The Catlins

Te Akau Tai Toka

Community Tourism Strategy

2016 - 2026

THE Catlins
Te Akau Tai Toka
NEW ZEALAND - AOTEAROA

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This is a collaborative strategy that has been developed, and will be collectively actioned by:

Catlins Coast Inc

South Catlins Promotions Inc

Catlins Promotions Inc

Awarua Runanga

Wai Koau Ngai Tahu

Te Ao Marama Inc.

People First Southland District Council Te Rohe Pōtae O Murihiku

Clutha District Council

Clutha Development

Otago Regional Council

Venture Southland Business • Tourism • Community • Events

environment SOUTHLAND Te Taiao Tonga

Department of Conservation Te Papa Atawhai

This document was prepared by Anna Coleman Consultancy Ltd and Venture Southland alongside the Catlins Community and its valued stakeholders

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Abbreviations:

AG = Advisory Group
AR = Awarua Runanga
CDC = Clutha District Council
CL = Clutha Development
CTO = Catlins Tourism Operators & Attraction Owners/Managers
CCI = Catlins Coast Inc
SCPI = South Catlins Promotions Inc
CPI = Catlins Promotions Inc
DOC = Department of Conservation
ES = Environment Southland
IMA = International Marketing Alliance
LPG= Local promotion groups
RTO = Regional Tourism Organisation
SDC = Southland District Council
SSR =Southern Scenic Route
SSRT=Southern Scenic Route Trust
VS = Venture Southland
VST=Venture Southland Tourism
WNT = Wai Koau Ngai Tahu

Executive Summary

In 2013, Catlins Coast Inc & Tourism Catlins Charitable Trust (on behalf of the local community), approached Venture Southland with a request to review the 2004 Catlins Tourism Strategy. It was agreed that a collaborative approach similar to the way the initial strategy was developed, was again required. A 'working review team' was developed to drive the review alongside consultant Anna Coleman.

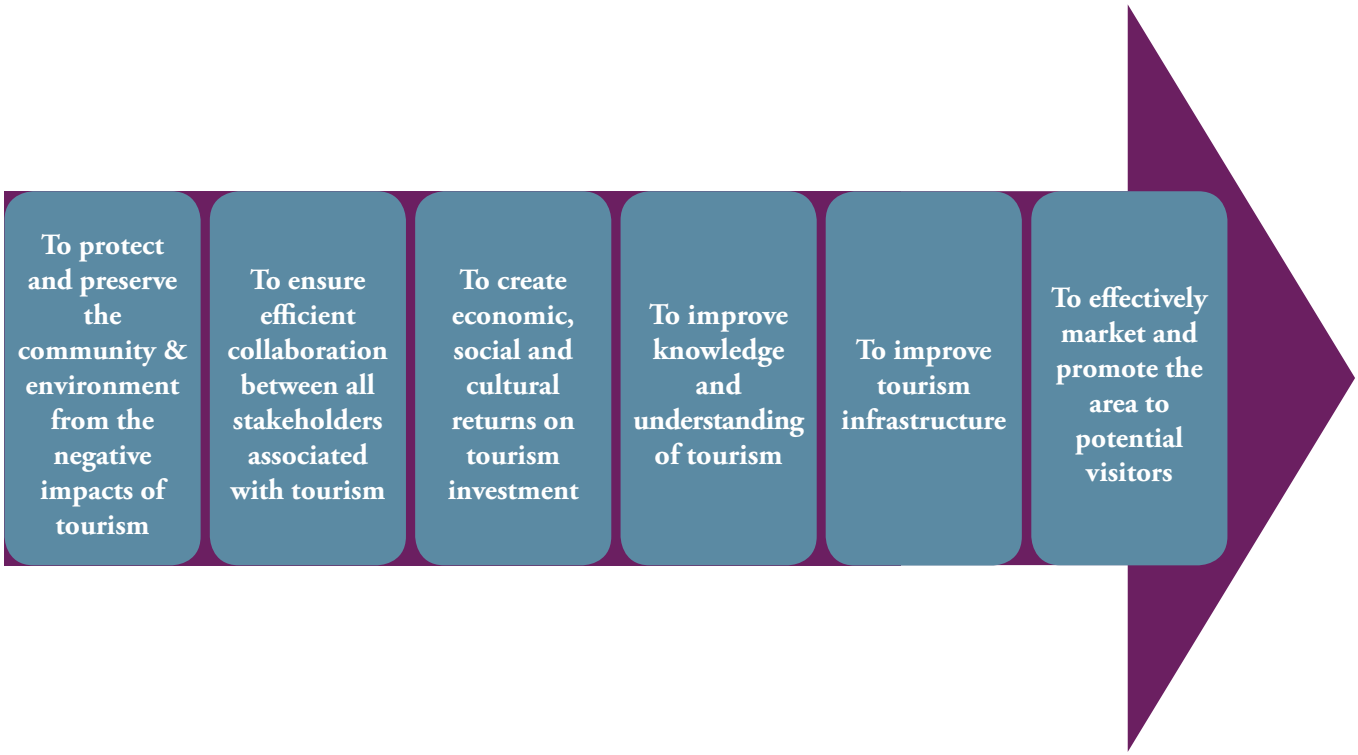
During the past ten years, the community has successfully implemented 80 of the 91 recommendations in the 2004 Catlins Tourism Strategy (see Appendix A). Section 5 also demonstrates key projects achieved with a view to understanding progress to date and what the next steps are to build on this.

Besides the unification of the community, other key milestones achieved particularly related to infrastructure with the sealing of the Southern Scenic Route (SSR - main highway through the area), numerous upgrades to the provision of public toilets and other amenities and improved cellphone coverage and internet access. Tourism Catlins/Catlins Coast Inc were also instrumental in developing an "Interpretation Plan" which looked at the types of signage required for consistency throughout the region, sites that required interpretation etc. Projects that have come out of this include upgrades at Nugget Point (Department Of Conservation - DOC), Fortrose, Florence Hill, Catlins Lake and Lake Wilkie (DOC) with many more planned.

There were six pieces of research undertaken in order to gain a thorough understanding of tourism from different perspectives; for example, the perspective of the visitor through to the local community and those involved in looking after the area.

As a result, six goals were developed as well as a framework in which these goals are set. This framework considered the 2004 strategy and previous goals and strategies in order to ensure continuity.

There are two approaches to achieving the six identified goals outlined above which include developing an implementation plan as well as looking at various projects related to infrastructure, product development, environment and heritage and promotion and marketing.



