

Murihiku Southland Destination Strategy

2023 – 2029



GREAT SOUTH 

Southland Regional Development Agency



Murihiku

The South Land

The world looks different from down here.

We live in one of the southernmost places on the planet – a southern land, under southern skies, surrounded on three sides by the Southern Oceans, guided by southern stars. Our special place is at the southern edge of the world, and it has shaped where we've come from, who we are, and the future we are navigating towards. The 'tail end of the land' in Te Ao Māori, Murihiku is the tail of the whale, guiding its movement forward as it guides our people.

Our place engages the senses in ways that only untouched places can - the earthy smells of primordial forests, the sounds of birds and thundering seas, rivers, and waterfalls, the sight of awe-inspiring skies, landscapes, and native creatures in the wild, the pure, fresh taste of kaimoana, and the touch of wind, rock, water, and sun.

Te Taiao - the skies we live under, the whenua, waters, coasts, oceans, flora, and fauna we live alongside - is crucial to our identity. We have never lost connection to the natural world; we experience its wildness, beauty, and abundance as part of everyday life. Preserving the richness of our environment and the abundance of our natural taonga has been embedded within us for generations.

We have a unique story that we believe is worth sharing with the world.



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Executive Summary

Tū tahi ki te Kei.

Let's all stand together in the stern of our waka.

The people of Murihiku Southland are shaped by our interwoven histories, our place at the southern edge of the world and our connection to Te Taiao. The spirit of kaitiakitanga runs deep, as does the southern hospitality we are renown for. Our place is one like no other, and one that visitors are drawn to experience and explore.

The Murihiku Southland Destination Strategy 2023-2029 (MSDS 2023) outlines the pathway forward for our tourism sector and a vision for its future, deeply grounded in the principles of destination management. It signifies a crucial step in our re-imagining of tourism, laying the foundations for a more sustainable and regenerative visitor economy. It is a plan for all Southlanders, and one that seeks to deliver economic, cultural, social, and environmental benefits for our people while protecting and preserving our place.

Our tourism sector experienced robust growth pre-Covid and visitor numbers are predicted to return to these levels within the next two-three years. The communities of Murihiku Southland are supportive of this return but want to see growth managed well, particularly in key locations such as Piopiotahi Milford Sound.

The MSDS 2023 echoes the priorities and perspectives of our communities and of mana whenua, and it has been developed in close consultation with key stakeholders, recognising that it will take a coordinated effort to realise its vision for tourism in Murihiku Southland.

It's pathway forward outlines:

> **Sixty-three recommended projects**

Spread across the areas of environmental stewardship, leadership and capability development, access and infrastructure, product and experience development and sharing our story

> **Twenty-four priority projects**

Reflecting the most significant opportunities to bring our vision to life and position the region as a stronger visitor destination

> **Five key enablers**

Areas of critical importance to the recovery and growth of our tourism sector:

1. Workforce attraction and development
2. Advocacy and regulatory planning
3. Tourism leadership group establishment
4. Data and insights
5. Quality accommodation development

In addition to these project areas, the MSDS 2023 outlines a plan for new measures of success which are more holistic in nature, addressing all the areas of benefit it seeks to deliver. Led by Great South, a supporting implementation plan will also be developed alongside key partners and stakeholders.

Together we have the opportunity to re-shape the future of tourism in Murihiku Southland, inviting visitors to join us in our special place at the southern edge of the world, experiencing it in a way that provides lasting benefits for our people and place.



The Importance of Tourism

Tourism has long been recognised as a key opportunity for the diversification of Murihiku Southland's regional economy.

It is a sector integral to the growth of the region's population, it has the ability to grow liveability and attractiveness of Murihiku Southland as a place to visit but also to work and live, and it can contribute positively to the social and economic wellbeing of the region.

Recognising this potential, the recently released Beyond 2025 Southland Regional Long Term Plan has identified tourism as one of the two most significant diversification opportunities for the region, alongside aquaculture.

Pre-Covid tourism had experienced significant growth, achieving a high of \$700 million in visitor spend in 2020. The sector was well on track to achieving its goal of visitor spend of \$1 billion by 2025 and nationally it had become the country's largest export sector. While this growth was severely impacted by Covid, our recovery has made a strong start and we expect to see visitor numbers return to pre-Covid levels within the next two-three years (p46).

TOURISM BENEFITS

The benefits tourism brings to Murihiku Southland are numerous and stretch far beyond purely economic measures, deep into the fabric of our communities. Tourism creates jobs, generates revenue, supports local businesses, and the development of improved services and infrastructure. It fosters a sense of pride in our communities and encourages the preservation of our heritage and environment, working to raise awareness and build support for our conservation efforts.

Recent Community Sentiment in Relation to Tourism research undertaken found that when compared with other New Zealanders, our residents are more likely to say they have benefited from tourism (p33). These benefits were from more local businesses having opened or being able to stay open, employment and income opportunities, having a more vibrant and friendly place to live, a greater appreciation of the natural environment and an enhanced profile or identity of their local region/area.



Tourism can be a powerful force for positive change, bringing economic, social, and cultural benefits while also promoting sustainable development and environmental stewardship.

COMMUNITY MANDATE

Tourism has an expansive reach into the communities of Murihiku Southland. Within the Community Sentiment in Relation to Tourism research (p33) undertaken, residents were found to be significantly more likely to have personally engaged in all forms of tourism activities than the total Aotearoa New Zealand population. Respondents also ranked tourism in their top five sectors for the Murihiku Southland economy, both now and into the future. Insights like these show the importance our residents place on tourism and its role within our economy.

Of residents surveyed 85% indicated an acceptance for the growth of tourism, with the proviso that this is well managed. This view aligns well with the aspirations and priorities identified with the strategic plans of our Council community boards, which all include reference to building tourism in their place, seeing it as a way to bring vibrancy, investment, job opportunities, and more activities to their communities.

Our Papatipu Rūnaka are also interested in being at the forefront of tourism development going forward. Working together in partnership, they have a key role to play in sharing their stories, an important part of what makes Murihiku Southland unique and special.



A DESTINATION MANAGEMENT APPROACH

In 2019, the Southland Murihiku Destination Strategy 2019-2029 (SMDS 2019) was launched. This plan signified a significant change in approach to the management of our tourism system. The aim of destination management is to develop and maintain a tourism industry that contributes to the economic, social, cultural, and environmental wellbeing of our region and residents. It is a collaborative and holistic approach to planning for the sustainable growth of our visitor economy and involves all those connected to the visitor journey working together.

This approach is particularly important moving forward when we consider the pressure strong tourism growth had put on some parts of our region prior to Covid. In key destinations like Piopiotahi Milford Sound, where visitor numbers were on track to reach one million, growth had started to impact on the enjoyment of locals and the experience of visitors. This resulted in the development of the Milford Opportunities Project, one of the most transformative tourism plans developed in our generation, which seeks to reassess how we manage tourism in this iconic destination.

While other areas are not under the same pressure as Piopiotahi Milford Sound, we need to carefully plan for the development of our entire region in a sustainable and holistic way. While we know our communities are supportive of tourism growth, they are also aware of its potential impacts. The return of tourism post Covid presents the opportunity for a gradual and more staged approach to visitor growth and a new way forward deeply rooted in the benefits it can bring to our communities.



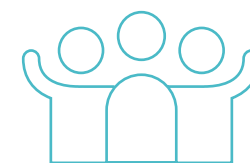
THE WAY FORWARD

This revision of the SMDS 2019 presents an opportunity to take our goals and aspirations for tourism further than ever before. Launched prior to Covid, many of the projects recommended in the SMDS 2019 have now been achieved. At the same time there has been a global shift in the importance of tourism being intrinsically linked to the benefits it can provide our communities, with the aspiration that the sector can work to deliver more than it takes and become regenerative.

The resulting MSDS 2023 is a significant step towards this and outlines a plan intrinsically linked to:



By developing our tourism sector in a gradual way that is deeply grounded in our people and place, we will not only create shared benefits for all, but develop a destination which offers a welcoming, connected, and memorable experience for visitors to Murihiku Southland.



Our Community

Delivering real benefits for our people (as identified by them).



Mana Whenua

Working in partnership and with a strong understanding of Te Ao Māori values.



Sustainability

At the heart of who we are and the future of our place.

Strategic Framework

VISION

Murihiku Southland is a world-class tourism destination that showcases our stunning natural landscapes, rich cultural heritage, and exceptional hospitality. By prioritising sustainability and community collaboration, we create unforgettable experiences for visitors, while benefiting residents, businesses, and the environment.

Murihiku Southland is a place of stunning and unique natural landscapes with over half of our region (58%) managed as conservation estate, predominantly within Fiordland and Rakiura National Parks.

We have over 3,100 km of coastline, a United Nations Educational, Scientific and Cultural Organisation (UNESCO) World Heritage site, 11 marine reserves, two marine sanctuaries, five of Aotearoa New Zealand's 11 Great Walks, and the world's southernmost International Dark Sky Sanctuary. Our region has a long-standing history of attracting visitors to our natural attractions and protecting the environment is important to our communities. Farmland occupies 85% of our non-conservation land, much of this supporting sheep or dairy farming, a way of life intrinsically linked to our people.

Our cultural heritage is rich, with the stories of both mana whenua and those who have made our region home a key part of Murihiku Southland's appeal, alongside the hospitality and genuine warmth we are known for.

By focusing on these key strengths, Murihiku Southland can differentiate itself as a destination and set a high standard for sustainability, community benefit, and the experience of visitors. This vision for the development of the region's tourism sector is deeply grounded in our people and place. It acknowledges the importance of working closely with our local community to ensure that tourism delivers real benefit and supports the region's economic, social, and environmental goals. Connection to our communities also ensures the region's unique character and identity are preserved, while fostering a sense of pride and ownership amongst our residents.

By promoting and encouraging sustainable tourism practices, Murihiku Southland can attract environmentally conscious visitors whose values align with those of our local communities, while building our reputation as a world-class responsible tourism destination.

Community

- ✓ Community engagement and local pride
- ✓ Improved local economy and job creation
- ✓ More and improved events, activities, services, and facilities
- ✓ Preservation of cultural heritage
- ✓ Improved infrastructure
- ✓ Increased cultural diversity

Economy

- ✓ Increased local spending
- ✓ Employment/job creation
- ✓ Business growth opportunities
- ✓ Improved infrastructure
- ✓ New investment in the region
- ✓ Economic diversification

Environment

- ✓ Financial contribution to conservation
- ✓ Improved understanding and appreciation of the natural environment
- ✓ Improved protection and guardianship
- ✓ More sustainable actions and activities
- ✓ Volunteer activity
- ✓ Enhanced natural environment

Visitor

- ✓ Authentic and connected experiences
- ✓ Improved knowledge and understanding of the region
- ✓ Experience of a low-impact holiday
- ✓ Willingness to return as a visitor
- ✓ Willingness to return to live and work



STRATEGIC FRAMEWORK

Priority Outcomes

Develop world-class experiences

Develop new product and experiences to attract visitors who align with our values and what we have to offer.

Share our uniqueness with the world

Build on what makes us different – our location, environment, wildlife, history, and our people.

Protect and enhance our place

Sustainability will be at the heart of all that we do, with real benefits for our communities delivered.

Build on who we are and our natural assets

Authentically understand and share the stories of our people and our communities.

Encourage a strong connection to our place

Build a deep connection with our visitors, keeping them with us for longer and more meaningful stays.

Work in collaboration and partnership

Partner with mana whenua as kaitiaki of our place, work together as a region on key challenges and opportunities.

Guiding Principles

Underpinning the vision are five guiding principles that have been used to help shape the MSDS 2023.



Whanaungatanga/Together

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



Ōhanga/Whairawa

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



Kaitiakitanga

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



Diversity

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



Manaakitanga

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

STRATEGIC FRAMEWORK

Strategy Review

For the last three years, the Southland Murihiku Destination Strategy 2019 -2029 (SMDS 2019) was the overall framework which guided how we develop, manage, and promote Murihiku Southland as a visitor destination. Launched in December 2019, Murihiku Southland was one of the first regions to align with the New Zealand-Aotearoa Government Tourism Strategy and the National Destination Management Guidelines developed by Ministry of Business, Innovation and Employment (MBIE).

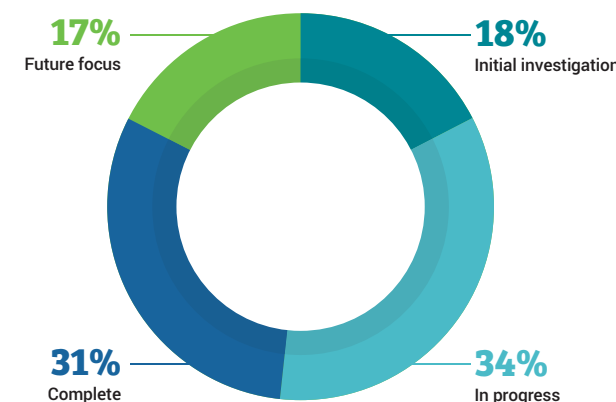
“The Government’s goal is to enrich Aotearoa New Zealand through sustainable tourism growth. This requires better co-ordination across the range of individuals and agencies, both public and private, that make up the tourism sector. We need to make sure that tourism evolves in a way that is consistent with, and supported by, local communities and Māori/iwi. Destination management and planning is the mechanism by which New Zealanders can ensure that tourism in their region reflects their wishes and they have an agreed way to maximise the benefits that tourism brings whilst managing any negative impacts.”

Iain Cossar, GM Tourism, MBIE



The SMDS 2019 identified 68 recommendations for the sustainable growth of our regional tourism sector, and it was anticipated that these would be implemented over the following 10 years. However, just three years since the SMDS 2019’s creation, two thirds of these projects are either complete, in progress or under investigation despite the interruption of Covid. A key factor contributing to this implementation success has been the funding and support provided by MBIE through the Strategic Tourism Assets Protection Programme and the Tourism Communities: Support, Recovery and Re-set Plan.

SOUTHLAND MURIHIKU DESTINATION STRATEGY 2019-2029 Project Implementation Status



It is therefore timely that the SMDS 2019 is reviewed to ensure it will continue to enable the successful recovery of tourism for Murihiku Southland through to 2029. It will also provide key input into the Beyond 2025 Southland Regional Long Term Plan.

REVIEW PROCESS

To guide the review process and development of the Murihiku Southland Destination Strategy 2023 - 2029, a strategic advisory group was formed. This group consisted of people with relevant skills and experience relating to the development and management of Murihiku Southland as a visitor destination. Several members of the advisory group who supported the creation of the SMDS 2019 have again been involved, along with new members intended to ensure strong representation from across the region.

Advisory group members

- › **Aaron Joy** – *Stewart Island Promotion Association/Business Owner*
- › **Amie Young** – *Great South*
- › **Angee Shand** – *Invercargill Licensing Trust*
- › **Anne Pullar** – *Gore District Council*
- › **Hannah Whyte** – *Bill Richardson Transport World*
- › **Julie Jack** – *Invercargill Airport*
- › **Karyn Owen** – *Community Representative (Western Southland)/Te Hikoi Museum*
- › **Nathan Benfell** – *Fiordland Business Association/Business Owner*
- › **Pam Yorke** – *Community Representative (Te Akau Tai Toka Catlins)/Business Owner*
- › **Rob Scott** – *Mayor for Southland District/Community Representative (Northern Southland)/Business Owner*
- › **Sarah Greaney** – *Southland District Councillor/Community Representative (Te Anau)/Business Owner*
- › **Simon Moran** – *Southland District Council, Milford Opportunities Project*
- › **Tammi Topi** – *Community Representative (Motupohue Bluff)*

While not being part of the advisory group these organisations were consulted and provided key input to help guide its direction:

- › Awarua Rūnaka
- › Hokonui Rūnaka
- › Ōraka Aparima Rūnaka

- › Waihōpai Rūnaka
- › Department of Conservation (DOC)
- › Invercargill City Council

To inform the revised MSDS 2023’s development, assess the current state of the tourism sector, and understand the aspirations of our communities, several key inputs were also facilitated. A stakeholder workshop series was undertaken, research on community views towards tourism completed, future visitor scenarios assessed, and a range of hui were held with other key groups. Key aspects of the Beyond 2025 Southland Regional Long Term Plan with linkages to tourism have also been considered and referenced i.e., transport, air connectivity, accommodation/housing, and infrastructure.

Throughout this process it was found that many of the key insights within the original SMDS 2019 are still relevant and the considerations these raised have been incorporated into the revised MSDS 2023, with projects still holding relevance also being carried forward.

The revised MSDS 2023 will:

- › Connect and provide context for other initiatives and planning currently underway including the Milford Opportunities Project, Bluff Motupohue 2020 Tourism Master Plan and The Catlins Te Akau Tai Toka Community Tourism Strategy.
- › Seek to align with developments in infrastructure, amenities, and services which benefit both locals and visitors, including the Waihōpai Invercargill CBD rejuvenation, more flights to the city and new hotels.
- › Focus on the sustainable development and management of the Murihiku Southland destination considering decarbonisation efforts and climate change.
- › Ensure the views of the region’s communities are understood and at the heart of the overall approach.
- › Acknowledge and strengthen our valued partnership with mana whenua which will ensure their perspectives and aspirations are at the heart of any future approach.

Our Place



**MURIHIKU
SOUTHLAND**

Murihiku Southland is the southernmost region in Aotearoa New Zealand and one of its largest, covering 3.2 million hectares.

Bordered by the Tasman Sea to the west and the Southern Ocean to the south, our region has an expansive coastline that has strong connections to many of our communities. Our vast size provides a plethora of contrasting landscapes from rugged coastlines and rolling plains to snow-capped mountains and native forests. Murihiku Southland offers visitors a unique blend of natural beauty, outdoor adventure, and rural charm.

Given the size of Murihiku Southland, the region is divided into several sub-regions, each with its own unique landscapes, culture, and attractions.

Sub-regions

WAIHŌPAI INVERCARGILL

Waihōpai Invercargill is the regional capital and commercial hub of Murihiku Southland. It is Aotearoa New Zealand's southernmost city and one of the southernmost in the world. Numerous heritage buildings give the city a charming old-world quality while the magnificent Queens Park impresses with its sprawling 80 hectares of beautifully kept gardens, wildlife habitats, playgrounds, and sports grounds.

Dubbed as the 'City of Water and Light', referring to the long summer daylight hours, appearances of the Aurora Australis and the city's position beside the Waihōpai River estuary, Waihōpai Invercargill has a friendly, laid-back atmosphere. The city is also a hub for classic motoring with themed attractions and events enticing visitors to the south.

MOTUPŌHUE BLUFF

Murihiku Southland's port, Motupōhue Bluff, lies 30km south of Waihōpai Invercargill. The town is the southernmost settlement on mainland Aotearoa New Zealand, and it has a strong connection to the sea. Motupōhue Bluff is home to the iconic Bluff Oyster and the ferry service to Rakiura Stewart Island departs from the town. Motupōhue Bluff Hill Lookout offers stunning views of the surrounding landscape, and, at its base, the Stirling Point signpost marks the beginning of State Highway 1 and is the beginning (or end) of the Te Araroa Trail linking Motupōhue Bluff to Cape Reinga.

RAKIURA STEWART ISLAND

Rakiura Stewart Island is the smallest of Aotearoa New Zealand's three main islands. Roughly 85% of the island is protected as Rakiura National Park, making it a haven for birdlife and one of the only places where you can readily see brown kiwi in their natural habitat. The island has over 280km of walking tracks and is popular for fishing, sea kayaking, diving, and hunting. Rakiura Stewart Island is subantarctic and has a range of unmodified ecosystems from rainforests and wetlands to sand dunes, while also being home to the world's southernmost International Dark Sky Sanctuary.



TE AKAU TAI TOKA THE CATLINS

The spectacular coastal stretch between Balclutha and Waihōpai Invercargill known as The Catlins, is situated across both the Murihiku Southland and Clutha Districts. The area is sparsely populated which contributes to its wild and unspoiled character. Te Akau Tai Toka The Catlins boasts a world of native forests, spectacular waterfalls, caves, picturesque lighthouses, sparkling bays, numerous walking tracks, and a 180 million-year-old Jurassic Forest. The area is also home to an array of fauna from native birds to seals, sea lions, dolphins, and penguins. The coastline sees some of the country's largest ocean swells, attracting surfers to its sandy beaches.

GORE DISTRICT

Māruawai Gore, along with its surrounding district, is a destination for vintage aircraft, arts/culture, and events. Māruawai Gore is also a hub for trout fishing, it is the home of Hokonui Moonshine, and renowned for its country music scene. The area has a strong agricultural focus and prides itself on offering the best of rural city living.

CENTRAL SOUTHLAND

Central Southland comprises the towns of Winton, Limehills and Dipton. Winton, in particular, is an important service centre for surrounding farms and as a popular stop-off for visitors travelling on the Waihōpai Invercargill to Queenstown highway. The area has an abundance of lush, rolling farmland and offers a rural feel.

WESTERN SOUTHLAND

Tucked between the towering peaks of Te Rua-o-Te-Moko Fiordland to the west, the Takitimu mountain range to the north and the ocean to the south, Western Southland boasts spectacular unspoiled scenery. The area is home to the popular coastal destinations of Aparima Riverton and Ōraka Colac Bay as well as Tuatapere, the town serving as a base for those exploring Murihiku Southland's newest Great Walk, the Hump Ridge Track.

NORTHERN SOUTHLAND

Northern Southland is a beautiful contrast of green, rolling farmland, majestic snow-capped mountains and tussock clad high country. The area comprises the towns of Lumsden, Mossburn, Athol and Garston. Lumsden has a rich rail history which is preserved in the town's railway precinct, and the town is a major hub, with roads to key destinations departing on all four points of the compass. An hour north is Queenstown, an hour south is Waihōpai Invercargill, to the south-east Māruawai Gore and north-west Te Anau and Piopiotahi Milford Sound. The Around the Mountains Cycle Trail, Murihiku Southland's Ngā Haerenga Great Ride, runs through the small, picturesque towns in this part of the region, taking in the Ōreti and Mataura Rivers.

TE RUA-O-TE-MOKO FIORDLAND

Te Rua-o-Te-Moko Fiordland encompasses over 1.2m hectares of protected wilderness, including Fiordland National Park, Aotearoa New Zealand's largest National Park. The Park makes up a large part of Te Waipounamu, a UNESCO World Heritage Site and is home to several iconic landmarks, including Piopiotahi Milford Sound, Patea Doubtful Sound, and the Kepler, Routeburn, and Milford Tracks, all Great Walks which offer multi-day hiking opportunities. The area's fiords were created by glaciers during the last ice age and Piopiotahi Milford Sound is the jewel in Te Rua-o-Te-Moko Fiordland's crown, attracting significant international tourism to the area. Te Rua-o-Te-Moko Fiordland is also home to several rare and endemic species, including the takahē, kākāpō, kiwi, and many other native birds.

Its main township Te Anau is a hub for activity within the National Park, and a destination in its own right. It is known for its tranquility and the wide range of outdoor activities available.



OUR PLACE

Mana Whenua

NGĀ PAPTIPU RŪNAKA KI MURIHIKU

The sustainable development of tourism in Murihiku Southland requires consideration of the perspectives and expectations of mana whenua.

It is crucial that our destination is developed and nurtured in collaboration with our region's Papatipu Rūnaka, ensuring there is alignment with their values and aspirations for Murihiku Southland. By prioritising this partnership, we can ensure the long-term success and responsible growth of tourism while honouring the cultural significance and heritage of our region.

Te Ao Māori

WORLDVIEW

In Māori, the term “whenua” carries a profound dual meaning, representing both land and placenta.

This linguistic duality symbolises the deep relationship between Papatūānuku, the earth mother, and her children, who are sustained by the land, much like a baby is nurtured by its mother’s placenta in the womb. Within Te Ao Māori, the whenua is regarded as a living entity intricately interconnected with all living beings. The people and the land are intrinsically bound together, their connection likened to the vital bond of an umbilical cord.

Te Ao Māori is deeply spiritual, centered around the interconnectedness and interdependence of all things, and places a strong emphasis on respecting and living in harmony with the natural environment.

There are three fundamental values that are of key importance in relation to tourism and sustainability:

Whakapapa (genealogy)

Encompasses a profound sense of identity, linking Māori to their ancestors, land, and culture. It encapsulates the spiritual and cultural threads that weave together the connections between people, places, and all aspects of existence.

Kaitiakitanga (guardianship)

Signifies the crucial role of mana whenua as custodians entrusted with the preservation of the environment for future generations. It encompasses a deep commitment to nurturing and safeguarding the wellbeing of the environment as an integral part of cultural stewardship.

Manaakitanga (looking after people, hospitality)

Encompasses the ongoing endeavour of nurturing and upholding mana through acts of respect, generosity, care, honesty, and warm hospitality. It extends beyond the realm of human interactions to encompass the whenua, ensuring the sustainable wellbeing of the land for all.



NGĀ PAPTIPU RŪNAKA KI MURIHIKU

Ngāi Tahu, the largest iwi of Te Waipounamu, the South Island, holds ancestral authority over the land, including Murihiku Southland, which lies within their takiwā (territory). Within Ngāi Tahu, 18 Papatipu Rūnaka, as mana whenua, exercise jurisdiction and responsibility over specific areas, ensuring the preservation and enhancement of the mana of their people in relation to the land, seas, and natural resources.

In Murihiku Southland, four of the 18 Papatipu Rūnaka collectively engage to fulfil their role as guardians and advocates for their people and the region’s wellbeing.

