visual amenity and scenic attractiveness of the region.</li> <li>▪ Yet others include fast-moving global technological and social trends; widespread economic crises; pandemics; geopolitical events and wars; extreme weather events; and eruptions (elsewhere but with atmospheric effects). Often these events cascade or compound each other, and their timing and scale are hard to predict.</li> <li>▪ Such events will most likely change the visitor economy and may necessitate very different product offerings for the longer term, all determined by the impact of macro disruptive forces. We can plan for these based on recent history and by recognising our inherent vulnerabilities.</li> </ul>	Regional	TBA
<b>Regenerative tourism opportunities</b>	<ul style="list-style-type: none"> <li>▪ Regenerative tourism encourages and facilitates visitors to 'give back' to the places they visit and will be key to achieving the vision of this plan. Te Manahuna is home to precious species and ecosystems, many not found anywhere else, which are under pressure from multiple threats, and climate change will only increase this problem.</li> <li>▪ A range of conservation projects is underway to combat this, including some at landscape scale. Cultural values are under similar pressure, often from the same threats, and the mana whenua initiatives in this plan aim to turn that around. Visitors' engagement with the challenges and contributing to solutions could turn the situation around. The challenge is working out ways to make this happen at an operational or system level.</li> <li>▪ Opportunities for encouraging all visitors (domestic and international) to contribute directly to regenerative tourism programs whilst in the region need to be developed and encouraged by operators so their visitor markets see the benefit and need to be contributors. Success will require strong collaboration, the ability to pilot and learn from experience over time, and innovative business models. A range of supporting funding sources is likely to be required, particularly in the short term.</li> </ul>	Regional	TBA





## 4.2. Implementing the “Big Moves”

While Mackenzie District Council is the guardian and driver of Te Manahuna, its future role will be one of ongoing coordination, advocacy, and support. Implementation will require a joint approach in partnership with tourism industry stakeholders, government, and mana whenua.

Table 10 - Table 13 indicates how the “Big Moves” (see Section 3.7) recommendations could be implemented, along with an indication of who could be involved. The ‘Who’ have been ordered alphabetically and is not an illustration of who will be the primary owner. The Industry Leaders Group will continue to meet regularly to oversee the implementation of the strategy. As previously noted, the recommended actions are non-exhaustive and will continually be validated over time.



### Principle 1 - Protecting our Treasures

Short term: 2022-2031 Medium term: 2032 – 2051 Long term: 2052-2122

Table 10: Implementation Plan - Protecting Our Treasures

Recommendation	Actions	Who	Timeframe	Budget
Sustainable travel and transport options	<ul style="list-style-type: none"> <li>Identify mechanisms to reduce private vehicle dependency throughout Te Manahuna. Possible options to investigate include park and ride facilities, public transit stations, electric charging stations, electric aviation etc.</li> </ul>	Tourism Governance Group, DOC, Waka Kotahi	Short Term	\$5.0m
Whare Wānaka (Pou concept & storytelling)	<ul style="list-style-type: none"> <li>Work with mana whenua to identify and develop experiences around mana whenua stories of Te Manahuna in a way that not only attracts visitors but also provides a deeper connection for mana whenua and encourages their participation in the visitor economy.</li> </ul>	Mana whenua, Tourism Governance Group	Short Term	\$100k
Improve the provision of community services	<ul style="list-style-type: none"> <li>Undertake an analysis, considering community feedback on community services and upgrades that are required including services related to pharmacy outlets, medical services more generally links to various tertiary training institutions for upskilling and additional entertainment amenities for local families etc.</li> </ul>	MDC	Medium Term	\$50k



## Principle 2 - Enduring Partnerships

Short term: 2022-2031 Medium term: 2032 - 2051 Long term: 2052-2122

Table 11: Implementation Plan - Enduring Partnerships

Recommendation	Actions	Who	Timeframe	Indicative Costs
Storytelling via viewpoints/storyboards.	<ul style="list-style-type: none"> <li>Work with mana whenua and historical groups to develop a series of consistent and cohesive storytelling points throughout Te Manahuna.</li> </ul>	Mana whenua, MDC, historical groups, DOC	Short Term	\$1.0m
Centralised experience hub (booking & information centre).	<ul style="list-style-type: none"> <li>Complete a feasibility study assessing the potential and interest in a centralised booking hub to centralise visitor experience information and create a "one-stop-shop" for visitors. The study should also assess the most suitable location to encourage visitor dispersal.</li> </ul>	RTO, industry operators, MDC, MBIE	Medium Term	\$7.0m



## Principle 3 - Thriving People and Places

Short term: 2022-2031 Medium term: 2032 - 2051 Long term: 2052-2122

Table 12: Implementation Plan - Thriving People and Places

Recommendation	Actions	Who	Timeframe	Indicative Costs
Commercial centre expansion & upgrades for Takapō.	<ul style="list-style-type: none"> <li>Develop an urban design plan for Takapō to ensure future growth is strategic and integrates better design guides to achieve a far more attractive and well-integrated urban feel.</li> </ul>	MDC, commercial property owners	Medium Term	\$16.0m
Stronger destination link for Fairlie to some of the surrounding ski fields.	<ul style="list-style-type: none"> <li>Identify mechanisms to support a stronger link between the various ski fields throughout Te Manahuna to position Fairlie as a regional hub for skiing and other outdoor pursuits.</li> </ul>	MDC, ski field operators	Medium Term	\$100k
New/enhanced F&B experiences.	<ul style="list-style-type: none"> <li>Consider introducing a more flexible development approval process to allow for seasonal pop-up food and beverage outlets in both urban and rural locations throughout Te Manahuna.</li> <li>Work with Food and Beverage (F&amp;B) operators to upskill customer service standards, marketing, merchandising, and social/digital media.</li> </ul>	Tourism Governance Group, local F&B operators	Medium Term	\$250k



### Principle 4 - A Unique Experience

Short term: 2022-2031 Medium term: 2032 - 2051 Long term: 2052-2122

Table 13: Implementation Plan - A Unique Experience

Recommendation	Actions	Who	Timeframe	Indicative Costs
Destination brand	<ul style="list-style-type: none"> <li>Work with a nationally significant brand developer to create a Made in Te Manahuna produce brand that can feature food, produce, condiments, arts, crafts, accommodation, transport etc. It is important this is developed with the tourism sector and creative community's input to generate buy-in and support.</li> </ul>	MDC, Tourism Governance Group	Short Term	\$200k
Diversified accommodation mix.	<ul style="list-style-type: none"> <li>Undertake a detailed accommodation audit across Te Manahuna looking at the size, range, scale, and quality of accommodation throughout Te Manahuna and identify specific gaps that could be filled via private investment.</li> </ul>	Tourism Governance Group, accommodation sector operators and investors	Short Term	\$85.0m
Lake Takapō on-lake recreational experiences.	<ul style="list-style-type: none"> <li>Investigate options for introducing recreational experiences such as kayaking, boating etc to offer options for trail networks around parts of the lake and to show the diversity of products (cycling, trail running, tramping, kayaking etc).</li> </ul>	Tourism Governance Group, industry operators	Short Term	\$400k
New half- and full-day walking experiences.	<ul style="list-style-type: none"> <li>Identify opportunities for new, shorter-day walking opportunities that may have appeal to a broader market.</li> </ul>	Tourism Governance Group, land holders	Short Term	\$250k
Takapō hillside activity precinct.	<ul style="list-style-type: none"> <li>Work with the existing landholder to develop the hillside activity precinct at Takapō as a unique sustainable lakeside nature-based experience.</li> </ul>	Landholder, MDC	Short Term	\$7.0m
Water visitor experience hub with iconic design.	<ul style="list-style-type: none"> <li>Work with the project proponent to assess the merit of developing a water resource experience hub with other components in a truly iconic design.</li> </ul>	Project Proponent, MBIE	Short Term	\$30.0m
Accommodation property (80+ rooms & conferencing).	<ul style="list-style-type: none"> <li>Complete an accommodation demand assessment to identify the feasibility of and most suitable location for a new, larger-scale accommodation property to support larger groups as well as a conferencing and functions market.</li> </ul>	Tourism Governance Group, accommodation sector operators and investors	Medium Term	\$35.0m
Agri-tourism & aqua-tourism experiences.	<ul style="list-style-type: none"> <li>Work with existing and new agri and aqua operators to identify mechanisms to grow the tourism profile of agri and aqua products throughout Te Manahuna.</li> </ul>	MDC, industry operators	Medium Term	\$5.0m
Agri-tourism showcase experience centre.	<ul style="list-style-type: none"> <li>Complete a feasibility study assessing the potential to develop an agri-tourism centre to showcase the best of Te Manahuna's produce and to act as an information hub to encourage visitor dispersal throughout Te Manahuna.</li> </ul>	Tourism Governance Group, MDC, agri tourism operators	Medium Term	\$7.0m





Recommendation	Actions	Who	Timeframe	Indicative Costs
Eco-huts on the edge of Aoraki/ Mount Cook National Park.	<ul style="list-style-type: none"> <li>Work with private landholders to identify opportunities for introducing new eco-huts on the edge of Aoraki/ Mount Cook National Park.</li> </ul>	Tourism Governance Group, landholders	Medium Term	\$5.0m
Electric & solar houseboats.	<ul style="list-style-type: none"> <li>Investigate water-based recreation activities that could be encouraged on Te Manahuna's waterways including electric and solar houseboats to offer an alternative and unique form of accommodation.</li> </ul>	Tourism Governance Group, industry operators and investors	Medium Term	\$2.5m
Experiences/attractions for youth and 18-35-year-olds.	<ul style="list-style-type: none"> <li>Assess possible youth experiences and attractions that could be introduced including indoor climbing facilities, pump tracks, gym and recreation equipment and other entertainment facilities.</li> </ul>	MDC, MBIE	Medium Term	\$1.5m
Guided storytelling and digital application.	<ul style="list-style-type: none"> <li>Work with a digital developer, mana whenua and historical groups to develop a guided digital storytelling application to enable free independent travellers to explore Te Manahuna with guided narration.</li> </ul>	Tourism Governance Group	Medium Term	\$200k
Major fishing & hunting destination festival.	<ul style="list-style-type: none"> <li>Develop a major fishing and hunting destination event to profile and leverage Te Manahuna's strengths in these recreational sports</li> </ul>	RTO, industry operators	Medium Term	\$300k
Max Smith storytelling experience.	<ul style="list-style-type: none"> <li>Develop a narrative to explain the Max Smith story and investigate integration into a potential rowing sports centre of excellence.</li> </ul>	MDC, Tourism Governance Group, MBIE	Medium Term	\$1.5m
Meridian & Genesis sites for hydro-tourism experiences.	<ul style="list-style-type: none"> <li>Identify experiences that showcase the importance of the two major hydro generating companies in Te Manahuna and leverage these for unique tourism experiences via journeys to sites of significance to better understand the hydro story.</li> </ul>	Genesis, Meridian, Tourism Governance Group	Medium Term	\$1.5m
New trails for accessing Aoraki/Mount Cook National Park.	<ul style="list-style-type: none"> <li>Investigate the potential for the development of trails that start outside of the national park and either end within the national park or which utilise parts of the national park for the experience along with external landholder sites.</li> </ul>	DOC, Tourism Governance Group	Medium Term	\$450k
Series of seasonal fishing competitions.	<ul style="list-style-type: none"> <li>Leverage Te Manahuna's strength as a high-quality recreational fishing location through the development of a series of seasonal fishing competitions which could be rotated through different locations in Te Manahuna.</li> </ul>	RTO, MDC, industry operators	Medium Term	\$90k
Ski touring experiences (packaging & profiling).	<ul style="list-style-type: none"> <li>Work with ski field and ski tour operators to create cohesive packages to profile and showcase Te Manahuna's ski resorts. A collective approach is likely to have more strength when competing against much more well-known resorts near Queenstown.</li> </ul>	Ski field operators, RTO	Medium Term	\$1.0m
Unique dark skies experiences.	<ul style="list-style-type: none"> <li>Work with existing and new tourism experience operators to identify ways to offer new and exciting dark skies experiences with value-adds that help the region maintain its position as a leader in dark skies experiences.</li> </ul>	Operators, Tourism Governance Group	Medium Term	\$3.0m



Recommendation	Actions	Who	Timeframe	Indicative Costs
Visitor attraction and a lakeside promenade (to better link Twizel with Lake Ruataniwha).	<ul style="list-style-type: none"> <li>Complete an analysis looking at ways to create a stronger link between Twizel town centre and Lake Ruataniwha which offers an exciting and attractive natural asset to help support the positioning of Twizel as a more attractive destination hub for Te Manahuna.</li> </ul>	Tourism Governance Group, MDC	Medium Term	\$10.0m
Mackenzie Multi-Day Walk.	<ul style="list-style-type: none"> <li>Investigate the potential to create a Multi-Day Walk experience in Te Manahuna (including cross-regional opportunities).</li> </ul>	Tourism Governance Group, land holders	Long Term	\$5.0m









## Appendix 1 Infographic Source Data

The source data for the summary infographic is as follows.

- **Total visitation, Visitation by type, Domestic versus international visitation:** New Zealand International Visitor Survey, NZ Stat International Travel and Migration and Fresh Info's New Zealand Visitor Activity Forecast.
- **Visitor spend:** MBIE'S Tourism Electronic Card Transactions (TECTs).
- **Age profile, Packaged v non-packaged travel:** Fresh Info's New Zealand Visitor Activity Forecast
- **Where international visitors are visiting:** New Zealand International Visitor Survey
- **Origin of domestic overnight visitors:** Fresh Info's New Zealand Visitor Activity Forecast
- **Origin of international overnight visitors:** New Zealand International Visitor Survey
- **Visitor spend by product area:** MBIE'S Tourism Electronic Card Transactions (TECTs).
- **Top 10 destinations with the largest proportion of international spend:** MBIE'S Tourism Electronic Card Transactions (TECTs).