The strategic framework from 2004 was revised in order to ensure that the recommendations within it can be implemented. Reviewed and confirmed, the vision remains the same but the goals and the objectives altered based on feedback from surveys and key partner interviews. Monitoring and evaluation is seen as essential.

VISION

The Catlins is one of New Zealand's most popular eco tourism destinations with a thriving community, wildlife and environment that are respected and cared for by all.

PURPOSE

To encourage and enable tourism growth along with protecting and preserving The Catlins community, wildlife and environment.

KEY PRINCIPLES

- Whole of Catlins approach
- A 'living' document to evolve as requiered
- Guide and direct
- Simplicity & common sense
- Celebrate success

GOALS

To protect and preserve the community and environment from the negative impacts of tourism.	To ensure efficient collaboration between all partners.	To create economic, social and cultural returns on tourism investment.	To improve knowledge and understanding of tourism.	To improve tourism infrastructure.	To effectively market and promote the area to potential visitors.
#2	#1	#3 & #4	#7	#5, #6, #8 & #10	#9

OBJECTIVES FROM 2004 STRATEGY

#1 To provide for the implementation of The Catlins Tourism Strategy through the development of an appropriate body (or bodies) with appropriate mandate, representation and funding.

#2 To provide for the absolute protection of the natural and cultural resources that are integral to Catlins tourism from the negative physical impacts of tourism.

#3 To optimise the value of tourism for local residents, including social and economic benefits.

#4 To develop opportunities to enhance the existing visitor experience, in terms of attractions and activities.

#5 To optimise information flow to visitors in The Catlins through the provision of appropriate signage, information, interpretation and associated services.

#6 To cater for the hospitality service needs of The Catlins tourist through provision of appropriate accommodation and food services.

#7 To learn more about the visitor and their relationship with the community and the environment in The Catlins.

#8 To ensure that the infrastructural requirements of The Catlins tourism industry are addressed.

#9 To match the visitor with The Catlins tourism product through appropriate marketing and promotion.

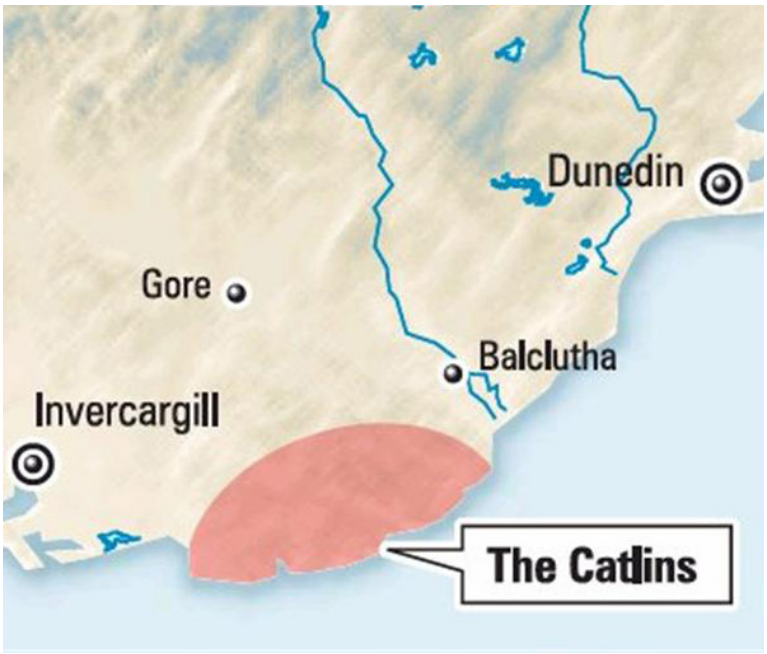
#10 To assist The Catlins tourism operators (and associated services) to achieve an outstanding level of service to their clients

DEFINITIONS

1.1.1 The Catlins

The Catlins (sometimes referred to as The Catlins Coast) comprise an area in the south-eastern corner of the South Island of New Zealand. The area lies between Balclutha and Invercargill, straddling the boundary between the Otago and Southland regions.

The use of the term 'The Catlins' to describe the whole region is a relatively recent phenomenon, and has been associated with the growth of tourism. It is certainly the case that tourism enterprises and communities link and



identify with the "brand" of The Catlins. This locally used name was formally recognised as the official geographic name with a bounded extent on the 4th February 2010.

"The Catlins" is the area defined as an area bounded in the north by the mouth of the Clutha River and in the south by the mouth of the Mataura River. The Pacific Ocean forms the eastern and southern boundaries. The Catlins extends inland to the watersheds of all the river catchments between the Clutha and Mataura Rivers and beyond to include the Mokoreta catchment as far west as Redan and all areas designated under the Catlins Coastal Rainforest Park.

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1.1.2 The Community

The wellbeing of the community is a central consideration of sustainable tourism. The definition that we use is

"…all persons and public and private bodies who are potentially affected, both positively and negatively by tourism development within the boundaries of the destination area."

This includes those who reside in The Catlins, those who may reside elsewhere, but own a business or land in The Catlins and those who have family or historic associations with The Catlins and still feel a strong tie with The Catlins.

1.1.3 The Tourists

Any tourism strategy needs to define tourists. For most purposes, the World Tourism Organisation definition of a tourist is appropriate:

"… Tourists may come from far away or from a place just outside the area.."

This definition includes those who travel for a variety of reasons: leisure or holiday, business, or visiting friends and relations. Tourists may come from as far away as China, or as close as Gore.

It includes as well a potentially important group of visitors, and these are the "day- trippers". This group is both an important source of income for destinations, and also a potential cause of impacts.

All visitors by and large, have similar requirements, in terms of tourism management, that conventional "tourists" have. For the purposes of this strategy, day-trippers are generally included in discussions using the term "visitor" or "tourist". It is worth noting, however, that when the term "day-tripper" is used in a technical sense, it applies to trips of greater than 40km each way. This is a standard definition accepted by the wider tourism industry including Tourism New Zealand and the New Zealand Tourism Industry Association (NZTIA).

The Catlins, Tautuku Bay

ABOUT THE CATLINS

1.2.1 People

The Catlins area is sparsely populated with around 2000 residents. The largest town is Owaka with a population of around 400. Most people live close to the Southern Scenic Route which runs through The Catlins between Balclutha and Invercargill, and in small coastal settlements. The largest coastal settlement is Kaka Point (population 200), Waikawa, Pounawea, Papatowai, Fortrose and Curio Bay are similar or much smaller.

Locals at Curio Bay Beach

These places offer some services and accommodation. Most have only a few permanent residents, but increase dramatically during holiday periods when visitors arrive.