Te Rūnaka o Awarua

The takiwā of Te Rūnaka o Awarua is centred around Awarua and extends to the coastal regions and estuaries adjoining Waihōpai Invercargill. Te Rūnaka o Awarua shares a collective interest in the lakes and mountains that span from Whakatipu-Waitai to Tawhitare, alongside other Rūnaka within Murihiku Southland and those situated beyond Waihemo. Within this takiwā, Te Rau Aroha Marae is situated in Motupōhue Bluff, serving as a significant cultural and community gathering place for Te Rūnaka o Awarua.

Hokonui Rūnaka

The takiwā of Hokonui Rūnaka revolves around the Hokonui region and encompasses a collective interest in the lakes and mountains spanning from Whakatipu-Waitai to Tawhitare. This interest is shared with other Murihiku Southland Rūnaka as well as those located southwards from Waihemo. Hokonui Rūnaka actively engages in preserving and advocating for the cultural, environmental, and community wellbeing within this expansive and diverse takiwā.

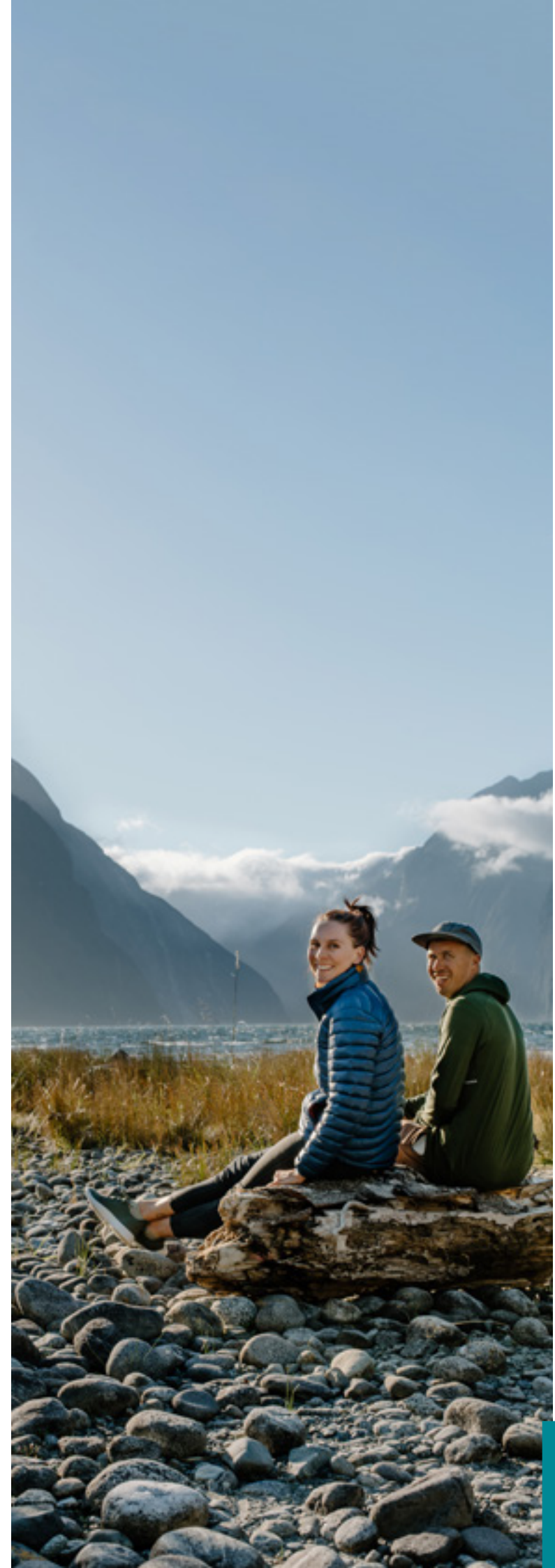
Te Rūnaka o Ōraka Aparima

The takiwā of Te Rūnaka o Ōraka Aparima is centred around Ōraka Colac Bay and extends from Waimatuku to Tawhitare. Within this takiwā, there is a shared interest in the lakes and mountains spanning from Whakatipu-Waitai to Tawhitare, which extends to other Murihiku Southland Rūnaka and those situated southwards from Waihemo. At the heart of Te Rūnaka o Ōraka Aparima, the Takutai o Te Tīti marae stands in Ōraka, serving as a cultural hub and gathering place for the community.

Waihōpai Rūnaka Incorporated

Te Rūnaka o Waihōpai, located in Murihiku Southland, is anchored by Murihiku Marae in Waihōpai Invercargill. The takiwā of Waihōpai Rūnaka spans from Waihōpai Invercargill to Te Matau, encompassing a shared connection to the lakes and mountains that stretch from the western coast to other Murihiku Southland Rūnaka situated southward from Waihemo.





PRIORITY OUTCOMES

To effectively manage our destination, implementation of the MSDS 2023 will require strong engagement, collaboration and partnership with mana whenua and key stakeholders. This not only supports our region’s Papatipu Rūnaka but fosters positive outcomes for our community and visitors.

The MSDS 2023 recognises the significance of specific projects to our region’s Papatipu Rūnaka, while simultaneously encompassing their broader aspirations:

Preservation and recognition of Māori culture

Upholding and honouring Ngāi Tahu culture is paramount for Papatipu Rūnaka, encompassing the preservation and recognition of our identity. This entails the intergenerational transmission of traditions, narratives, spiritual beliefs, artistic expressions, music, and the revitalisation of Te Reo Māori.

Recognition of Ngāi Tahu history and Māori heritage

Acknowledging Māori history and heritage entails honouring the footprints left by our ancestors, recognising the historical sites that hold immense significance to Papatipu Rūnaka (Ngāi Tahu), Māori history and culture. Celebrating and respecting the richness of Ngāi Tahu culture is of utmost importance, as it embodies the essence of honouring and upholding Māori heritage.

Developing cross-cultural relationships

Fostering cross-cultural relationships is a vital aspect of our journey towards a brighter future, as it necessitates collaboration and co-design. By working together in partnership, our Papatipu Rūnaka are empowered to voice their perspectives on decisions that impact their communities, ensuring the recognition and acknowledgment of Māori culture.

Taking care of, and connection to, our environment (respecting our native land)

Through the development of sustainable tourism, education of visitors and communities on the importance of protecting our environment and involvement in conservation efforts and ecological restoration projects.

Employment and training opportunities

Creating employment and training opportunities is crucial for supporting both economic and social outcomes within our Māori communities. The tourism sector, with its potential for job creation, education, and business ownership, plays a vital role in building skills, fostering capacity, and empowering individuals within our communities.

In August 2022, a Memorandum of Understanding (MOU) was signed between Great South and the four Papatipu Rūnaka of Murihiku Southland (Awarua, Hokonui, Ōraka Aparima, and Waihōpai). This MOU solidifies the commitment to enduring collaboration and partnership, specifically focusing on areas of significance within Murihiku Southland. These areas encompass the development of our visitor economy and the effective management of our destination.

OUR PLACE

Our Story

Murihiku Southland is unique and has its own story. Southlanders are proud to live here and there is a close tie between people and place.

A strong understanding of our regional story underpins our communities’ sense of place and pride in their home, and it also communicates the values and strengths of our region to non-residents. As such, our story plays an integral role in attracting those who align with our values to visit, live, work, and study in Murihiku Southland.

The need for a unified regional story was identified within the Southland Regional Development Strategy 2015-2025 (SoRDS), a plan which had a goal of growing the region’s population by 10,000 by 2025. The plan noted that ‘when there is strong alignment between Southlanders’ views of themselves and their region, and the external view of them and their region, then attraction will take place’. The need for a clear destination brand story was also identified as a key building block project within the SMDS 2019, based on the recognition that there was a lack of understanding of Murihiku Southland as a visitor destination.

Developing a unified story is a challenge for our region due to its diversity - both geographically and by sector and community. As such its development process has been community-led, with the intention of creating a master story, tools and resources for communities, sectors, and organisations. In essence the story development has been focused internally to build clarity of identity within Southlanders first and foremost.

The development of our story was undertaken in three parts:

1 GO SOUTH

Collection of perceptions and views of Southlanders about Murihiku Southland.

2 SOUTHLAND DESTINATION INSIGHTS

Perceptions of Murihiku Southland from other New Zealanders and Australians.

3 MURIHIKU – THE SOUTH LAND

The final story and clear articulation of what makes the people and place of Murihiku Southland unique.

1 GO SOUTH

Principals Brand began this work on behalf of Great South in 2019. A series of workshops and interviews were conducted to get to the essence of Southlanders' view and perceptions about their region.

Several key themes were identified:

Southlanders make things happen

They are innovative and make the most of opportunities.

Southlanders live on the edge

They live in a remarkable place and are connected to the nature that surrounds them.

Southlanders are down to earth

They are genuine and refreshingly real, community values ring true here.

Southlanders choose more time

They live here because time goes further and there is a before and after work.

Southlanders are southern hospitality

They are respectful and generous with a strong sense of manaakitanga.

2 SOUTHLAND DESTINATION INSIGHTS

This work undertaken by Angus and Associates in early 2021 looked at the perceptions of Murihiku Southland held by other New Zealanders and Australians. It sought to identify how our region could best be positioned as a destination to visit based on what it has to offer and what makes the region unique.

The travel motivations of those most drawn to Murihiku Southland were based on those wanting to get away to relax and recharge, those wanting to travel to a unique destination off the beaten path where they can explore, and those who want to spend quality time away with family and friends.

The three most unique strengths that differentiate Murihiku Southland as a visitor destination were found to be our unique location, landscape, and wildlife. Other strengths included our friendly and welcoming locals, less crowds, more open spaces, and that we have some of the most direct back to nature experiences on offer i.e., hunting, fishing, food production.



Unique Location

You can't get further south.



Unique Landscape

Unique landscape (especially Te Rua-o-Te-Moko Fiordland and Rakiura Stewart Island) and variety within a short distance.



Unique Wildlife

Unique and authentic wildlife encounters.



3 Murihiku | THE SOUTH LAND

Murihiku – The South Land is the articulation of what makes our region, our people, and our place unique.

It seeks to generate local and regional pride and strengthen what unites us as Southlanders. Building on the learnings from the already completed Go South and Destination Insights work, it is an asset that will help attract people to visit, live, work and study in Murihiku Southland, as it enables them to genuinely connect with what the region stands for and the exceptional experiences that we offer. It can also be used to support business growth and development, encourage new

investment and the development of new employment opportunities.

Our story is a living one, in that it will continue to change as we change. Mana whenua are currently enhancing cultural narrative across the region through key projects such as the Milford Opportunities Project, the Waihōpai Invercargill CBD, Motupōhue Bluff Hill, and the Māruawai Precinct. This mahi is extremely important and will be woven further into Murihiku – The South Land as we continue to work in partnership with our four Papatipu Rūnaka.

The southern edge

Our place in the world, what it means to us and what it meant to those who came before us has shaped who we are, how we think, how we live, what we value.

Living at the southern edge means we look at the world differently, it fuels our spirit and enthusiasm for making the most of a place with more space, freedom, and opportunities. It makes us who we are.

This is the central pillar of our story.

The Southern Edge narrative is supported by five further pillars:

Nature at its wildest

Here, nature is part of everyday life. We experience nature, close up, at its wildest, most elemental, and most bountiful – skies, stars, rivers, ocean, plains, mountains, changing weather and changing seasons. We care deeply about the natural taonga/treasures that we live with and the ecosystems we are part of. We are vividly aware of our responsibility as kaitiaki.

Hapori whānui Thriving communities

We understand the value of strong, connected communities. We believe in creating a sense of belonging where everyone can thrive as their authentic selves. Our communities are built on deep roots and a shared desire to work together for the common good. When in need, we stand together.

More life, less pressure

We live with more time, more space, more light, less noise. We are not swept along by the pace, dictates and stresses of more crowded places. We are hardworking and ambitious. Here in the south, we relish the time and space we have to think and the freedom and opportunities we have to create the lives we want.

Rich in the things that matter

We have an abundance of resources, stories, ideas, and opportunities and a strong sense of what is really important. We care deeply about the natural treasures, precious taonga, and resources that surround us and using them wisely. We are rich in stories, characters, and creative energy.

Groundbreakers and dealmakers

Living on the southern edge comes with unique challenges and opportunities. We've got big imaginations and big ambitions and our remoteness has always spurred our entrepreneurial spirit and independent mindset. We don't stand back, we get in there, boots and all. We have a long track record of innovating, early adoption of new ideas and backing ourselves to get things done.

Our Community Voice



Community Sentiment Research

Understanding community aspirations and how tourism can be developed to deliver benefits for our people is at the heart of planning for the future of the sector.

To support this and inform the development of the MSDS 2023, Community Sentiment in Relation to Tourism research was undertaken by Angus and Associates. This research covered a regional view and also looked at five subregional areas: Te Rua-o-Te-Moko Fiordland, Western Southland, Waihōpai Invercargill/Motupōhue Bluff, Rakiura Stewart Island/Waihōpai Toetoe (community board areas) and Heartland Southland (Central and Northern Southland). While there were some differences across these areas the findings here largely represent the overall regional view.

On the whole our residents view tourism positively, they have a keen understanding of its benefits and support well-managed growth. However, there are concerns in the Te Rua-o-Te-Moko Fiordland and Western Southland communities where tourism is operating at a higher level and some of its adverse impacts are being felt more keenly. This is reflected in the survey results through concerns around housing availability and affordability and the safety of driving in the area, however this is associated more with international tourism than domestic visitors.

LIVING IN MURIHIKU SOUTHLAND

What's good about living in Murihiku Southland?



Murihiku Southland's remoteness means there is a very strong community feel and a self-sufficiency we haven't seen elsewhere. The remoteness also means an unspoiled natural environment where you can truly escape.

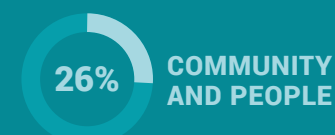
What makes Murihiku Southland different?



A place of stunning landscapes, hidden wonders, easy access to National Parks, World Heritage sites, beaches, forests, lakes, and mountains.



A relaxed pace of life with room to breathe – how Aotearoa New Zealand used to be without the pressures of larger, more crowded cities.



Welcoming, community minded and spirited residents. Southlanders are friendly, genuine, respectful, caring, resilient, and self-sufficient.

*Residents could select multiple options. These results represent the most popular responses.

VIEWS ON TOURISM

Tourism has an expansive reach into the communities of Murihiku Southland, with residents more likely to have personally engaged in activities linked to tourism than other New Zealanders.

Tourism's key benefits

When compared with other parts of Aotearoa New Zealand, Murihiku Southland residents are more likely to say they have benefited from tourism in all the areas below:

- More local businesses opening, or being able to stay open.
- Opportunities for employment and income.
- Made Murihiku Southland a more vibrant and friendly place to live.
- Encourages greater appreciation of our natural environment.
- Enhances the profile of our region.
- Inspires residents to travel within Aotearoa New Zealand.
- Encourages greater appreciation of our historic buildings and sites.
- Improves services for the local community.
- Creates opportunities to be involved with/attend local festivals and events.
- Makes a greater variety of goods/services available than would otherwise be.
- Creates a greater sense of pride in our communities.

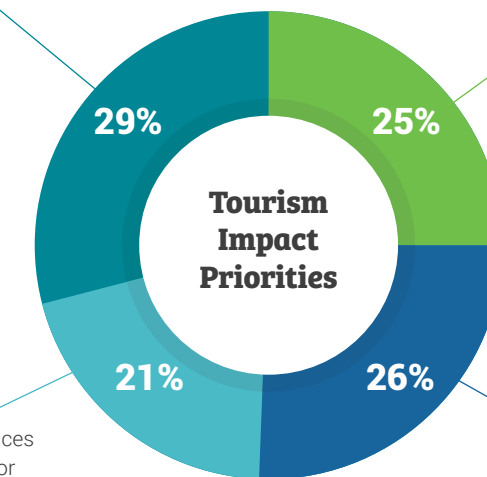
In terms of the priority impacts for tourism, residents would like to see a reasonably balanced approach considering benefits from an economic, community, environmental, and individual perspective.

A positive *economic* impact

Providing jobs/employment, creating opportunities for entrepreneurship and development of tourism businesses, contributing to other sectors of the local economy through visitor expenditure.

A positive impact on *individuals*

Providing new and enjoyable experiences for locals and visitors, opportunities for recreation and physical/mental health benefits, encouraging cross-cultural exchange, providing opportunities to learn new skills.



A positive impact on the *environment*

Building understanding and an appreciation of the natural environment, contributing funds for conservation, encouraging volunteer activity such as tree planting, creating demand for active transport.

A positive impact on *communities*

Creating amenities, services and events for local people to enjoy, building vibrant communities and generating local pride.



The kind of tourism in which the community most benefits from is that which promotes our natural biodiversity.

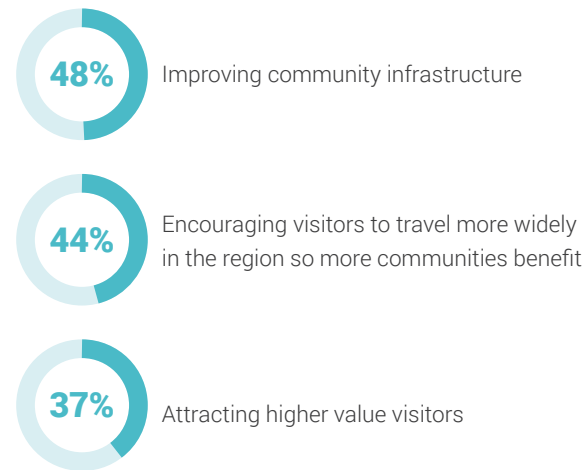
Tourism's adverse impacts

Residents also indicated the adverse impacts of tourism they have experienced:

- More litter and waste.
- Damage to the natural environment.
- Pressure on community infrastructure.
- Increase pricing for local activities and attractions.
- Cost of maintaining tourism infrastructure for locals.
- Availability of housing for local people.
- Feel less safe driving.
- Increased demand for, and price, of local housing.

LOOKING FORWARD

Desired tourism focus

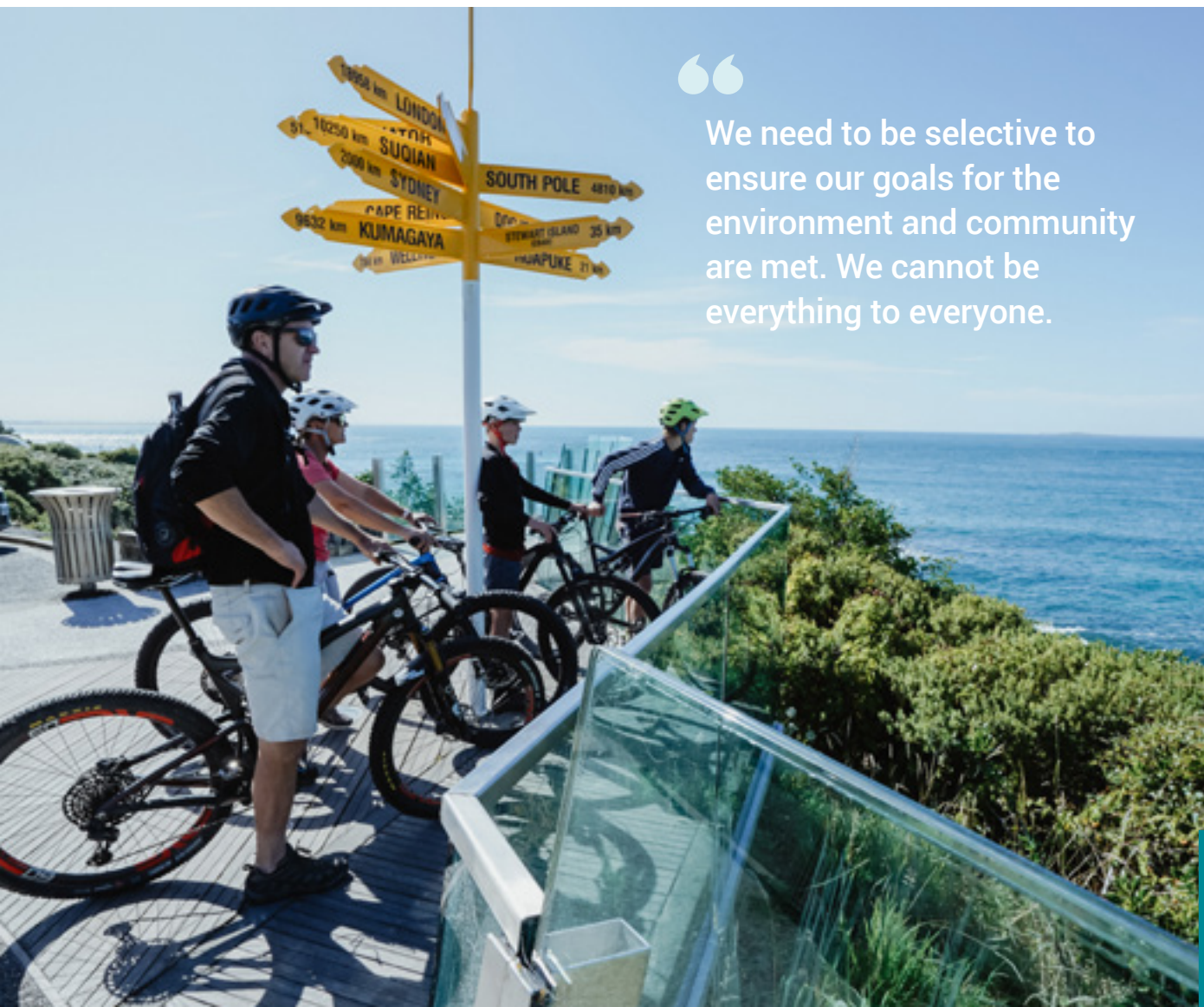


*Residents could select multiple options. These results represent the most popular responses.

Tourism growth mandate

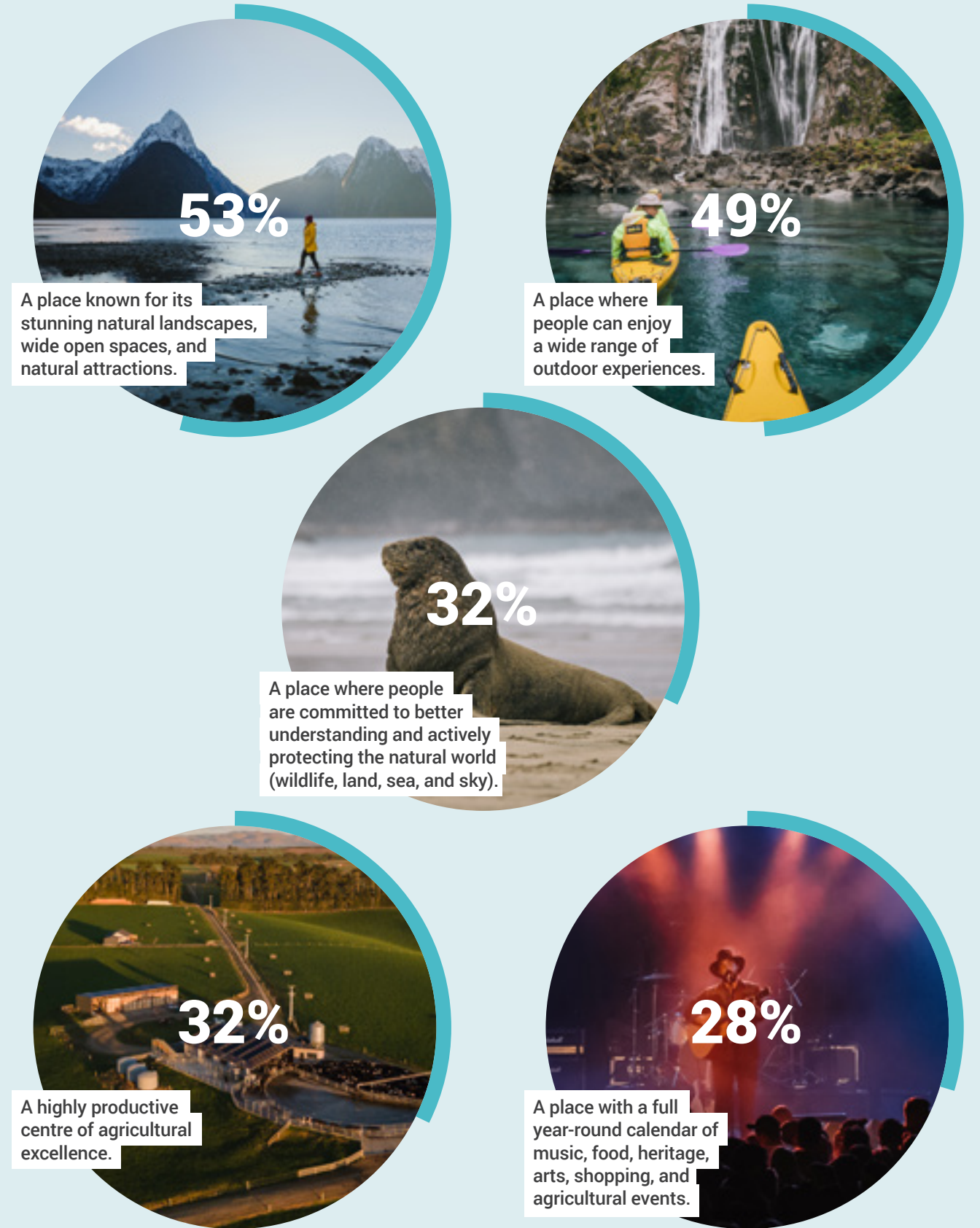


This growth should be well managed in order to maximise its benefits and minimise any adverse effects. Residents overall demonstrate a higher level of approval for domestic tourism, while still seeing the benefits of international visitors. However, at the community level, Te Rua-o-Te-Moko Fiordland and Western Southland residents' acceptance for increased international tourism is more limited.