## Appendix 2 Accommodation Audit

The following provides a tourism product audit for Te Manahuna. This includes two audits: one focused on accommodation offering and one on attractions and experiences. The purpose of the audit is twofold:

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

The audit is primarily based on an extensive ‘data scraping’ exercise that leveraged the following sources: The New Zealand Tourism Operator Database, TripAdvisor, Booking.com, Google Travel and Google Maps.<sup>21</sup> This was undertaken in March 2021.

### + Audit by Property Type & Bookable Units

The accommodation audit focused primarily on commercial forms of accommodation. When assessing the audit, it is important to recognise that:

- some properties are listed online across multiple categories - in these cases, Stafford has selected the most applicable category based on online information available;
- for each property, the number of bookable units<sup>22</sup> was also included which typically reflects room numbers (where this information was available);
- for caravan parks, bookable units were only required for cabins, chalets, and villas - site numbers have been excluded from the assessment as this data are difficult to obtain with accuracy;
- for DOC Huts, the number of bunks has been included as these can be individually utilised, although very few are bookable;

- for holiday homes and apartments, bookable units are recorded as “1” because they can only be booked by one party and, therefore, represent one unit.

Figure 11 provides a summary of accommodation in Te Manahuna broken down by accommodation type.

Based on the audit, there are 433 accommodation properties in Te Manahuna and an estimated 3,128 bookable units. Of the 433 properties, just under half of the properties identified are holiday homes, representing 47% of all properties. If holiday homes are excluded from the assessment, there are 228 properties and 2,803 bookable units.

DOC huts make up the fourth-largest share of properties and the second-largest share of units. This demonstrates the significance of DOC as a provider of backcountry visitor experiences across Te Manahuna and its popularity as a tramping destination. Backcountry huts and campsites are not, however, accessible as accommodation on the same terms as many of the other categories listed.

Although holiday homes make up the largest share of properties, hotels make up the largest share of room stock, totalling 22% of all bookable units in Te Manahuna (identified via the audit). This is important to note and demonstrates the importance of hotels in providing room capacity for Te Manahuna.

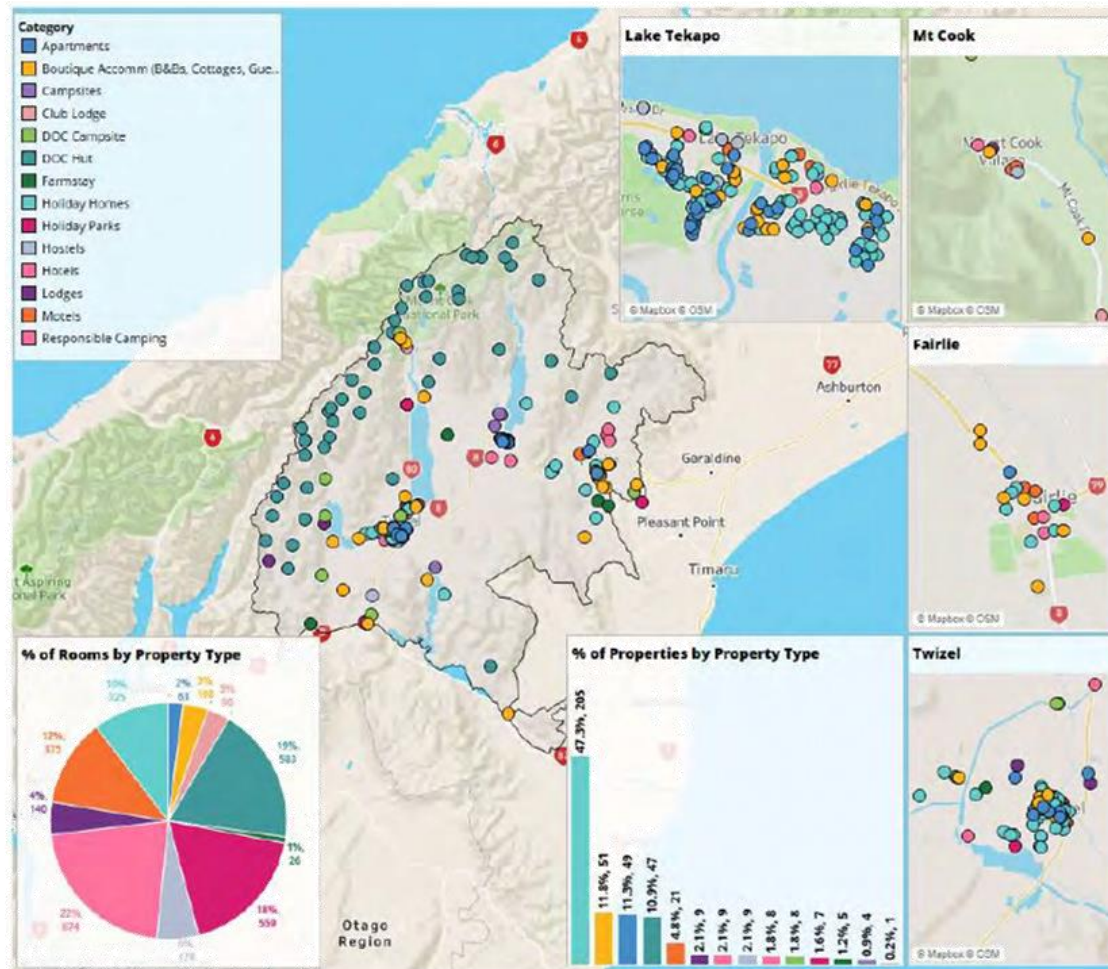
The largest property (by the number of rooms) in Te Manahuna is The Hermitage Hotel (offering 164 rooms and comprising 5% of room stock), followed by Peppers Bluewater Resort Lake Takapō (142 rooms, 5% of room stock).

<sup>21</sup> It is important to note, therefore, that the audit may not be fully comprehensive, particularly for those operators who are not listed online.

<sup>22</sup> If a hotel has 25 rooms, this is recorded as 25 bookable units. If a holiday home has 4 bedrooms, this is recorded as 1 bookable unit as this can only be booked by the one party.



Figure 11: Mackenzie Accommodation Audit (by Property Category)







**+ Audit by Sub-Region**

Figure 12 and Figure 13 provide a summary of accommodation by sub-region. The key findings are as follows.

- Accommodation properties are very clearly geographically clustered around four key centres within Te Manahuna - Fairlie, Lake Takapō, Aoraki/Mount Cook and Twizel. There are some properties scattered elsewhere in the region, however, the majority of these (63%) are DOC huts.
- Lake Takapō has almost half (43%) of properties identified in the region, however, the bulk of these properties (60% or 111 properties) are holiday homes. Lake Takapō has 54% of all holiday homes identified in the entire Mackenzie region. It also has 76% of all apartments identified across Te Manahuna.
- Bookable units are more evenly distributed throughout Te Manahuna than property numbers – with 22% being from properties in Lake Takapō, 30% from Twizel, 15% from Aoraki/Mount Cook, 30% from other parts of Te Manahuna and the remaining 3% being in Fairlie.
- Fairlie, Lake Takapō and Twizel have more holiday homes than any other property type, comprising 32%, 60% and 64% of properties, respectively. Aoraki/Mount Cook's properties are more evenly distributed across the accommodation mix, with motels, DOC Huts, boutique accommodation and hostels each making up 18% of the accommodation mix.
- In terms of bookable units, Lake Takapō and Aoraki/Mount Cook have the greatest share of rooms supplied through hotels (33% and 45% of rooms respectively are supplied via hotels). In

Twizel, holiday parks comprise most of the room stock (45%) and in Fairlie, hotels comprise 29% of room stock.

- Most responsible camping sites are situated in Fairlie and Twizel, each having three sites. This is followed by Lake Takapō which has two sites.
- Hostels were only identified for Lake Takapō (5), Aoraki/Mount Cook (1) and other areas (3).
- There are few holiday parks in Te Manahuna, with only five identified as part of the audit. these were evenly distributed throughout the region, except for Aoraki/Mount Cook.
- Lake Takapō's accommodation mix is characterised by smaller-scale forms of accommodation including holiday homes and apartments.
- Fairlies' accommodation mix is distributed between holiday homes and boutique forms of smaller-scale, commercial accommodation (such as cottages, guest houses, chalets etc.).
- Aoraki/Mount Cook - due to its location within a national park - has a more limited supply of accommodation but its mix is more reflective of traditional tourism commercial accommodation including boutique products, motels, DOC huts and hostels.
- Twizel's accommodation mix reflects a more non-commercial focus, with 64% of all properties identified being holiday homes.
- Te Manahuna's accommodation mix is largely dominated by non-commercial properties. Only half the properties identified in the region are classified as commercial properties<sup>23</sup>. While having holiday homes (including Airbnbs and Bookabach) are an important part of the accommodation mix, a careful balance must be achieved.

<sup>23</sup> This includes apartments, boutique accommodation properties (guesthouses, chalets), club lodges, farmstays, holiday parks, hostels, hotels, lodges, and motels.



Figure 12: Mackenzie Accommodation Audit (by Sub-Region & with Property Category Breakdown)

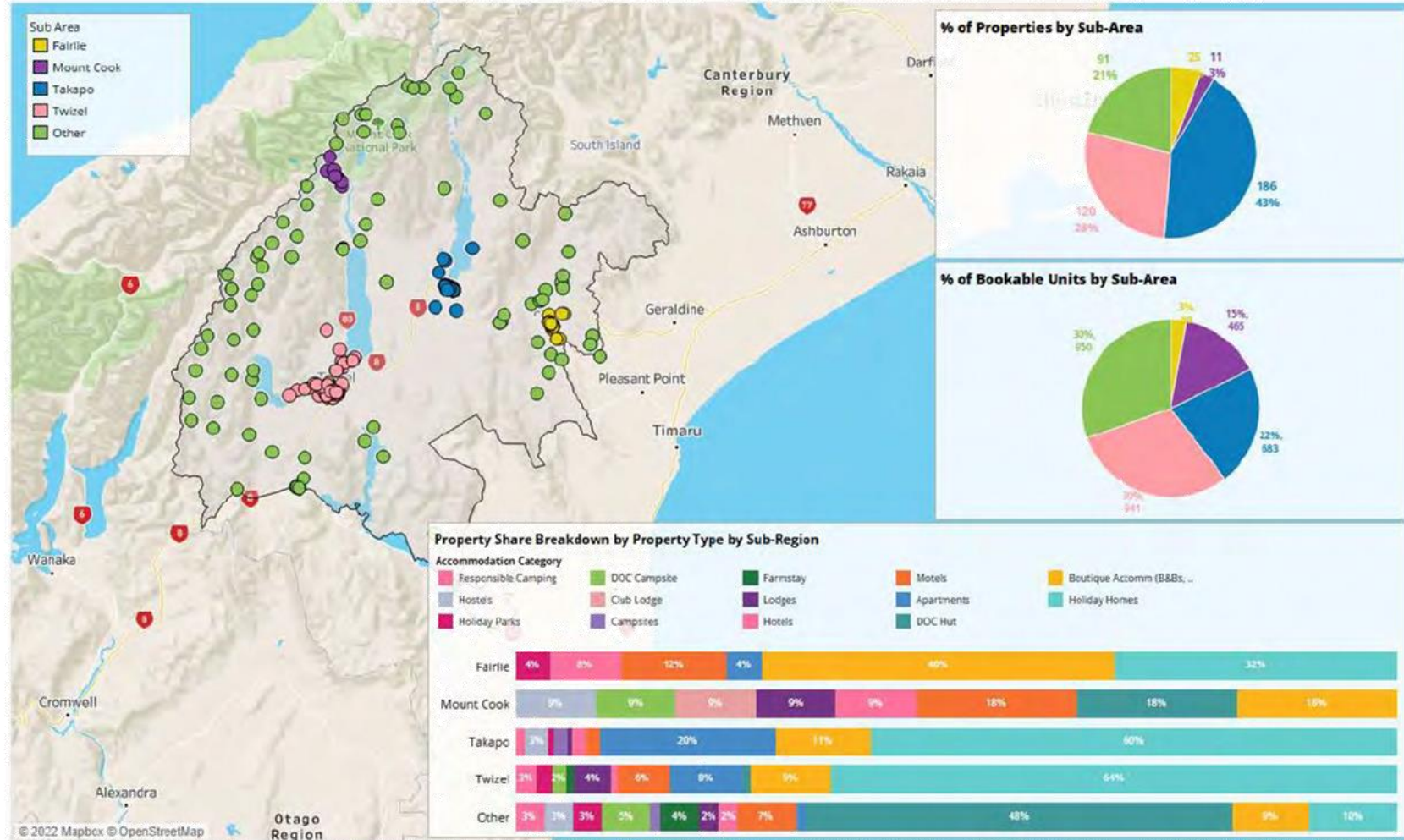
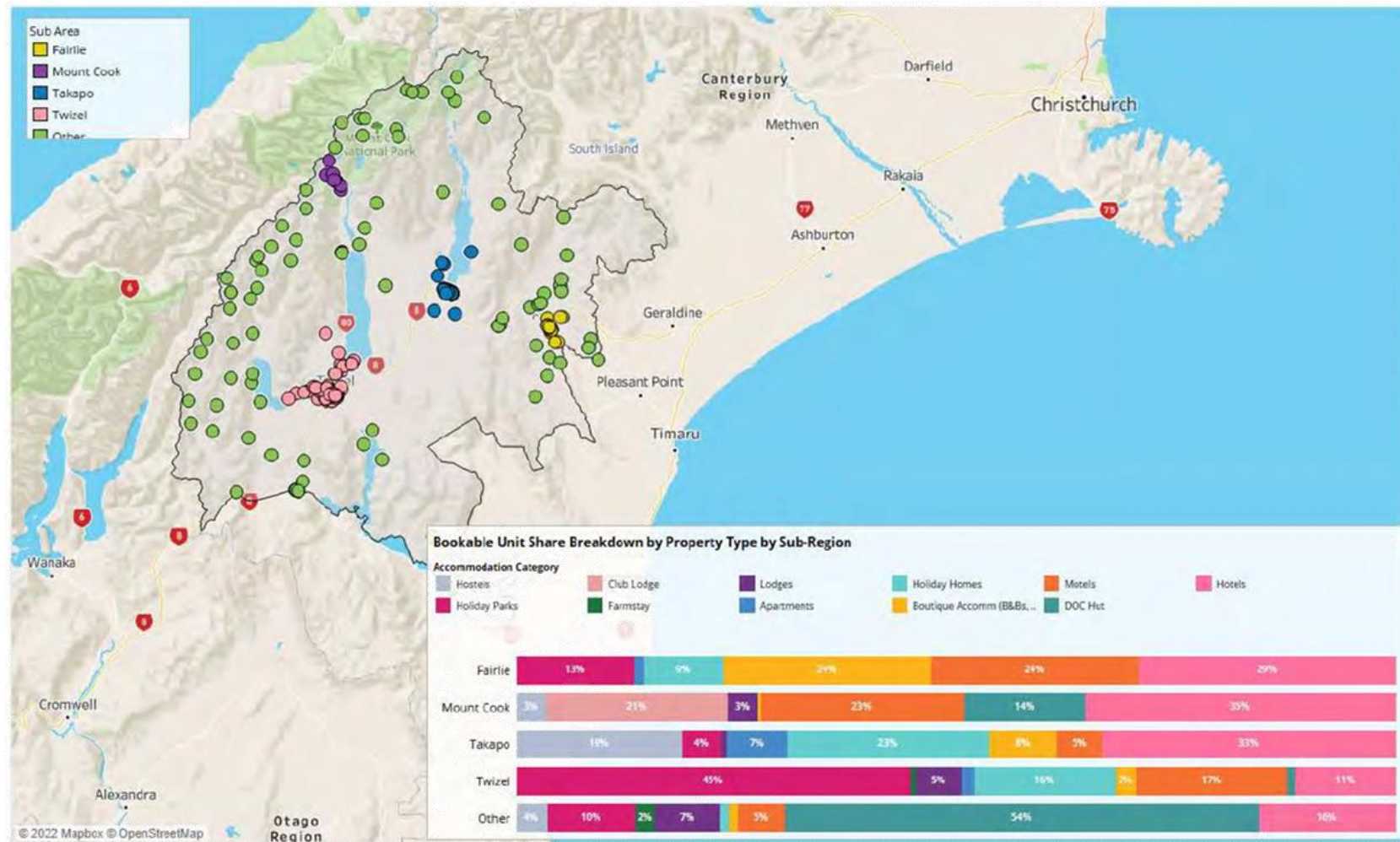