There are several farming settlements, such as Tokanui, Mokoreta, Romahapa, Maclennan and Glenomaru. In addition, there are many historic townships; Tawanui, Caberfeidh, Chaslands, and Niagara where little remains of once thriving sawmilling communities.

The 2013 census information shows that the area's population has predominantly European ancestry, (Owaka 73% European, 15% Maori), has a relatively low unemployment rate and income compared to the country as a whole.

1.2.2 Economy

The Catlins

People have lived in The Catlins since around 1350 AD. The early Polynesians were semi-nomadic as they lived by hunting and gathering, making seasonal movements around the wider region. In The Catlins they favoured the food-rich river mouths where today there remain many signs of their occupation in the form of middens, some of which are important archaeological sites. When the Maori in the south obtained goods and potatoes from the first Europeans in the late 18th century their population grew. By the 1830's European whalers were living with the Maori in several coastal settlements in The Catlins. These were at Kaka Point, Tautuku, Waikawa and Fortrose. These settlements declined in the 1840's as the whales were hunted out and the Maori were devastated by the European diseases. European-style organised settlement started in The Catlins in the 1860's with the growth of timber milling and bush dairy farming with some sea fishing. The population was quite high during the timber and small farm era, however, by the 1970's the easily worked native forest was gone and farms were amalgamated into mainly sheep and beef cattle units. Of the total area of land in The Catlins about half, (28,000 hectares) is in protected native bush.

The Catlins - Scenic

Today the economy is primarily based on pastoral sheep and beef farming with a number of larger dairy farms appearing on the fringes of The Catlins. Most of the working population is either engaged in farming or related service industries. There remains some commercial fishing based at Kaka Point and Waikawa with more inshore and offshore fishing being done by boats based outside the region.Timber still remains an important economic resource, although this is now nearly all based on planted, exotic forests and processing takes place outside The Catlins. Although The Catlins has been a holiday destination for Otago and Southland people for over a century, it is only since the late 1980's that tourism has become a significant part of the economy. Mostly small-scale accommodation, ranging from part-time farm and home stays, backpacker lodges, 'cribs', camping ground camp sites and cabins; to motels, holiday parks and high quality houses and cottages provides a variety of accommodation for visitors, although many still drive through The Catlins without staying. Activity and heritage providers include guided tours, horse trekking, surf school, museum and artisans. A growing number of service providers include eating places, coffee shops, fuel and food stores.

1.2.3 Climate

The Catlins has a temperate climate. Summer temperatures hover around 16-24 degrees Celsius with the occasional day of up to 30 degrees Celsius. In winter, the weather is milder than that of inland Otago with temperatures generally in the 8-13 degree Celsius range with some frosts when the temperatures can dip to -5 degrees Celsius. The Catlins experiences the occasional light snowfall.

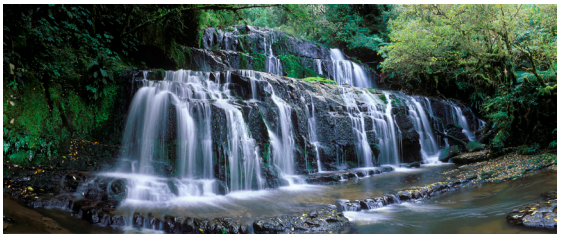
Curio Bay

The Catlins - Scenic

The Catlins has an average annual rainfall of about 1300mm. It is reliable throughout the year. The rain is beneficial to the local agricultural industry and to maintaining The Catlins rainforests. The Catlins region is prone to weather patterns which originate from the Great Southern Ocean. Dramatic changes in weather are frequent with calm, sunny days suddenly becoming cool, wet and windy ones.

1.2.4 Natural Environment

The Catlins area is generally a steep hilly country, however, there is substantial fertile farmland surrounding the Clutha and Mataura Rivers. The Catlins is known for its natural environment and variety of features that make it unlike any other part of the east coast of the South Island. The rugged and varied coastline of sandy beaches, rocky headlands,



Purakaunui Falls

cliffs, rock stacks, reefs, sea caves, blowholes, river mouths and estuaries of The Catlins are very attractive features.

The land is generally steep hill country with short radiating river valleys. The valleys contain land of gentle contour where most farming takes place. The steeper and higher hills still support the native forest that once covered most of the area, except for the inland fringes.

The Catlins is renowned for its greenness, ever-changing panoramic coastal views, often moody skies, wind-shorn trees and large tracts of native fern-rich rainforest. Wildlife is abundant, with the seas being particularly rich in marine life, including species such as yellow eyed penguins, fur seals, Hector Dolphins and sea lions. The forests support high numbers of native forest birds such as bellbird, fantail, tui, native pigeon and the inland silver beech forest are one of

the last strongholds of the rare mohua or yellow head. The lowland forests were exploited in the sawmilling era for their ancient podocarps: rimu, matai, miro, totara and kahikatea. The silver beech forest was also exploited later in the timber milling era.

Sea Lion

The rocks of The Catlins are very interesting. They are dinosaur-age sediments with many locations containing plant and animal fossils The most well known fossil location is the petrified forest at Curio Bay - now a major visitor attraction.

Yellow Eyed Penguins

1.2.5 Maori Heritage

When the first Polynesians arrived about 1000 years ago, they found a wonderful land that at first offered abundant sea and forest food resources. They lived and travelled widely on both sea and land in the south (Te Wai Pounamu) and the remnant signs of their seasonal encampments are visible at the many midden (camp remains) sites. These are most common along the coast where some sites have been exposed by sea erosion.

The early Maori hunted many bird species including several of the moa species, kiwi as well as seals and other sea food (kai moana). The dog (kuri) and the rat (kiore) that they bought with them had huge impacts on the original fauna of New Zealand and possibly as many as forty bird species disappeared. In The Catlins today, Maori people of Waitaha, Ngati Mamoe and Ngai Tahu descent have ancestoral and SILNA (South Island Landless Native Act – 1906) land: **Source: http://www.catlins.org.nz/index.php?/site/iwi**

RECREATIONAL SITES

Camping grounds
Tramping and walking tracks
Nature trails
Picnic grounds
Freshwater fishing opportunities

CULTURAL SITES

Museums
Industrial and railway heritage
Historic buildings with architectural interest

NATURAL SITES

Rainforest
Subalpine tussock land
Wetlands and waterfalls
Scenic reserves and stops
Geological formations
Beech forest podocarp

Saltwater fishing services
Farm visits
Sports venues
Surfing
Lodges/retreats and education centres

Churches and cemeteries
Memorials and monuments
Lighthouses and landmarks
Shipwrecks sites
Archaeological sites
Maori heritage sites

Beaches and rocky shores
Sea caves
Estuaries (wading birds)
Sites to view penguins
Prominent marine mammal viewing sites
Oceanic bird viewing sites
General lookouts and vistas

Diagram - About The Catlins

PROCESS AND METHODOLOGY

1.3.1 Initiating The Review

In 2013, Catlins Coast Inc & Tourism Catlins Charitable Trust (on behalf of the local community), approached Venture Southland with a request to review the 2004 Catlins Tourism Strategy. It was agreed that a collaborative approach similar to the way the initial strategy was developed, was again required. A 'working review team' was developed to drive the review alongside consultant Anna Coleman.