“ We need to be selective to ensure our goals for the environment and community are met. We cannot be everything to everyone. ”

The kind of place we want Murihiku Southland to be...



*Residents could select multiple options. These results represent the most popular responses.

OUR COMMUNITY VOICE

Community Visioning

Outside of our main urban centres of Waihōpai Invercargill and Māruawai Gore, Murihiku Southland has 11 community boards, nine in the Southland District, Mātara in the Gore District and Motupōhue Bluff within Invercargill City.

Within the Southland District area each community board has developed their own plan for 2021-2024. These plans outline each community's vision, history, people, priorities, and action plans to achieve them. As summarised below, they all include reference to and focus on the visitor economy, indicating a desire to build tourism and the community benefits it can deliver.

ARDLUSSA

The Ardlussa community are a rural community with a history of goldmining and determination, where they never shy away from a challenge and look forward to the future. The area has a lot to offer, with a good range of sporting, cultural and arts facilities, and are looking for more people, businesses, and visitors to contribute to their increasingly diverse area. The Ardlussa community has started work on a high-quality and progressive series of mountain bike trails and are looking to create more sporting events to increase visitation to the region.

Tourism priorities:

- › Waikaia Forest Trails – mountain bike trails project.
- › Increased tourism visits/overnight stays in the area.

FIORDLAND

Te Rua-o-Te-Moko Fiordland's community would like to grow in a sustainable way that values the natural environment and the sense of community that is part of their unique DNA. The development of a wider range of sustainable tourism products with a year-round focus, will provide year-round employment opportunities for the benefit and growth of the community. It is key that tourism is focused on quality visitation, longer stays, greater spend, and contributes positively to the community and environment. There is an identified need for increased capability and capacity to support growth in visitor numbers, including infrastructure and housing for workers.

Tourism priorities:

- › Grow the visitor economy – visitors stay longer, spend more, and have a positive community impact.
- › Development of sustainable tourism products.
- › Develop more winter tourism product e.g., Dark Sky Sanctuary.
- › Development of Fiordland Heritage Centre.
- › Enhance multi-purpose trails – walking, cycling.
- › Activity-based touring routes/itineraries in conjunction with other regions.
- › Development of events/conferences, e.g., food festivals, creative art expos, multisport events.
- › Develop boutique eco accommodation with staff accommodation.



NORTHERN

Northern Southland is an area strong in agriculture with a unique central location, being a key part of routes from Queenstown, Waihōpai Invercargill, and Te Rua-o-Te-Moko Fiordland. The area is a great place to work and play, with fishing, cycling, agritourism and outdoor experiences already harnessed to attract visitors to the area.

Tourism priorities:

- › Ensure district-wide infrastructure can support the visitor industry, e.g., EV chargers, accommodation.
- › Develop attractions and tourism products that encourage people to visit and stay in Northern Southland, with a focus on cycling.
- › Ensure safe driving supports are in place for locals and visitors.

ŌRAKA APARIMA

The community of Ōraka-Aparima are proud of their place, and are keen to ensure it is protected, able to evolve, and thrives for future generations. Residents enjoy being a tourist hot spot, and value the flow on effect of having nice cafés and restaurants made possible through increased visitation.

Tourism priorities:

- › Continue to grow visitation.
- › Ensure infrastructure keeps up with visitor growth – particularly available housing for the area's workforce.
- › Explore the development of more visitor accommodation.



ŌRETI

Ōreti is an area balancing a combination of rural and residential lifestyles. There is a desire to ensure their natural and built environment is clean, healthy, and attractive. Through the heart of the community runs State Highway 6, connecting Waihōpai Invercargill to Queenstown, flanked by smaller rural towns. There is a desire to identify and maintain local attractions and create opportunities around these, and develop innovative ideas for the future.

Tourism priorities:

- › Identify local attractions and develop a promotional plan.
- › Develop/maintain heritage buildings and attractive main streets.
- › Develop cycle networks and walking tracks.



RAKIURA STEWART ISLAND

The Rakiura Stewart Island community is fiercely passionate about being kaitiakitanga guardians for their special and unique natural environment. It is acknowledged that tourism plays an important role but protecting the island for future generations is a priority and the community would like Rakiura Stewart Island to be a world leader in eco tourism. Accommodation for residents and workers remains an issue due to the demand for visitor accommodation. The community value events that bring locals and visitors together to foster a shared love for the island.

Tourism priorities:

- › Engage visitors in ways that contribute to environmental projects on the island.
- › Be a world leader in the areas of eco tourism, conservation, and sustainability.
- › Support and encourage further understanding of and the development of best practice eco tourism on Rakiura Stewart Island.
- › Develop a Dark Sky Sanctuary Strategic Plan to maximise opportunities of having International Dark-Sky Association (IDA) Sanctuary status.

TUATAPERE TE WAEWAE

Tuatapere Te Waevae is an area rich with inland and coastal experiences, a strong sense of community, history, and heritage. Increasing visitation is seen as the most important opportunity to grow the economy as the community have felt the loss of international tourism in recent years.

Tourism priorities:

- › To create a community that is a destination for visitors and develop more tourism products.
- › Promote and market the area to visitors, encouraging groups to showcase the areas heritage and history.
- › Celebrate and protect the heritage and stories of the area, encompassing sawmilling, forestry, goldmining, farming, railway, and electricity generation.
- › Identify and access infrastructure and funding requirements in relation to destination development.

WAIHŌPAI TOETOE

Waihōpai Toetoe is an area that values its people and their unwavering community spirit. The area encompasses a wide range of opportunities including several parks and reserves, agriculture, and coastal tourism. Two protected places of ecological significance in the area are Te Akau Tai Toka The Catlins (Curio Bay) and Waituna Lagoon. The community treasures their special places, eco systems, native species, landscapes, and townships and wishes to ensure these are restored and protected.

Tourism priorities:

- › Attract and manage visitors, ensuring the visitor economy provides positive economic benefits for communities and local businesses.
- › Develop a heritage site plan to redevelop heritage sites in Curio Bay and Waituna to tell Māori and European stories, with the possible establishment of a heritage trail.
- › Develop sustainable tourism opportunities to share these places with visitors.
- › Minimise the negative impact of human activity (such as freedom camping) to maintain a healthy environment.

WALLACE TAKITIMU

The Wallace Takitimu community are a united and proud community who are values-driven and understand the importance of pulling together to protect one another and the area they call home. The community have a desire to attract people, business, and visitors resulting in the creation of a vibrant, exciting, and prosperous area. The area has a history of farming, coal mining, and railways.

Tourism priorities:

- › Develop and promote new attractions.
- › Provide quality accommodation – including a camping ground.
- › Market the area to domestic and international visitors.
- › Establish new events to draw visitors to the area, e.g., triathlon, fishing competitions, family events.



Our Tourism Sector



Key Pillars

WHAT ATTRACTS VISITORS TO MURIHIKU SOUTHLAND?

Our key pillars are the experiences most associated with Murihiku Southland in the minds of domestic and international travellers.

They are heavily linked to what we offer as a region, our people and place, generally making them the most authentic of our experiences. Most of these pillars extend across the entire region however flight and boat cruise are currently more synonymous with the Visit Fiordland experience.



WALKING



FOOD



WILDLIFE & WILDERNESS



STARGAZING



AGRITOURISM



ROADTRIP



OUTDOOR ADVENTURES



CYCLING



CULTURE & HERITAGE



CRUISE



FLIGHT

As looking after our environment and sustainability is a key focus, it's important that these pillars also align with this priority i.e. dark skies focuses on the reduction of light pollution, agritourism allows us to support farmers to diversify their income and highlight where our food comes from, food tourism supports our regional food sovereignty and the development of local food networks, cycling and

walking are low emission activities and culture and heritage allows us to preserve and honour our past alongside the identity of our communities.

In terms of specific activities aligned with these pillars, our hero experiences within each part of the region align strongly with those most highly rated on TripAdvisor.

- › **Te Rua-o-Te-Moko Fiordland / Te Anau**
 - › Great Walks — Milford, Routeburn, and Kepler Tracks
 - › Piopiotahi Milford Sound day cruises and kayaking
 - › Patea Doubtful Sound overnight cruises
 - › Guided walks
 - › Scenic flights
- › **Motupōhue Bluff**
 - › Shark Experience
- › **Waihōpai Invercargill**
 - › Bill Richardson Transport World
 - › E Hayes Motorworks
 - › Classic Motorcycle Mecca
 - › Queens Park
- › **Gore District**
 - › Croydon Aviation Heritage Centre
 - › Eastern Southland Gallery
 - › Hokonui Moonshine Museum
- › **Northern Southland**
 - › Around the Mountains Cycle Trail
 - › Welcome Rock Trails
 - › Agritourism experiences
 - › Rail heritage
- › **Western Southland**
 - › The Hump Ridge Track
 - › Te Hiko Museum
 - › Jetboating
- › **Te Akau Tai Toka The Catlins**
 - › Tumu Toka Curioscape Visitor Centre
 - › Catlins tours
- › **Rakiura Stewart Island**
 - › Great Walk – the Rakiura Track
 - › Dark sky tours
 - › Ulva Island
 - › Guided kiwi spotting tours

OUR TOURISM SECTOR

Key Visitor Groups

The Destination Insights work undertaken by Angus and Associates as part of our regional story development, identified key consumer segments of best fit with Murihiku Southland and what we have to offer. Attracting these visitors and considering their needs and motivations will be woven into how we promote the region.

Busy professionals

Looking to escape, disconnect and relax. Interested in connecting with nature.

Empty nesters/retirees

Looking to explore now they have more time to travel.

Solo travellers

Looking to be alone to reconnect with self and nature.

Paddock/ocean to plate foodies

Interested in reconnecting with their food and understanding the paddock/ocean to plate journey.

Special interest travellers

Looking to participate in specific activity i.e., fishing, hunting, surfing, motorsport enthusiasts.

The research also identified that Murihiku Southland is slightly more appealing to Australians than New Zealanders, but equally appealing to North and South Islanders. As Murihiku Southland is geographically distant from our largest population centres, advocating for and maintaining access to the region will be important to grow our domestic market. Creating a strong balance and demand from this market is key to the long-term sustainability of our tourism sector.





OUR TOURISM SECTOR

Data Insights

Prior to the Covid pandemic, tourism had become one of Aotearoa New Zealand's largest export sectors, accounting for approximately 20% of the country's total exports.

The industry was experiencing strong growth and in the year ending March 2020, a record high of 3.9 million international visitors came to Aotearoa New Zealand and total annual tourism expenditure reached \$41.9 billion (across domestic and international markets).

Further growth was also predicted with visitor numbers expected to reach five million by 2024.

MURIHIKU SOUTHLAND CONTEXT

As Murihiku Southland is a large region with diverse geographic areas, there are two Regional Tourism Organisations (RTOs) operating within our tourism sector – Visit Fiordland (predominately Manapouri, Te Anau and Piopiotahi Milford Sound) and Visit Southland (the remainder of the region). Both RTOs are managed by Great South to provide integrated tourism leadership for the region, particularly in the area of destination management.

The two RTOs have a vastly different visitor make up, (based on 2019 data).

- > Visit Fiordland's spend being largely international (68%)
- > Visit Southland's spend being largely domestic (88%)

Pre-Covid, both RTOs had experienced steady growth and the region was tracking well to achieve visitor spend goals outlined in the SMDS 2019 of \$1b by 2025. Growth for the calendar year 2019 had been 3%, reaching a total visitor spend of \$692m (Monthly Regional Tourism Estimates Tool (MRTE) data). This total comprised of:

- > Visit Southland \$442m spend (64%)
- > Visit Fiordland \$250m spend (36%)

Tourism's proportion of the region's Gross Domestic Product (GDP) was also growing, reaching 10% to year end March 2020, a reflection of its increasing contribution to the regional economy.

In the years ended 2018 and 2019, Rakiura Stewart Island experienced its highest levels of visitation and Piopiotahi Milford Sound visitor numbers were also strong with the number of days above 4,000 visitors becoming frequent during the peak summer months.

CHANGE IN NATIONAL DATA COLLECTION

The spend figures noted above, and our original spend target in the SMDS 2019, used the government's MRTEs tool which aimed to represent total visitor spend (including electronic transactions, online purchases, cash, prebooked activities etc). However, the methodology underlying this tool was impacted by significant changes in the tourism sector due to Covid, making it no longer fit for purpose. The Tourism Electronic Card Transactions tool (TECT) has been an interim replacement for the MRTEs also seeking to represent tourism spending activity in Aotearoa New Zealand. However, this tool only accounts for electronic card transactions attributable to tourism and so represents the sector at a lower level. The Government has signalled a return to the MRTEs from September 2023, along with some key methodology changes. We await further guidance from MBIE in relation to this.

IMPACT OF COVID

Covid had an immediate, catastrophic effect on our tourism sector with international borders closed and domestic travel severely limited. While domestic travel restrictions were eased earlier, international borders only fully reopened in July 2022, meaning a full or partial closure was experienced for over two years.

During this time, stimulating domestic visitation became a high priority to support tourism businesses in the region struggling to continue operating. However, with the domestic market far smaller in size than international markets, job losses were felt and many businesses went into hibernation. All key indicators that had been used to measure the sector were affected with GDP, guest nights, employment, and spend significantly diminished.

The impact of Covid was felt differently across Murihiku Southland based on differing levels of international visitation traditionally experienced. Visit Fiordland, where the tourism sector had a heavy international focus,

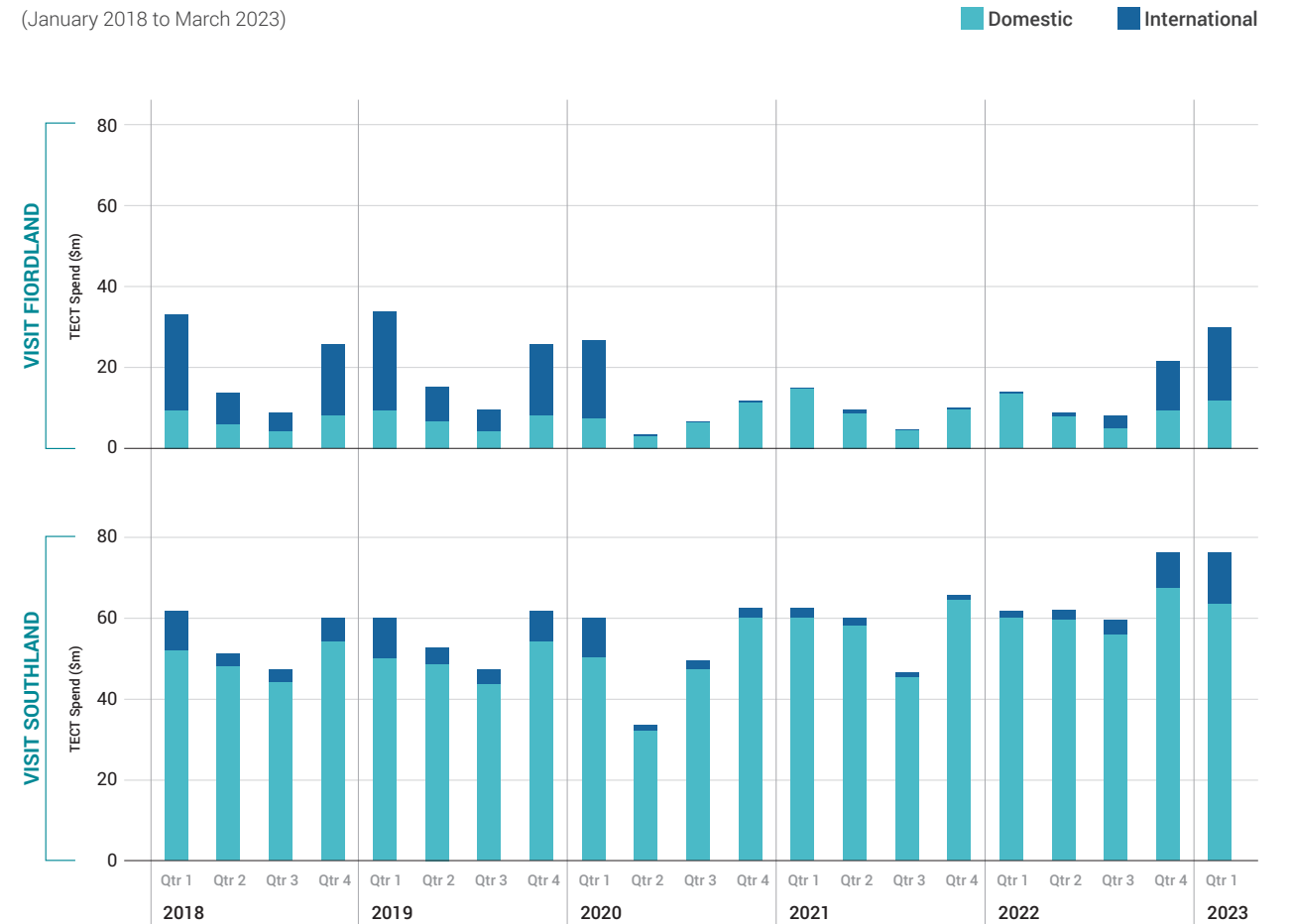
continued to face steady decline making it the worst affected RTO in the country. This was also attributable to the area's relative isolation, lack of through-traffic, and its distance from large domestic populations.

Visit Southland recovered quickly from the original Covid lockdown with spend often above pre-Covid levels. Domestic visitors increasingly undertook touring holidays experiencing our region in a slower way while ticking off some of their 'bucket-list' destinations. As a result key visitor travel routes throughout Murihiku Southland maintained good traffic volumes.

Rakiura Stewart Island was particularly appealing to New Zealanders and from June to November 2020 (during off-peak season) had 26% more visitors than the same period in 2019. However, visitation fell back in the 2021/2022 year when the absence of international visitors was felt more keenly.

Tourism Electronic Card Transactions (TECTs) Spend (\$m) by RTO

(January 2018 to March 2023)





AN ENCOURAGING RECOVERY

The full opening of Aotearoa New Zealand's borders in July 2022 has seen significant improvement in the tourism sector across Murihiku Southland with improved results in guest nights, visitor numbers, commercial accommodation, and visitor spending. The region's TECT visitor spend for year end March 2020 was \$290m and by year end March 2023 it had reached \$338m. While this indicates a strong recovery, the proportion of international spend has decreased from 25% to 18%, indicating surges in domestic spending have helped to support the region.

At an RTO level, Visit Southland has recovered faster than Visit Fiordland due to the delayed resumption of international tourism and the comparative strength of the domestic market in Visit Southland.

Visit Southland RTO

In the Visit Southland RTO, TECT visitor spend for year end March 2020 and 2023 was \$220m and \$272m, respectively. International spend made up 12% of annual spending pre-Covid (year end to March 2020), and 10% to the year end March 2023. While this represents some growth in the international market, the rise has been predominately driven by domestic demand.

However, this strong domestic demand may ease as cost-of-living pressures persist and international markets are re-opened. International spend is also expected to grow as evidenced by Australia (our largest international market) which has been routinely exceeding pre-Covid levels since November 2022, signaling a strong recovery.

Visit Fiordland RTO

Visit Fiordland's recovery has been slower, with TECT visitor spend for the year end March 2020 and 2023 \$70m and \$66m, respectively. This is due to the RTOs reliance on international tourism. However, proportion of international spend rose throughout 2022 and, with borders now open, is expected to continue growing.

The strength of the Australian market's recovery will further support Visit Fiordland, with the November 2022 proportion of their pre-Covid spend already reaching 84%, and Australian arrival numbers expected to make a full recovery by 2024.

Visit Fiordland's recovery will also be dependent on its ability to rebuild the workforce required for tourism businesses to thrive. The hibernation of the industry led to many workers leaving the area in search of alternative employment and backpackers on working holiday visas have not been present to the levels required this season.

Accommodation for workers is also in short supply and further constrained by the growth in non-commercial accommodation utilised by visitors (e.g. Airbnb). These shortfalls will need to be overcome before the next summer season or they may have an impact on the destination's reputation and demand in future seasons.



Total Visitor Spend

TECT year end March



Visit Fiordland



Visit Southland

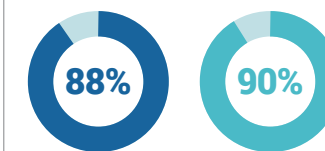
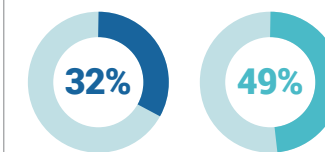
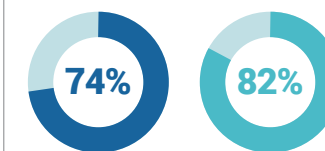


Domestic Visitor Spend

As a percentage of total visitor spend

TECT year end March

2020 2023



Tourism Contribution to GDP

Year end March 2020

10%



Accommodation Capacity

Based on 2021 data

Murihiku Southland region

2989 Hotel rooms/apartments

Te Anau 1393 **Waihōpai Invercargill 804**



Top Domestic Markets

Visit Fiordland Visit Southland

- | | |
|---------------|---------------|
| 1. Otago | 1. Otago |
| 2. Canterbury | 2. Southland |
| 3. Auckland | 3. Canterbury |
| 4. Southland | 4. Auckland |
| 5. Wellington | 5. Waikato |



Top International Markets

Visit Fiordland Visit Southland

- | | |
|--------------|--------------|
| 1. Australia | 1. Australia |
| 2. UK | 2. USA |
| 3. USA | 3. UK |
| 4. Germany | 4. Germany |
| 5. China | 5. China |

Future data approach

To date, many key measures used to assess the tourism sector have been economic, focusing on metrics such as visitor spend. Moving forward new, more holistic measures to track progress will be required, reflecting a destination management approach to tourism development. This means a wider range of data and insights will be used to inform how the sector is performing in Murihiku Southland.

While understanding economic benefits will still be important, the community benefits of tourism, its environmental impact and the experience of our visitors will also be assessed. The measuring success section (p112) discusses these measures and their wider destination management context moving forward, both regionally and nationally.



TOURISM OUTLOOK

The post-Covid world is full of uncertainty so two recovery scenarios for tourism have been considered as we look forward, Big World and Small World. Big World considers the return to 'normal' international travel and Small World considers 'restricted' international travel.

Both scenarios assume that Milford Opportunities Project (p81) has been activated for Visit Fiordland and Te Anau becomes a hub for tourism with longer stays in the region occurring and less pressure being placed on the Piopiotahi Milford Sound trip.

The following scenarios are based on TECT visitor spend data.

SCENARIO 1: BIG WORLD

Key assumption:

- International travel returns to its pre-Covid levels through more affordable travel, increased connectivity, and by Aotearoa New Zealand being viewed as a premium destination to visit.

Key points:

- By the end of 2023, Visit Southland should have fully recovered to pre-Covid levels due to its high percentage of domestic tourism (including business travel), events, and increased accommodation capacity.
- By the end of 2025, Visit Fiordland should have fully recovered to pre-Covid levels due to its high reliance on international tourism, delayed reopening of Asian markets, and current capacity issues (e.g., accommodation, workforce).
- By 2029, visitor spending as a percentage of pre-Covid levels is expected to reach 156% for Visit Southland and 124% for Visit Fiordland.

SCENARIO 2: SMALL WORLD

Key assumptions:

- A combination of impacts make travel beyond short haul destinations severely constrained i.e., unaffordable travel costs, environmental impacts of travel, and/or geopolitical uncertainty.
- This results in a greater focus on domestic and Australian visitors who are expected to stay longer within the region (higher instances of staying with friends and family). These visitors will also be constrained from travelling to other countries, growing the popularity of Aotearoa New Zealand as a travel destination.

Key points:

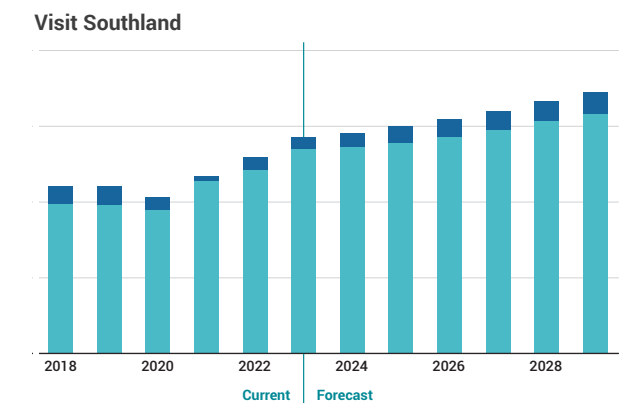
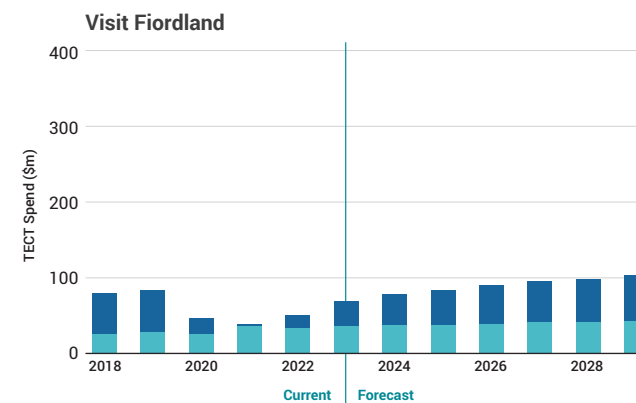
- By the end of 2023, Visit Southland is again expected to have fully recovered to pre-Covid levels due to its high percentage of domestic tourism (including business travel), events, and increased accommodation capacity.
- By the end of 2026, Visit Fiordland should have fully recovered to pre-Covid levels as it currently relies significantly on international tourism.
- By 2029, visitor spending as a percentage of pre-Covid levels is expected to reach 163% for Visit Southland and 111% for Visit Fiordland.