Figure 13: Mackenzie Accommodation Audit (by Sub-Region & with Room Share Breakdown)







**+ Net Promoter Score Assessment (Accommodation)**

To undertake a top-line assessment of the quality of a region’s tourism product offering, the Net Promoter Score (NPS) metric can be used. This is a measurement of consumer loyalty. In a tourism context, this translates to a visitors’ willingness to not only return for another stay but also make a recommendation to their family, friends, and colleagues. NPS scores are reported with a number from -100 to +100, with a score above 30 considered good and a score above 50 considered excellent.

The NPS is calculated using a scale (see Figure 14), with:

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

Figure 14: NPS Score Scale



TripAdvisor and Google<sup>24</sup> use a scale of 1-5 for consumer ratings on accommodation products. Converting this to the NPS scale means that a rating of 1-3 are considered “detractors” for the product, a score of 4 are the product’s “passives” and a score of 5 are the products “promoters”.<sup>25</sup> Only product with more than 5 reviews was included in the NPS assessment to ensure a robust sample size.

Of the 433 properties identified, NPS ratings were able to be obtained for 244 properties (56%).

Figure 15 on the following page provides a summary of the NPS results for Mackenzie’s accommodation mix. The findings are as follows.<sup>26</sup>

- Mackenzie’s accommodation stock receives an overall NPS of +45, based on 26,696 reviews. Breaking this down by accommodation type produces the following results:
- Lodges: +75 (based on 2,116 reviews);
- Apartments: +75 (based on 1,276 reviews);
- Boutique accommodation: +70 (based on 2,115 reviews);
- Farmstays: +69 (based on 314 reviews);
- Motels: +38 (based on 6,349 reviews);
- DOC Campsites: +37 (based on 93 reviews)
- Hostels: +36 (based on 3,400 reviews);
- Holiday parks: +27 (based on 2,837 reviews);
- Club lodges: +17 (based on 6 reviews);
- Holiday homes: +9 (based on 5,706 reviews)
- Hotels: -29 (based on 9,069 reviews).

This demonstrates that typically, more boutique forms of accommodation in Te Manahuna achieve higher NPS scores than larger-scale properties.

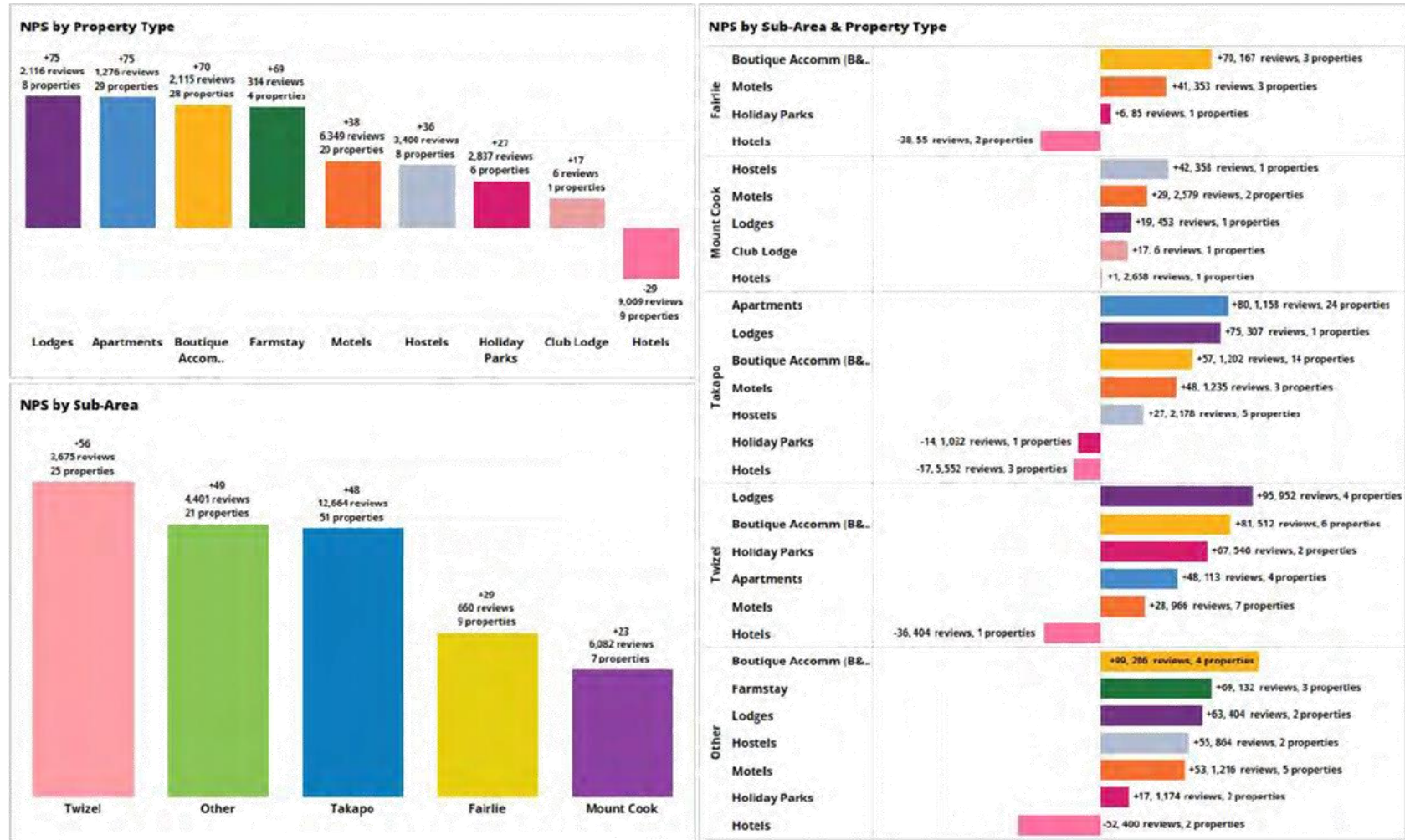
- The low hotel NPS of -29 is interesting and important to note. Upon more detailed qualitative analysis (i.e., reviewing individual feedback items), negative consumer feedback appears to be centred on a disequilibrium in the price to value/quality offering.
- Looking at NPS scores on a sub-regional basis, Twizel achieves the highest average NPS (+55) followed by those not in a sub-region (+49), Lake Takapō (+40), Fairlie (+29) and Aoraki/Mount Cook (+23).
- In Fairlie, boutique accommodation generates the highest NPS score (+70), while hotels generate the lowest (-38).
- In Lake Takapō, apartments generate the highest NPS score (+80), while hotels generate the lowest (-17).
- In Aoraki/Mount Cook, hostels generate the highest NPS score (+42), while hotels generate the lowest (+1).
- In Twizel, lodges generate the highest NPS score (+95), while hotels generate the lowest (-36).
- In “other”, boutique accommodation generates the highest NPS score (+99), while hotels generate the lowest (-52).

<sup>24</sup> Booking.com has not been used to derive a NPS because it does not provide a scale of scores, but rather, only provides an overall score. Therefore, an NPS is unable to be calculated from Booking.com listings.

<sup>25</sup> <https://birdeye.com/blog/net-promoter-score-explained/>  
<sup>26</sup> The data scraping for NPS scores was undertaken in December 2020. The number of reviews therefore is reflective of this period.



Figure 15: Accommodation NPS Summary





## Appendix 3 Attractions/Experiences Audit

### + Audit by Attraction/ Experience Type

Because the tourism sector is so far-reaching, there are many products, experiences and assets which can be considered tourism based. This audit, has, however, focused on those which are considered primary tourism experiences, that is, those which are marketed and positioned as “things to do” when visitors travel to Te Manahuna. Those products which are primarily utilised by the local community have been excluded.

To be able to derive qualitative and meaningful findings from the product audit, product has had to be listed within product categories.

When reading the product findings, it is important to note:

- Regional conservation lands and other non-national parks are excluded from the audit because of the number of these throughout Te Manahuna which would skew the findings;
- events have been excluded from the audit; and
- general food and beverage (cafes, restaurants, bars), rather, the audit only focuses on unique food experiences such as distilleries, food tours, cooking classes etc. if these are available in the area.

Figure 17 illustrates the findings of the attractions audit.

Based on the audit findings, there are 238 tourism attractions/experiences in Te Manahuna.

Te Manahuna's attraction/experience mix is largely dominated by tramping tracks, comprising 44% (105 experiences) of the attractions/experiences identified.

Te Manahuna's product mix is skewed towards free products, covering more than half (65%) of all experiences/products identified. These are largely walking and mountain biking trails, along with natural sites of significance. Although free product forms an important part of a destination's product mix, it is important to ensure there is a balance: paid product generates far greater economic benefit which can assist in growing social licence for tourism.

Aside from a small selection of products, there are limited all-weather experiences for visitors to undertake during times of inclement weather.

There are three ski/snowboard areas, though, these are largely club/local facilities rather than international ski destinations (when compared with this in Queenstown, for example).

While there is an array of adventure-based products, there appears to be a lack of more passive-based products for those visitors with younger families to undertake.

It is understood that the hunting and fishing available in Te Manahuna, in particular, is high quality and presents opportunities to leverage (with appropriate complementary products).