Other key partners were invited to be a part of the working review team, however for a variety of reasons (e.g. resource constraints) they preferred to be kept informed as the process progressed rather than having 'hands on' involvement. They were all consulted as part of the research and methodology.

It is important to note that the original period of the 2004 strategy was intended to be ten years. There was a real desire by the community to understand what had happened in the ten year period since the original document was drafted with a view to identifying what was now required. Anecdotally the number of visitors had continued to dramatically increase, mirroring the growth of international awareness of The Catlins. Section 2 provides insights into what was achieved in the ten years since the original strategy, including the implementation plan (Appendix A).

1.3.2 The Methodology

Anna Coleman facilitated the process and the team met at key milestones, and also communicated regularly via e-mail and phone.
As this was a review of the 2004 Catlins Tourism Strategy, a mixed approach was adopted consisting of repeating and replicating as much of the original research undertaken back in 2003 as possible to enable comparisons to be made, while also undertaking additional research to ascertain the progress made actioning the strategy's recommendations. It is essential to understand key partners' current views and future aspirations with regard to the development and management of tourism of The Catlins and how the strategy reflects this.

In summary the methodology included the following:

1. Review key reference documents
2. Review of 2004 plan (what was achieved)
3. Repeat surveys undertaken in original strategy
    a. Visitor
    b. Resident
    c. Perception
    d. Business
4. Interviews with ten key partners
5. Analysis of the findings by an independent consultant
6. Development of a draft document for community consultation

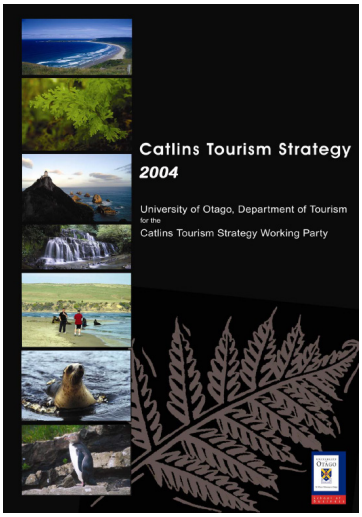
It is acknowledged that there has been a longer than anticipated delay from when the research was undertaken in 2014/15 through to when the draft document was prepared and presented to Catlins Coast Inc (late 2015/early 2016). During this period the number of visitors continued to significantly rise and a number of projects (particularly infrastructural) were undertaken and completed). In other words, while the document was not completed, the work continued, including potential projects mentioned in the implementation in Section 5.

In late 2015, the draft document was presented to Catlins Coast Inc and members reviewed it to ensure it was up to date and still relevant. They also added new projects and initiatives to the original findings to ensure it was the most up to date framework.

Therefore, it is seen as satisfactory that while the research referred to in Section 3 is not the most up-to-date, the information it provides is relevant and has provided the context to develop the framework as demonstrated in Sections 4 and 5.

Section 2: Reflecting Back

2.1 The 2004 Catlins Tourism Strategy



In 2003 the Catlins Tourism Strategy Working Party with the essential support of Venture Southland, the Clutha Economic Development Board and the Community Employment Group initiated the development of a tourism strategy. The group created the brief and contracted the Department of Tourism at the University of Otago to develop the Catlins Tourism Strategy in consultation with the Catlins Community, in response to growing concerns from the local Catlins community that without development planning, the quality aspects that make The Catlins an attractive place to visit and live in, maybe negatively affected.

The resulting community driven strategy (finalised in 2004) has, for the last ten (10) years, provided a sound framework to:

"…manage tourism growth and maximize opportunities for the community, wildlife and the environment."

Through to this present day the Strategy continues to guide tourism development and planning in The Catlins. However, many of the strategy's recommendations have been completed, and there have been numerous societal and environmental changes not reflected in the current Strategy that need to be, so it was considered timely to review the strategy ensuring tourism development in The Catlins can continue to be effectively managed.

2.2 What Was Achieved?

A key recommendation from the 2004 strategy was the need to unite both North and South Catlins communities which straddled the Southland and Clutha District Councils and up till then had been operating somewhat independently of each other. Visitors to The Catlins did not see the boundaries and identified with the brand 'The Catlins'. The community understood the need to work together in terms of promoting the area as the visitor destination it was growing into. The Tourism Catlins Charitable Trust was established and this later evolved into Catlins Coast Inc. With members from both north and south Catlins, the group expanded to also include members from inland Catlins or Mokoreta.

The formation of this community group was important because it became the key organization responsible for driving the implementation of the 2004 strategy. The original strategy included an implementation plan which detailed 91 key recommendations of varying priorities linked to various aspects of development e.g. infrastructure, promotion, community, signage etc.

During the past ten (10) years, the community has successfully actioned 80 of the 91 recommendations (see Appendix A). Section 5 also demonstrates key projects achieved with a view to understanding progress to date and what the next steps are to build on this.

Besides the unification of the community, other key milestones were achieved, particularly related to infrastructure with the sealing of the Southern Scenic Route (main highway through the area), numerous upgrades to the provision of public toilets and other amenities and improved cell phone coverage and internet access. Tourism Catlins/Catlins Coast Inc were also instrumental in developing an "Interpretation Plan".This plan looked at the types of signage required for consistency throughout the region, sites that required interpretation, etc. Projects that have come out of this include upgrades at Nugget Point (DOC), Catlins Lake, Fortrose, Florence Hill and Lake Wilkie (DOC) with many more planned.

Section 3: The Current Situation

3.1 Literature Review

Key reference and planning documents prepared by stakeholders and key partners, were reviewed in order to gain insights into their vision and plan for The Catlins. It was also hoped to ensure strategic alignment and to capture collaborative opportunities.

What became apparent was that there was a high level of awareness of The Catlins and particularly an awareness of it straddling two territorial council boundaries. The Department of Conservation had identified the need to manage the area as a whole and altered existing boundaries and structures accordingly.