Visitor Spend Scenarios - Tourism Electronic Card Transactions (TECT)

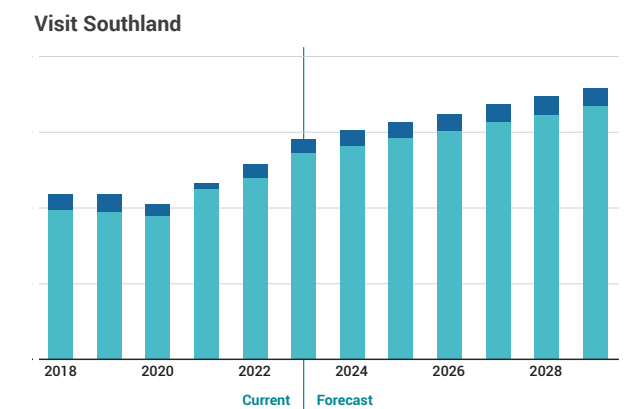
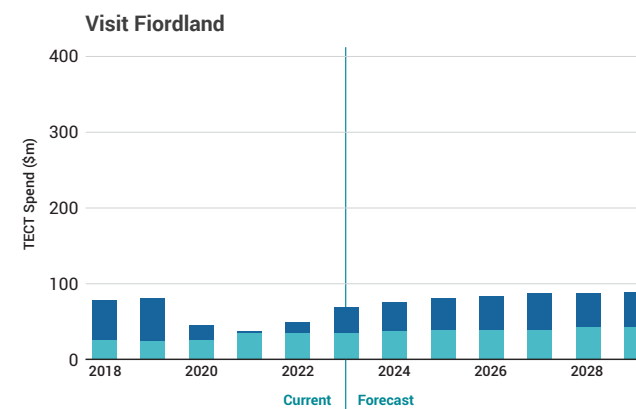
(January 2018 to March 2029)

■ Domestic ■ International

BIG WORLD



SMALL WORLD



Our Pathway Forward



A variety of recommended projects have been identified throughout the process to develop and inform the Murihiku Southland Destination Strategy 2023 - 2029.

Based on input from our community, partners and stakeholders, and the analytical and strategic supporting work completed, these recommendations have been included because they support the achievement of our vision and goals for the tourism sector in Murihiku Southland. They also address our barriers to growth, ensure alignment with our guiding principles, emphasise community support for tourism and provide the foundation for a sustainable visitor economy.

The 63 recommended projects are outlined in detail within this section of the MSDS 2023, grouped according to these five components of destination management:

 **Environmental Stewardship**

 **Leadership and Capability Development**

 **Access and Infrastructure**

 **Experience and Product Development**

 **Sharing our Story**

PRIORITY PROJECTS AND ENABLERS

From the 63 recommended projects, 24 have been prioritised, each reflecting the most significant opportunities to bring our vision to life and position the region as a stronger destination.

There are also five key enablers, which are of critical importance to the well-managed growth of our tourism sector. Key challenges in these areas need to be addressed.

 **Workforce Attraction and Development**

Our tourism workforce is facing significant and critical shortages, worsened by the impacts of Covid. Recruiting and retaining staff within our region who see tourism and hospitality as a pathway of value, is critical to our visitor economy.

 **Advocacy and Regulatory Planning**

Within the tourism sector there are many national issues and challenges that are important to our communities and businesses. Our region has a role to play in terms of advocacy and representation within these wider conversations and as part of higher-level decision making.

 **Tourism Leadership Group**

Achieving successful destination management requires a comprehensive and co-ordinated approach that involves multiple stakeholders. Establishing a Regional Tourism Leadership Group will provide strong direction for our tourism sector and support continued implementation of the MSDS 2023.

 **Data and Insights**

Tourism data is essential for the planning, development, marketing, and management of our tourism sector. Accessing accurate and timely information allows us to inform our sector and track progress across key measures i.e., community sentiment, visitor satisfaction, economic benefits, and sector sustainability.

 **Quality Accommodation Development**

Accommodation is in short supply across the region and there are also significant gaps in the higher quality accommodation segment. Addressing these shortages will support tourism sector growth and reduce pressure on housing which is being utilised to bridge these gaps in some locations.

Vision

Murihiku Southland is a world-class tourism destination that showcases our stunning natural landscapes, rich cultural heritage, and exceptional hospitality. By prioritising sustainability and community collaboration, we create unforgettable experiences for visitors, while benefiting residents, businesses, and the environment.

Priority Projects

A WORLD-CLASS DESTINATION

- Milford Opportunities Project
- World renown dark skies destination
- Predator Free Southland including Rakiura
- Māruawai cultural precinct
- Motupōhue visitor experience - Te Taurapa o Te Waka
- Home to Great Walks

SHOWCASING EXCEPTIONAL HOSPITALITY

- Regional ambassador programme
- Destination promotion to locals
- Southland Murihiku Food Tourism Strategy implementation
- Regional visitor information and Invercargill Waihōpai welcoming activation hub

PRIORITISING SUSTAINABILITY

- Regional spatial planning and tourism
- Murihiku Southland Sustainable Tourism Programme and sector support
- Cycling infrastructure and trail development

SHOWCASING RICH CULTURAL HERITAGE

- Cultural narrative and experience development
- New museum for Waihōpai Invercargill and Murihiku Southland
- Punanga Manu o Te Anau Te Anau Bird Sanctuary development
- Tutarau cultural storytelling
- Cultural storytelling in Waihōpai Invercargill

CREATING LASTING BENEFITS FOR COMMUNITY AND BUSINESS

- CBD rejuvenation in Waihōpai Invercargill and Māruawai Gore
- Town story and identity development
- Community engagement in tourism
- Public transport network investigation
- Business events attraction (MICE)
- Enhanced air connectivity – Waihōpai Invercargill and Te Anau

Enablers

Tourism Leadership Group

Data and Insights

Advocacy and Regulatory Planning

Workforce Attraction and Development

Quality Accommodation Development

DISPERSAL OF VISITORS

There are some parts of our region that currently experience high levels of visitation. To alleviate the pressure this can cause, one of our key goals is to encourage visitors to travel further into our region, particularly in areas where fit for purpose infrastructure exists. This spreads the benefits of tourism across our communities and aligns with one of the key objectives of the Milford Opportunities Project, to “facilitate broader Murihiku Southland benefits”.

To enable this to occur and allow visitors to experience new destinations our existing transport system will need to be considered, with further development and improvements likely required.



Suggested approach:

1 Promote regional initiatives which create awareness of and encourage travel to other parts of the region

- Touring route development e.g., The Southern Way (connecting Otago/Murihiku Southland).
- Town story and identity development.
- Regional sustainability, cycling, walking, and predator free positioning.

2 Activate Murihiku – The South Land regional story alongside subregional positioning

3 Enable visitors to travel into, and around the region

- Importance of public transport network, roading, and other infrastructure e.g., public toilets.
- Air connectivity and connection to international flights.
- Regional visitor information and Waihōpai Invercargill welcoming activation hub.

4 Develop experiences across the region to drive visitation and prioritise opportunities to connect them together (examples on the above map)



OUR PATHWAY FORWARD

Environmental Stewardship

We have a key role to play in supporting the sustainability of our regional tourism sector, identifying key projects and priorities to support a more regenerative future.

The MSDS 2023 has a clear desire for tourism in the region to be developed in a way that achieves benefits for our natural environment and local communities. The industry has been predicted to be one of the most impacted sectors in our region due to climate change, further driving the urgency to build a climate resilient economy.

ROLE OF DEPARTMENT OF CONSERVATION (DOC)

With so much of Murihiku Southland being conservation land, DOC is the largest tourism operator in our region. They are also charged with managing and protecting the sensitive natural environments and wildlife that draw visitors to Murihiku Southland. In their Climate Change Adaptation Action Plan (CCAAP), DOC identify that Aotearoa New Zealand's changing climate is affecting nearly every area of their responsibilities. While aiming to become leaders in low carbon conservation management, the CCAAP's focus is on understanding which places and values are vulnerable to climate impacts and how we can adapt. Working alongside DOC to understand the impacts for tourism will be important moving forward.

In terms of visitor numbers, DOC staff monitor key sites and if impacts are felt, work to adapt their management strategy. The Fiordland National Park Plan review is also within the prioritised work programme of DOC. This review is of high interest to tourism operators in the region, particularly those interested in the development of cycle trails, which the plan doesn't currently permit.

In terms of regeneration, DOC sees strong opportunity for visitors to boost conservation efforts and feel there is potential for tourism businesses to connect visitors to existing volunteer groups working on these projects.

DECARBONISING THE REGION

The Beyond 2025 Southland Regional Long Term Plan identifies this as a key focus area to support and enable Murihiku Southland to achieve net zero emissions by 2050. The region is already on this journey having reduced our contribution to the country's emissions from 9.7% in 2018 to 9.2% in 2021. The Beyond 2025 Southland Regional Long Term Plan articulates the need for everyone to play their part to achieve further progress towards our goal.

Murihiku Southland's Regional Development Agency, Great South has a key focus on regional emissions reduction and undertakes annual monitoring. A low emission economy would provide Murihiku Southland with major opportunities to support economic and social prosperity while mitigating the risks posed by climate change. Over the last 15 years Great South

have worked with businesses across the region to educate and support them to decarbonise, recognising that business as usual is not sustainable and that we need to future-proof and start adapting.

Responsible for the region's RTOs, Great South has a key role to play in supporting the sustainability of our regional tourism sector.

SUSTAINABILITY INSIGHTS

In order to monitor where our businesses are at in relation to their sustainability journey and to understand the key challenges faced, Great South conducted a tourism sector sustainability survey in early 2023. This provided the key insights summarised below which will be used to tailor support provided moving forward.

- › Many of our businesses are undertaking sustainable actions, but few have an accreditation to support this and fewer are measuring their carbon footprint.
- › There is a strong willingness to find out more and work on improving sustainability, but most don't know where to begin and are overwhelmed by the information available.
- › Many of our operators are small businesses so dedicating time or a person to work on sustainability is difficult, alongside the challenges of meeting the costs involved. Some felt that larger operators with more resource have an advantage and may be perceived as doing more when this isn't necessarily the case.
- › Those with transport-based businesses felt there was a higher cost to improve their impact.
- › Some felt that visitors' desire for cleanliness and hygiene means they are focused on single-use solutions, hampering their efforts to improve sustainability.
- › The vast majority rely on word of mouth to share the work they are doing in this area. This is in keeping with Southlanders nature to be humble and not share their mahi, but it means visitors who are looking for this information may not be able to readily identify sustainable options.
- › The lack of carbon-certified businesses in the region is again a reflection of the costs involved being high, particularly as many are recovering from the impacts of Covid.

KEY SURVEY RESULTS

Why sustainability is important to your business/organisation

- ✔ Protecting the environment, wildlife, and natural resources
- ✔ Creating authentic visitor experiences
- ✔ Enhancing our reputation

What businesses are doing...

...to be more environmentally sustainable

- ✔ Working to minimise waste
- ✔ Minimising impacts on water, biodiversity, landscape, and air

...to be more economically sustainable

- ✔ Communicating business values
- ✔ Managing finances and potential business risks

...to be more socially sustainable within the community

- ✔ Pay a living wage
- ✔ Maintaining up-to-date employment policies and agreements

...to be more socially sustainable for visitors

- ✔ Acting appropriately on feedback
- ✔ Incorporating local stories into the visitor experience

**These results reflect the most popular answers from respondents.*

16% measure their carbon footprint, 32% intend to soon.

19% have a sustainability accreditation or certification (primarily Qualmark).

0% of those surveyed have a carbon certification.

90% would like to find out more about improving the sustainability of their business and measuring their carbon footprint.

Barriers preventing businesses from being more sustainable

- ✔ Unsure of practical steps or where to start/ too much information makes it confusing
- ✔ Not enough time

How sustainability efforts and successes are shared

- ✔ Word of mouth
- ✔ Website
- ✔ Social media

SMDS 2019

Project Spotlight

This project was identified as one of the 68 recommendations from the SMDS 2019 (p16).

Murihiku Southland Sustainable Tourism Programme

In 2022 Great South developed the Murihiku Southland Sustainable Tourism Programme based on the principles of the Global Sustainable Tourism Criteria and the Tourism Sustainability Commitment from Tourism Industry Aotearoa. The programme is run over 12 weeks with three-four in-person workshops and one-on-one support throughout. Participants gain an understanding of climate change science and its impacts, calculate their carbon footprint, develop a sustainability plan for their business and gain guidance on telling their sustainability story. The first intake involved 11 tourism operators from different parts of the region.

Priority Projects

Long-term spatial planning – climate change impacts

The long-term impacts of climate change are well understood, being used to guide future decision making and mitigation pathways.

Many of our current tourism activities are at risk from the impacts of climate change. Predicted sea level rise, areas suffering from drought, and an increase in significant weather events will impact Murihiku Southland in different ways. Being aware of these impacts will be important as we look to support the future of our tourism sector and operators, and future proof new developments.

As much of Murihiku Southland is conservation estate, DOC's CCAAP outlines the areas they see as being impacted and Ngāi Tahu have also developed a climate change strategy. Alongside this our region's Councils are working on spatial planning in relation to climate change impacts.

KEY ACTIONS

- › Advocate for alignment of spatial planning at a national and regional level, and locally across key partners such as DOC, Ngāi Tahu, Te Ao Mārama Inc, Councils, Government etc.
- › Advocate for tourism considerations to be included in the development of the Murihiku Southland Regional Climate Change Strategy, a key recommendation within the Beyond 2025 Regional Long Term Plan.
- › Support the development of solutions to mitigate the impacts of climate change in areas reliant on tourism through regional coordination.

KEY STAKEHOLDERS

DOC, Ngāi Tahu, Ngā Papatipu Rūnaka ki Murihiku, Councils, Te Ao Mārama Inc, Great South

Tourism sector sustainability – leadership and support

Tourism operators are supported with pathways to improve the sustainability of their businesses.

Sustainability is at the heart of destination management and regenerative tourism. To achieve our net zero carbon goals and reduce our impact on the environment all sectors will need to do their part. We have a significant role to play in supporting our tourism operators on their journey, helping them to lessen their individual impact and improve their sustainability from an economic, environmental, community, and visitor perspective.

To support this, the Murihiku Southland Sustainable Tourism Programme will continue to be offered. To involve more operators and encourage continual learning, a bimonthly education series should also be established, with each session led by a speaker and/or expert in an area of sustainability e.g., waste management, procurement, electric vehicle (EV) basics, carbon certification, storytelling. The series could be used to encourage sharing of ideas and challenges that can be worked on together, overcoming barriers and supporting ongoing improvement.

KEY ACTIONS

- › Continue to run the Murihiku Southland Sustainable Tourism Programme up to two times per year, dependent on demand and resourcing.
- › Develop a bimonthly education series to encourage continual learning, sharing of ideas, and joint solutions to sustainability challenges.

KEY STAKEHOLDERS

Great South

Predator Free Southland including Predator Free Rakiura

Murihiku Southland's predator free programmes are understood by visitors to the region and opportunities to support these are well communicated and advocated for.

Predator Free 2050 is an ambitious goal to rid Aotearoa New Zealand of its most damaging introduced predators that threaten our nation's indigenous biodiversity, our taonga species, our economy and primary sector. In order to support the many ongoing efforts across Murihiku Southland and to move us closer towards our predator free goal, a joint initiative of Ngāi Tahu, Environment Southland, the DOC, Gore District Council, Invercargill City Council, and Southland District Council has resulted in the formation of a governance group and the joint funding of a Predator Free Southland Co-ordinator.

One of the most well-known programmes in the region is Predator Free Rakiura, which aims to eradicate all major predators – rats, possums, feral cats, and hedgehogs to help restore the true vitality, mana, and mauri of the Island. The size and scale of this project is significant globally as, if successful, it will make Rakiura Stewart Island the largest pest eradication of an inhabited island (based on land area and population). It will create a haven not only for native and endemic species, but for sustainable nature tourism.

The project will be an ongoing one, with funding and support over the next five years going into research and development of effective eradication systems. Beyond this ongoing maintenance and biosecurity measures will be required to ensure the sustainability of the project.

KEY ACTIONS

- › Raise the profile of Murihiku Southland's predator free programmes with visitors to the region.
- › Investigate options for the visitor economy to support predator-free activity.
- › Advocate for continued support of significant predator-free programmes in the region i.e., Predator Free Rakiura, efforts of the Bluff Hill Motupōhue Environment Trust (BHMET).

KEY STAKEHOLDERS

DOC, Councils, Ngāi Tahu, Ngā Papatipu Rūnaka ki Murihiku, Predator Free Community Organisations

Other Projects

Work with the tourism sector to establish sustainability goals

The potential to establish regional sustainability goals is explored, with pathways to success clearly identified.

In several regions there are examples of sustainable activity that a wider group of tourism operators have worked together to support. Some examples of these include the Mārahau Pledge in Nelson/Tasman where every operator in Mārahau is certified carbon zero and gives a portion of their profits to improve the areas biodiversity, or SUCfree Wānaka who aim to make Wānaka Aotearoa New Zealand's first single-use cup free town.

Operators in Murihiku Southland are already very involved in supporting the natural environment, but a clearly defined and unified goal has the power to enact significant change and would be a strong signal to visitors to the region.

KEY ACTIONS

- › Work with the tourism sector in Murihiku Southland to identify any collective goals they would like to support and/or see achieved in relation to sustainability.

KEY STAKEHOLDERS

Great South



Investigate opportunities for the visitor economy to support environmental protection

Pathways for visitors to contribute to environmental preservation and protection are established.

Travellers are becoming increasingly aware of their environmental impact, and many are interested in contributing to the betterment of the destinations they visit. This aligns well with our goal of achieving regenerative tourism, with the tourism sector delivering more than it takes and improving our region. Many tourism businesses already contribute to conservation work, but potential also exists to connect visitors directly to volunteer groups working on conservation and community projects. In the process visitors gain an in-depth understanding of the projects they contribute to, and an authentic experience connected to our place. Pathways for this to occur should be investigated and promoted.

Our communities are also interested in how the visitor economy can be utilised to support our environmental protection efforts, possibly finding avenues for 'money from tourism (to be) put back into preserving and conserving the environment'. Options to support this at a community and regional level should be considered.

KEY ACTIONS

- › Connect visitors to volunteer programmes operating within our region.
- › Investigate commercial models focused on volunteering that may work well in Murihiku Southland.
- › Consider options for the visitor economy to support environmental preservation within the region.

KEY STAKEHOLDERS

DOC, Great South

Develop an online platform for tourism sustainability within Murihiku Southland

The commitment of our region and tourism businesses towards sustainability and regeneration is readily shared with visitors seeking low emission destinations.

There is strong potential for Murihiku Southland to grow its position as a low emission tourism region. Significant work to decarbonise has been undertaken over the last decade with the region leading the way for the rest of Aotearoa New Zealand through programmes like Wood Energy South and the Carbon Neutral Advantage Programme. Renewable energy is also a key focus for the region with potential green hydrogen production and other renewable options being explored.

Elevating businesses that are committed to their sustainability journey and highlighting the wide range of low emission activities our region is known for, has strong potential to attract visitors with aligned values to our place. To provide them with the best possible information about our destination, an online platform for tourism sustainability should be established within the regional destination website SouthlandNZ.com. This would share the efforts of operators and of key projects being undertaken in the region. To be featured within the platform, operators would need to meet certain criteria based on their sustainability journey and be sharing this visibly within their own websites. The platform will allow us to share best practice and highlight the good work that is already being done, encouraging and incentivising others to follow the example of those taking a lead in this area. Itinerary suggestions should also be included, highlighting our wide range of low emission activities alongside operators committed to sustainability.

KEY ACTIONS

- › Develop and maintain an online platform sharing information on sustainability within our regional tourism sector.
- › Establish a range of itineraries based on low emission experiences and operators committed to sustainability.

KEY STAKEHOLDERS

Great South

Promote guidelines for visitor behaviour

Visitors clearly understand how to experience our place respectfully and mindfully, acting in the spirit of kaitiakitanga.

The environment of Murihiku Southland is one of the main reasons visitors are drawn to the region. To preserve it for future generations, we have a key role to play in educating visitors on how to experience our place. This is extremely important to our people, who have a strong desire to ensure visitors adopt sustainable travel practices and reduce their environmental impact.

Making visitors aware of how to manage their waste, respect our wildlife, and tread lightly should be integrated into information on travelling to and within the region. Education tools like the Tiaki Promise (a commitment to care for Aotearoa New Zealand) and wildlife care codes support this well. Information on the respect required for sensitive areas and those with Tōpuni or Mātaitai status should also be considered.

Many visitors to the region are also travelling independently and may not be used to the conditions our roads propose, particularly in winter and in alpine environments. Driver safety education is paramount to ensure we fulfill our role as caring hosts in the spirit of manaakitanga.

KEY ACTIONS

- › Promote the Tiaki Promise, wildlife care codes and share information on travelling sustainability within the region; both at key locations and digitally.
- › Share information on driver safety within the regional destination website SouthlandNZ.com.
- › Ensure information centres and rental car businesses inform visitors of road safety considerations and conditions.

KEY STAKEHOLDERS

Great South, Councils, Waka Kotahi NZTA



Advocate for energy transition in key tourism destinations

Renewable energy solutions for key tourism destinations are established and clear transition timeframes identified.

The key source of power in two of our region's most iconic visitor destinations, Rakiura Stewart Island and Piopiotahi Milford Sound, is through diesel fueled generators. On Rakiura Stewart Island this is largely due to the Island's distance from the mainland and its low population base, making investment in large scale power infrastructure difficult. Piopiotahi Milford Sound's remoteness means it also suffers from similar challenges. While diesel generators are reliable, can operate independently and don't require connection to the main power grid, the current situation in both destinations is not sustainable environmentally or economically and doesn't meet expectations of visitors whom are increasingly aware of the impacts they and the services they expect have on the environment.

This has been identified within the Beyond 2025 Southland Regional Long Term Plan and the Southland Murihiku Regional Energy Strategy 2022 – 2050, which seeks to support energy resilience and affordability for all and provide renewable energy to support the region becoming net zero by 2050. The Energy Strategy recommends a transition away from diesel in these two destinations by 2030.

Establishing a renewable energy supply will ensure remote locations such as Piopiotahi Milford Sound and Rakiura Stewart Island are more resilient and provide residents greater protection from energy price increases, aligning with visitor expectations surrounding environmental sustainability.

KEY ACTIONS

- › Investigation of new generation and renewable energy opportunities for Rakiura Stewart Island and Piopiotahi Milford Sound, aligning with the recommendations from the Southland Murihiku Regional Energy Strategy 2022–2050.

KEY STAKEHOLDERS

Southland District Council, DOC, Milford Sound Tourism, Milford Opportunities Project, Great South

Support efforts to reduce and better manage waste at visitor destinations

Options to improve waste management and reduction at key visitor sites are considered and solutions clearly communicated to visitors.

In our Community Sentiment in Relation to Tourism research undertaken in 2023, litter and waste were the most frequently identified adverse impacts associated with the sector. This visual sign of environmental damage is a key issue for our people and something that needs to be a focus moving forward.

Waste reduction is also important in terms of our sustainability goals, helping to minimise our carbon footprint and environmental impact. The tourism sector and tourism operators have a role to play in educating visitors regarding waste, and how we would like it to be managed in Murihiku Southland.

KEY ACTIONS

- › Promote the Tiaki Promise as a set of guidelines to follow in terms of how to tread lightly in our region, with consideration to the environment.
- › Investigate solutions to better manage waste and offer recycling options at key visitor destinations.
- › Encourage the use of composting systems to minimise food waste.
- › Encourage the sector to move away from single use items, especially plastics.

KEY STAKEHOLDERS

Councils, DOC, WasteNet Southland, Great South

Support improved inclusive and accessible tourism within the region

Tourism operators better understand the needs of those with disabilities and how the products they offer can be more inclusive.

According to the World Health Organisation (WHO), more than one billion people around the world live with some form of disability. Yet, even in a developed nation like Aotearoa New Zealand, we are still struggling to understand the value and concept of accessible and inclusive tourism.

From the mild experience to the thrill-seeking extreme, backpacker to luxury resort, bus services to campervans, cycleways to DOC trails and everything in between, there is a strong opportunity to make our destination one that welcomes all visitors. Our population is also ageing and considerations around how best to cater for this segment of the market should be considered.

KEY ACTIONS

- › Work with the Makingtrax Foundation to offer workshops that educate operators on how they can look to make their experiences and products more inclusive, while providing an understanding of the value of this market.
- › Consider other opportunities that support tourism operators to make their products more accessible to those with disabilities, physical or otherwise.

KEY STAKEHOLDERS

Great South





OUR PATHWAY FORWARD

Leadership and Capability Development

Tourism leadership is vital for effective decision-making and collaborative partnerships. It provides a framework for strategic planning which ensures the long-term success and responsible growth of the tourism industry.

Strong partnerships and leadership are required to successfully implement the MSDS 2023, and its aspirations for our tourism sector. Collaboration, connection, and advocacy will be also be essential to move forward in a way that best benefits our communities and reduces barriers to growth.



REGIONAL CHALLENGES

There are many challenges severely impacting our regional tourism sector. Working collaboratively on these, across multiple agencies and with strong leadership, will provide a unified voice within planning to alleviate their impact. Workforce and accommodation are currently the most pressing challenges for our sector and areas limiting its growth and recovery.

Workforce

The tourism sector workforce, like many others, is currently facing significant and critical shortages. Many tourism and hospitality workers lost their employment due to Covid, which has affected perceptions of stability the sector can provide moving forward. However, even prior to Covid the industry was facing issues and challenges, largely due to its seasonal nature and the challenge in providing workers with good work-life balance, which is of high importance to our younger generations.