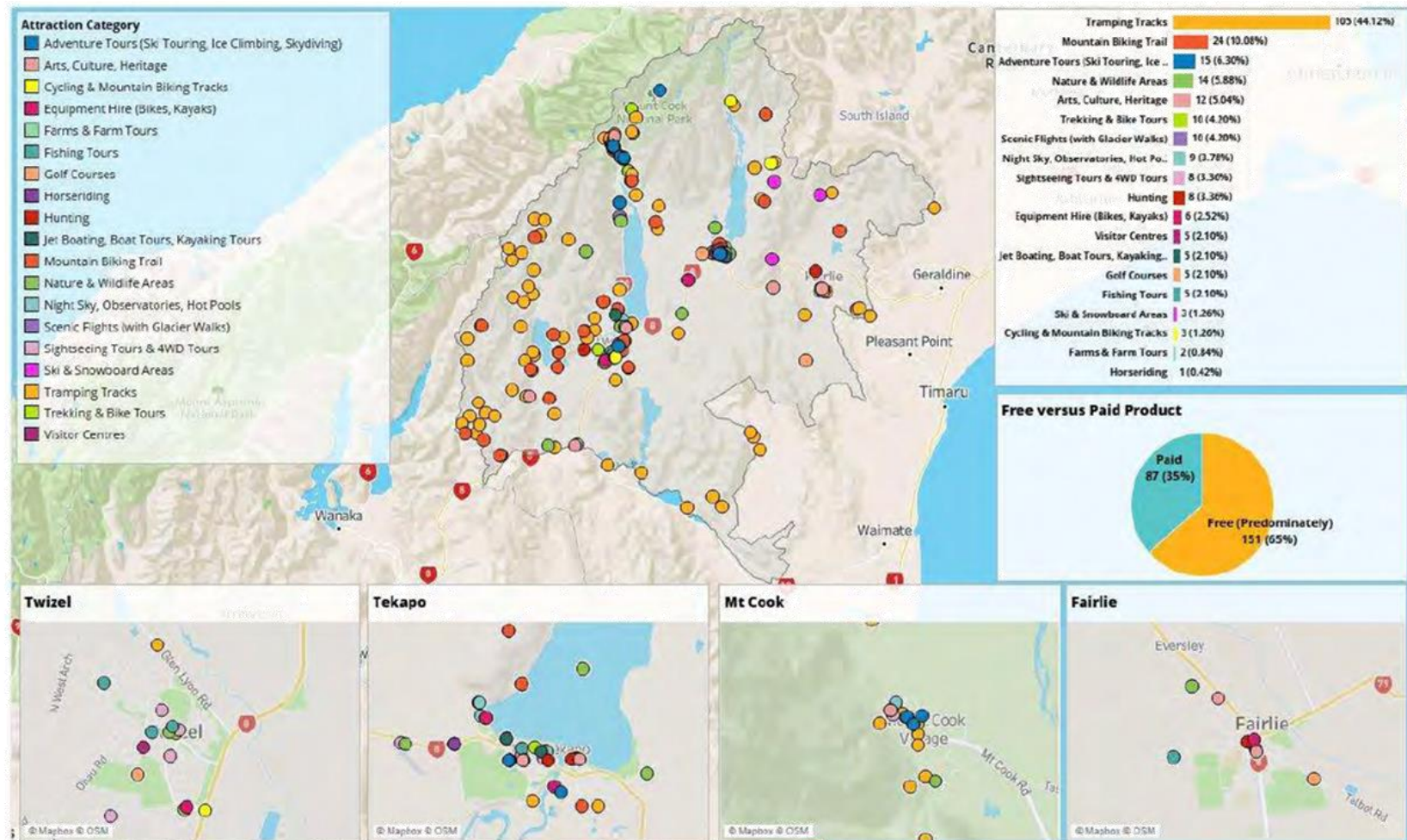
Te Manahuna has two international bucket list drawcards, being, Lake Takapō and Aoraki/Mount Cook. While this presents many opportunities for the region, it can also be considered a “double-edged sword” when trying to encourage visitor dispersal and when trying to manage carrying capacity and sustainability measures.

Based on the tourism experiences and attractions on offer, Te Manahuna could currently be characterised as largely an outdoor, recreation and adventure destination. One of the challenges with this is that due to the lack of all-weather products, Te Manahuna may be avoided during seasons and/or periods of bad weather.





Figure 16: Mackenzie Attractions/Experiences Audit (by Attraction/Experience Category)





**+ Audit by Sub-Region**

Figure 17 provides a summary of tourism attractions/experiences by sub-region and illustrates the following.

- Like accommodation, tourism attractions/experiences are largely clustered around the hubs of Twizel (making up 22% of product), Aoraki/Mount Cook (18%), Takapō (18%) and, to a lesser extent, Fairlie (5%).
- Takapō is the only sub-region that, based on the audit, has a greater proportion of paid products (representing approximately 60% of the product identified) compared to free products (40%).
- Of the four sub-regions, Fairlie has the highest proportion of free products (representing 58% of products) followed by Aoraki/Mount Cook (56%) and Twizel (56%).
- Takapō also has a more diverse and distributed tourism attraction and experience mix. This is potentially because of Lake Takapō being a major visitor drawcard that attracts large numbers of international visitors. As a result, there is a larger market for operators to leverage.
- Most adventure-based product is situated in the Aoraki/Mount Cook sub-region. It comprises 20% of the sub-region's attractions/experiences mix. This is expected given

the natural assets that the sub-region has (glaciers, backcountry ski areas, heli-ski areas etc.).

**+ Net Promoter Score Assessment (Attractions)**

When assessing NPS scores for attractions, it is important to recognise that the availability of data to collate NPS scores is more heavily skewed towards bookable/commissionable and/or major tourism experiences/products. Often, experiences such as free walking trails etc. are not listed on TripAdvisor.

For Te Manahuna, NPS scores were able to be obtained for 76 of the 238 (32%) attractions/experiences identified. If walking trails are removed, NPS scores were obtained for 66 of the 142 (46%) of the attractions/experiences which is a good sample size.

Only product with more than 5 reviews was included in the NPS assessment to ensure a robust sample size.

Figure 18 provides a summary of the NPS results for Te Manahuna's attraction's mix. The findings are as follows.<sup>27</sup>

- Mackenzie's attractions/experiences product receives an overall NPS of +61, based on 17,068 reviews. This is an excellent NPS rating and rates above the accommodation NPS achieved (+44).

- The product category that receives the highest average NPS score is Trekking & Bike Tours, with a very high NPS of +96. This is based on 254 reviews across 6 different operators. This is followed by Adventure Tours (+88) and Scenic Flights and Jet Boating, Boat Tours & Kayaking Tours both receive an NPS of +84.
- The Night Sky and Observatories product received a relatively low (+36) score when compared with other products. This was surprising given our understanding of Te Manahuna as a high-quality, dark skies destination. Upon further investigation into the qualitative feedback behind these quantitative scores, it appears cloudy evenings and the lack of a high-quality alternative product significantly impact the reviews of these products.
- Although Fairlie has the highest overall NPS (+76) it is important to note that this is only based on two attractions (there are limited attractions in Fairlie). Aoraki/Mount Cook receives the second-highest overall NPS (+63), and this is based on a more robust number of attractions (26 attractions with 5,616 reviews).

<sup>27</sup> The data scraping for NPS scores was undertaken in December - January 2020. The number of reviews therefore is reflective of this period.





Figure 17: Mackenzie Attractions/Experiences Audit (by Sub-Region)

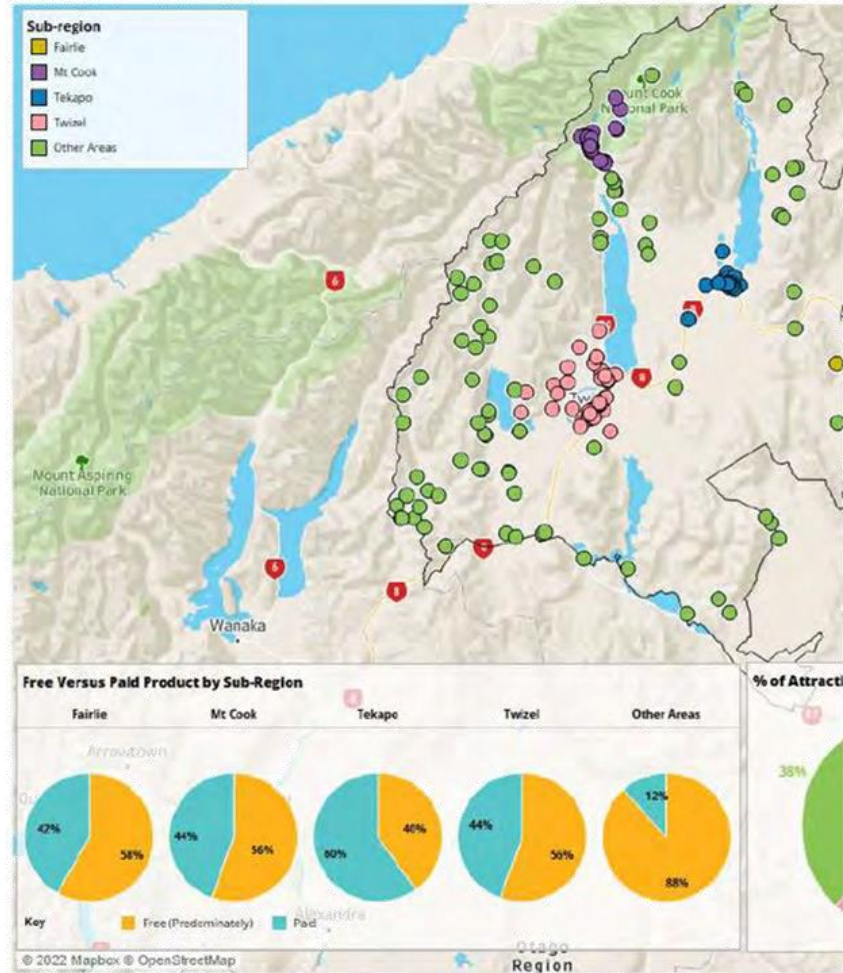
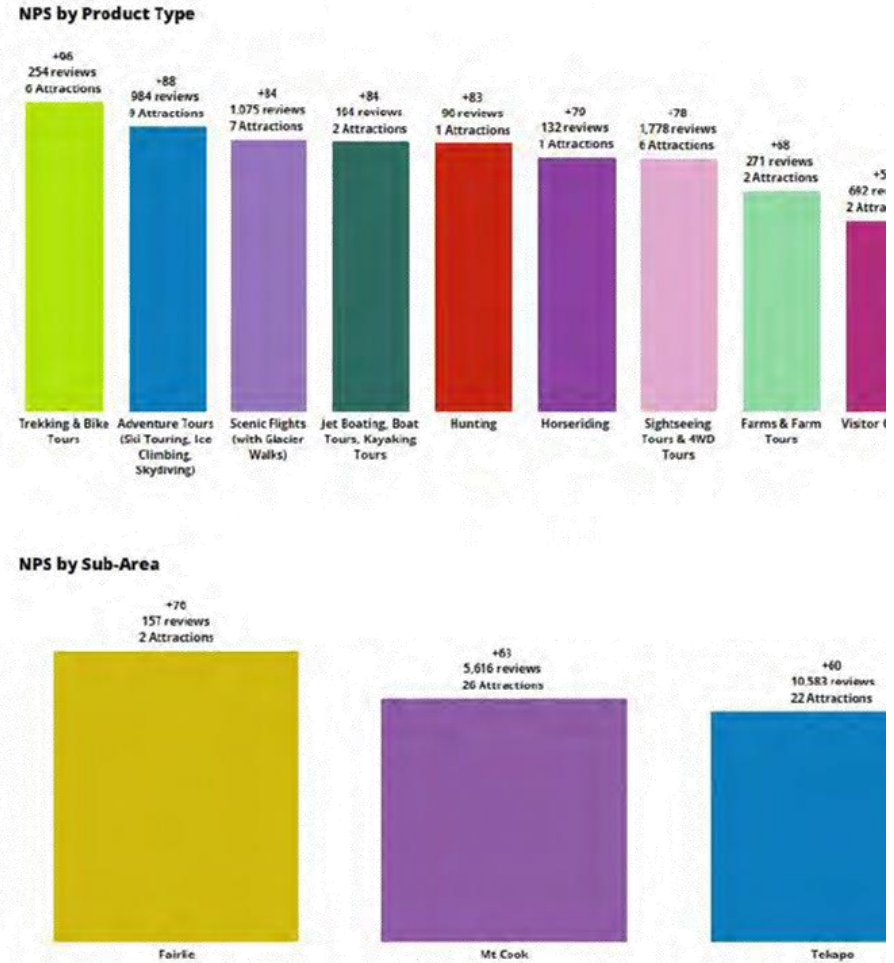


Figure 18: Attractions/Experiences NPS Summary







## Appendix 4 Visitation Data

### + The Challenge with NZ Tourism Data

There are significant data gaps in New Zealand tourism data. Before 2012, a comprehensive dataset covering regional tourism was issued<sup>28</sup>, however, this full dataset is no longer available. As a result, data must be collected from several different sources<sup>29</sup>, each of which uses a different methodology and often have differing boundaries applied (due to the shifting nature of NZ RTO boundaries). This makes it extremely challenging to determine a complete picture of visitation to a region and perform trend analysis.

### + The Methodology Applied for TMKU

To determine a comprehensive picture of visitation to Te Manahuna, a variety of datasets have been leveraged. These are summarised in Table 14.

Table 14: Data Used in TMKU

Metric	Source Used
Visitor Spend – Domestic & International	<ul style="list-style-type: none"> <li>MBIE’s TECT Data</li> </ul>
Visitation – Domestic Day Trip	<ul style="list-style-type: none"> <li>Domestic day trip travel as a percentage of total international travel was obtained from the 2011 Regional Tourism Estimates and applied to current domestic overnight data from the New Zealand Visitor Activity Forecast.</li> </ul>
Visitation – International Day Trip	<ul style="list-style-type: none"> <li>International day trip travel as a percentage of total international travel was obtained from the 2011 Regional Tourism Estimates and applied to current IVS data.</li> </ul>
Visitation – Domestic Overnight	<ul style="list-style-type: none"> <li>Data compiled by FreshInfo as part of the New Zealand Visitor Activity Forecast. This is based on a comprehensive nationwide survey of AA members.</li> </ul>
Visitation – International Overnight	<ul style="list-style-type: none"> <li>New Zealand International Visitor Survey</li> </ul>
Comparative TLAs (spend & visitation)	<ul style="list-style-type: none"> <li>As per the above sources</li> </ul>

<sup>28</sup> Including total visitation by market (overnight and day trips by international and domestic visitors), spend, average length of stay etc.