The key partner interviews proved very insightful and complemented the literature review. Key partners talked about the planning documents which outlined their approach to the area and in many cases, the level and type of resource allocated. There had been a significant increase in investment in the area which was reflected in some plans and this is also reflected in the number of infrastructural projects undertaken and planned. What was appealing about the review of The Catlins Tourism Strategy was that it was still 'community driven' and understanding the perspective of the community was extremely useful for many key partners. See Section 3.2.5 for further insights.

Other visitor strategies and tourism documents were also reviewed to ensure that there was alignment where possible and an understanding of the wider picture.

3.2 Survey Highlights

Beginning in the summer of 2014 and ending in November 2014 the following research was undertaken:

Visitor Survey	**An onsite survey of 260 domestic and international visitors**
Resident Survey	**A postal survey of 1000 residents which received 194 responses**
Perception Survey	**An onsite survey of 322 non visitors to The Catlins in Dunedin and Te Anau**
Business Survey	**A postal survey examining businesses involvement with and perceptions of tourism, and tourism growth.**
Key Partner Interviews	**Ten face to face interviews with representatives from organisations involved in The Catlins to ascertain their views about tourism in the area.**
Review of the 2004 Strategy's Implementation Plan	**A desk based review to determine the level of progress made actioning the Implementation Plans recommendations.**

The following sections provide a snapshot of key findings. The full research findings are compiled in a separate supplementary research report which is available on request from Venture Southland. The main purpose of undertaking such a wide variety of research was to gain a thorough understanding of tourism from different perspectives; e.g. the perspective of the visitor through to the local community and those involved in looking after the area.

3.2.1 Visitor Survey

OBJECTIVE: To gauge the level and nature of visitation, including key characteristics of visitors, both domestic and international.

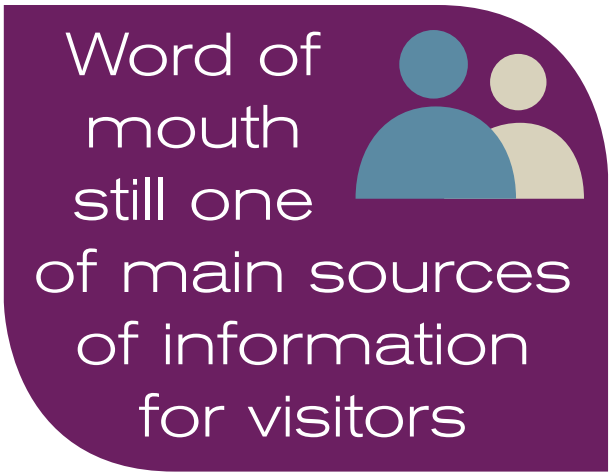
Areas focused on were: demographics, travel characteristics, travel to The Catlins region, and use of tourist services within The Catlins. Five interviewers located at three key locations through The Catlins interviewed 260 visitors over a three month period. It is acknowledged that there are some limitations to this research and its methodology. For example, some interviewers were located at the Cathedral Caves, which then featured as a major attraction in results and also the sample size. However, the findings do provide useful insights, particularly when considering alongside other national statistics and research and should therefore be treated as such.

Demographics

- A larger proportion of visitors in 2012 were female (72.3% Domestic and 58.8% International)
- Domestic visitors tend to be older (50+) compared to international visitors who are mainly under 34 years old.
- As in 2004, the majority of international visitors come from Germany, United Kingdom and Australia.

Travel Characteristics (based on both domestic and international visitors)

- The Cathedral Caves are a major attraction with both markets, placing it in their top three 'Most Liked' aspects of their trip to The Catlins. There were comments about access to the caves and also knowing when was the best time to access them (and where to find this information).
- The quality of the roads was a notable 'Least Liked' aspects for both groups.
- Both placed importance on wildlife viewing, viewing scenery, and experiencing new and exciting things, and were less concerned with developing skills and abilities, and the lack of internet and cell phone coverage. This was a surprising change from original research in 2003/2004. Visitors were less satisfied with the cell phone coverage and internet access but did not appear to be put off by the lack of telecommunications.
- International visitors have a significantly greater interest in wildlife viewing compared with domestic visitors.
- Word of mouth is still one of the main sources of information for both visitors
- Domestic visitors prefer to use local websites, while international visitors prefer regional and national websites.