Due to the seasonal nature of many tourism roles, they have often been filled by short-term international visitors with working visas. With less of these workers in the country and more competition to attract them, many of our businesses are severely short-staffed. As a result, their owners and existing staff are facing burnout issues and having to close their businesses on certain days of the week to take a break. This has an impact on the viability of these businesses and for the visitor experience. Hospitality has been particularly affected and more so in highly visited areas like Te Anau.

Accommodation and housing

Accommodation is also a key challenge, with housing for workers a barrier in many parts of the region. The shortage of commercial accommodation in Murihiku Southland has led to a thriving market for non-commercial accommodation platforms like Airbnb, attracting more tourism, but reducing housing availability for residents and workers. This creates challenges in attracting workers and raises concerns about unfair competition. Regulatory changes are being advocated for by some of our communities, such as Rakiura Stewart Island and in towns like Aparima Riverton and Te Anau, where 14% of all housing is used for non-commercial accommodation. The lack of housing options also poses a major challenge for the region's tourism sector in recruiting and retaining staff. While addressing the proliferation of non-commercial accommodation could help, alternative housing solutions for workers are also needed.

SMDS 2019

Project Spotlight

These projects were identified in the 68 recommendations from the SMDS 2019 (p16).

Destination tourism organisation

To support integrated tourism leadership in the region and sustainably grow our visitor economy, the two RTOs within Murihiku Southland are now aligned under the management of Great South, Southland's Regional Development Agency.

Great South assumed responsibility for the Fiordland RTO, previously known as Destination Fiordland on 1 April 2021. As a result, both the Southland and Fiordland RTOs were rebranded to become Visit Southland and Visit Fiordland. The visual identity of both RTOs was also aligned to clearly show joint ownership, resourcing, and the strategic opportunity to better align tourism development and promotional activity across the whole Murihiku Southland region, while still allowing the differences between the two RTOs to be acknowledged.

Papatipu Rūnaka Memorandum of Understanding (MOU)

A MOU between Great South and the four Papatipu Rūnaka of Murihiku Southland (Awarua, Hokonui, Ōraka Aparima, and Waihōpai) was signed on 8 August 2022. This is a significant milestone, recognising the commitment to enduring collaboration and partnership in relation to projects of significance within Murihiku Southland, including those related to the development of our visitor economy and destination management.

Sector support and leadership

Several workshops and training opportunities have been provided to operators in the tourism sector, linked to developing key skills and expertise in areas relevant to the SMDS 2019. Some of the key opportunities provided were:

- › Digital capability development
- › Development and marketing of an agritourism business
- › Dark skies tourism product development
- › Murihiku Southland Sustainable Tourism Programme
- › Food storytelling workshops

Priority Projects

Tourism leadership group

A tourism leadership group is established to provide leadership for our tourism sector and support ongoing implementation of the MSDS 2023.

Achieving successful destination management requires a comprehensive and co-ordinated approach that involves multiple stakeholders. While the MSDS 2023 and forward planning has been co-ordinated and written by Great South, it will not be able to deliver outcomes alone, needing strong partnership to fulfill the goals identified. The tourism leadership group would therefore have a key role to play in driving the MSDS 2023 outcomes and the delivery of its action plan.

The mandate and purpose of this tourism leadership group should be clearly defined, and terms of reference established at its inception. Alongside delivery of the MSDS 2023, it is widely agreed that the groups' role would include advocacy for the tourism sector and its priorities, challenges, and opportunities, ensuring tourism has a voice both at a local and national level. The group should also have a good understanding and connection to key regional projects such as the Milford Opportunities Project and the Regional Skills Leadership Group.

The group should have representation from relevant organisations who have a role to play in the implementation of the MSDS 2023 including each of our Councils, DOC, and our region's Papatipu Rūnaka. Avenues to ensure continued community engagement should also be established.

KEY ACTIONS

- › Establish a tourism leadership group to provide direction and advocacy for our regional tourism sector and support continued implementation of the MSDS 2023.
- › Establish terms of reference and meeting frequency.

KEY STAKEHOLDERS

Great South

Regulatory and planning - sector advocacy

The voice of Murihiku Southland is heard within higher-level decision-making, addressing key challenges and opportunities that impact our tourism sector.

Within the tourism sector there are many challenges and opportunities that are important to our communities and businesses. Our region has a role to play in terms of advocacy and representation within these wider conversations and as part of higher-level decision-making at both a regional and national level. While these will evolve and change over time, some of the areas affecting our region's tourism sector where Murihiku Southland's perspective should be conveyed include:

- › Freedom camping legislation and enforcement being put in place to see improved management across Aotearoa New Zealand.
- › Spatial planning work being undertaken that needs to consider tourism (connected to the reform of the Resource Management Act).
- › The Fiordland National Park Plan review.
- › DOC CCAAP
- › The investigation of options around the management of non-commercial accommodation.

KEY ACTIONS

- › Advocate for and represent Murihiku Southland's perspective on key issues and challenges.
- › Include advocacy as part of the tourism leadership group's terms of reference.

KEY STAKEHOLDERS

Great South, future tourism leadership group, Councils, Ngā Papatipu Rūnaka ki Murihiku





Build the profile of careers in tourism

Tourism is an attractive career path for Southlanders and training options are readily available.

Careers in tourism are often perceived as low skill and low pay, with the sector not always seen as a valid career path. Addressing these issues and the attractiveness of the tourism industry for workers is a key focus of the Aotearoa New Zealand Government's Better Work Action Plan. This Plan is part of the first phase of the Tourism Industry Transformation Plan that aims to transform tourism in Aotearoa New Zealand towards a regenerative model.

The Better Work Action Plan aims to pave the way for a future where people have a strong desire to work in the sector. There are six key areas they have outlined to achieve this – improving employment standards and recognising quality employers, providing fit for purpose education and training, encouraging businesses to work together to minimise employment seasonality, improving cultural competency, lifting technology and innovation, and showcasing the pathways of people in tourism.

KEY ACTIONS

- › Support implementation of the Better Work Action Plan.
- › Consider opportunities for tourism to be included within Great South's Southland Youth Futures programme, highlighting tourism pathways within our schools.
- › Support businesses and organisations to build stronger relationships with schools, polytechnics, and universities, while also providing experiential learning programmes.
- › Support SIT | Te Pūkenga as a regional tourism training facility.

KEY STAKEHOLDERS

Great South, MBIE, SIT | Te Pūkenga

Tourism workforce development

Our regional tourism sector has the workforce it needs to reach its potential and allow businesses to thrive.

Workforce shortages in tourism are being faced nationally and much discussion and planning is underway to alleviate this pressure (including longer-term plans within the Better Work Action Plan). It is essential that Murihiku Southland continues to connect into these national efforts.

To address workforce shortages within Murihiku Southland, a Regional Skills Leadership Group (RSLG) has been established incorporating Southland District, Gore District, Waihōpai Invercargill, Motupōhue Bluff, and Rakiura Stewart Island, while also working in partnership with our region's four Papatipu Rūnaka. Their mahi is underpinned by four aspirations:

- › **System Change** – our region is prepared for future labour market needs.
- › **Change for People** – our region supports people to thrive in the labour market.
- › **Cultural Change** – our region is committed to equitable outcomes for Māori.
- › **Workplace Change** – our region is renowned as a great place to live and work.

Tourism and hospitality are one of the RSLGs five prioritised sectors and their Regional Workforce Plan has identified a series of actions to address issues specific to the industry. Rather than creating an additional workforce plan, it is imperative that the region supports the recommendations and outcomes this group are working to implement. The RSLG has representation from Great South, alongside other key organisations.

KEY ACTIONS

- › Support implementation of the RSLG Regional Workforce Plan to address workforce shortages in tourism and hospitality.

KEY STAKEHOLDERS

Regional Skills Leadership Group (RSLG)

Investigate options for staff accommodation at key locations (with a focus on Te Anau)

Sufficient accommodation for our tourism workforce exists and this is considered as part of all new development.

Housing for staff was noted as a major challenge by our region's tourism sector in the SMDS 2019. This continues to be a major barrier to the growth and sustainability of the sector. With workforce also being a challenge and recruitment often occurring out of the region or local area, the lack of accommodation available can mean losing valuable and much needed staff. In the Southland Murihiku Employer Workforce Research 2023, 52% of employers noted that housing challenges are a significant barrier to recruiting staff.

Many parts of the region have noted this issue, with difficulty consistently being felt in more remote parts of the region such as Te Akau Tai Toka The Catlins. However, towns with high visitation such as Te Anau are experiencing a particularly heavy burden. With the re-start of international tourism more properties are moving back to becoming holiday rentals, leaving a lack of housing solutions available for those coming to the region for work.

While addressing the proliferation of non-commercial accommodation could alleviate some of this pressure, other solutions to provide accommodation for workers in these areas needs to be considered. The Beyond 2025 Southland Regional Long Term Plan proposes the establishment of a Regional Housing Forum who will be tasked to co-ordinate our efforts to addressing housing challenges. Tourism needs to be a key consideration within their approach.

KEY ACTIONS

- › Advocate for staff accommodation provision within new developments in the region.
- › Highlight staff accommodation as a key opportunity with potential investors and within the regional Tourism Investment Prospectus to be developed (p74).
- › Partner with the proposed Regional Housing Forum to ensure the needs of the tourism sector are considered in the wider approach to addressing housing challenges.

KEY STAKEHOLDERS

Councils, Great South, Employers



Collation and distribution of tourism data

Meaningful tourism data is readily available, allowing progress across key measures and movement within the sector to be assessed and shared.

Tourism data is essential for the planning, development, marketing, and management of our tourism industry. Accessing accurate and timely information allows us to inform our sector and track progress across key measures i.e., community sentiment, visitor satisfaction, economic benefit, and sector sustainability. It also plays a crucial role within decision-making, resource allocation, and in highlighting the overall benefit of tourism to the region.

Accessing consistent and meaningful data has been a particular challenge in the last few years. Key government datasets have undergone change and the shift to a destination management approach to tourism has meant that new measures of success need to be considered. To address these issues and establish data sets required, a national Tourism Data Leadership Group has been established. The central purpose of this group is to create a collaborative forum to identify the diverse information needs of tourism data users and support the implementation of possible solutions.

While the solutions identified by this group will be useful to our regional data picture, there will continue to be an ongoing need for the collation and management of more localised data i.e., qualitative surveying, visitor flows at

key locations. Therefore, a regional programme for the Murihiku Southland specific tourism sector is essential. This may be connected to the proposed Regional Data Repository and Regional Data Strategy as outlined in the Beyond 2025 Southland Regional Long Term Plan.

KEY ACTIONS

- › Develop a tourism data dashboard featuring key indicators that cover economic, sustainability, community sentiment, and visitor satisfaction measures.
- › Establish a programme to measure visitor satisfaction with our destination.
- › Investigate ways to best measure the sustainability of our tourism sector.
- › Establish a qualitative surveying programme at key destinations.
- › Ensure tourism is considered in connection to the implementation of the data related recommendations within the Beyond 2025 Southland Regional Long Term Plan - Regional Data Repository and Regional Data Strategy.

KEY STAKEHOLDERS

Great South

Other Projects

Community support and participation in tourism

Our regional tourism sector empowers and benefits our local communities, ensuring their perspectives contribute to its development.

To develop a tourism sector that truly delivers benefits for our local communities, their views need to be at the heart of its development. Community involvement in the development of tourism is also essential to successful destination management as we seek to build the industry around what locals want for their place. To achieve this, we need to facilitate stronger community awareness and participation in the development of tourism.

Building on the visitor economy awareness campaign from the SMDS 2019, ways to articulate the benefits of tourism and what is happening in the sector with the wider community should be explored. Actions that are being taken to mitigate any adverse impacts should also be shared – particularly those identified within the recently completed Community Sentiment in Relation to Tourism research.

KEY ACTIONS

- › Continue to conduct Community Sentiment in Relation to Tourism research on a biannual basis.
- › Establishing a regular means to connect and partner with our region's four Papatipu Rūnaka on their aspirations and projects of importance.
- › Create a community engagement plan to provide opportunities for community consultation and collaboration on destination management projects.
- › Consider priorities identified within Council community board plans and the aspirations of our regional promotion's groups.

KEY STAKEHOLDERS

Great South, Councils, Community Boards, Ngā Papatipu Rūnaka ki Murihiku

Support regional collaboration and capability building

Opportunities for tourism operators to collaborate, connect, and grow their capability are readily available and supported by the region's RTOs (managed by Great South).

Fostering collaboration and connection amongst our tourism operators is an area of key importance. Within the workshops undertaken to inform the development of the MSDS 2023, representatives from some parts of the region felt that while each part of our region has its strengths, we could do more to build these collectively.

Achieving this will involve continuation of many of the core activities undertaken by the region's two RTOs. This includes marketing campaigns that showcase the region and themed itineraries, alongside educational and training opportunities in areas relevant to our sector. Additional activities that could support further collaboration and connection would focus on the establishment of networking events, industry forums, and platforms for operators to connect, share knowledge and build relationships.

KEY ACTIONS

- › Develop an annual calendar/ongoing system for connecting with and updating our tourism sector on key activity and developments.
- › Facilitate stronger connections between our region's information centres.
- › Investigate the potential for an annual or biannual event bringing operators from around the region together.
- › Continue to provide workshops and opportunities for operators to develop their skills.

KEY STAKEHOLDERS

Great South, Promotions Groups

Leverage external funding for the region

Opportunities to leverage external funding for tourism development are maximised and approached proactively.

As Murihiku Southland is a large region with a small rate payer base, attracting funding to support our tourism sector is a priority for our communities. In our recent Community Sentiment in Relation to Tourism research, 48% of residents agreed that community infrastructure should be the highest focus for our local tourism industry. There is a strong feeling that this is underfunded with small communities paying for the infrastructure needed by visitors. These residents want to see more diverse funding in this area, therefore where opportunities exist to leverage council investment to gain further external funding for key projects, these should be pursued.

Proposed new tourism focused developments and projects of significance within the region also require investment. To encourage this in a way that aligns with our vision for the future, there is a need to apply a proactive approach and develop an investment prospectus. Targeted at potential investors, this prospectus would highlight why Murihiku Southland is a desirable location for tourism investment, illustrate tourism development projects that are priorities for the region, and stakeholder support, while offering information on our unique points of difference.

KEY ACTIONS

- › Identify opportunities to leverage existing funding for infrastructure projects related to tourism i.e., Tourism Infrastructure Fund.
- › Develop a regional Tourism Investment Prospectus.

KEY STAKEHOLDERS

Great South, Councils

Regulatory framework for non-commercial accommodation

Non-commercial accommodation and its impacts are well understood and managed in a way that maximises the housing needs of locals while meeting visitors needs.

The fact that Murihiku Southland is short of commercial accommodation means there is a strong market for non-commercial options through sites like Airbnb. Many visitors also prefer this type of accommodation, which has further driven its growth in use. While non-commercial options can support us to bring more tourism to the region, they can also have a detrimental effect on the level of housing stock available for our residents and those looking to work in the region. In areas with a strong tourism market, locals feel that Airbnb and other non-commercial accommodation options are pushing up housing prices and making it very hard to attract workers who are critically needed as they have no affordable accommodation options. There is a feeling that the playing field is also uneven as non-commercial accommodation owners don't pay the same rates or need to meet the same health and safety regulations as commercial operators.

In light of this context, there are many benefits for homeowners to offer their houses as short-term holiday accommodation and few disincentives. In areas like Te Anau, where 14% of the towns housing is used for non-commercial accommodation, there is a strong feeling that some sort of regulatory change is required to address this and make more housing available for locals and workers. This change would be required at a Council level.

KEY ACTIONS

- › Conduct an assessment on the impacts of non-commercial accommodation within the Murihiku Southland region in partnership with all Councils.
- › Investigate options to introduce regulatory change that would alleviate the pressure on our housing market caused by high levels of non-commercial accommodation use.

KEY STAKEHOLDERS

Councils, Great South

Regional tourism awards

The achievements of tourism businesses are celebrated and inspire continuous improvement.

The establishment of a tourism awards programme could provide several benefits for our tourism sector. They can bring recognition to the achievements of those who are doing well, increasing their visibility in such a way that would encourage others to follow their lead. They have a role to play in enhancing the overall quality of the tourism industry and our destination while also benefiting travellers by guiding them towards exceptional experiences.

There are several key areas where this would work well such as tourism sustainability and food storytelling. Awards could cover things like accessibility and innovative new product, and potential sponsorship could be obtained to support their delivery.

An alternative could involve working with existing programmes in the region to have tourism awards included. For example, the Environment Southland Community Awards or the Business Excellence Awards run by the Southland Business Chamber.

KEY ACTIONS

- › Investigate options for the development of regional tourism awards to showcase the achievements of our operators.

KEY STAKEHOLDERS

Great South





OUR PATHWAY FORWARD

Access and Infrastructure

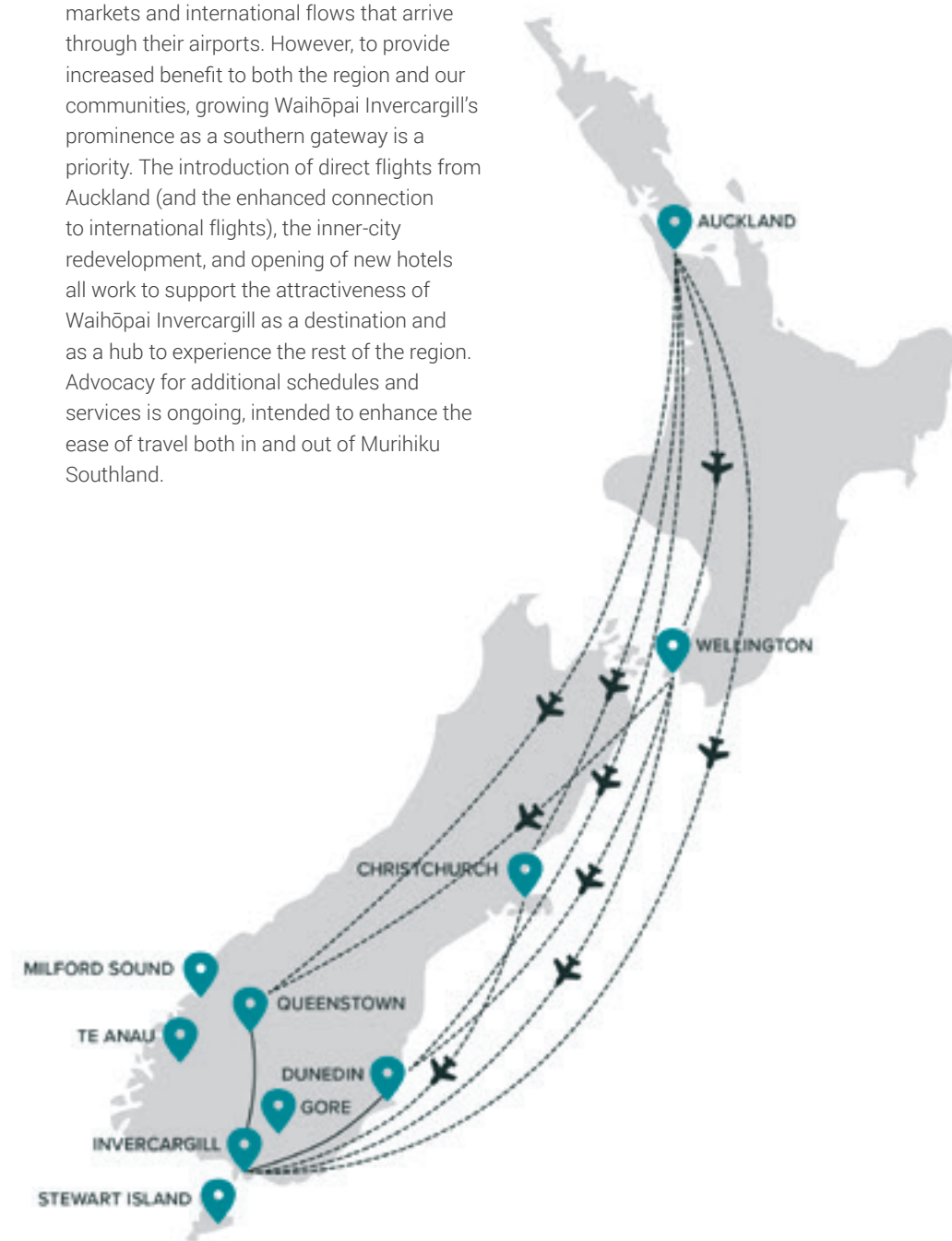
Efficient transportation networks, including well-connected airports, roads, and public transportation systems, enable visitors to easily reach our destination and explore what we have to offer.

Access and infrastructure are crucial for the success and growth of tourism. Infrastructure enabling tourism to occur must be fit for purpose and should encourage a shared approach, benefiting our communities as well as our visitors.



GATEWAY OF WAIHŌPAI INVERCARGILL

Although Waihōpai Invercargill is the primary aviation gateway into the southern part of the region, having Queenstown and Dunedin on the region's boundary is an advantage for Murihiku Southland, as there is potential to leverage the strong visitor markets and international flows that arrive through their airports. However, to provide increased benefit to both the region and our communities, growing Waihōpai Invercargill's prominence as a southern gateway is a priority. The introduction of direct flights from Auckland (and the enhanced connection to international flights), the inner-city redevelopment, and opening of new hotels all work to support the attractiveness of Waihōpai Invercargill as a destination and as a hub to experience the rest of the region. Advocacy for additional schedules and services is ongoing, intended to enhance the ease of travel both in and out of Murihiku Southland.



MILFORD OPPORTUNITIES PROJECT – A NEW WAY TO EXPERIENCE PIOPIOTAHU MILFORD SOUND

The Milford Opportunities Project was established in 2017 to create an ambitious and innovative masterplan for Piopiotahi Milford Sound, the Milford corridor and the region surrounding it. Established in response to high levels of visitation to the area, the project's goal is to uphold Piopiotahi Milford Sound's extraordinary natural and cultural heritage, enhance and sustain the visitor experience and harness opportunities to support the communities of Murihiku Southland and beyond. The Milford Opportunities Project is a collaboration between Ngāi Tahu, DOC, Southland District Council, the Ministry of Transport, Waka Kotahi NZTA and MBIE.

Stages one and two of the Milford Opportunities Project have now been completed, with the official masterplan launch held in July 2021 in Te Anau. The project is currently in stage three – the design, planning and implementation phase. A new governance group, and a project team have been formed for this stage and they will facilitate engagement sessions to gain feedback on concepts outlined in the masterplan throughout 2023. If implemented the recommendations in the masterplan would significantly change the way Piopiotahi Milford Sound is experienced and accessed.

MOVING AROUND THE REGION

Our roads, transport providers, and visitor information all play a role in supporting travellers to experience our region. With new product being developed it is expected that demand for transport options will increase. There are currently limited public transport networks both within our towns and to connect parts of the region together, particularly going east (Tuatapere) or west (Te Akau Tai Toka The Catlins). This has been further exacerbated by Covid and its impact on tourism focused transport providers. The rental vehicle fleet based at Waihōpai Invercargill is also short to meet demand. Advocacy and support to provide more options moving forward will support tourism growth. Infrastructure to support the electrification of our region will also be important as EV ownership increases and visitors increasingly demand low emission travel options.



SMDS 2019

Project Spotlight

This project was identified as one of the 68 recommendations from the SMDS 2019 (p16).

Flights to Waihōpai Invercargill

A direct Auckland to Waihōpai Invercargill service began in August 2019, making Waihōpai Invercargill the first (and only) regional airport to host a regular jet service. The availability of this direct flight not only makes Waihōpai Invercargill and Murihiku Southland more accessible to both the domestic and international markets, but it has also been crucial for the region's exporters.

The jet service was suspended in 2020 as a result of Covid, however a revised service with lunchtime arrivals and departures was reintroduced in July 2020, focusing on the domestic leisure travel market. At that time, Stewart Island Flights also changed its timetable to connect with the jet service, and this resulted in strong growth of Auckland visitors to the region.

Priority Projects

Enhanced air connectivity for Invercargill Airport

Invercargill Airport provides connection to key locations around the country, supporting the city's position as a regional hub for tourism.

Ensuring the region has affordable and regular air connections is a critical enabler of tourism. The jet service connecting Waihōpai Invercargill and Auckland has been a regional success story and a gamechanger for Murihiku Southland. Work now complete on the cycle trail and cultural identity as you leave the airport further cements the role it plays as a place of welcome to the region.

Currently the jet service operates five days per week with a midday departure which is well timed for international departures and freight. Adding further flights or investigating other destinations alongside Auckland could build on this capacity, supporting further access to the region. Developing the position of Invercargill Airport also supports its role as a hub servicing travel within Murihiku Southland, rather than other airports outside the region assuming this role.

This needs to be considered alongside the desire to increase freight capability into and out of the region. Increased freight demands could also support the need for additional flights and help ensure passenger travel remains affordable.

KEY ACTIONS

- › Continued advocacy for additional jet services at Invercargill Airport.

KEY STAKEHOLDERS

Invercargill Airport, Air New Zealand, Great South

Te Anau Airport as aviation access to Te Rua-o-Te-Moko Fiordland

The viability of Te Anau Airport is well understood, and its pathway forward is clearly identified.

Te Anau Airport has the opportunity to play a greater role within the region and become a hub (light aircraft only), because of its location as a gateway to Piopiotahi Milford Sound and four of our Great Walks. The Milford Opportunities Project proposes no fixed wing aircraft landing in Piopiotahi Milford Sound and if this was to occur Te Anau Airport would be the closest aviation access. Commercial viability would be key to this possibility.