<sup>29</sup> Including the IVS, MBIE’s visitor spend data, the Accommodation Monitor, Qrious data etc.



## Appendix 5 Visitor Forecasts and Projections

Table 15: Full visitor forecasts

Year	Domestic Day	Domestic Overnight	International Day	International Overnight	Total
2018	705k	385k	527k	354k	2.0m
2019	715k	390k	517k	347k	2.0m
2020	650k	355k	108k	72.9k	1.2m
2021	715k	390k	2.7k	1.8k	1.1m
2022	723k	398k	3.0k	1.5k	1.1m
2023	730k	406k	6.6k	6.6k	1.1m
2024	737k	414k	16.4k	26.9k	1.2m
2025	744k	422k	31.2k	53.8k	1.3m
2026	752k	426k	59.2k	108k	1.3m
2027	759k	431k	118k	108k	1.4m
2028	767k	435k	124k	129k	1.5m
2029	775k	439k	137k	155k	1.5m
2030	782k	444k	178k	232k	1.6m
2031	790k	448k	213k	349k	1.8m
2032	798k	453k	256k	488k	2.0m
2033	806k	457k	266k	513k	2.0m
2034	814k	462k	277k	538k	2.1m
2035	822k	466k	280k	571k	2.1m
2036	831k	471k	283k	610k	2.2m
2037	839k	476k	285k	659k	2.3m
2038	847k	480k	288k	679k	2.3m
2039	856k	485k	291k	686k	2.3m
2040	864k	490k	293k	693k	2.3m
2041	873k	495k	294k	700k	2.4m
2042	874k	496k	296k	701k	2.4m
2043	875k	496k	297k	702k	2.4m
2044	877k	497k	299k	703k	2.4m
2045	878k	498k	300k	704k	2.4m

Year	Domestic Day	Domestic Overnight	International Day	International Overnight	Total
2046	879k	499k	302k	705k	2.4m
2047	881k	499k	303k	706k	2.4m
2048	882k	500k	305k	707k	2.4m
2049	883k	501k	306k	708k	2.4m
2050	885k	502k	308k	709k	2.4m
2051	886k	502k	309k	710k	2.4m
2052	887k	503k	309k	711k	2.4m
2053	888k	503k	310k	712k	2.4m
2054	889k	504k	310k	712k	2.4m
2055	890k	504k	310k	713k	2.4m
2056	890k	505k	311k	714k	2.4m
2057	891k	505k	311k	715k	2.4m
2058	892k	506k	311k	715k	2.4m
2059	893k	506k	312k	716k	2.4m
2060	894k	507k	312k	717k	2.4m
2061	895k	508k	312k	717k	2.4m
2062	896k	508k	313k	718k	2.4m
2063	897k	509k	313k	719k	2.4m
2064	898k	509k	313k	720k	2.4m
2065	899k	510k	313k	720k	2.4m
2066	899k	510k	314k	721k	2.4m
2067	900k	511k	314k	722k	2.4m
2068	901k	511k	314k	722k	2.4m
2069	902k	512k	315k	723k	2.5m
2070	903k	512k	315k	724k	2.5m
2071	904k	513k	315k	725k	2.5m
2072	905k	513k	316k	725k	2.5m
2073	906k	514k	316k	726k	2.5m



Year	Domestic Day	Domestic Overnight	International Day	International Overnight	Total
2074	907k	514k	316k	727k	2.5m
2075	908k	515k	317k	727k	2.5m
2076	908k	515k	317k	728k	2.5m
2077	909k	516k	317k	729k	2.5m
2078	910k	516k	318k	730k	2.5m
2079	911k	517k	318k	730k	2.5m
2080	912k	517k	318k	731k	2.5m
2081	913k	518k	319k	732k	2.5m
2082	914k	518k	319k	733k	2.5m
2083	915k	519k	319k	733k	2.5m
2084	916k	519k	319k	734k	2.5m
2085	917k	520k	320k	735k	2.5m
2086	918k	520k	320k	736k	2.5m
2087	919k	521k	320k	736k	2.5m
2088	919k	521k	321k	737k	2.5m
2089	920k	522k	321k	738k	2.5m
2090	921k	522k	321k	738k	2.5m
2091	922k	523k	322k	739k	2.5m
2092	923k	523k	322k	740k	2.5m
2093	924k	524k	322k	741k	2.5m
2094	925k	525k	323k	741k	2.5m
2095	926k	525k	323k	742k	2.5m
2096	927k	526k	323k	743k	2.5m
2097	928k	526k	324k	744k	2.5m

Year	Domestic Day	Domestic Overnight	International Day	International Overnight	Total
2098	929k	527k	324k	744k	2.5m
2099	930k	527k	324k	745k	2.5m
2100	931k	528k	325k	746k	2.5m
2101	931k	528k	325k	747k	2.5m
2102	932k	529k	325k	747k	2.5m
2103	933k	529k	326k	748k	2.5m
2104	934k	530k	326k	749k	2.5m
2105	935k	530k	326k	750k	2.5m
2106	936k	531k	327k	750k	2.5m
2107	937k	531k	327k	751k	2.5m
2108	938k	532k	327k	752k	2.5m
2109	939k	532k	328k	753k	2.6m
2110	940k	533k	328k	753k	2.6m
2111	941k	534k	328k	754k	2.6m
2112	942k	534k	329k	755k	2.6m
2113	943k	535k	329k	756k	2.6m
2114	944k	535k	329k	756k	2.6m
2115	945k	536k	330k	757k	2.6m
2116	946k	536k	330k	758k	2.6m
2117	946k	537k	330k	759k	2.6m
2118	947k	537k	331k	759k	2.6m
2119	948k	538k	331k	760k	2.6m
2120	949k	538k	331k	761k	2.6m
2121	950k	539k	332k	762k	2.6m





## Appendix 6 The Preferred Scenario Detail





## Appendix 7 Regenerative Tourism Definition

Regenerative tourism encourages and facilitates visitors to 'give back' to the places they visit. Traditionally New Zealand had a clear focus on sustainability (a sustainable 'harvest' from ecosystem services) while more contemporary expressions now focus on more active contributions from tourism towards development goals to restoring past damage with further aspirational goals to the *regeneration* of eco- and socio-cultural services. These draw on the same compass bearings as sustainable tourism across the four (natural) capitals: environmental, social, cultural, and economic. They do however come with the promise of more demanding standards over time.

For Te Manahuna, a focus on regenerative tourism would require a refined tourism system that shapes and encourages the visitor and industry to become directly and indirectly engaged with environmental and social initiatives. To this end, the local community, other industry sectors and MDC would need to also actively encourage this refined tourism system and illustrate that other sectors are also working to achieve aligned outcomes for Te Manahuna.

For Te Manahuna, approaches to regenerative tourism could involve examples such as follows:

- Determining environmental mitigation costs as a foundation element and introducing (user pays models – with a clear interpretation of the uses to which payments are directed).
- Visitors, as a minimum, being fully engaged with local waste reduction systems. Pack out what you pack in.
- Visitors purchasing pest traps or contributing financially to their clearing and maintenance
- Visitors either purchasing (or planting) trees.
- Visitors being actively involved in environmental clean-up efforts (land and water-based).
- Visitors helping to undertake maintenance work on walking trails, cycleways etc.
- Visitors being involved in bush regeneration programs (reforestation and removal of weeds etc).
- Visitors helping to restore culturally significant sites or structures (e.g., planting, maintenance works).
- Tourism business models that avoid environmental and cultural impacts, minimise their use of natural resources, model respect for Te Manahuna's values, and account for multiple "bottom lines".



## Appendix 8 Methodology for Recommendation Prioritisation

To determine the refined list of opportunities, each has been assessed against the weighted criteria outlined in Table 16.

A weighted score has been used to reflect that some of the criteria have a stronger positive impact or a higher level of importance to each stakeholder than others. This weighting has been ranked and tested with the Project Working Group to deliver an agreed weighting spread.

Where possible, the assessment has utilised quantitative data (particularly for those projects where feasibilities or business cases have been developed). In the absence of such assessments, however, a qualitative assessment has been undertaken based on local knowledge, stakeholder consultation, professional experience, and a general assessment of the perceived benefits.

Table 16: Opportunity ranking criteria

Criteria	Score	Weighting	Description
Encourage mana whenua involvement in the visitor economy	Yes = 1 No = 0	15	Projects that actively encourage mana whenua involvement in the visitor economy and/or which grow mana whenua ventures are ranked higher.
Ability to help address climate change impacts	None = 0 Limited = 1 Medium = 2 Strong = 3	6	Projects that may assist in helping to mitigate climate change impacts are ranked higher.
Ability to improve the environment	None = 0 Limited = 1 Medium = 2 Strong = 3	6	Projects that comprise environmental initiatives are ranked higher.
Ability to act as a catalyst project to stimulate other investment projects	None = 0 Limited = 1 Medium = 2 Strong = 3	5	Projects that are more likely to encourage additional or complementary investment into other projects are rated higher.
Ability to attract a higher spending visitor market	None = 0 Limited = 1 Medium = 2 Strong = 3	5	Those which are likely to be drivers for encouraging visitation by those markets which typically spend more are ranked higher

Criteria	Score	Weighting	Description
Ability to be a major regional economic enabler	None = 0 Limited = 1 Medium = 2 Strong = 3	5	Projects that may act as major regional economic enablers through encouraging additional investment, job creation and greater spending (direct and indirect) are ranked higher
Ability to grow visitor yield	None = 0 Limited = 1 Medium = 2 Strong = 3	5	The ability of the project to increase visitor yield. Projects which are likely to encourage greater overnight stays (particularly in commercial accommodation) and those which introduce commissionable elements are ranked higher.
Likely to avoid reducing community social licence	None = 0 Limited = 1 Medium = 2 Strong = 3	5	Those projects that may potentially grow and/or not impact the community's social licence for tourism are ranked higher.
Size of private investment	<\$100,000 = 1 <\$500,000 = 2 <\$1,000,000 = 3 >=\$10,000,000 = 4	5	Projects which are more likely to attract private sector investment (regardless of the value of this investment) are ranked higher.
Likely to be supported by community	None = 0 Limited = 1 Medium = 2 Strong = 3	4	Those projects that may be supported (either through visitation or general support) by the local community are ranked higher.
Likely visitor appeal	None = 0 Limited = 1 Medium = 2 Strong = 3	4	The projects which are likely to have a stronger appeal to the visitor market are ranked higher than those which may generate lower visitor interest.
Regional dispersal of visitors	None = 0 Limited = 1 Medium = 2 Strong = 3	4	If a project can encourage stronger visitor dispersal throughout the region, it is ranked higher.
Uniqueness of product	None = 0 Limited = 1 Medium = 2 Strong = 3	4	The uniqueness of the product is ranked according to whether it is unique across NZ (ranked higher), across Te Manahuna, or whether the product is likely to be unique only to





Criteria	Score	Weighting	Description
			the specific area it is situated in (ranked lower).
Ability to encourage stronger domestic visitation	None = 0 Limited = 1 Medium = 2 Strong = 3	3	Those which are likely to encourage stronger domestic (rather than local) visitation are ranked higher.
Ability to secure govt. Funding for project	None = 0 Limited = 1 Medium = 2 Strong = 3	3	Those projects which may be more likely to be able to secure government funding (CAPEX or OPEX) are ranked higher.
Short term to activate	Yes = 1 No = 0	2	If the project is likely to be able to be activated in a shorter period, it is ranked higher.
Size of public investment	<\$100,000 = 4 <\$500,000 = 3 <\$1,000,000 = 2 >=\$1,000,000 = 1	2	Projects which have a stronger public sector investment requirement are ranked lower.
Ability to encourage stronger international visitation	None = 0 Limited = 1 Medium = 2 Strong = 3	1	Those which are likely to encourage stronger international visitation and profile are ranked higher.

Criteria	Score	Weighting	Description
Landowner	DOC = 0 Mana whenua = 1 Council = 2 Other Govt. Agency = 2 Private = 3	1	Projects which are situated on private land are ranked higher because there are likely to be fewer constraints.
Likelihood to be profiled by Tourism NZ	None = 0 Limited = 1 Medium = 2 Strong = 3	1	The ability of the project to grow the region's destination profile. Projects which may have stronger marketing budgets (particularly those run by larger tourism players), as well as highly unique products, are ranked higher.
Requirement for ongoing operational govt. Funding	None = 4 Limited = 3 Medium = 2 Strong = 1	1	If the project is likely to require ongoing government contributions to fund operating costs, it is ranked lower. If the project is likely to be commercially viable/sustainable, it is ranked higher.