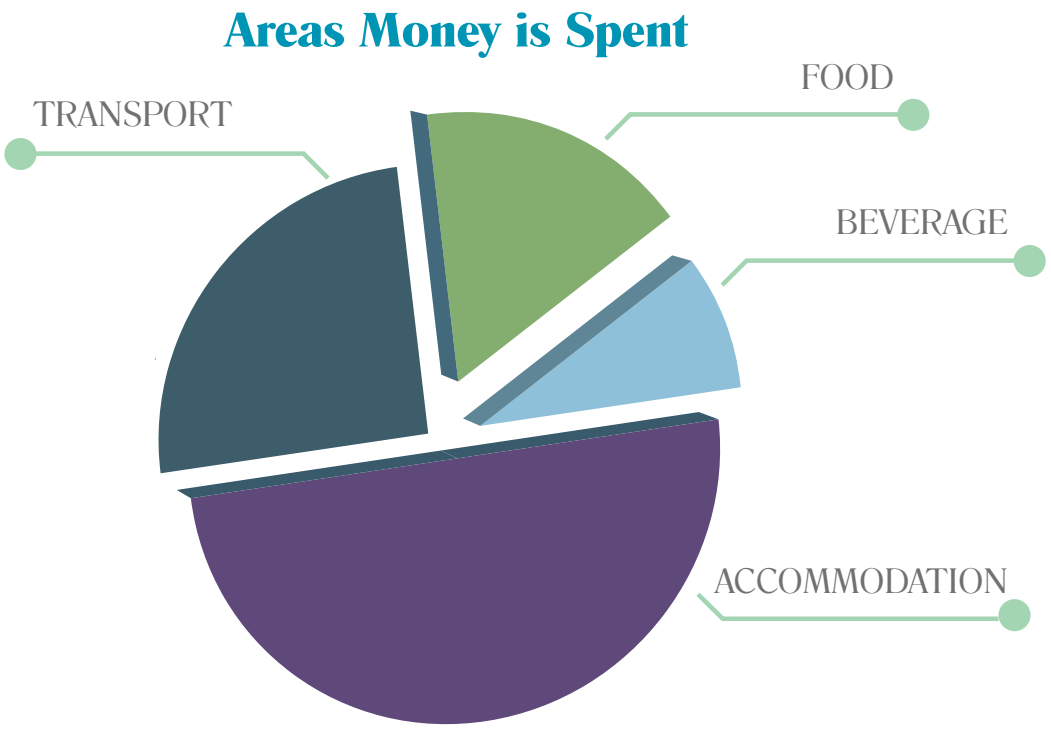


Travel to The Catlins

- Visitors tend to travel with their partners. Domestic visitors tend to be family groups, while international visitors often were travelling with friends.
- Visitors tend to travel to The Catlins in small groups, normally of two, and mainly less than four.
- There is a higher return visit rate for the domestic visitor, with 50% of domestic respondents being first time visitors, as opposed to 87% of international respondents.
- Both visitors were inclined to stay overnight, rather than making a day trip. While it could not be proven, it appeared that visitors' length of stay was longer than results found in 2004 which may be reflecting more accommodation or more visitors.
- Domestic visitors prefer camping grounds, self contained motorhomes, and motels; while international visitors prefer camping grounds, and self contained motorhomes. A higher percentage of international visitors used backpacker accommodation and referred to themselves as 'freedom campers'. This is similar to findings from 2004.
- Cars and motorhomes were the most popular forms of transport for both markets. Although it cannot be proven in this research, there are questions around whether there are in fact fewer people choosing to travel in the area in buses. Cycling as a mode of transportation did not feature significantly in this research, but it is questioned whether this may have changed more recently with the growth in cycle trails throughout the country.

Use of Tourist Services in The Catlins

- Visitors chose to participate in walks and wildlife viewing, with international visitors tending to view more wildlife.
- Both markets were less interested in farm tours
- Both markets were satisfied with the friendliness of the locals, the environment and wildlife, attractions and activities in the region and the visitor information provided.
- They were less satisfied with the cell phone coverage and internet access.
- Over 70% of both markets were satisfied with the eating establishments available, however international visitors were slightly less satisfied.
- Both markets spent the largest amount of money on accommodation followed by transport, food and beverage.



3.2.2 Residents' Survey

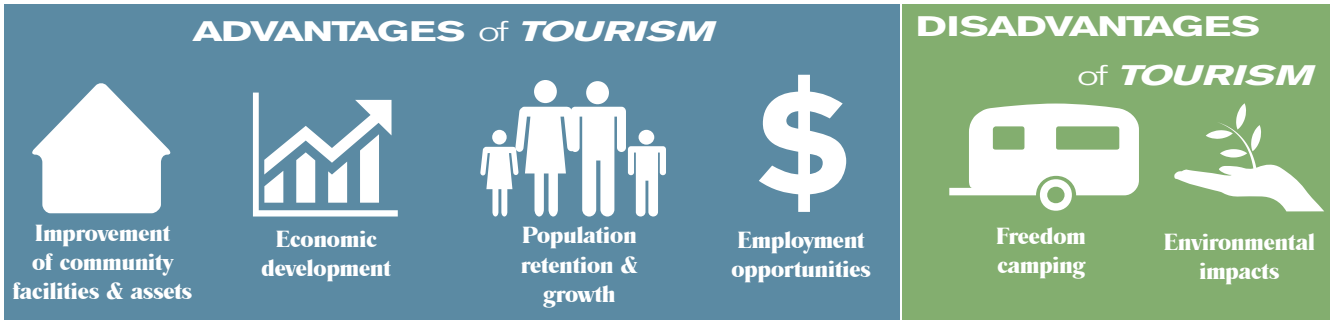
OBJECTIVE: To gauge an understanding of how residents of The Catlins perceive tourism and tourism planning to date (particularly since the original 2004 Tourism Strategy).

Residents of The Catlins area were asked to respond to questions in relation to three main areas: demographics, perceptions of tourism, and tourism planning in The Catlins. Approximately 1000 residents were sent a postal survey and 194 responses were received. The quality and length of some responses were pleasing and extremely useful.

Demographics
Respondents tended to be females over the age of 45, showing an increase in the average age of respondents compared with 2004. Although this could also reflect the person who filled in the survey form. Over half the respondents were self employed working in the agricultural industry.

Perceptions of Tourism
Respondents believed they had a slightly less day-to-day contact and involvement with tourism than in 2004, however a significant increase in the desire for tourism is apparent.

Tourism Advantages
Similar to 2004, employment opportunities, improvement of community facilities and assets, economic development, and population retention and growth, were still viewed as the most important tourism advantages.



Tourism Impact
There has been a visible shift with 'environmental impacts' dropping from the most important impact in 2004 to sixth place in 2014. Freedom camping remains a major issue within the region and was by far the most significant disadvantage as seen by residents.

Communication Methods
Residents were asked how they prefer to stay in touch and communicate. Technology has greatly influenced the methods of communication deemed appropriate, with emails and newsletters, proving to be popular and growing since 2004 while more traditional forms such as information sheets and public meetings are still valued.

Economic Development Opportunities
In 2004 respondents expressed a strong desire to continue to explore opportunities to develop and diversify agricultural and forestry industries. Tourism was also mentioned but not to the extent of diversity in the farming economy. In 2014, there is a distinct change with tourism now viewed more positively.

Development Issues
There appears to be a shift in priorities by residents with cell phone coverage and access to broadband internet being deemed the most important issue to develop. Traditional issues such as waste disposal, roading and emergency services are still crucial and featured in responses, however, not to the level of telecommunications.

Tourism Effects on The Catlins
A high level of importance was placed upon infrastructure development, including accommodation, recreational walks, and heritage, within the region for tourism. The environmental issues prominent in 2004 seem to have made way for these effects. There was a desire from residents to now look at how to make the most of tourism by developing products and also ensuring tourists' needs are met.

Stakeholder Involvement
The host community, economic development entities, and regional tourism authorities all indicated an increased desire for involvement in planning by the community.

3.2.3 Perception Survey

OBJECTIVE: To understand what types of people are not visiting The Catlins and their perceptions of The Catlins.

Three interviewers located in Dunedin and Te Anau interviewed 322 tourists who had not (or did not intend to) visit The Catlins. Again, it is acknowledged that there are some limitations to this research and its methodology, namely the small sample size and the threat that this sample would not truly reflect a significant majority of visitors. This was meant to provide insights about The Catlins and overall awareness and perception. While there were some interesting findings regarding a lack of knowledge of The Catlins within domestic visitors in particular, there were some promising findings, which indicate that The Catlins could provide the type of visitor experience they were after.

Profile

- Slightly more female respondents than in 2004 were interviewed.
- As in 2004, there were two distinct age markets represented the majority of domestic visitors tending to be older (30-44 years) than international visitors (20-29 years).
- As in 2004, domestic visitors had shorter trips compared to international visitors
- There was a marked difference in marital status between the two markets with more international visitors being single.