In its current situation, the airport has high capital costs and low passenger numbers exacerbated by Covid. Due to this it has a funding shortfall that is covered by a targeted rate in the Te Rua-o-Te-Moko Fiordland area. In light of this the airport is currently being reviewed by a working group who will assess barriers preventing the airport's success and possible ways it could become financially viable. This work will consider where it fits into the wider Te Rua-o-Te-Moko Fiordland and Murihiku Southland context.

KEY ACTIONS

- › Complete review into the viability of Te Anau airport and its future opportunities.

KEY STAKEHOLDERS

Southland District Council, Great South, Milford Opportunities Project, Airport Review Working Group



Visitor information and Waihōpai Invercargill welcoming activation hub

Visitor information is provided at key locations across the region and aligned with the national network.

As a result of Covid the Waihōpai Invercargill i-SITE has been closed for the last two years and has been missed by visitors to the region, as well as our local community. i-SITEs play a key role in attracting, welcoming, and retaining people within our region.

- › **From a visitor perspective** – many travellers wait until they arrive in a region to book parts of their holiday, including local transport, accommodation, and activities. They also look to these locations for visitor safety messaging and in times of emergency.
- › **For businesses** - many rely on the national network of i-SITEs to promote and sell their products, as 38% of all international visitors book through an i-SITE.
- › **For local communities** – they are a place where local events and public amenities are promoted.
- › **For newcomers** – as well as being a place of orientation for new residents, many people who move to Murihiku Southland have experienced the region as a visitor first. They are, therefore, a useful tool to support the attraction of our workforce and resident population.

In line with the reset of tourism post-Covid the value of i-SITEs have been reinforced as people trust the brand and it can be relied on to provide good quality, useful and objective information. A national review of the i-SITE network has recently been undertaken by the Visitor Information Network (VIN Inc). This review found that there is still strong value in the network and a rebranded network model is now being planned, with a key focus on higher standards of consistency in-store, and a focus on both visitors and the community.

The primary approach is based on 'one per place', and within Murihiku Southland VIN Inc have vested the license in Great South. The ideal scenario is that Waihōpai Invercargill becomes that gateway and a 'one-stop shop' providing orientation for all of Murihiku Southland, with enhanced alignment with the Gore Visitor Centre and DOC visitor centres on both Rakiura Stewart Island and in Te Anau. These sites would share the regional story Murihiku – The South Land, key visitor messaging around the Tiaki Promise, and provide information on the region from a live and work perspective. There is also the possibility of a second i-SITE in Te Anau, however this requires investigation.



The Waihōpai Invercargill i-SITE would be situated in or alongside the proposed welcoming activation hub, a key project within the Beyond 2025 Southland Regional Long Term Plan. This facility aims to co-ordinate all welcoming activity in the region and provide support for businesses with their workforce attraction efforts.

KEY ACTIONS

- › Assess the feasibility for i-SITEs in Waihōpai Invercargill and Te Anau.
- › Develop close links between i-SITEs/visitor centres and RTO staff.
- › Investigate ways the network can support the attraction of new residents wanting to live and work in the region.

KEY STAKEHOLDERS

MBIE, DOC, Great South, Councils, Emergency Management Southland, VIN Inc, Tourism New Zealand

Support progression of the Milford Opportunities Project

The design, planning, and implementation of the Milford Opportunities Project is supported.

“Piopiotahi – New Zealand as it was forever”

The Milford Opportunities Project was established in 2017 to create an ambitious and innovative 50-year masterplan for Piopiotahi Milford Sound, the Milford corridor and the region surrounding it. The masterplan will make recommendations to ensure Piopiotahi Milford Sound maintains its status as a key visitor icon and provides a world-class visitor experience. It must be accessible, uphold mana whenua, national park, and conservation values, maintain its World Heritage status, and add value to Murihiku Southland and Aotearoa New Zealand.

The Project was created as a result of the growing congestion in Piopiotahi Milford Sound and the Milford corridor, which if not addressed, is expected to have a negative impact on the environment and visitor experience.

KEY ACTIONS

- › Provide input into relevant areas within the feasibility testing of the masterplan's recommendations.
- › Support the design, planning and implementation of the final masterplan.

KEY STAKEHOLDERS

Milford Opportunities Project Governance Group, Ngāi Tahu, DOC, Southland District Council, the Ministry of Transport, Waka Kotahi NZTA, MBIE, Great South

Support the development of public transport networks

Appropriate public transport systems are in place to enable visitors to navigate the region, while also benefiting our local communities.

Murihiku Southland is a large region, and its subregional areas are largely connected by road. However, due to our relatively low population base, there are currently few public transport options connecting our towns. This has an impact on visitors who want to travel the region as it means they are reliant on rental cars which are also currently in short supply. In addition to this, public transport can be a more sustainable option (where volumes of passengers are viable) as we try to reduce our emissions and the cost of living becomes higher for residents. The lack of public transport options was also echoed in our Community Sentiment in Relation to Tourism research recently undertaken. Popular routes that could be established would include Motupōhue Bluff to Waihōpai Invercargill.

Options to get around our larger centres and what could be done to improve them should also be considered. These services would be used by visitors and residents, particularly our rangatahi who have indicated that inability to get around makes them feel isolated.

KEY ACTIONS

- › Support Invercargill Airport to grow their rental car fleet.
- › Advocate for increased public transport networks linking towns within our region.
- › Support Invercargill City Council to grow usage of public transport within the city and its surrounds.
- › Investigate the potential to introduce ride-sharing options.

KEY STAKEHOLDERS

Councils, Invercargill Airport, private transport operators, Great South



Develop infrastructure to support cycle tourism

Cycle tourism opportunities for the region are assessed and progressed based on those of highest appeal to visitors.

Cycle tourism has experienced significant growth in recent years. In 2022 the government commissioned Angus and Associates to produce Cycle Tourism Insights – New Zealand and Australian Markets. It found that 27% of adults in Aotearoa New Zealand participate in cycle tourism and that a further 18% are interested in undertaking a cycle holiday in the next two years. With the Australian market, 21% of the population already participate in cycle tourism and a further 13% are interested in taking a future trip. Across both countries, the potential cycle tourism market equates to approximately 8.7 million people. Cycling has strong potential economic benefit and supports the health and wellbeing of our local communities.

The development and use of cycle trails supports our sustainability goals and provides a low emission option for visitors. The growing use of e-bikes also means a wider range of ages and abilities can get involved in cycling, opening larger segments of the visitor economy.

Murihiku Southland is currently home to one of Aotearoa New Zealand's 23 Ngā Haerenga Great Rides, Around the Mountains Cycle Trail, and has several other significant trails – the Lake2Lake Trail in Te Rua-o-Te-Moko Fiordland, Te Ara Taurapa from Waihōpai Invercargill to Motupōhue Bluff, and various other mountain biking trails. However, opportunity for further development exists particularly in the creation of multi-day trail options and those which link to existing trails such as Around the Mountains Cycle Trail.

The development of supporting infrastructure is also key to building our profile as a cycle tourism destination. Key towns linked to cycle trails should offer related services to support this part of the visitor experience i.e., coffee stops, repair services, water taps, bike-racks and cycle lanes.

KEY ACTIONS

- › Establish stronger monitoring of trail usage to support robust decisions on cycle tourism development, including research on the economic impact of cycle trails.
- › Establish guidelines and/or programmes to support and upskill businesses to provide best practice services and experiences around our cycle tourism trails and facilities.
- › Advocate for best practice cycling infrastructure within our towns and urban centres.
- › Finalise the cycle tourism opportunity assessment currently underway and progress recommended outcomes related to infrastructure.

KEY STAKEHOLDERS

Great South, Councils

Other Projects

Encourage further development of our EV network – the future roading network

The provision of infrastructure to support our regional EV network is in place, alongside rental options for visitors.

As our region is largely travelled by road, and we are working towards achieving our net zero goals, further use of electric vehicles will be essential. A regional approach to plan what EV charging stations will be needed and in which locations is required, with consideration as to what should be available at these sites i.e., toilet facilities cafes, playgrounds. Charging infrastructure established at accommodation providers will also support travellers using electric vehicles.

We also currently lack an EV rental fleet, which will be essential to establish moving forward as we seek to support visitors to our region wanting to minimise their carbon footprint. Invercargill Airport will be a key hub for this fleet, and EV charging and e-bike facilities should also be incorporated into the airport infrastructure.

KEY ACTIONS

- › Work with key stakeholders to understand what EV charging stations will be needed across the region.
- › Support Invercargill Airport to establish an EV rental vehicle fleet and accompanying charging infrastructure.
- › Encourage key accommodation providers to install charging infrastructure.

KEY STAKEHOLDERS

Invercargill Airport, charging network providers, Great South

Cruise sector assessment

The benefits and impacts of the cruise sector are well understood, providing clear insight into the preferred pathway for each of our cruise destinations.

Murihiku Southland has three cruise ports and is a place of high value to cruise visitors, pre-Covid attracting 140 ships to Piopiotahi Milford Sound, 24 to Rakiura Stewart Island and five to Motupōhue Bluff. However, there is limited understanding in relation to its costs and benefits and wider community sentiment has not been assessed. The Milford Opportunities Project proposes reducing the numbers of ships in line with environmental considerations, which would have an impact on the rest of Aotearoa New Zealand as Piopiotahi Milford Sound is seen as the jewel in our crown.

Research needs to be undertaken to assess the benefits of cruise, its costs, impacts on the environment, and the level of community support it possesses. This research should compare large cruises alongside smaller expedition

cruises and the views of the different communities it is most heavily linked to i.e., Motupōhue Bluff, Rakiura Stewart Island and Piopiotahi Milford Sound. It should also consider the costs and responsibilities of the provision of fit for purpose infrastructure and alignment with the region’s net zero aspirations.

KEY ACTIONS

- Complete a regional cruise sector assessment, identifying recommended pathways for each of our cruise ports.

KEY STAKEHOLDERS

Environment Southland, South Port, Milford Sound Tourism, Councils, Great South, Milford Opportunities Project

Stirling Point visitor management

A solution for improved visitor management at Stirling Point is established, enhancing the experience of the area for visitors and locals.

Stirling Point is a significant site being the end of Te Araroa Trail, the location of the famous ‘Bluff Signpost’, and the dispersal point for many walking trails. There is limited parking at the site, which means that during peak periods parking is challenging and pedestrian movements are constrained. The need to address these issues and make Stirling Point a highly memorable, safe, and significant experience for visitors and locals was identified within the Bluff Motupōhue 2020 Tourism Master Plan. This plan builds on prior feasibility work completed by Invercargill City Council and suggests the potential for a ‘park and ride’ service for Stirling Point, which would help reduce parking congestion, improve safety, and create better walking trail links for local users.

KEY ACTIONS

- Support Invercargill City Council with their plans to manage visitors and reduce congestion at Stirling Point.

KEY STAKEHOLDERS

Invercargill City Council, Great South

Support tourism inclusion within future planning for towns

Tourism is considered within place-specific town planning undertaken across the region.

Murihiku Southland has 11 community boards outside our main urban centres of Waihōpai Invercargill and Māruawai Gore. The community boards within the Southland District have each developed their own future plans outlining their vision, history, people, priorities, and action plans moving forward. Many of these plans include reference to the development of community specific town centre master plans and/or destination management plans. It’s important that tourism is considered within these should they be developed in the future.

KEY ACTIONS

- Advocate that Councils and community boards consider the potential of tourism in place specific destination and town planning.

KEY STAKEHOLDERS

Councils, Ngā Papatipu Rūnaka ki Murihiku, Great South





OUR PATHWAY FORWARD

Experience and Product Development

Our visitor products and experiences need to represent who we want to be as a destination, allowing visitors to create a deeper connection to our people and place.

Any development of new product or experiences in our region need to be grounded in our people and place to create the authentic experiences sought by visitors. Our key pillars are central to this, as they are strongly linked to what makes us unique. Sustainability should also be at the heart of new development, clearly demonstrating benefits for our environment and communities.

PRODUCT DEVELOPMENT OPPORTUNITY

The SMDS 2019 stated a high proportion of visitors to Murihiku Southland are on day trips, accounting for 62% of visitation to Te Rua-o-Te-Moko Fiordland and 55% of visitation to Murihiku Southland. These day visitors are lower yielding, spending less on accommodation, food and beverage, activities, and transport. To encourage more overnight visitation and higher economic impacts within our communities the original SMDS 2019 recommended a strong programme of product and experience development focused on accommodation, commissionable experiences and new destination events while increasing the digital capability of our operators.

PRODUCT AUDIT AND GAP ASSESSMENT

Attractions

As the SMDS 2019 stated, Murihiku Southland's tourism product is primarily made up of natural attractions and walking experiences. These are also predominantly free of charge (53%), with the Visit Southland RTO having a higher number of free experiences and the Visit Fiordland RTO having a higher number of paid experiences, reflecting its higher international visitor prevalence. Most of our paid experiences are located near major towns, with free experiences scattered around the region and in more remote locations.

The limited availability of paid or commissionable products within the region hinders our capacity to attract international visitors effectively. The presence of such products serves as an incentive for agents to actively promote and sell our region, thereby enhancing Murihiku Southland's visibility and increasing bookings. Working to address this and incorporate more paid experiences is an ongoing focus for the region.

Accommodation

To gain an idea of overall capacity in the region, in 2021 Great South undertook an audit of commercial accommodation. This found that we have 2,989 rooms in the region, coming from 320 properties. Of these 1,393, or almost half of our rooms, are in Te Anau and 804 rooms were in Waihōpai Invercargill. This is now 880 with the Langlands Hotel being open, however, we are still short, and a large conference or event being held in the city can mean accommodation is often fully booked. Further development of quality options is needed to meet this need. Particular gaps across the region lie in the availability of boutique, up-market and eco lodge options.

OTHER IDENTIFIED BARRIERS TO GROWTH

Work has been done to address these barriers within the last three-four years, however many are still relevant, and a focus of the product and experience development outlined in the MSDS 2023.

- › A 5-star natural environment, 3-star built environment (e.g. accommodation and infrastructure).
- › Accessing agricultural product is difficult, despite it being a strength.
- › Economic leakage on weekends – locals leaving the region.
- › Imbalance of Piopiotahi Milford Sound as the major regional icon, need to spread the visitor load.
- › Limited all-weather, cultural, and family-friendly visitor experiences.
- › Limited higher-quality accommodation stock.
- › Limited commissionable tourism experiences.
- › Definition and sharing of the stories of our towns.
- › Seasonality impacts.

SMDS 2019

Project Spotlight

These projects were identified in the 68 recommendations from the SMDS 2019 (p16)

Waihōpai Invercargill city redevelopment

Waihōpai Invercargill has recently undergone a major redevelopment, adding vibrancy, modernisation, and new life back into the city centre.

- › The **Invercargill Central** mall development stages one and two were completed in early 2023, which included all carparking, anchor tenant, retail space, and food and beverage outlets. Stage three includes Food Central, a food court style dining option, a medical centre, and offices.
- › Stage one of the **Invercargill City Centre Masterplan**, developed by Invercargill City Council as a means to make our city centre more enticing, has seen new streetscaping on Don and Esk Streets, around Invercargill Central and the Langlands Hotel.
- › The **Langlands Hotel**, developed by Invercargill Licensing Trust, opened in September 2022. The seven-storey, 78-room, 4.5-star hotel's design draws inspiration from the area's rich history with contemporary twists. The interior is a subtle representation of Murihiku Southland and boasts five eateries and bars, crafted menus, and modern surroundings.

These developments highlight the city's investment potential and make it a place residents can be proud of, while also attracting visitors. Further streetscaping by Invercargill City Council and the opening of the new Distinction Hotel in 2024 will build on this progress and address gaps in Waihōpai Invercargill's accommodation capacity.

Cultural narrative and storytelling

The Stead Street stopbank upgrade was part of Invercargill City Council's wider plan to protect the city from extreme weather events, sea level rise, and further effects of climate change. Alongside this work, a pathway connecting Invercargill Airport to the city has been created. Artwork designed and developed with Waihōpai Rūnaka has also been

incorporated as part of this project. The artworks celebrate and reflect the beauty and importance of the Kōreti estuary, as an interface between freshwater tributaries and Te Ara a Kiwa Foveaux Strait.

Te Ara Taurapa, the trail between Waihōpai Invercargill and Motupōhue Bluff, opened in March 2022. This was a significant addition to Murihiku Southland's trail network, further reinforcing the region's cycling and walking proposition. The trail is also part of the Te Araroa Trail, connecting Motupōhue Bluff to Cape Reinga. Te Ara Taurapa, a journey along the taurapa (stern post) of the waka Aoraki, is the name gifted to the trail by mana whenua. Six panels have been installed along the trail which share the cultural narrative developed by Awarua Rūnaka and Waihōpai Rūnaka.

Bluff Motupōhue 2020 Tourism Master Plan

The original 2019 SMDS highlighted the significant potential of Motupōhue Bluff as a visitor destination alongside its key role as a gateway to Rakiura Stewart Island. It recommended the development of a master plan to ensure future development is undertaken in a collaborative and co-ordinated way. Now complete, the Bluff Motupōhue 2020 Tourism Master Plan was facilitated by Great South alongside Awarua Rūnaka, Invercargill City Council and the Bluff Community Board. The plan identified 11 overall hubs or precincts and a more specific list of 24 transformational concepts, projects, and staging. Each of these concepts, projects and staging will collaboratively transform and revitalise Motupōhue Bluff to make it a more attractive place to live, work, play, visit, and invest in.

Several other key projects have been completed or are in progress including an information and storytelling kiosk in the Bluff Central Tourism Precinct, Ocean Beach aquaculture developments, the development of additional mountain biking trails and infrastructure, and concept designs reflecting Awarua Rūnaka's vision for Motupōhue Bluff Hill.



Priority Projects

Development of quality accommodation options

Accommodation capacity across the region is improved and higher quality options are developed, addressing gaps in our existing product mix.

Accommodation and the need for the development of more capacity within the region was a key focus of the SMDS 2019. An audit undertaken to inform its development found many options with a 1-3-star rating exist but there are significant gaps in the higher quality accommodation segment. As a result, it was recommended that development of new accommodation in the region should be focused on:

- › Boutique regional accommodation (with staff accommodation).
- › Upmarket lodges (with staff accommodation).
- › Eco-lodges in remote locations (with staff accommodation).
- › Further commercial accommodation in Waihōpai Invercargill.

In 2022, Distinction Hotels announced plans for a new 4.5-star, 150 room hotel in the Waihōpai Invercargill city centre. The hotel will be a significant addition to the higher-quality

accommodation segment, and it will also provide a much needed revitalisation boost to Wachner Place, where it will be located.

Within the accommodation gaps identified, a focus on wellness and wellbeing should also be explored as this is a strong fit with Murihiku Southland's more relaxed pace and could suit the identified segment of busy professionals who seek to relax and recharge. Staff accommodation and how they will be housed should also be considered within new developments, particularly if the location is in a more remote part of the region.

KEY ACTIONS

- › Advocate and highlight demand for more quality accommodation in the region.
- › Support the launch of the 4.5-star Distinction Hotel in Waihōpai Invercargill, which will add 150 rooms to the city's capacity.

KEY STAKEHOLDERS

Distinction Hotels Group, Great South

Support mana whenua to develop cultural narrative and experiences

The stories mana whenua would like to share permeate our region, enlightening and engaging both visitors and residents.

The stories of mana whenua are an important part of our region's rich cultural heritage, yet there are few places in the built environment of our towns and cities where these stories are shared. These stories and history are of high value to visitors as they allow a deeper and more authentic connection to our people and place. However, they also allow residents and future generations to develop and build their understanding and knowledge. This supports preservation of Māori culture and language, and greater recognition of Māori history and heritage, honouring the footprints of those gone before.

KEY ACTIONS

- › Incorporate cultural storytelling within our regional destination website SouthlandNZ.com, including use of Māori place names.
- › Advocate for increased cultural identity within our towns and cities, recognising the importance of preserving Māori history and heritage

KEY STAKEHOLDERS

Great South, Ngā Papatipu Rūnaka ki Murihiku

Cultural storytelling at Tuturau

The rich history of Tuturau, a site of key importance to Hokonui Rūnaka, is shared with visitors to the area.

Tuturau, on the eastern bank of the Mataura River, marks the site of what is regarded to be the last intertribal battle in Aotearoa New Zealand. In 1836, Te Pūhoho a chief of Ngāti Tama, set off with taua (war party) to the far south in the hope of skinning the Ngāi Tahu 'eel from head-to-head'. He initially captured the inhabitants of the settlement at Tuturau, but only three days later was killed by two Ngāi Tahu warriors. Tuturau was also an important stopping place for those travelling either north or south along the river, and it has a rich history of mahinga kai. Tuturau is a key site of importance for Hokonui Rūnaka, and they have a strong desire to share the in-depth kōrero of this site.

KEY ACTIONS

- › Support Hokonui Rūnaka to develop culturally designed panels sharing the stories of Tuturau.

KEY STAKEHOLDERS

Hokonui Rūnaka, Great South

Kāitahutaka Waihōpai - mana whenua cultural identity in Waihōpai Invercargill

Stories behind Tohu Whenua established within the Waihōpai takiwa are readily shared, supporting Waihōpai Rūnaka to increase the knowledge of visitors and residents.

As part of the Invercargill City Council Levels of Service evaluation in 2020, an iwi workshop was held to gain in depth insight into community perceptions and needs. One of the main concerns raised as part of this research was the lack of visibility of Māori culture and identity within the city. The group identified the need to work with mana whenua in the development of civic spaces and places to better reflect the Tiriti partnership. The aspiration was to openly express Takata Whenua identity – Kāitahutaka – in balance with colonial cultural heritage and urban fabric of Waihōpai Invercargill.

Since that time, and under the guidance and leadership of Waihōpai Rūnaka, some progress has been made towards this vision. Mana whenua interpretation signage was developed and completed in collaboration with Te Rūnaka o Awarua along Te Ara Taurapa (Waihōpai Invercargill to Motupōhue Bluff cycle and walking trail – a project facilitated by Great South). 'Kā Matau o Te Maramtaka' (facilitated by Invercargill City Council) stands on Stead Street in an area that was once part of the Kōreti estuary. It is a form that reflects the estuary's importance over generations as a source of mahika kai and also as the interface between waitī of the upper catchment freshwaters and waitā of Te Ara a Kiwa Foveaux Strait. 'Te Mana a Kewa', a distinctive sculptural form of whakamanuhiri, stands near Invercargill Airport to greet and farewell travellers to and from this region (also developed with Invercargill City Council under Stead Street stopbank). Te Ara Tūpuna is a series of interpretation panels that accompanies Stead Street elements and begins to trace an important Ara Tawhito. On Esk and Don Streets, Te Kāika (Esk St) and Mahika Kai (Don St) are two tohu whenua, landmarks that speak to the cultural landscape of the city (facilitated by Invercargill City Council).

These recent additions to Waihōpai Invercargill are making accessible Kāi Tahu cultural values, associations and traditions that are relevant to our city and surrounds. Each new opportunity for cultural expression extends the network of knowledge, both intergenerationally and cross-culturally, and fosters a greater depth of bicultural understanding and broader socio-cultural intelligence.



KEY ACTIONS

- › Support Waihōpai Rūnaka to develop profiles of identified Tohu Whenua in the Waihōpai takiwā to increase the knowledge and awareness of the narratives behind these important taoka.
- › Support Waihōpai Rūnaka to establish a new Tohu Whenua that represents and symbolises ahi kaa and links to other Tohu Whenua in the central city. Ahi kaa is the long-standing presence of mana whenua, in this case Waihōpai Rūnaka as the local representative of Kāi Tahu Whānui in Waihōpai Invercargill City.

KEY STAKEHOLDERS

Waihōpai Rūnaka as developed in partnership with Invercargill City Council, Great South and Kā Huru Manu.



Punanga Manu o Te Anau Te Anau Bird Sanctuary development

Concepts for the future development of a visitor experience at Punanga Manu o Te Anau Te Anau Bird Sanctuary is explored, in line with the vision of Ōraka Aparima Rūnaka.

The Punanga Manu o Te Anau Te Anau Bird Sanctuary is set on the shores of Lake Te Anau. The park provides a peek at some of Aotearoa New Zealand's most special taonga that are difficult to see in the wild. The rare flightless takahē are the stars of the Bird Sanctuary, a species thought to be extinct until 1948 when they were rediscovered in Te Rua-o-Te-Moko Fiordland's remote Murchison Mountains. Visitors can also enjoy close up views of kākā, beautiful native forest parrots, kererū, Aotearoa New Zealand's stunning wood pigeon, tūi, ducks and geese. Entry is currently free and guided tours can also be booked.

Strong opportunity exists to investigate the future potential of this site and provide a nationally recognised visitor experience which allows Ngāi Tahu and Ōraka Aparima Rūnaka to showcase their culture, history, and relationship with the area and with wildlife, recognising their role as kaitiaki.

KEY ACTIONS

- › Support Ōraka Aparima Rūnaka to articulate the stories that could be told at this site i.e., history, taonga and significance to mana whenua.
- › Identify possible concepts for a new visitor/ community experience based on the sharing of these stories.

KEY STAKEHOLDERS

Ōraka Aparima Rūnaka with support from Fish and Game, DOC, Great South, Southland District Council, Milford Opportunities Project



Te Taurapa o Te Waka - Motupōhue Bluff visitor experience

Concept plans for a nationally significant visitor experience at Motupōhue, Te Taurapa o Te Waka, are finalised, based on the aspirations of Awarua Rūnaka.

The Bluff Motupōhue 2020 Tourism Master Plan outlines concepts for the future development of Motupōhue Bluff as a significant tourism destination. The need for this plan was identified as a priority project within SMDS 2019, which recognised the strategic importance of Motupōhue Bluff and its potential to be a vibrant hub for local community first and foremost, as well as for its visitors.