# Appendix 9 Project Ranking Matrices

Table 17: The full matrix with attributes

Recommendation	Ability to act as a catalyst project to attract investment projects	Ability to attract a higher spending visitor market	Ability to be a major regional economic enabler	Ability to encourage stronger domestic visitation	Ability to encourage stronger international visitation	Ability to Grow Visitor Yield	Ability to help address climate change impacts	Ability to improve the environment	Ability to Secure Govt. Funding for Project	Employment (Operational potential)	Encourage events where involvement in the visitor economy	Estimated Visitation	Landowner	Likelihood to be profiled by tourism NZ	Likely to avoid reducing community social license	Likely to be supported by community	Likely/visitor appeal	Regional Disposal of visitors	Requirement for ongoing operational Govt. funding	Short term to activate	Uniqueness of Product	
Accommodation property (80+ rooms & conferencing)	Low	Medium	Medium	High	Low	High	Low	Low	Low	High	No	Medium	Private	Low	Low	Low	Medium	Low	Low	No	Low	
Address lack of seasonal workers across the region	Low	Medium	Low	None	None	None	None	None	None	None	No	None	Other Govt. Agency	High	Low	Low	High	Medium	Low	Yes	None	
Agri-tourism & aqua-tourism experiences	Medium	High	Low	Medium	High	Medium	Low	Low	Low	Medium	No	Medium	Private	High	Low	Low	High	Medium	Low	No	Low	
Agri-tourism showcase experience centre	High	Medium	High	High	High	High	None	Low	Medium	Medium	No	Medium	Council	Low	Low	Low	High	Medium	Low	No	Medium	
Assess growing A20 access from Takapo	Low	Low	Low	Medium	Medium	Low	Low	Low	Low	No	Low	Low	Other Govt. Agency	Low	Low	Medium	Low	Low	Low	No	Low	
Assist smaller-scale operators with agrarations to grow	Medium	Low	Low	None	None	Low	None	Low	None	No	None	None	Private	Low	Low	High	None	None	Low	Yes	Low	
Build stronger marketing partnerships with the new gateway destinations (Queen)	Low	Low	Low	Low	Medium	Low	Low	Low	None	No	High	Private	Low	Low	Low	Low	None	None	Low	Yes	Low	
Centralised experience hub (booking & information centre)	Medium	Low	Low	Medium	Low	Low	Low	Low	Low	Medium	No	Medium	Private	Low	Low	Low	Medium	Low	Low	No	Low	
Commercial centre expansion & upgrades for Takapo	Medium	Low	Medium	Low	Low	Medium	Low	Low	Low	Medium	No	Low	Private	Low	Low	Low	Low	Low	Low	No	None	
Community tourism awareness campaign	Low	Low	Low	None	None	None	Low	Low	None	No	None	None	Council	Low	Medium	Medium	None	None	Low	Yes	None	
Cycle and walking trails linking Lake Puaka and Lake Rotomahana	Low	Low	Low	None	None	None	Low	Low	None	No	None	None	Other Govt. Agency	Low	Medium	Medium	None	None	Low	Yes	None	
Define tools available to achieve best practice visitor management	Low	Low	Low	Low	Low	High	High	High	Low	None	No	None	DOC	Low	Medium	Medium	None	None	Low	Yes	Low	
Destination brand ('Made in Te Manahuna')	High	High	High	Medium	Medium	Low	None	Low	Medium	None	No	None	Council	High	Low	Low	Medium	High	Low	Yes	High	
Destination events toolkit	Low	Low	Low	None	None	Low	Low	Low	None	No	None	None	Council	Low	Low	Low	None	None	Low	Yes	None	
Developer forum to guide urban regeneration	Medium	Medium	Medium	None	None	None	Low	Medium	Low	None	No	None	Private	Low	Medium	High	None	None	Low	Yes	None	
Digital app and QR codes for visitor information and movement tracking	Low	Low	Low	None	None	None	Low	Medium	Low	None	No	None	Other Govt. Agency	Low	Medium	High	None	None	Low	Yes	None	
Diversified accommodation mix	Low	High	Medium	High	High	High	Low	Low	Low	Medium	No	High	Private	Low	Low	High	Low	Low	Low	No	Low	
Eco-huts on the edge of Aoraki/Mount Cook National Park	Medium	High	Low	Medium	High	Medium	Low	Low	Low	No	Medium	Private	High	Low	Low	High	High	None	Low	No	Low	
Electric aviation	Low	Medium	Low	Medium	Low	Medium	Low	Low	Low	No	Medium	Private	Medium	Low	Low	Low	Medium	Low	Low	No	Medium	
Enhanced, future proofed visitor information services	Medium	High	Medium	Low	Medium	Low	Low	Medium	Low	No	None	None	Private	Low	Low	Medium	Low	Low	Low	No	Low	
Enhanced, future proofed visitor information services	Low	Low	Low	Low	Low	None	Low	Low	None	No	None	None	Council	Low	Low	Medium	Medium	Low	Medium	Low	Low	
Ensure zoning changes in District Plan to encourage tourism	High	Low	Low	None	None	Low	Low	Low	None	No	None	None	Council	Low	Low	Medium	Low	Medium	Low	Yes	None	
Experiences/attractions for youth and 16-25 year olds	Low	Low	Low	Medium	Low	Medium	Low	Low	Low	No	Low	Low	Council	Low	Low	Medium	Low	Low	Medium	No	Low	
Greater provision of community services	Low	Low	Low	None	None	None	Low	Low	None	No	None	None	Council	High	Low	Medium	Low	Low	Medium	No	Low	
Guided storytelling and digital application	Low	High	Low	Medium	Low	Low	Low	Low	Medium	Low	Yes	Low	Mana whenua	Medium	Low	Medium	Medium	Low	Low	No	Low	
Improve pedestrian safety and accessibility across SH1 to link Takapo village to IB	Low	Low	Low	None	None	Low	Low	Low	None	No	Low	None	Other Govt. Agency	Low	High	High	Low	Low	Low	No	None	
Improve the provision of community services	Low	Low	Low	Medium	Low	Low	Low	Low	Low	No	Low	None	Private	Low	Medium	High	Medium	Low	Low	No	Low	
Improved sense of arrival into Takapo	Low	Low	Low	Low	Low	Low	Low	Low	None	No	Low	None	Council	Low	Low	Low	Medium	Low	Medium	Yes	Low	
Industry operator digital upskilling & service quality upskilling	Low	Medium	Low	None	None	None	Low	Low	None	No	None	None	Private	Low	Low	Medium	Low	Low	Medium	Yes	None	
Integration of Fairlie with regional cycle & walking trail network	Medium	Low	Low	Medium	Medium	Low	None	Low	None	No	Medium	Council	Low	Low	Medium	Medium	Medium	Medium	Medium	No	Low	
Lake Takapo on lake recreational experiences	Medium	Medium	Low	Medium	Medium	Medium	Low	Low	Low	No	Medium	Private	Low	Low	Low	Medium	Low	Low	Low	Yes	Low	
Leverage the Te Araua Trail as a national asset	Medium	Low	Low	Medium	Medium	Low	Low	Low	None	No	Low	None	Other Govt. Agency	Low	Low	Low	Low	Low	Low	Yes	Low	
Links to cycleways and a hub for the A20	Low	Low	Low	Low	Low	Low	Low	Low	None	No	Low	None	Other Govt. Agency	Low	Low	Low	Low	Low	Low	No	Low	
Mackenzie Great Walk	Medium	High	Low	Medium	High	Medium	Low	Low	Low	No	None	None	DOC	Low	Low	Low	High	Low	High	No	Low	
Major fishing & hunting destination festival	Medium	Low	Low	Medium	Low	Medium	Low	Low	Low	No	Medium	Private	Medium	Low	Low	High	Low	Low	Low	No	Low	
Max Smith storytelling experience	Medium	Low	Low	Medium	Medium	Low	Low	Low	Low	No	Medium	Other Govt. Agency	Low	Low	Low	Medium	Low	Low	Low	No	High	
MDC major presence in Fairlie	Low	Low	Low	None	None	None	Low	Low	None	No	None	None	Council	Low	Low	Low	Low	None	Low	No	None	
Meditation & Genosie sites for hydro tourism experiences	High	Medium	Low	Medium	Medium	Medium	Low	Low	Medium	No	Medium	Private	Low	Low	Medium	Low	Low	Low	Low	No	Medium	
New half- and full-day walking experiences	Medium	High	Low	Medium	High	Medium	Low	Low	Low	No	Medium	DOC	High	Low	Low	High	Medium	Medium	Low	No	Low	
New recreation/venture destination events such as traditions, ultras etc.	Medium	Low	Low	Medium	Low	Low	Low	Low	None	No	Medium	None	Council	Low	Low	Low	Medium	Medium	Low	Yes	Low	
New trails for accessing Aoraki/Mount Cook National Park	Medium	Medium	High	Low	High	Low	Low	Low	Medium	No	Medium	DOC	Low	Low	Medium	High	Medium	Medium	Medium	No	Low	
New/revamped FAB experiences	High	Low	Low	Medium	High	Medium	Low	Low	Medium	No	High	Private	Low	Low	Medium	Low	Medium	Low	Low	No	Low	
Place names - connections and dual place names	Low	Low	Low	None	None	None	Low	Low	None	Yes	None	None	Mana whenua	Low	Low	Low	Low	Low	High	No	Low	
Position Fairlie as a visitor information gateway	Low	Low	Low	Low	Low	None	Low	Medium	Low	No	Low	None	Council	Low	Low	Medium	Low	High	Medium	No	Low	
Reassess location for Rakai Airport	Medium	Low	Low	Low	Low	Low	Low	Low	None	No	None	None	Private	Low	Low	Medium	Low	Low	Low	No	Low	
Redesign and build new visitor promenade and landscaping at Takapo	Medium	Medium	Low	Medium	Low	Medium	Low	Low	None	No	Low	None	Council	Low	Low	Low	Medium	None	None	Low	Low	
Regional events calendar to promote regional events	Low	Low	Low	High	Medium	Low	Low	Low	None	No	None	None	Council	Low	Low	Low	Low	Low	Low	Yes	None	
Replacement of freedom camping sites with private & DOC controlled sites	Low	High	Low	Low	Low	Low	Medium	Low	None	No	Medium	DOC	Low	Low	Low	Low	Low	Low	Low	Yes	Low	
Robust visitor data collection for the region	Medium	Low	Low	None	None	None	None	Low	Medium	None	No	None	Other Govt. Agency	Low	Medium	Low	None	None	Low	Yes	None	
Series of seasonal fishing competitions	Medium	Low	Low	Medium	Low	Medium	Low	Low	Low	No	Medium	Private	Medium	Low	Low	High	Low	Low	Low	No	None	
Simplify compliance process, regulations and cost of implementing developments	Low	Medium	Low	None	None	None	Low	Low	None	No	None	None	Council	Low	Low	Low	Low	None	Low	Yes	None	
Ski touring experiences (packaging & profiling)	Medium	Low	Low	High	Medium	Low	Low	Low	Medium	No	Medium	Private	Medium	Low	Medium	Medium	Medium	Medium	Low	No	Medium	
Storytelling via view points/story boards	Medium	Low	Low	Medium	Medium	Low	Low	Low	Medium	None	Yes	Medium	Mana whenua	Medium	Low	Medium	Low	Medium	Medium	Low	Yes	Low
Stronger destination link for Fairlie to some of the surrounding ski fields	Low	Low	Low	Medium	Low	Medium	None	Low	None	No	Low	None	Private	Low	Low	Medium	Medium	Medium	Low	No	Low	
Sustainability in building eco/dorm/urban form design guidelines	Low	Low	Low	None	None	None	None	Medium	Low	None	No	None	Council	Low	High	Medium	None	None	Low	Yes	Low	
Sustainable travel and transport options	Low	High	Low	Low	Low	Medium	Low	Low	None	No	None	None	Private	Medium	Medium	High	Low	Low	Low	No	Low	
Takapo Hiltop activity precinct	High	Medium	Low	Medium	Medium	Medium	Low	Low	Low	No	Medium	Private	Medium	Low	Low	Medium	Low	Low	Low	Yes	Low	
Trail running development (linking to half- and full-day trails)	Low	Low	Low	Medium	Low	Low	Low	Low	None	No	Medium	Private	Medium	Low	Low	Medium	Low	Low	Low	No	Medium	
Trails trust establishment to grow trail networks	Low	Low	Low	None	None	None	Low	Low	None	No	Medium	Other Govt. Agency	Medium	Low	Low	Low	None	None	Low	No	Low	
Unique dark skies experiences	Medium	High	Low	Medium	High	Medium	Low	Low	Low	No	Medium	Private	High	Low	Medium	Low	Low	Low	Low	No	Low	
Urban form improvements for Fairlie	Low	Low	Low	Low	Low	Low	None	None	None	No	None	None	Other Govt. Agency	Low	Low	Medium	Low	Low	Low	No	None	
Visitor attraction and a lakeside promenade (to better link Takapo with Lake Rautau)	Low	Medium	Low	Medium	Medium	Low	Low	Low	Low	No	Medium	Private	Low	Low	Low	Low	Low	Low	Low	No	Medium	
Water visitor experience hub with iconic design	High	High	High	High	High	High	Medium	Low	Medium	High	No	High	Private	High	Low	High	High	High	Low	No	High	
Where Whakana (Po concept & storytelling)	Medium	Low	Low	Low	Low	Low	Medium	Medium	Medium	Low	Yes	Medium	Mana whenua	Low	Low	Low	Low	Medium	High	Yes	High	





Table 18: The full matrix with scores (unweighted/weighted score)