Perception of The Catlins

- Out of those interviewed, there was a decrease in domestic respondents' knowledge of The Catlins region compared to 2004. This was consistent for Dunedin and Te Anau and it did not change depending on where the domestic visitor came from.
- Awareness of activities and attractions provided in the region has dropped significantly for both markets since 2004.
- Significantly fewer domestic tourists intend to travel to The Catlins than in 2004.
- The main reason for both markets to travel to the area was on recommendations by others, with lack of time remaining the main reason for not travelling to the area.
- The main source of information remains family and friends for the domestic market, and guidebooks for the international market.

Characteristics of Planned Trip

- Eating out and shopping, two activities not widely found in The Catlins were the two top activities that both markets intended to engage in during their trip.
- There has been a shift in the nature based activities undertaken by each market, with wildlife viewing now being within both markets top three activities as opposed to bush and beach walks.

The Catlins compared to other Southland/Otago Destinations

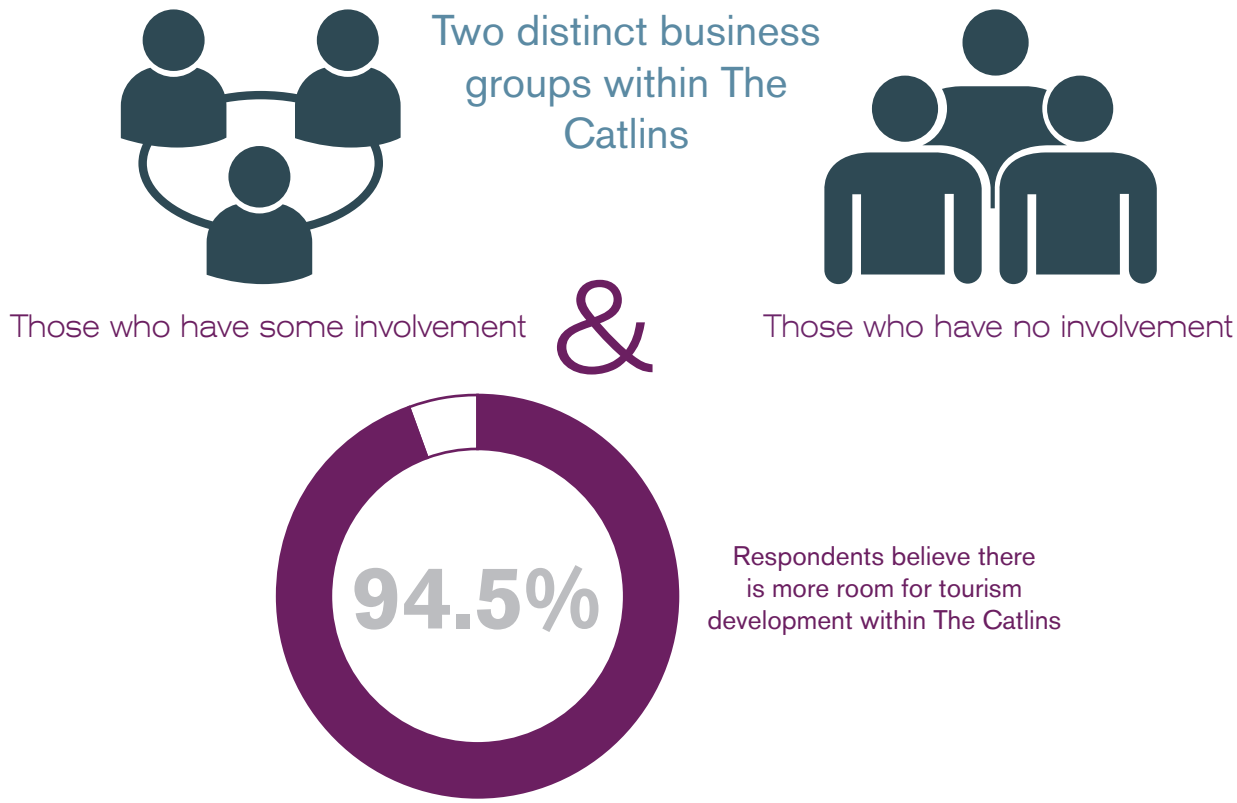
- Overall perceptions of competing destinations remain the same as in 2004.
- There has been a shift in how both markets perceive The Catlins in 2014 with an increase in the perception of good and very good wildlife and water attractions, with domestic markets also mentioning an increased perception of cultural attractions.
- Roading is now a significant trip element for domestic visitors.

3.2.4 Business Survey

OBJECTIVE: To gauge an understanding of how residents of The Catlins perceive tourism and tourism planning to date (particularly since the original 2004 Tourism Strategy).

A survey was emailed out to all businesses within The Catlins region to gain insights into: their level of involvement in tourism, their perception of tourism and tourism growth in the region and their challenges for sustainable tourism growth.

There were two distinct business groups in the area – those who have some involvement in the tourism industry and those who have nothing to do with it e.g. agricultural and forestry businesses. It was not able to identify the types of businesses who identified as being part of the tourism industry or those who identified with more than one industry.



Suggestions for growth in The Catlins focused around targeting specific markets and developing certain infrastructure. There was also strong comment similar to the resident survey regarding improving telecommunications, including cell coverage and internet connection and quality from all businesses. Comments were around the need for these services in order to be able to effectively run a business and do things such as online bookings, pay staff with internet banking etc.

Challenges to sustainable growth in The Catlins include the lack of capital, facilities and finding a way to extend the tourism season. There were also comments around lack of staff accommodation and the ability to attract seasonal staff when required. Other comments noted the extra costs to operate in The Catlins including distance from essential services and extra costs to be included in the price passed on to visitors.

3.2.5 Key Partner Interviews

OBJECTIVE: To gauge an understanding of how key partners and stakeholders of The Catlins perceive tourism and tourism planning to date (particularly since the original 2004 Tourism Strategy).

Only ten organisations were interviewed by Anna Coleman in 2014 to gain an understanding of their perspective regarding The Catlins. These organisations displayed below, were asked about the most significant successes and or positive changes over the past ten years and what they believe still remains a priority including perceived threats and opportunities. The interviews were extremely informative and provided a lot of detailed insights. Overwhelmingly there was a high level of positivity regarding the planning and community driven approach to managing The Catlins and a desire for the high level of collaboration to continue. While some things certainly featured as having evolved positively in the past ten years, these same things were then listed as still remaining a priority to be addressed.