One of the concepts within this plan focuses on the creation of a nationally iconic destination hub at Motupōhue Bluff Hill. The strong cultural significance of Motupōhue Bluff Hill with its Tōpuni status, would heavily underpin this and the resulting vision will reflect the aspirations of Awarua Rūnaka. The hub would acknowledge that Motupōhue Bluff is the starting point of the Te Araroa Trail and the journey north through Aotearoa New Zealand. It would also incorporate parking capability, a potential stargazing platform and a visually commanding pouwhenua or "taurapa" sternpost.

KEY ACTIONS

- › Support Awarua Rūnaka to develop a concept plan based on their vision for Motupōhue Bluff Hill.
- › Establish an indicative budget for implementation of the project and an associated fundraising plan.

KEY STAKEHOLDERS

Awarua Rūnaka, DOC, Invercargill City Council, Great South, Bluff Community Board

New museum for Waihōpai Invercargill and Murihiku Southland

The new regional museum is opened, once again becoming a key attraction for visitors to Waihōpai Invercargill.

In 2018, Southland Museum and Art Gallery was closed to the public due to its building having been deemed an earthquake risk. The museum was a popular indoor attraction for visitors and provided a deeper understanding of Murihiku Southland's history and culture. In the year of its closure the museum expected to welcome 220,000 visitors through its doors and was also well utilised by residents. Its absence has been deeply felt by the community and by past visitors returning to the region.

Invercargill City Council has recognised this and are aiming to have the new museum building completed by December 2025 and the museum opened at the end of 2026. A new building to house the city's iconic tuatara will also be established in Queens Park as part of the current animal reserve. Developing indoor activities like the museum also supports the outdoor activities our region has to offer, by providing visitors with options for wet weather days.

KEY ACTIONS

- › Support Invercargill City Council to progress the redevelopment of a new museum for Waihōpai Invercargill.
- › Highlight the potential for tourism the museum can provide and how it can cater to visitor markets alongside our residents. The potential for paid commissionable components such as guided tours should also be considered.

KEY STAKEHOLDERS

Invercargill City Council, Ngā Papatipu Rūnaka ki Murihiku, Great South

Development and launch of the Māruawai Precinct

All stages of the Māruawai Precinct are complete, transforming Māruawai Gore into a significant visitor destination.

The Māruawai Precinct is a three-stage project which aims to create an internationally significant arts and heritage destination that combines iwi culture and history with eccentric and eclectic brands and pioneering stories.

Stage one is near completion and will include an upgrade of Māruawai Gore's Hokonui Moonshine Museum, an expanded visitor information centre as well as the development of a distillery producing Hokonui Moonshine. Stage two involves the development of the Māruawai Centre – a museum facility that will tell the wider story of the Mataura River valley. Stage three will see themed and fully developed streetscape which is visitor, pedestrian, and event friendly.

This precinct will be a game changer for the Gore District, attracting visitors to the town whilst also providing a trade commissionable product. It is also a key destination for one of our iconic food stories and so a key step forward in Murihiku Southland's positioning as a food tourism destination.

KEY ACTIONS

- › Support the marketing of Māruawai Precinct and its integration into wider regional promotion.

KEY STAKEHOLDERS

Gore District Council, Hokonui Rūnaka, Great South



Establish Murihiku Southland as a world-class dark skies destination

Murihiku Southland has two international accredited dark sky sanctuaries, establishing the region as a world-class dark skies destination.

The Murihiku Southland region has limited light pollution and a strong focus on protecting our natural environment. This aligns well with astro tourists who seek out the world's most dark destinations, which are scarce in the larger urban areas of the northern hemisphere.

Rakiura Stewart Island is already an International Dark Sky Sanctuary and this development saw visitation to the island in the first winter after accreditation grow by 17%. The skies above Fiordland National Park are also of the level required to become an International Dark Sky Sanctuary, and work is currently being undertaken to progress this opportunity for the Te Rua-o-Te-Moko Fiordland community. Should this application be successful Murihiku Southland would be home to the southernmost (Rakiura Stewart Island) and largest (Te Rua-o-Te-Moko Fiordland) dark sky sanctuaries in the world. This would establish the region as a key destination for dark sky enthusiasts and ensure the night sky above these areas is protected for generations to come.

KEY ACTIONS

- › Establish Fiordland National Park as Murihiku Southland's second International Dark Sky Sanctuary.
- › Support viewing opportunities, interpretation and storytelling around the night sky and its cultural significance i.e., at Observation Rock and on Motupōhue Bluff Hill.
- › Advocate for improved lighting regulation in support of dark skies with each of our Councils with the vision that Murihiku Southland could become a dark sky region.
- › Establish a 'night sky friendly' lighting certification for businesses.

KEY STAKEHOLDERS

Great South, DOC, Councils, Ngā Papatipu Rūnaka ki Murihiku, Fiordland Community Board, Stewart Island Promotion Association

Implementation of the Southland Murihiku Food Tourism Strategy

Implementation of the Southland Murihiku Food Tourism Strategy is complete, making the region a nationally competitive food tourism destination.

The Southland Murihiku Food Tourism Strategy was developed in late 2021 in response to the region's desire to become a key food tourism destination. The Murihiku Southland region has an abundance of food production and a strong reputation for the quality of its ingredients, but currently little ready-to-market food tourism product exists. The Strategy sets out a five-year plan to achieve its vision that 'Murihiku Southland is a world-class, nationally competitive food tourism destination, supported by a thriving, innovative and connected local food network. The quality and vast variety of the region's food and food stories are readily accessible, provide an authentic taste of place, and increase visitation to the region'.

The Destination Insights research undertaken identified key visitor segments aligned with Murihiku Southland also identified the 'paddock/ocean to plate foodie' as a good fit for the region, with strong potential for the development of authentic experiences which reconnect people with where their food comes from.

The Beyond 2025 Southland Regional Long Term Plan also recommends the development of our regional 'Provenance Story' to enhance the value of our food products within both domestic and international markets.

KEY ACTIONS

- › Continue implementation of the Southland Murihiku Food Tourism Strategy.

KEY STAKEHOLDERS

Great South, Key Partners outlined within the Southland Murihiku Food Tourism Strategy





Position Murihiku Southland as a cycle tourism destination

The strength of Murihiku Southland’s cycle tourism product is promoted and shared, building the region’s identity as a key cycling destination.

While further cycle trail development is recommended to strengthen Murihiku Southland’s cycle tourism offer, a good foundation of trails and events already exist. Murihiku Southland is home to the Around the Mountains Cycle Trail (a Ngā Haerenga Great Ride), Te Ara Taurapa (Waihōpai Invercargill to Motupōhue Bluff), the Lake2Lake Trail in Te Anau, Welcome Rock in Northern Southland, and mountain biking at various locations around the region including the downhill trails on Motupōhue Bluff Hill. Waihōpai Invercargill and Māruawai Gore both have rural/urban flood bank rides, and the region has a network of Heartland Rides, which take in roads less travelled. Waihōpai Invercargill is also home to one of only two indoor velodromes in Aotearoa New Zealand and every year the region hosts the iconic Tour of Southland, which has been taking in the breathtaking landscapes of Murihiku Southland for over 60 years.

These developments all provide strong opportunity to leverage the region’s distinctive identity as a cycle tourism destination.

KEY ACTIONS

- › Build Murihiku Southland’s distinctive identity as a cycle tourism destination.
- › Progress implementation of the cycle tourism opportunity assessment recommended outcomes related to marketing.
- › Create a mapped trail network promoting our key cycle tourism experiences.
- › Leverage cycle tourism to build Murihiku Southland’s other special interest sectors including food, art, dark skies and agritourism.

KEY STAKEHOLDERS

Great South, Councils, Ngā Papatipu Rūnaka ki Murihiku, Regional Cycling Groups

Home to Great Walks

Murihiku Southland continues to be the home of Great Walks, with the Hump Ridge Track successfully launched.

Murihiku Southland will soon be home to five of Aotearoa New Zealand’s 11 Great Walks, with the Hump Ridge Track to be added to the current list once upgrades are complete. Great Walks are our most popular multi-day hikes, and they provide access to some of our country’s most incredible landscapes, wildlife, and heritage. The Great Walks in the Murihiku Southland region are the Milford Track, Routeburn Track, Kepler Track, Rakiura Track, and the Hump Ridge Track. The popularity of these walks means the towns that service them also benefit during their open seasons, with many add-on opportunities for our local communities in Te Anau, Rakiura Stewart Island and Tuatapere.

KEY ACTIONS

- › Continue to market and promote our region’s Great Walks nationally and via trade channels.
- › Support the Tuatapere community to maximise benefits of the Hump Ridge Track’s Great Walk status.

KEY STAKEHOLDERS

Great South, Southland District Council, DOC

Support urban rejuvenation in Waihōpai Invercargill and Māruawai Gore

Waihōpai Invercargill and Māruawai Gore CBD developments are complete, transforming our two largest centres into vibrant urban spaces.

Our urban centres have an important role to play in the creation of sustainable, livable, and vibrant cities. Waihōpai Invercargill, our region’s largest city, is currently undergoing a rejuvenation of its urban environment. The city centre streets upgrade, Invercargill Central development, and new hotel projects are giving Waihōpai Invercargill back its heart, turning the city into a bright and bustling place residents can be proud of while creating an attractive hub for visitors to Murihiku Southland. From a tourism perspective this is a significant step forward for our region as a whole, working to improve the attractiveness of Waihōpai Invercargill as a destination in its own right and as a gateway to the rest of Murihiku Southland.

In Māruawai Gore, work is currently progressing on the Māruawai Precinct, a three-stage development intended to create an internationally significant arts and heritage destination and grow Māruawai Gore’s position as a visitor destination. Stage three will see a themed and fully developed streetscape which is visitor, pedestrian, and event-friendly, with public art being a prominent component. This project is in its conceptual phase.

KEY ACTIONS

- › Support Invercargill City Council and Invercargill Central Ltd to market Waihōpai Invercargill’s city centre to visitors outside of the region.
- › Advocate support for the completion of further stages of the Invercargill City Centre Master Plan.
- › Develop activations and events that attract people into the city centre.
- › Support Gore District Council to complete stage three of the Māruawai Precinct.

KEY STAKEHOLDERS

Invercargill City Council, Gore District Council, Waihōpai Rūnaka, Hokonui Rūnaka, Great South



Define the stories and unique identity of our towns

The stories and identities of our towns are clearly defined and encourage visitors to travel more widely within the region.

Encouraging visitors to travel more widely within our region allows us to spread the benefits of tourism further into our communities. To achieve this and market our towns more effectively we need to better understand their stories and what they want to share with visitors. These stories and experiences should be deeply rooted in each local community and aligned with their unique identity. Developing these stories would link to the wider Murihiku - The South Land regional story and provide a more localised understanding of our places and people. This work would involve consideration of history, food, activities, and attractions. Strong partnership with local community boards, mana whenua, and promotions groups will be essential to support the most successful outcomes.

KEY ACTIONS

- › Develop an understanding of the unique stories connected to each of our communities alongside the experiences they want to share with visitors.
- › Ensure alignment with Council's community board planning.

KEY STAKEHOLDERS

Great South, Ngā Papatipu Rūnaka ki Murihiku, Promotions Groups, local communities

Other Projects

Matariki wayfinding pouwhenua

Matariki pouwhenua are installed across Murihiku Southland, honouring the stars of Matariki and acting as wayfinders to encourage further travel in the region.

Matariki is the Māori name for the cluster of stars also known in other parts of the world as Pleiades. Its rising is focused on the promise of a new year, remembering those who have died, and celebrating time with family and friends. In 2022, the celebration of Matariki became Aotearoa New Zealand's first indigenous public holiday. To reflect its significance, nine pouwhenua will be established across the region. These pouwhenua represent the number of stars in the constellation and each will be supported by interpretation panels that tell the story of that particular star. The pouwhenua will also act as wayfinders encouraging people to visit other parts of the region in order to complete the story.

KEY ACTIONS

- › Matariki pouwhenua installed across the region with accompanying interpretation.
- › Marketing support established.

KEY STAKEHOLDERS

Southland District Council, Ngā Papatipu Rūnaka ki Murihiku, Great South

Further development of agritourism opportunities

Murihiku Southland is well known as the 'Home of Agritourism' with new products developed to build on the breadth on offer available to visitors.

With our rural sector being a key driver of the region, agriculture lies at the core of our identity and is a key part of who we are and what we do. Therefore, agritourism is well aligned with Murihiku Southland and its communities, offering visitors the chance to immerse themselves in an authentic experience. To build on this Murihiku Southland was recently launched as the 'Home of Agritourism in Aotearoa New Zealand'. To develop this positioning further, work to support product development and improvements in the overall quality of our offering should be undertaken. Encouraging our operators to develop trade ready offerings will also support our ability to promote agritourism through international channels.

Developing the region's offer to include more experiences, particularly those linked to our food story, should be prioritised and will build on the strong network of farmstays available.

KEY ACTIONS

- › Host the national Agritourism Accelerator Programme 2023 in Murihiku Southland.
- › Continue to build Murihiku Southland's position as the 'Home of Agritourism'.

KEY STAKEHOLDERS

Great South

Arts and heritage tourism approach for Murihiku Southland

Murihiku Southland's unique arts and heritage stories, locations, and experiences are well understood and showcased as part of our regional tourism offer.

Murihiku Southland's heritage underpins our uniqueness as a destination. Our region has a number of important heritage and historic sites, regional museums, heritage trails, and a wide range of historic buildings. An opportunity exists to identify how this heritage could be communicated, connected, and incorporated into visitor experiences and tourism opportunities alongside wider regional heritage planning.

An opportunity also exists to better understand and elevate our region's art culture. The Ralph Hotere and other collections at the Eastern Southland Gallery are nationally significant and the South Sea Spray Trust has created a wealth of street art all focused on the identity of our towns – Aparima Riverton, Motupōhue Bluff, Māruawai Gore, and Waihōpai Invercargill with further additions planned.

KEY ACTIONS

- › Assess the tourism potential of our region's arts and heritage i.e., galleries, museums, buildings, locations of significance, stories and other assets.
- › Identify pathways to showcase arts and heritage as part of our regional tourism offer.
- › Assess pathways and opportunities to support local community initiatives that share our heritage stories i.e., local museums.

KEY STAKEHOLDERS

Great South, Southland Regional Heritage Committee, Ngā Papatipu Rūnaka ki Murihiku, Councils, Arts Murihiku

Collective development and marketing of Te Akau Tai Toka The Catlins

Te Akau Tai Toka The Catlins is collectively managed by the areas two RTOs, Visit Southland and Clutha Development, ensuring alignment in the promotion and development of this well-known destination.

Te Akau Tai Toka The Catlins area is known for its rugged beauty, diverse wildlife, and untouched natural landscapes. It is home to a variety of unique flora and fauna, including rare bird species like the yellow-eyed penguin and the New Zealand sea lion. From a tourism perspective, two RTOs are responsible for management of Te Akau Tai Toka The Catlins area - Visit Southland to the south (managed by Great South) and Clutha Development in the north. Both collaborate to market the area and recently completed a review of the existing The Catlins Te Akau Tai Toka Community Tourism Strategy. There are many areas of focus within this Strategy where working together can achieve successful outcomes, including further alignment of the marketing of this popular destination.

To formalise this collective approach for Te Akau Tai Toka The Catlins an MOU should be created outlining how the partnership will operate and where resources and efforts could be shared. It is envisioned that this approach will build on the existing success of both RTO's regional destination brands as well as The Catlins brand. It will also support operators by enabling their businesses to become more sustainable and provide stimulus for increased product development.

KEY ACTIONS

- › Develop an MOU between Great South and Clutha Development in relation to tourism development and promotion in Te Akau Tai Toka The Catlins.
- › Work to align all marketing of the area to leverage resources and assets.
- › Continue progress on key projects being progressed and others outlined with The Catlins Tourism Strategy i.e., The Catlins Coastal Walk, qualitative data capture, development of the Catlins experience cluster.

KEY STAKEHOLDERS

Great South, Clutha Development, Catlins Coast Inc, Catlins Partnership Group

Facilitate implementation of Bluff Motupōhue 2020 Tourism Master Plan

The Bluff Motupōhue 2020 Tourism Master Plan is halfway through its implementation, and projects to cement the town as a key tourism destination are either complete or in progress.

This 2020 Tourism Master Plan provides concepts for the future development of Motupōhue Bluff as a jewel in the crown of the Murihiku Southland region. The need for this project was determined as a priority outcome in the original SMDS 2019, which recognised the strategic importance of Motupōhue Bluff and its potential to be a vibrant hub for the local community first and foremost, as well as for its visitors. The Plan was informed by research, analysis and consultation with local community groups and residents, organisations, businesses, and government agencies. It reflects a valued partnership with Awarua Rūnaka and will be used to guide the revitalisation of the area over the next 20 years.

A project co-ordinator has been established to guide the implementation of the Plan and facilitate the strong stakeholder connection required to realise the potential outlined. Many projects within the Plan have been significantly progressed and many are also at the early planning stages.

KEY ACTIONS

- › Continue implementation of the Bluff Motupōhue 2020 Tourism Master Plan.
- › Focus on key transformational tourism projects – Motupōhue Visitor Experience - Te Taurapa
 - o Te Waka, Active Recreation Precinct, Bluff Southern Marine Discovery Centre, Ocean Beach Aquaculture Hub.

KEY STAKEHOLDERS

Awarua Rūnaka, Bluff Community Board, Invercargill City Council, Great South



Bluff Southern Marine Discovery Centre/Bluff Oyster World

The business case for the Bluff Southern Marine Discovery Centre/Bluff Oyster World project is complete and next steps towards this development are identified.

This centre is one of the transformative projects outlined within the Bluff Motupōhue 2020 Tourism Master Plan. The project would add a new visitor experience focused on the marine life within Te Ara a Kiwa Foveaux Strait and the marine industry that relies on it. It would provide an indoor experience and draw on Motupōhue Bluff's strong reputation as a destination for kaimoana, particularly the Bluff Oyster. The Bluff Oyster and Food Festival is arguably Aotearoa New Zealand's most well-known food event and developing a visitor experience around this was originally identified within the SoRDs Action Plan in 2015. Since then, Awarua Rūnaka have undertaken a feasibility study for Bluff Oyster World, with pleasing results indicating the strength of the opportunity.

KEY ACTIONS

- › Support Awarua Rūnaka to review the original Bluff Oyster World feasibility study and create a business case.
- › Assess next steps towards the establishment of the visitor experience.

KEY STAKEHOLDERS

Awarua Rūnaka, Great South

Destination management planning for the Te Anau basin

Destination planning for the Te Anau basin is complete, providing urban and spatial planning recommendations to support well-managed growth of the area.

Te Anau is the main town linking visitors to Fiordland National Park and Piopiotahi Milford Sound. The Te Anau community is very aware of the beautiful corner of the world they live in and the fact that they are heavily reliant on tourism. To protect their place and manage it well into the future, the Fiordland Community Board are working to create a specific destination planning assessment for the Te Anau Basin, covering Te Anau, Manapouri, and the wider area. It is intended that this development plan will provide detailed urban and spatial planning and include recommendations that consider accommodation, services, infrastructure, roading, cycleways, walking tracks, open spaces, CBD, and Te Anau Airport opportunities.

Outcomes from the plan are intended to support Te Anau to become a standalone destination and the beginning of the journey to Piopiotahi Milford Sound and the rest of Te Rua-o-Te-Moko Fiordland. Developing a central hub in Te Anau is also well aligned with the Milford Opportunities Project Masterplan.

KEY ACTIONS

- › Completion of the Te Anau Basin Development Plan.
- › Assessment of next steps and actions arising from the Te Anau Basin Development Plan.

KEY STAKEHOLDERS

Southland District Council, Fiordland Community Board, Great South, Ngā Papatipu Rūnaka ki Murihiku



OUR PATHWAY FORWARD

Sharing our Story

We need to ensure that our destination stands out in a competitive marketplace, sharing our story and our uniqueness with key markets who align with our values.

Sharing our story and gaining a stronger understanding of its essence has been a key focus for the region and will continue to be moving forward. Our story is the heart of what makes our people and place unique and how we can best connect with those who would visit us. Along the journey to develop the MSDS 2023 feedback provided echoed this, that its 'not (necessarily) about having more products, but making the most of what we have already.'



MURIHIKU – THE SOUTH LAND

Our regional story sets a strong narrative for our destination and its people. It unites us and sets a foundation for the development of more specific stories focused on our towns. It also supports our ability to connect our people to tourism and the role they play as ambassadors for our region.

DESTINATION BRANDING

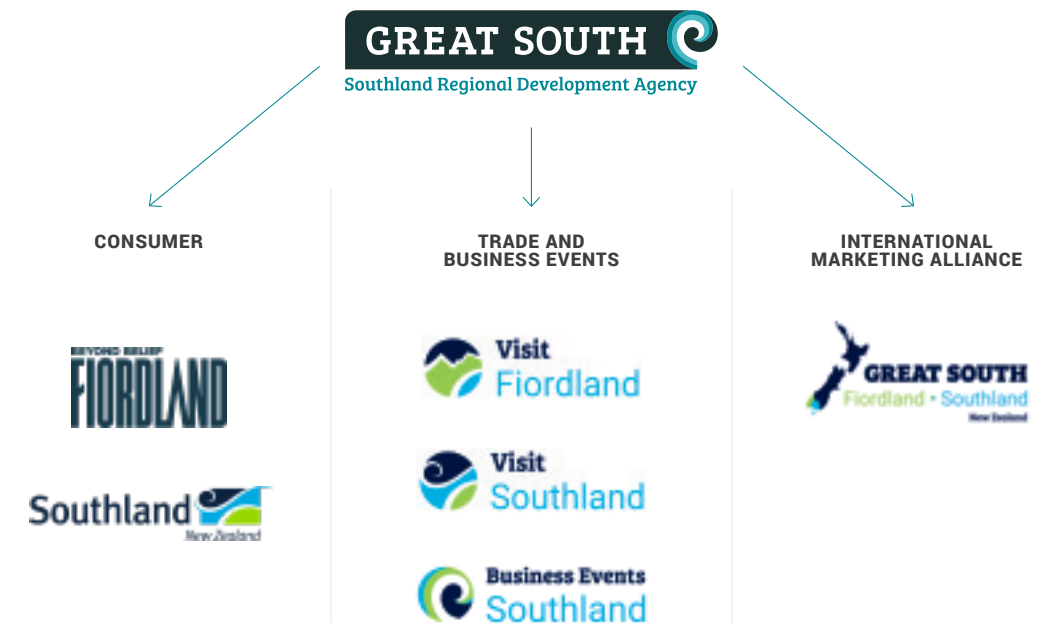
Building on Great South's integration of leadership for the region's two RTOs and their associated trade branding - Visit Southland and Visit Fiordland, a new International Marketing Alliance (IMA) was formed comprising only the two Southland RTOs. Having an IMA focused purely on our region will allow us to build a stronger profile for Murihiku Southland within international markets. Until mid-2021, there were nine IMAs nationwide - Te Rua-o-Te-Moko Fiordland was part of the Southern Lakes International Marketing Alliance (IMA) along with Queenstown and Wānaka, while Murihiku Southland was part of the Pure Southern Land IMA with Dunedin, Waitaki, and Clutha. The alliances are marketed by Tourism New Zealand at international tradeshows, making it easier to promote the entire country. These changes mean the consumer, trade, and international brands for the Murihiku Southland region are now all under the co-ordinated management of Great South.

IMPORTANCE OF EVENTS

Murihiku Southland is home to many iconic events such as the famous Bluff Oyster and Food Festival, Tussock Country Music Festival, Burt Munro Challenge, and the Kepler Challenge. Events play a key role in attracting people to the region both to visit and to live. They also contribute to quality of life for residents, creating a sense of place, belonging, and improved livability.

Events can define what it is to be a Southlander and represent various aspects of Murihiku - The South Land regional story, providing a platform to highlight our local traditions, unique culture, people, and places. Visitors attending events alongside the local community contributes to the overall appeal of our destination, attracting those who are seeking authentic and immersive experiences.

Alongside implementation of the Southland Murihiku Events Strategy, the attraction of business events and capability building within our events sector are key priorities moving forward.



SMDS 2019

Project Spotlight

These projects were identified in the 68 recommendations from the SMDS 2019 (p16).

Lower South Collaboration – The Southern Way

Increased collaboration between the RTOs of the lower South Island has been recognised as key to improving visitor management, as visitors don't recognise traditional RTO and regional boundaries. Working together and building a strong lower south proposition also supports improved connectivity and longer length of stay based on the strength and breadth of experiences available.

To recognise this potential, the Southern Way touring network was launched in May 2023 as a collaborative project between the eight RTOs of the lower South Island: Destination Queenstown, Great South (Visit Southland and Visit Fiordland), Tourism Waitaki, Clutha Development, Tourism Central Otago, Enterprise Dunedin, and Lake Wānaka Tourism. The Southern Way has had its own brand identity, website and digital content developed which includes itineraries based on popular themes and areas of interest in the lower south.

Destination Events Strategy

The Southland Murihiku Events Strategy was launched in 2020. Developed by Great South and key partners, it reflects a regional commitment and desire to maximise the benefits events bring to our region, communities and people. With the support of the Regional Events Fund, significant implementation of this plan has occurred in the last three years. Existing destination events have been supported with marketing planning and the development of photo and video content, Murihiku Southland's Unmissable Events calendar was launched, new events have been supported (particularly those showcasing our food story), and work to profile Murihiku Southland as a conference destination has been furthered.