Recommendation	Ability to act as a catalyst project to stimulate other investment projects	Ability to attract a higher spending visitor market score	Ability to be a major regional economic enabler score	Ability to encourage stronger domestic visitation score	Ability to encourage stronger international visitation score	Ability to Grow Visitor Yield Score	Ability to help address climate change impacts score	Ability to improve the environment score	Ability to Secure Govt. Funding for Project Score	Employment (Operational) Potential Cnt	Encourage maunga whenua in the local economy score	Estimated Visitation Cnt	Landmark Score	Likelihood to be profiled by Tourism NZ Score	Likely to avoid reducing commercial/retail Namebase score	Likely to be supported by community score	Likely visitor appeal score	Regional Disposal of Visitors Score	Requirement for ongoing operational/engng. funding score	Short Term to Activate Score	Size of Private Investment Score	Size of Public Investment Score	Uniqueness of Product Score	Grand Total
Accommodation property (30+ rooms & conferencing)	1/15	2/10	2/10	3/8	1/1	3/15	1/6	1/6	1/3	3/8	0/0	2/4	3/3	1/1	1/15	1/4	3/8	1/4	2/3	0/0	4/20	4/8	1/4	40/137
Address lack of seasonal workers across the region	3/15	1/15	1/15	0/0	0/0	0/0	0/0	0/0	1/3	0/0	0/0	0/0	2/2	1/1	1/15	2/8	0/0	0/0	2/2	1/2	0/0	3/6	0/0	16/44
Agri-tourism & aqua-tourism experiences	2/10	3/15	1/15	2/6	3/3	2/10	1/6	1/6	1/3	2/6	0/0	2/4	3/3	3/3	1/15	1/4	3/12	2/6	2/2	0/0	3/15	4/8	1/4	43/138
Agri-tourism showcase experience centre	3/15	2/10	3/15	3/8	3/3	3/15	0/0	3/6	2/6	2/6	0/0	2/4	2/2	2/2	1/15	1/4	3/12	2/6	2/2	0/0	3/15	1/2	2/8	43/140
Assess growing A20 access from Takapo	1/15	1/15	1/15	2/6	2/2	1/15	1/6	1/6	1/3	1/3	0/0	1/2	2/2	1/1	1/15	2/8	1/4	1/4	2/2	0/0	0/0	3/6	1/4	27/84
Attract smaller-scale operators with aspirations to grow	2/10	1/15	1/15	1/3	0/0	1/15	0/0	1/6	1/3	0/0	0/0	0/0	3/3	1/1	1/15	3/12	0/0	0/0	2/2	1/2	0/0	4/8	1/4	24/74
Build stronger marketing partnerships with the two gateway districts	3/15	1/15	1/15	3/3	2/2	1/15	1/6	1/6	1/3	0/0	0/0	3/6	3/3	1/1	1/15	1/4	1/4	0/0	2/2	1/2	0/0	1/2	1/4	27/83
Centralised experience hub (booking & information centre)	2/10	1/15	1/15	2/6	1/1	1/15	1/6	1/6	1/3	2/6	0/0	2/4	3/3	1/1	1/15	1/4	2/8	1/4	2/2	0/0	3/15	4/8	1/4	34/111
Commercial centre expansion & upgrades for Takapo	2/10	1/15	2/10	1/3	1/1	2/10	1/6	1/6	1/3	2/6	0/0	1/2	3/3	1/1	1/15	1/4	1/4	2/2	0/0	4/20	4/8	0/0	33/113	
Community tourism awareness campaign	1/15	1/15	1/15	0/0	0/0	0/0	1/6	1/6	1/3	0/0	0/0	0/0	2/2	1/1	2/10	2/8	0/0	0/0	2/2	1/2	0/0	4/8	0/0	20/63
Cycle and walking trails linking Lake Pupuke and Lake Taupo	1/15	1/15	1/15	1/3	1/1	1/15	1/6	1/6	1/3	0/0	0/0	1/2	2/2	1/1	1/15	1/4	1/4	1/4	2/2	0/0	0/0	1/2	1/4	21/60
Define tools available to achieve best practice visitor management	1/15	1/15	1/15	1/3	1/1	1/15	3/18	1/3	0/0	0/0	0/0	1/2	2/2	0/0	3/12	2/8	0/0	0/0	2/2	1/2	0/0	4/8	1/4	26/90
Destination brand ("Made in Te Manahuna")	3/15	3/15	3/15	2/6	2/2	1/15	0/0	1/6	2/6	0/0	0/0	0/0	2/2	3/3	1/15	1/4	2/8	3/12	2/2	1/2	1/5	3/6	3/12	30/131
Destination events toolkit	1/15	1/15	1/15	1/3	0/0	1/15	1/6	1/6	1/3	0/0	0/0	0/0	2/2	1/1	1/15	1/4	0/0	0/0	2/2	1/2	0/0	4/8	0/0	20/62
Developer forum to guide urban improvements	2/10	2/10	2/10	0/0	0/0	0/0	1/6	2/12	1/3	0/0	0/0	0/0	3/3	1/1	2/10	3/12	0/0	0/0	2/2	1/2	0/0	3/6	0/0	25/87
Digital app and QR codes for visitor information and movement tracking	1/15	1/15	1/15	1/3	1/1	0/0	1/6	1/6	1/3	0/0	0/0	0/0	3/3	2/2	1/1	1/15	1/4	1/4	1/1	1/2	0/0	4/8	1/4	22/69
Diversified accommodation mix	3/15	3/15	2/10	3/8	3/3	3/15	1/6	1/6	1/3	2/6	0/0	3/8	3/3	1/1	1/15	1/4	3/12	1/4	2/2	0/0	4/20	4/8	1/4	40/137
Eco-huts on the edge of Aotahi/Mount Cook National Park	2/10	2/15	1/15	2/6	3/3	2/10	1/6	1/6	1/3	1/3	0/0	2/4	3/3	3/3	1/15	1/4	3/12	3/12	3/8	0/0	0/0	1/2	1/4	38/110
Electric & solar power boats	1/15	2/10	1/15	2/6	1/1	2/10	1/6	1/6	1/3	1/3	0/0	2/4	3/3	2/2	1/15	1/4	2/8	1/4	2/2	0/0	3/15	4/8	1/4	36/118
Electric aviation	2/10	3/15	2/10	1/3	2/2	2/10	1/6	2/12	1/3	1/3	0/0	2/4	3/3	2/2	1/15	1/4	2/8	1/4	2/2	0/0	0/0	4/8	1/4	36/118
Enhanced, future-proofed visitor information services	1/15	1/15	1/15	1/3	1/1	0/0	1/6	1/6	1/3	0/0	0/0	0/0	2/2	1/1	1/15	2/8	2/8	1/4	1/1	0/0	0/0	2/4	1/4	21/71
Ensure zoning changes in District Plan to encourage tourism	3/15	1/15	1/15	0/0	0/0	1/15	1/6	1/6	1/3	0/0	0/0	0/0	2/2	1/1	1/15	1/4	0/0	2/8	2/2	1/2	0/0	3/6	0/0	22/75
Experiences/attractions for youth and 18-25 year olds	1/15	1/15	1/15	2/6	1/1	2/10	1/6	1/6	1/3	1/3	0/0	1/2	2/2	1/1	1/15	2/8	1/4	1/4	1/1	0/0	3/15	2/4	1/4	28/100
Greater provision of community services	1/15	1/15	1/15	1/3	0/0	0/0	1/6	1/6	1/3	0/0	0/0	0/0	2/2	1/1	3/15	3/12	0/0	0/0	1/1	0/0	3/15	4/8	1/4	25/91
Guided storytelling and digital application	1/15	3/15	1/15	2/6	1/1	1/15	1/6	1/6	1/3	0/0	0/0	1/2	2/2	1/1	3/15	3/12	1/4	1/4	2/2	0/0	0/0	3/6	1/4	31/115
Improve pedestrian safety and accessibility across SH1 to link Takapo	1/15	1/15	1/15	1/3	0/0	0/0	1/6	1/6	1/3	0/0	0/0	1/2	2/2	1/1	3/15	3/12	1/4	1/4	2/2	0/0	1/2	0/0	1/2	32/102
Improve the provision of community services	1/15	1/15	1/15	2/6	1/1	1/15	1/6	1/6	1/3	1/3	0/0	1/2	3/3	1/1	2/10	3/12	1/4	1/4	2/2	0/0	1/5	4/8	1/4	32/104
Improved sense of arrival into Takapo	1/15	1/15	1/15	1/3	1/1	1/15	1/6	1/6	1/3	0/0	0/0	1/2	2/2	1/1	3/15	1/4	2/8	1/4	1/1	1/2	0/0	1/2	1/4	22/74
Industry operator digital upskilling & service quality uplinking	1/15	2/10	1/15	0/0	1/1	1/15	1/6	1/6	1/3	0/0	0/0	0/0	3/3	1/1	1/15	2/8	1/4	0/0	2/2	1/2	1/5	4/8	0/0	25/79
Integration of Fairlie with regional cycle & walking trail network	2/10	1/15	1/15	2/6	2/2	1/15	0/0	1/6	1/3	0/0	0/0	2/4	2/2	1/1	1/15	2/8	2/8	2/8	1/1	0/0	0/0	3/6	1/4	28/89
Lake Takapo on-lake recreational experiences	2/10	2/10	1/15	2/6	2/2	2/10	1/6	1/6	1/3	1/3	0/0	2/4	3/3	1/1	1/15	1/4	2/8	1/4	2/2	1/2	2/10	4/8	1/4	36/116
Leverage the Te Araroa Trail as a national asset	2/10	1/15	1/15	2/6	2/2	1/15	1/6	1/6	1/3	0/0	0/0	1/2	2/2	1/1	1/15	1/4	1/4	1/4	2/2	1/2	0/0	3/6	1/4	27/84
Links to cycleways and a hub for the A20	1/15	1/15	1/15	1/3	1/1	1/15	1/6	1/6	1/3	0/0	0/0	1/2	2/2	1/1	1/15	1/4	1/4	1/4	2/2	0/0	1/5	2/4	1/4	24/78
Major fishing & hunting destination festival	2/10	3/15	1/15	2/6	3/3	2/10	1/6	1/6	1/3	1/3	0/0	2/4	0/0	1/1	1/15	1/4	3/12	1/4	0/0	0/0	1/2	1/4	1/4	28/103
Max Smith storytelling experience	2/10	1/15	1/15	2/6	2/2	1/15	1/6	1/6	1/3	1/3	0/0	2/4	2/2	1/1	1/15	1/4	2/8	1/4	2/2	0/0	3/15	4/8	3/12	35/116
MDC major presence in Twizel	1/15	1/15	1/15	0/0	0/0	0/0	1/6	1/6	1/3	0/0	0/0	0/0	2/2	1/1	1/15	1/4	1/4	0/0	2/2	0/0	0/0	1/2	0/0	15/50
Meridian & Genesis sites for hydro-tourism experiences	3/15	2/10	1/15	2/6	2/2	2/10	1/6	1/6	1/3	2/6	0/0	2/4	3/3	1/1	1/15	1/4	2/8	1/4	2/2	0/0	3/15	4/8	2/8	39/131
New half- and full-day walking experiences	2/10	3/15	1/15	2/6	3/3	2/10	1/6	1/6	1/3	1/3	0/0	2/4	0/0	3/3	1/1	1/15	1/4	3/12	2/8	2/2	0/0	3/6	1/4	35/115
New recreational/adventure destination events such as treks, trails, ultra	2/10	1/15	1/15	1/3	2/2	1/15	1/6	1/6	1/3	0/0	0/0	2/4	2/2	1/1	1/15	1/4	2/8	2/8	2/2	1/2	0/0	4/8	1/4	30/101
New trails for accessing Aotahi/Mount Cook National Park	2/10	2/10	3/15	1/3	3/3	1/15	1/6	1/6	1/3	0/0	0/0	2/4	0/0	1/1	1/15	2/8	3/12	2/8	1/1	0/0	0/0	3/6	1/4	33/116
New/unbranded F&B experiences	3/15	3/15	1/15	2/6	3/3	2/10	1/6	1/6	1/3	2/6	0/0	3/6	3/3	1/1	1/15	1/4	2/8	1/4	2/2	0/0	1/5	3/6	1/4	38/123
Place names - corrections and dual place names	1/15	1/15	1/15	1/3	1/1	0/0	1/6	1/6	1/3	0/0	1/15	0/0	1/1	1/1	1/15	1/4	1/4	0/0	0/0	0/0	1/2	1/4	1/4	17/74
Position Fairlie as a visitor information gateway	1/15	1/15	1/15	1/3	1/1	1/15	1/6	1/6	1/3	0/0	0/0	1/2	2/2	1/1	3/15	2/8	1/4	3/12	1/1	0/0	0/0	4/8	1/4	27/86
Reassess location for Pupuke Airport	1/15	1/15	1/15	1/3	1/1	1/15	1/6	1/6	1/3	0/0	0/0	0/0	3/3	1/1	1/15	2/8	1/4	1/4	2/2	0/0	0/0	2/4	1/4	25/74
Redesign and build new lakefront promenade and landscaping at Tak.	2/10	2/10	1/15	1/3	2/2	1/15	1/6	1/6	1/3	0/0	0/0	1/2	2/2	1/1	1/15	1/4	2/8	1/4	1/1	0/0	0/0	1/2	1/4	24/83
Regional events calendar to promote regional events	2/10	1/15	1/15	3/8	2/2	1/15	1/6	1/6	1/3	0/0	0/0	0/0	2/2	1/1	1/15	1/4	1/4	1/4	2/2	1/2	1/5	4/8	0/0	28/88
Replacement of freedom camping sites with private & DOC-controlled	1/15	3/15	1/15	1/3	1/1	1/15	1/6	2/12	1/3	0/0	0/0	2/4	0/0	1/1	1/15	1/4	1/4	1/4	2/2	1/2	0/0	3/6	1/4	26/91
Risk/audit data collection for the region	2/10	1/15	1/15	0/0	0/0	0/0	1/6	2/6	0/0	0/0	0/0	2/2	1/1	2/10	1/4	0/0	0/0	2/2	1/2	0/0	4/8	0/0	0/0	20/61
Series of seasonal fishing competitions</																								





## Appendix 10 Economic Impact Summary

Te Manahuna is an area of significant cultural values, and like many other areas in NZ, is facing development pressures that have to be carefully managed and addressed. Protecting, preserving, and enhancing natural landscapes and cultural values are central to the local development process. M.E's assistance covered:

- The economic narrative and supplying background information,
- Defining a business as usual (BAU) future to frame the baseline economic outlook,
- Technical assessment, from an economic perspective, of:
  - The alternative growth scenario, and
  - The project package and the associated costs and benefits.