Priority Projects

Regional ambassador development

A regional ambassador programme is in place to give those in our community the tools and knowledge to engage with visitors, sharing our unified regional story.

Murihiku – The South Land consists of key messaging that underpins how we understand and talk about our region. As well as having benefit for our local communities, Murihiku – The South Land is a powerful tool that can be used to impart knowledge about our place to visitors.

To support the wider sharing of our story, a regional ambassador programme should be established. This programme would be intended for anyone engaging with visitors, supporting them to authentically connect and share knowledge about the region. It would cover our unique stories, Māori history, early settlers, and key milestones up until the present day. In the spirit of tūrangawaewae and manaakitanga, the establishment of a programme like this would acknowledge the contribution our residents make to the visitor experience. It also has strong potential to support the attraction of new residents to our region and to improve the knowledge of those who have recently moved to Murihiku Southland.

As well as being ambassadors, locals have the best knowledge of the areas where they live. This knowledge could be used to connect visitors with locally recommended experiences, encouraging them to explore more of our region and what its 'really' like here.

KEY ACTIONS

- › Develop a regional ambassador programme to give those in our community and those connected to tourism, the tools and knowledge to engage with visitors.
- › Consider opportunities to involve locals in the marketing of our region i.e., the identification of 'hidden gems', the road less travelled, behind the scenes storytelling.

KEY STAKEHOLDERS

Great South

Attraction of MICE (meetings, incentives, conference and expo) activity

Murihiku Southland is a thriving business events destination, supporting key stakeholders to attract and host events throughout the year.

The region's convention bureau, Business Events Southland, operates with funding from local council and is delivered by Great South. The role of Business Events Southland is to provide impartial leadership for the sector, setting the strategic direction for the region and leading its implementation. Business Events Southland's primary function is the promotion of Murihiku Southland as a business events destination, creating demand and supporting key stakeholders to attract, develop, host, and retain business events. This is an area of key importance to Murihiku Southland, as business events provide significant economic benefit, business opportunities, and cultural exchange, while also supporting destination promotion.

KEY ACTIONS

- › Implement and deliver the Business Events Southland MICE Strategy.

KEY STAKEHOLDERS

Great South

Destination promotion to locals

Regional tourism and event promotion focuses on local residents as well as visitors, recognising their ability to participate in and showcase what Murihiku Southland has to offer.

Local residents play an important role in promoting tourism in our region - hosting friends and relatives and interacting with visitors keen to gain local travel advice. However, it is common for these residents to be unsure of all the activities and attractions available in their own communities. When residents are aware of, or have personally engaged in positive tourism experiences, they are more likely to share their experiences and recommend activities to others.

To maximise locals' ability to showcase what the region has to offer, promotional efforts should be directed towards them and not only at those outside the region. As Murihiku Southland is geographically large, our tourism operators and event organisers can also generate significant benefit from residents travelling within the region, achieving more sustainable businesses in the longer term.

KEY ACTIONS

- › Ensure marketing of key events and tourism experiences also targets Southlanders.
- › Promote the regional destination website SouthlandNZ.com as a tool for locals exploring the region alongside visitors.

KEY STAKEHOLDERS

Great South



Other Projects

Activation of Murihiku - The South Land

Murihiku – The South Land is finalised, becoming the basis for how we market and share our region with the rest of the world.

Murihiku – the South Land is our story. It captures the essence of our region, its people, and its distinctiveness. Its purpose is to foster a sense of local and regional pride, while reinforcing the bonds that unite us as Southlanders. Its messaging will underpin how we talk about our region and how we market ourselves to the rest of the world – to attract those who we want to visit, but also those who may look to live, work, and study in Murihiku Southland.

The story will also support improved understanding of the geographic make up of the region, as this was identified within the Destination Insights research as an area needing to be strengthened in the minds of potential visitors.

Our story is a living one, in that it will continue to change as we change. Mana whenua are currently enhancing cultural narrative across the region through key projects such as the Milford Opportunities Project, the Waihōpai Invercargill CBD, Motupōhue Bluff Hill, and the Māruawai Precinct. This mahi is extremely important and will be woven further into Murihiku – The South Land as we continue to work in partnership with our four Papatipu Rūnaka.

KEY ACTIONS

- › Incorporate mana whenua cultural narrative into Murihiku – The South Land in partnership with Ngā Papatipu Rūnaka ki Murihiku.
- › Integrate Murihiku – The South Land into our regional destination website, SouthlandNZ.com.
- › Utilise Murihiku – The South Land to support the attraction and retention of new residents coming to live and work in Murihiku Southland.
- › Develop video content that uses Murihiku - The South Land development to promote the region.

KEY STAKEHOLDERS

Great South

Continued implementation of the Southland Murihiku Events Strategy 2020 – 2025

Actions within the Southland Murihiku Events Strategy are complete, with the plan's desired outcomes achieved.

Events are a key driver of domestic visitation and a tool used to share the Murihiku – The South Land story, strengthening the position and profile of the region. The overall vision of Southland Murihiku Events Strategy seeks to foster a supported, dynamic, and sustainable event sector that encourages community participation and drives visitation to the region by building on unique points of difference. The Strategy's four key goals are:

- › To stimulate Murihiku Southland's economy by supporting, promoting, and growing existing events and attracting new events that bring visitors and encourage spending across the region.
- › To maximise community wellbeing by working with event organisers, business, and community groups to ensure economic, social, cultural, and environmental benefits are achieved.
- › To work with the events sector to encourage excellence in event management, strengthening our regional event organisers' skills and capabilities.
- › To provide a balanced, all-season calendar of premier, special interest, regional and community events.

KEY ACTIONS

- › Work with and alongside key event organisers to drive delivery of the Southland Murihiku Events Strategy.

KEY STAKEHOLDERS

Great South, Invercargill City Council, Gore District Council, Southland District Council, Active Southland, Ngā Papatipu Rūnaka ki Murihiku, Te Anau Events Trust



Development of the Regional Events Toolkit

Event organisers have access to a centralised resource centre, providing the tools they need to improve their capability and supporting the development of our regional events sector.

To support the development of Murihiku Southland's events sector and enhance the capability of our region's event organisers, a Regional Events Toolkit should be developed. This would be a digital toolkit including resources for event organisers such as a digital events calendar, directory of local event suppliers, and health and safety guidelines. It would also include advice on staffing

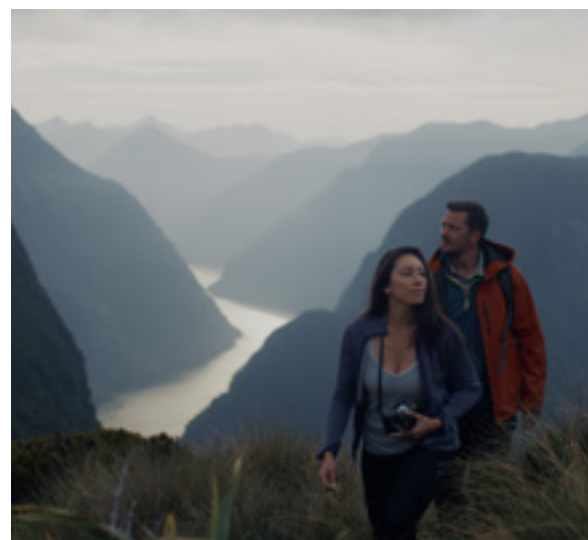
and volunteer management, finance, marketing, event planning and logistics, and regulations and consents, providing a resource centre for best practices and principles, tips, and useful links.

KEY ACTIONS

- › Develop resources, launch, and promote the Regional Events Toolkit to event organisers.

KEY STAKEHOLDERS

Great South



Build content and campaigns around key pillars for Te Rua-o-Te-Moko Fiordland and Murihiku Southland

Key activities and experiences closely linked with Murihiku Southland and Te Rua-o-Te-Moko Fiordland are readily identifiable and used to promote the region to visitors.

While there are many reasons to visit Murihiku Southland, some of our key activities and experiences are more closely intertwined with what our region has to offer, our people and place. As a result, these are also those we are most well known for and provide the most authentic experiences for visitors. Of these key pillars many are the same across Te Rua-o-Te-Moko Fiordland and the wider Murihiku Southland region, but some differences do exist.

To further position these pillars as reasons to visit Murihiku Southland, it's important we have the content and resources available to highlight them. Events that link to these activities also have a role to play in developing the stories of our region and people.

KEY ACTIONS

- › Create photo and video content based on our key pillars to be used in marketing activity, including hero videos on each.
- › Develop itineraries and package products and experiences based on our key pillars.

KEY STAKEHOLDERS

Great South

Target key markets and audiences

Our marketing and trade activity is well aligned with the type of visitor we want to attract, with an ongoing focus on the domestic market.

A key part of achieving well-managed and sustainable tourism growth is linked to the type of visitor we attract. Both at a national and a community level, there is a growing focus on attracting a high-quality visitor. In the Community Sentiment in Relation to Tourism research undertaken, 37% of residents indicated they would like the tourism industry to focus on this, a level far higher than the national average. It's important to note that a high-quality visitor does not necessarily mean those who spend the most, rather those who deliver the highest benefits and have mindsets that align well with our people and place. Key visitor groups identified within the Southland Destination Insights research undertaken to inform Murihiku – The South Land align with this well, demonstrating a high focus on exploring nature, reconnecting, and taking time during their travels. Our work in the trade space to attract international visitors must also align with this approach.

Our communities also want to see a strong focus on the domestic market continue as we rebuild the sector post Covid. Understanding what makes Murihiku Southland different to other regions will be important to achieve this.

KEY ACTIONS

- › Work with trade markets and with Tourism New Zealand to ensure our international marketing for Murihiku Southland is in line with the markets we want to attract.
- › Target domestic marketing activity to the high-quality visitor mindsets identified as being of best fit for Murihiku Southland.

KEY STAKEHOLDERS

Tourism New Zealand, Great South

Build the profile of our day walks

The large range of day walks on offer in the region are highlighted well and engage locals, while also attracting visitors to the region.

Murihiku Southland is a key destination for walking, being home to five of Aotearoa New Zealand's 11 Great Walks – The Rakiura Track, Routeburn Track, Milford Track, Kepler Track, and the Hump Ridge Track. These are often fully booked ahead of their season with capacity limited by hut availability.

However, our region also has a significant network of day walks of varying lengths that could be better promoted and elevated to encourage further visitation to our region, as well as working to support longer length of stay. These walks better cater to those not wanting an overnight hut experience, those with lesser fitness levels, and family groups. By staying in our towns overnight there is also the potential to add more benefit to the local economy through engagement in other activities, meals, and accommodation. Many of these walks currently have limited visibility in our local communities as we are lacking a centralised information source.

The region's destination website, SouthlandNZ.com, should be further developed to showcase day walks, incorporating a mapping feature and filters based on level of difficulty, duration, and location.

KEY ACTIONS

- › Develop our walking platform within the region's destination website, SouthlandNZ.com, to incorporate mapping and listings filterable based on level of difficulty, duration, and location.
- › Establish a promotional programme to connect this platform with visitors and our local communities, highlighting it as a one-stop shop for day walks in Murihiku Southland.
- › Develop a short/day walks passport for the Te Anau area, catering to those unable to experience the areas Great Walks.
- › Encourage product development that links these walks together i.e., packages that give a 'taste' of the options available and pick up and drop off between them to create linkages.

KEY STAKEHOLDERS

Great South

Integration of digital media

Digital connectivity in the region is vastly improved and printed materials are limited, with digital solutions reducing cost and supporting our sustainability goals.

As we move towards increased digital technology use and considerations around the environment grow in importance, digital media has a key role to play in the marketing of our region. However, to be well utilised digital content needs to be up to date and have strong connectivity in place. There are some remote parts of our region where access is limited and, while this is improving, it will be a factor we need to consider. There is also a certain market that prefers something printed, being less savvy with technology, and some visitor groups are choosing to disconnect while on holiday and reduce reliance on technology.

There is a strong consensus that printed information in the form of touring maps are well used and that these can provide important navigational information without being as cumbersome as a printed brochure. The use of QR codes and connection to mobile websites can then be maximised for instances where further detail is required.

The regional destination website SouthlandNZ.com will continue to be our main tool for visitor information, with opportunities to also promote the region through user generated content and influencer models considered.

KEY ACTIONS

- › On a regular basis, assess the printed material on offer in our region and where this could become digital content and/or reduced in size and supported by online content.
- › Consider options to develop printed material that encourages multiple use for returning visitors.

KEY STAKEHOLDERS

Great South

Develop RTO partnerships and established touring route networks

The Southern Way is a well-recognised touring network, encouraging increased visitation to the lower south and further collaboration between the network's RTOs.

Murihiku Southland is a large region which is primarily travelled by road and visitors are increasingly choosing to navigate the region independently as opposed to being part of a tour group.

Touring routes have a key role to play in educating these travellers in the best ways to experience our place, while encouraging them to travel where we want them to go. Murihiku Southland is a key part of the Southern Scenic Route and the recently launched Southern Way – a touring network based on the 8 RTOs of the lower south. Southern Way will focus on themed experiences and encouraging travellers to extend their length of stay in Otago and Murihiku Southland. Further opportunities to leverage these touring routes will be explored as part of ongoing marketing activity, particularly with the Southern Way where work to build its profile will be undertaken in conjunction with the participating RTOs.

The support and development of touring routes aligns well with our community's desire for tourism, with 44% of respondents in the Community Sentiment in Relation to Tourism research wanting to see visitors encouraged to travel more widely within the region so that more communities benefit.

KEY ACTIONS

- › Continue to support the Southern Scenic Route and the Southern Way touring route partnership, marketing these networks to encourage dispersal of visitors.
- › Investigate other opportunities for alignment with the RTOs of the lower south in the areas of marketing and destination management.

KEY STAKEHOLDERS

Great South



Measuring Success



How we measure our success and the impact of our visitor economy moving forward will be deeply connected to the ethos and vision of the MSDS 2023.



Murihiku Southland is a world class tourism destination that showcases our stunning natural environment, rich cultural heritage, and exceptional hospitality. By prioritising sustainability and working closely with the local community, Murihiku Southland will provide unforgettable experiences for visitors while creating lasting benefits for residents, businesses, and the environment.

This requires consideration of new ways to measure our progress, ways that reflect a destination management approach to tourism development. These measures will be more holistic and in line with the benefits we seek to achieve through tourism activity. They will also be influenced by our guiding principles (p15).



Whanaungatanga
Working together inclusively to ensure benefits are shared.



Ohanga/Whairawa
Striving for the wellbeing and economic prosperity of our people.



Kaitiakitanga
Looking after our special place, protecting our land, sea, air, wildlife, and traditions both now and for the future.



Diversity
Celebrating our diversity and our uniqueness.



Manaakitanga
Welcoming our visitors and addressing their needs as well as our own.

The measures identified here include a mix of data sources already available and those that are still being established. Ways to monitor and address progress against these will be explored at a regional level, and nationally, connecting to efforts of the national Tourism Data Leadership Group and to the evolving datasets within the Tourism Evidence and Insights Centre (TEIC) developed by MBIE in collaboration with DOC and representatives from the tourism industry. Launched in 2021, the TEIC aims to provide information about tourism's relationship with the environment, economy, visitors, communities, and regions, strongly aligned with the goals of destination management.

Alongside these measures, progress and completion of the projects identified within the MSDS 2023 will be monitored as a key measure of our impact. A dashboard highlighting measures already in existence will be developed as part of the implementation of the MSDS 2023.



COMMUNITY BENEFITS

- > Community views on tourism.
- > Mana whenua views on tourism.
- > Growth in positive, and reduction in negative, impacts of tourism.
- > Meaningful employment and business ownership.
- > Preservation of cultural heritage.
- > Community participation in destination management planning.



ECONOMY

- > Tourism employment and contribution to GDP.
- > Visitor spend and volume by origin.
- > Accommodation capacity and guest nights.
- > Visitor length of stay.
- > Great Walks bookings.
- > Regional reliance on tourism.



ENVIRONMENT

- > Regional carbon footprint.
- > Businesses measuring their carbon footprint.
- > Tourism businesses and visitors' contribution to environmental care, protection, and restoration.
- > Optimal visitation levels/carrying capacity at key locations.
- > Visitor numbers to Piopiotahi Milford Sound and Rakiura Stewart Island.
- > Natural resource use and management, ecosystem health and wellbeing of taonga species.
- > Waste management and reduction.



VISITOR

- > Quality of experience.
- > Visitor knowledge and understanding of the region.
- > Visitor cultural awareness.
- > Accessibility and connectivity.
- > Visitor flows and direction of travel.
- > Tourism infrastructure investment.

Project Summary

Environmental Stewardship

Ⓞ PRIORITY PROJECTS

- › Long term spatial planning – climate change impacts
- › Tourism sector sustainability – leadership and support
- › Predator Free Southland including Predator Free Rakiura

Other Projects

- › Work with the tourism sector to establish sustainability goals
- › Investigate opportunities for the visitor economy to support environmental protection
- › Develop an online platform for tourism sustainability within Murihiku Southland
- › Promote guidelines for visitor behaviour
- › Advocate for energy transition in key tourism destinations
- › Support efforts to reduce and better manage waste at visitor destinations
- › Support improved inclusive and accessible tourism within the region

Leadership and Capability Development

Ⓞ PRIORITY PROJECTS

- › Tourism leadership group
- › Regulatory and planning - sector advocacy
- › Build the profile of careers in tourism
- › Tourism workforce development
- › Investigate options for staff accommodation at key locations (with a focus on Te Anau)
- › Collation and distribution of tourism data

Other Projects

- › Community support and participation in tourism
- › Support regional collaboration and capability building
- › Leverage external funding for the region
- › Regulatory framework for non-commercial accommodation
- › Regional tourism awards

Access and Infrastructure

Ⓞ PRIORITY PROJECTS

- › Enhanced air connectivity for Invercargill Airport
- › Te Anau Airport as aviation access to Te Rua-o-Te-Moko Fiordland
- › Regional visitor information and Waihōpai Invercargill Welcoming Activation Hub
- › Support progression of the Milford Opportunities Project
- › Support the development of public transport networks
- › Develop infrastructure to support cycle tourism

Other Projects

- › Encourage further development of our EV network – the future roading network
- › Cruise sector assessment
- › Stirling Point visitor management
- › Support tourism inclusion within future planning for towns

Experience and Product Development

Ⓞ PRIORITY PROJECTS

- › Development of quality accommodation options
- › Support mana whenua to develop cultural narrative and experiences
- › Cultural storytelling at Tuturau
- › Kāitahutaka Waihōpai - mana whenua cultural identity in Waihōpai Invercargill
- › Punanga Manu o Te Anau Te Anau Bird Sanctuary development
- › Motupōhue visitor experience - Te Taurapa o Te Waka
- › New museum for Waihōpai Invercargill and Murihiku Southland
- › Development and launch of the Māruawai Precinct
- › Establish Murihiku Southland as a world-class dark skies destination
- › Implementation of the Southland Murihiku Food Tourism Strategy
- › Position Murihiku Southland as a cycle tourism destination
- › Home to Great Walks
- › Support urban rejuvenation in Waihōpai Invercargill and Māruawai Gore
- › Define the stories and unique identity of our towns

Other Projects

- › Matariki wayfinding pouwhenua
- › Further development of agritourism opportunities
- › Arts and heritage tourism approach for Murihiku Southland
- › Collective development and marketing of Te Akau Tai Toka The Catlins
- › Facilitate implementation of Bluff Motupōhue 2020 Tourism Master Plan
- › Bluff Southern Marine Discovery Centre/ Bluff Oyster World
- › Destination management planning for the Te Anau basin

Sharing our Story

Ⓞ PRIORITY PROJECTS

- › Regional ambassador development
- › Attraction of MICE (Meetings, Incentives, Conference and Expo) Activity
- › Destination promotion to locals

Other Projects

- › Activation of Murihiku - The South Land
- › Continued implementation of the Southland Murihiku Events Strategy 2020-2025
- › Development of the regional events toolkit
- › Build content and campaigns around key pillars for Te Rua-o-Te-Moko Fiordland and Murihiku Southland
- › Target key markets and audiences
- › Build the profile of our day walks
- › Integration of digital media
- › Develop RTO partnerships and established touring route networks



Risk Assessment

The projects outlined within the MSDS 2023 require the active participation and co-operation of a number of key stakeholders within the region including our Councils, DOC, our region's Papatipu Rūnaka, and the wider tourism industry.

As such, there are a variety of risks which if not addressed, could affect the implementation of the MSDS 2023 for Murihiku Southland, and our associated ability to sustainably grow the region's visitor economy.

The primary risks identified are:

- › Inadequate levels of co-operation by key stakeholder groups.
- › Inability to secure funding from sources within the region and from central government to activate opportunities.

- › Lack of human resource capacity generally to activate opportunities on a timely basis.
- › Major externalities which could impact on the economy overall and which are beyond the region's ability to mitigate.
- › A diminishing community social licence for tourism and conflict between communities and the visitor economy.
- › Failure to align strongly enough with central government's focus on destination management principles.
- › Climate change impacts grow in impact and affect tourism activities and/or legislation to limit climate change impacts the tourism sector.
- › Lack of interest from surrounding regions to want to work collaboratively to activate opportunities.
- › Growing competition from other regions within the South Island especially, and changes to visitor dispersal patterns.
- › Lack of development of commissionable tourism products which are needed to grow visitor yield and to generate employment and wider economic benefits which sub-regional areas, in particular, are wanting to generate.

Implementation

To achieve success, the MSDS 2023 will require strong regional leadership, co-ordination, collaboration, and connection.

Throughout the process to develop the MSDS 2023 it was evident that there are many passionate people and significant projects being undertaken across the region, much of which is very connected to the development of our region as a destination for tourism.

Development of the MSDS 2023 Implementation Plan will be done in partnership with the wider community, key stakeholders, our region's Papatipu Rūnaka, funders, and leaders. It will also be important to connect and create linkages to other related projects being undertaken within Murihiku Southland.

The Implementation Plan will:

- › Outline the prioritisation of key enablers, projects, and identification of those which require advocacy.
- › Identify a project lead and accountable support organisations to drive the delivery of key enablers and projects.
- › Identify short (1-2 years), medium (3-4 years) and long-term (5-6 years) timeframes for each project.
- › Identify datasets required to measure success and outcomes of the MSDS 2023.
- › Identify potential funding support.
- › Clearly identify next steps to establish the Tourism Leadership Group, along with confirmation of its purpose, terms of reference and required resourcing.
- › Require an understanding of alignment with other significant projects and areas of focus, e.g., Council long-term planning processes.

The outcome will be a clear prioritised action plan with allocated areas of responsibility, resources, and timeframes for implementation. This process will be facilitated by Great South.

Key References

There are a range of strategies, reports and projects that have either been completed or are underway, which link to tourism. Each of these has been reviewed and where applicable, integrated into the MSDS 2023. This ensures there is alignment between the MSDS 2023 and the hard work that has already been undertaken by a multitude of stakeholders both within and outside the region. In addition to this, new research was undertaken to further inform the strategy development.

The key strategies, reports and projects considered in the development of the MSDS 2023 include:

National

- › New Zealand Aotearoa Government Tourism Strategy, MBIE, May 2019
- › Destination Management Guidelines, MBIE, 2020
- › Climate Change Adaption Plan - Te Papa Atawhai he whakamahere hātepe urutau mō te huringa āhuarangi, Department of Conservation, 2020/2021 – 2024/2025
- › Heritage & Visitor Strategy - He Rautaki Taonga Tuku Iho, Manuhiri Tūāurangi hoki, Department of Conservation, February 2021
- › Tourism 2025 & Beyond – A Sustainable Growth Framework - Kaupapa Whakapakari Tāpoi, Tourism Industry Aotearoa
- › Tourism Industry Transformation Plan – Better Work Action Plan – He Mahere Tiaki Kaimahi, March 2023


Regional/ Local


- › Southland Murihiku Destination Strategy 2019 – 2029, Great South
- › Beyond 2025 Southland Regional Long-Term Plan, June 2023
- › Southland Regional Development Strategy - Te Iwi Me Oranga Rauemi, Action Plan 2015 -2025
- › Murihiku – The South Land, The Pyjama Strategist Ltd, 2023
- › Southland Story, Principals Consulting, March 2019


- › Southland Destination Insights, Angus and Associates, 2022
- › Milford Opportunities Project, A Masterplan for Milford Sound Piopiotahi and the Journey May 2021
- › Southland District Council Community Board Plans, 2021- 2024
- › Community Sentiment in Relation to Tourism Research, Angus & Associates, 2023
- › Tourism Forecast Report for Great South, Infometrics, May 2023
- › Murihiku Southland Sustainable Tourism Programme, Great South, 2022
- › He Rautaki Mō Te Huringa O Te Āhuarangi Climate Change Strategy, Te Rūnanga o Ngāi Tahu, August 2018
- › Southland Murihiku Regional Energy Strategy 2022-2050, BECA Consulting
- › Net Zero Southland: Economic Mitigation Pathways Analysis to Net Zero Emissions for Southland, Ernst & Young, March 2021
- › The Tiaki Promise, Tourism New Zealand
- › Making Trax Foundation
- › Southland Cycling Strategy, 2016-2026
- › Cycle Tourism Insights – New Zealand and Australian Market Summary, Angus and Associates, September 2021
- › Southland Murihiku Regional Workforce Plan - Te Rautaki Huka Mahi A Rohe, 2022 & 2023 Update
- › Bluff Motupōhue 2020 Tourism Master Plan, Great South
- › The Catlins Te Akau Tai Toka Community Tourism Strategy Review, Destination Planning, 2022
- › Southland Murihiku Events Strategy 2020 – 2025, Great South
- › Southland Murihiku Food Tourism Strategy, Great South, December 2021
- › Southland Murihiku Employer Workforce Research, March 2023

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