The economic assessment consisted of three key parts:

- The baseline and business-as-usual outlook,
- The scenario assessment looked at the potential economic impacts of alternative growth pathways in Value Added (like GDP) and employment terms, and
- The costs and benefits associated with the project package.

### + Baseline And Business-As-Usual Future

The economic assessment used a range of datasets and projections, including population projections prepared for the Council, official information published by StatsNZ covering demographics, deprivation levels, employment levels, sectoral performance and GDP data published by MBIE. The main points about the current situation and the outlook are:

- The population base is small but it is growing. Estimates suggest that the district has 4,950 residents. The population is expected to expand over the short, to medium term with the population projected to increase by 2.9% per year to 6,750 by 2031 and 7,900 by 2041. The growth is expected to taper off over the longer term.
- The population is projected to age, and the ageing effect will have several flow-on implications, ranging from shifts in the demand for schools, changes in household structures (smaller

households and more single-person households), as well as changing income levels and varying abilities to participate in the labour force.

- Official information<sup>30</sup> suggests that in 2019 (pre-Covid), the district had a GDP of \$259m with total employment of 2,910 MECs<sup>31</sup>. The local economy's size and structure have been changing, responding to market shifts and pressures.

In simple terms, the local economy has three core parts:

- Agriculture and the rural economy,
- The visitor economy (tourism), and
- a component that services the local population (residents).

The historic trends were linked to known limits and constraints to form the BAU Future scenario. Growth is expected to continue on a strong foundation, with the Covid pandemic having a marked impact on the immediate, short-term, growth patterns. The recovery pathway is however uncertain and subject to external forces. Under the BAU Futures, the local economy is expected to grow to \$780m by 2101. This equates to a long-term growth (compound) rate of 1.3%. Total employment is expected to increase, reaching an estimated 7,170 MECs (including working proprietors) by 2101.

Over the next decade, growth is expected to come in at 1.2%, dragged lower due to the uncertainty associated with international travel, and global geopolitical developments. However, recent announcements around border re-openings will support the tourism activity in the short term – clearly there are upside risks.

In the absence of any concerted economic development efforts to redirect the economy, the structure will remain broadly stable. Agriculture activities will continue to play an important role, but sectoral shifts are anticipated in response to changing environmental pressures and market expectations. Under the BAU settings and over the long term, other livestock farming (e.g., deer, etc.) will increase from 1.0% of the district's Value Added (VA<sup>32</sup>) to 1.8%. Fishing and aquaculture will see strong increases in contributed values – growing from around \$5m to \$31m over the long term. This growth is driven by recreational fishing as well as the potential to develop commercial aquaculture opportunities. However, the emphasis is expected to fall on the recreational segment and its links to

<sup>30</sup> Published by MBIE

<sup>31</sup> a MEC, or modified employee count, is a headcount of employees and working proprietors.

<sup>32</sup> VA is similar to GDP, but there are small differences in how some taxes are treated.



tourism activities. The sector's share of VA will approach 4%. Importantly, the future availability of, and conditions associated with, the water resource will be key.

As the surrounding rural economy grows over time, a degree of market scale will be achieved. In turn, this will enable local agriculture support businesses to provide the services, substituting interregional imports. While still relatively small, the support sector will grow from \$4m of VA to \$28m (VA) by 2101.

With reference to tourism-related activities continued growth is expected, including:

- **Retail trade** will see VA increasing from around \$9m to \$28m but the relative share of the overall economy will remain relatively flat, staying rangebound between around 3% and 4%. (importantly, the VA presented here is the value of retailing and excludes the value of goods that retailers sell and it relates to the total retail sector which also includes services to households).
- **Accommodation and food services** will see VA increase from \$39m to \$88m over the long term. However, the share of VA that these activities generate is expected to fall from 13% to 11% over the long term. Activities like AirBnB are not recorded in the accommodation sector's data meaning that the true value of accommodation is likely to be understated in official data.

The demographic shifts will flow through and have economic effects, with growth in some sectors expected in response to the shifts. The core shifts are:

- **Health care and social services** growing from \$8m to \$32m over the long term. The VA contribution increases from 3% to 4% of local VA.
- **Personal and other services** increasing from \$8m to over \$28m. The relative contribution of these activities to the overall economy remains around 3%.
- **Arts and recreation** services will see an increase from \$25m to \$68m, and
- **Local government increases** from 1% to 2% of the economic VA – a marginal increase based on increasing the VA from around \$3m to \$12m over the long term.

**The economy is concentrated, with large parts of the VA delivered by a small selection of sectors. The local Tress Index<sup>33</sup> is 77, meaning that the economy is highly concentrated. Long term, this level of concentration is expected to see a small decrease, but the overall level will remain high. Being highly concentrated means that the economy is exposed to external shocks, making it vulnerable to sudden market shifts, or developments in the local area (e.g. natural hazards, localised events).**

The analysis highlights the role of labour and labour constraints in the economy. Labour shortages and the potential mismatch between labour demand and labour supply (skill levels and attributes)

<sup>33</sup> This index shows the level of concentration.

are key challenges facing local businesses. These challenges are not unique to the district, and likely to remain acute for the foreseeable future.

#### + Scenario Assessments

A key part of the DMP process related to working with stakeholders to define the vision, development principles and the values that would guide the DMP process going forward. This engagement process resulted in three scenarios:

- **Scenario 1: Status Quo Plus (Status quo and demand-driven approach):** The scenario reflects life as before but more mindful of avoiding sustainability issues and peak seasonal pinch points. The scenario reflects uncertainty, uneven demand, and development largely initiated by public sector initiatives.
- **Scenario 2: Growth (Volume and Value Push):** The scenario reflects sustainability principles that are widely accepted, government investment that leverages private investment and, partnerships start to activate.
- **Scenario 3: Stretch (Value Push):** This scenario reflects earlier activation of projects that are leveraged by public sector funding and a strong link to private sector activity and initiatives over the medium term.

The scenario analysis reflected the relativity between the scenarios and are based on a range of assumptions. The scenarios were framed as alternative growth pathways based on visitor numbers, spending patterns, length of stay and visitor composition (domestic vs international visitors). The scenarios have different degrees of sustainability and environmental elements, and these important elements are integrated into all the scenarios. However, scenario 3 has the deepest and most comprehensive integration of these aspects. Regenerative tourism is specifically mentioned<sup>34</sup>.

The scenarios were assessed in terms of the potential economic impacts (GDP/VA and employment), over time and compared against the BAU Future to identify key shifts and the local constraints. The scenarios are not 'targets' and were used to guide the process.

**The economic impacts (GDP and employment) estimated for each scenario should not be treated as benefits – GDP (or VA) is not a benefit, it is a measure of economic production.** However, this part of the economic assessment (for the DMP process) is concerned with local production, the likely shifts in economic activity, and the anticipated constraints. Therefore, GDP remains an appropriate metric. The scenario analysis revealed:

<sup>34</sup> Regenerative tourism encourages, and facilitates, visitors to 'give back' to the places they visit



- In terms of visitor numbers:
  - Over the medium-term (10 years), Scenarios 1 and 2 return the highest growth in visitor numbers, with between 2.2m and 2.3m visitors<sup>35</sup>. In contrast, Scenario 3 is lower, and the estimated visitor numbers is 1.8m. Over the next two decades (to 2051), a gap opens between all scenarios. Scenario 3 will see the lowest visitor numbers and this trend continues over the entire assessment period. Scenario 3 consistently returns the lowest visitor numbers (in day equivalent terms).
- From a spending perspective:
  - Even after accounting for the lower visitor numbers, Scenario 3 returns the highest spending over the long term.
  - Over the short term (i.e., visitor sector's recovery) scenarios 1 and 2 are expected to see the highest numbers, but this reverses from around 2041 onwards.
- On an indexed basis that combines total spending and visitor numbers:
  - Scenario 3 returns an index of 1.1, increasing to 1.36 over the long term. This contrasts with an index of between 0.91 and 1 for the other two scenarios.
  - The index suggests that after allowing for scale (visitors), the level of spending per visitor, and shifts over time, that scenario 3 delivers the highest spending on a per visitor basis.

**The scenario analysis clearly points to scenario 3 as delivering the most favourable value proposition.**

Looking past the specific scenario, the economic analysis showed that:

- The three scenarios all deliver a larger economy over the initial 10-year period. This step change highlights the recovery profile across the three scenarios.
- Over the short and medium term, the difference between the scenarios (in terms of economic VA) is not large. The percentage difference is 4.8% (\$19m) between the largest (Scenario 1) and the smallest (Scenario 3) scenario.
- Under Scenario 3, the economic performance pulls ahead of the other scenarios from the second decade onwards.

The analysis highlights that, regardless of the scenario, the district will enter a higher growth pathway. Importantly, labour issues are likely to be limiting constraint on the economy. If labour constraints are not addressed, then the intended level of activity (and full opportunity) is unlikely to materialise. Labour pressures are expected to be particularly acute in the initial 10-year period. Addressing productivity challenges will need to be part of rolling out the DMP projects.

<sup>35</sup> Visitors refer to day-equivalents.

### + Assessing the projects (costs and benefits)

Using the scenarios as a guide to inform the projects, the team develop a list of projects that would deliver on the vision and principles of the DMP. The projects were assessed as a group, not individually, in terms of the social cost and benefits. The CBA examines the relationship between the costs and benefits of the projects in aggregate. The Cost-Benefit Ratio (CBR) provides a useful way to show if the projects deliver benefits that will outweigh the cost (>1 means that the benefits are greater than the costs) and if this is the case, then the community would be better off. The following table reports the CBA results under different discount rates.

Table 19: CBA Results

Discount rate	Benefits \$m	Costs \$m	Net position \$m	CBR	Av Annual \$m
0%	26,392	14,387	12,005	1.83	120.05
3%	6,091	3,530	2,561	1.73	25.71
5%	3,152	1,910	1,242	1.65	12.54
7%	1,923	1,214	709	1.58	7.22
9%	1,298	850	448	1.53	4.61
Mixed*	10,409	5,783	4,224	1.80	46.34

\* - Declining discount rate (from 5% to 0.5%)

The 5% discount rate is the default rate and aligns with the Treasury and Waka Kotahi NZTA settings. Under this discount rate, the CBR is estimated as 1.65 – well above 1. This suggests that the DMP projects, and the change in focus from volume to a value approach, would deliver benefits that outweigh the costs. The **positive outcome (>1) is observed across all the discount rates**, including the high rate of 9%. In reality, the overall value is likely to be towards the upper end of the spectrum because the lower discount rates (including the 'mixed' rate) show a more balanced view of the time preference of money.

The analysis allows for economic values like consumer and producer's surplus, as well as deadweight losses, displacement, and opportunity costs. The DMP and project-level details will be refined as part of the implementation process, and therefore it is not possible to include fine(r) details (e.g., benefit





values) around important matters like environmental improvement and cultural gains. Including these matters are however likely to increase (lift) the CBR.

Implementing the projects will take time and the benefits will be cumulative, building over the long term. A simulation approach reflecting different implementation pathways was used to assess the temporal distribution of effects. The figure shows the trend in net position over time (the thin line is the fitted trend line, and the dots show the average values over multiple simulations). Note, the annual values are benefits and include non-market values and should not be viewed as VA.

Some volatility can be expected over the short term, where the costs outweigh benefits. This reflects the change in delivery approaches, responding to the market recovery and positioning for the long-term activities and overall change. Next a period of high annual net positions is identified, capturing the move towards high(er) value activities.

Following from 2051, the steady improvement in net position continues. Over the long term, **the annual net benefits approach \$200m/a. These benefits are substantially higher than the short and medium terms. This underscores the important point that the DMP is not a quick fix, but a transitioning, and restructuring of the visitor economy that would deliver the outcomes over the long term.**

The overall project will see significant investments in diversifying the commercial opportunities, how the local economy interacts with the natural resource, protects it and how value is derived from the visitor market. The short-term costs and shallow net benefit positions over the short term should not be viewed as a barrier to working towards the material gains that would manifest over the medium to long term.

**+ Concluding remarks**

The economic assessment considered the historic trends, BAU Future as well as three growth scenarios. Underlying economic issues, like labour constraints and the need for productivity growth must be incorporated into the wider development programme, the DMP and development activities

to ensure that the true potential of the area is reached. These issues risk undermining the long-term rollout of the DMP, and the wellbeing of the local communities.

The scenario analysis confirmed that scenario 3 is the appropriate preferred option, and suggested that this option would deliver the greatest GDP impact at the lowest relative increase in visitor numbers (i.e., reflecting the shift to value from volume. The CBA analysis found that the relationship between the costs and benefits to be robust and favourable. Even if high discount rates and more aggressive settings were used, the CBR remained positive.