So from the perspective of these stakeholders, a lot of positive progress, but still more to achieve.
The following summarises key findings from all interviews:

People First Southland District Council Te Rohe Pōtae O Murihiku

South Catlins Promotions Inc

Clutha District Council

Catlins Promotions Inc

Clutha Development

Awarua Runanga

environment SOUTHLAND Te Taiao Tonga

Wai Koau Ngai Tahu

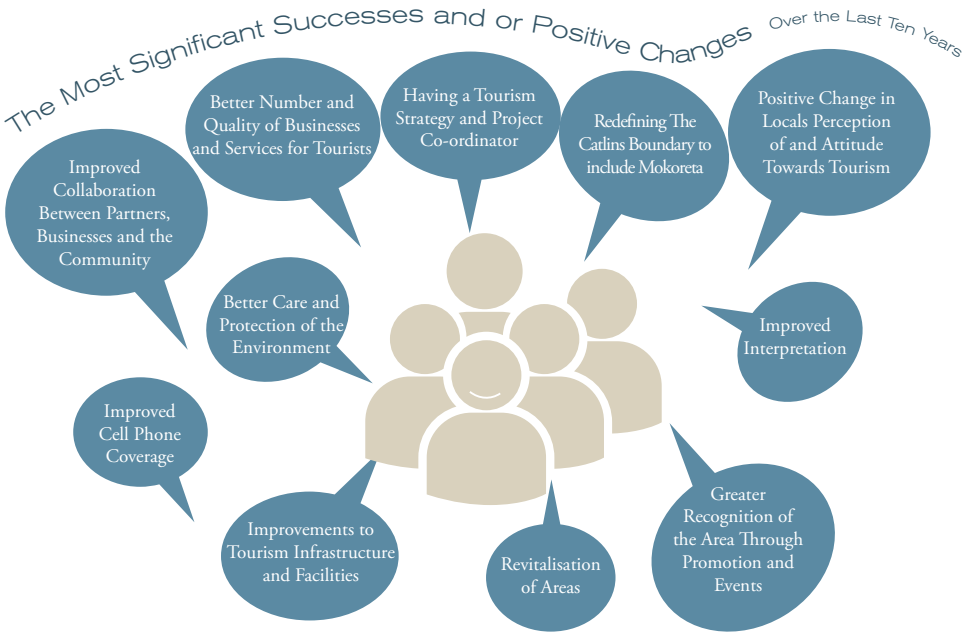
Venture Southland Business • Tourism • Community • Events

Te Ao Marama Inc.

Department of Conservation Te Papa Atawhai

The most significant successes and or positive changes over the last ten years

- Positive change in locals' perception of and attitude towards tourism, including a high level of acceptance
- Improved interpretation and celebration of local heritage, stories and the environment
- Better number and quality of businesses and services for tourists
- Improvements to tourism infrastructure and facilities
- Better care and protection of the environment
- Improved cell phone coverage
- Having a tourism strategy and an employed 'project coordinator'
- Greater recognition of the area through promotion and events
- Improved collaboration between partners, businesses and the community
- Revitalisation of areas and some communities
- Redefining The Catlins boundary to include Mokoreta



What Still Needs to be Addressed or Remain a Priority:

- Strategic planning for tourism
- Infrastructural improvements (toilets, waste management, roading, signage etc.)
- Adopting a "Whole of Catlins" approach
- An effective collaborative approach by all
- Creating a more sustainable structure for community groups
- Tourist 'word of mouth' promotions
- More support for existing and new businesses
- Management of and provision for freedom camping
- Improving cell phone coverage and internet access
- Sustainable environmental management and education
- Identification, education and promotion of cultural aspects to locals and tourists
- Creating a return on investment
- More walking and biking opportunities
- More regular and robust visitor information
- Community involvement with the revised strategy
- Better use of the Southern Scenic Route
- Improved emergency services
- Preservation of Mahinga Kai

Vision for the Area

- The partners' respective visions for the area are similar, with all partners stating a desire to work collaboratively to support the community, businesses and operators to grow tourism while protecting and preserving the natural environment that is the very essence of The Catlins area.

Views on Collaboration
There is a very strong desire and willingness among partners to work collaboratively, which was reinforced when they mentioned their upcoming plans, projects and priorities for the area, many of which already were collaborative initiatives.

Perceived Threats
- Inconsistent standards and unrealistic promotions by operators
- Unsustainable community input – risk of 'burnout'
- Ageing and inadequate infrastructure
- Environment, sea life and wildlife damage
- The temptation to 'kill the golden goose' - overdevelopment
- Increasing tourist numbers not effectively managed
- Limited return on investment
- Global and national impacts that negatively affect tourism
- Being perceived as an unsafe place to visit, because of its isolation

Perceived Opportunities
- Adopting a more collaborative approach
- Completion of projects currently underway
- Increasing returns on investment
- Improving the standard and number of local businesses
- Strengthen community spirit and the sustainability of community groups
- Improving infrastructure and facilities
- Better promotion and utilisation of community resources
- Further enhancement, promotion and utilisation of walking and biking tracks
- Sustainable environment management
- Protection of The Catlins 'point of difference'
- Further improve locals appreciation and understanding of tourism
- Grow eco and cultural tourism
- Increase the number of events/festivals and the effectiveness of promotions

Usefulness of the 2004 Catlins Tourism Strategy
Four of the partners found the current Catlins Tourism Strategy useful, one found it somewhat useful, and five weren't currently utilising it, but were aware of its existence.

Partners want the revised Catlins Tourism Strategy to be a living document that has:
- A shared vision and key themes
- Emphasis on the natural value of the area, preserving its 'point of difference'
- Emphasis on working collaboratively with strategic alignment
- Emphasis on creating a return on investment
- Emphasis on capacity building
- Clear guidance and direction for implementation
- Robust accountability
- Simple language and realistic aspirations
- Reflection and forward planning
- A balanced approach considering community, environmental and tourism needs
- Greater recognition, consultation and acknowledgement of mana whenua

Research
A range of research is being carried out by partners that could form a useful series of indicators, and partners are interested in working collaboratively to address research gaps. There was an acknowledgement of the need to firstly assess what data is required and to explore options for acquiring it, with a desire for regular data being captured around:
- Visitor Information - numbers, trends, directions, visitor flow
- Cultural tourism opportunities
- Environmental monitoring and education
- Road related data - vehicle count, types, directional information
- Monitoring of service standards
- Behavioural research
- Economic opportunities
- Community needs, satisfactions and perceptions

Waipapa Point

3.3 Latest 2015/2016 Visitor Statistics

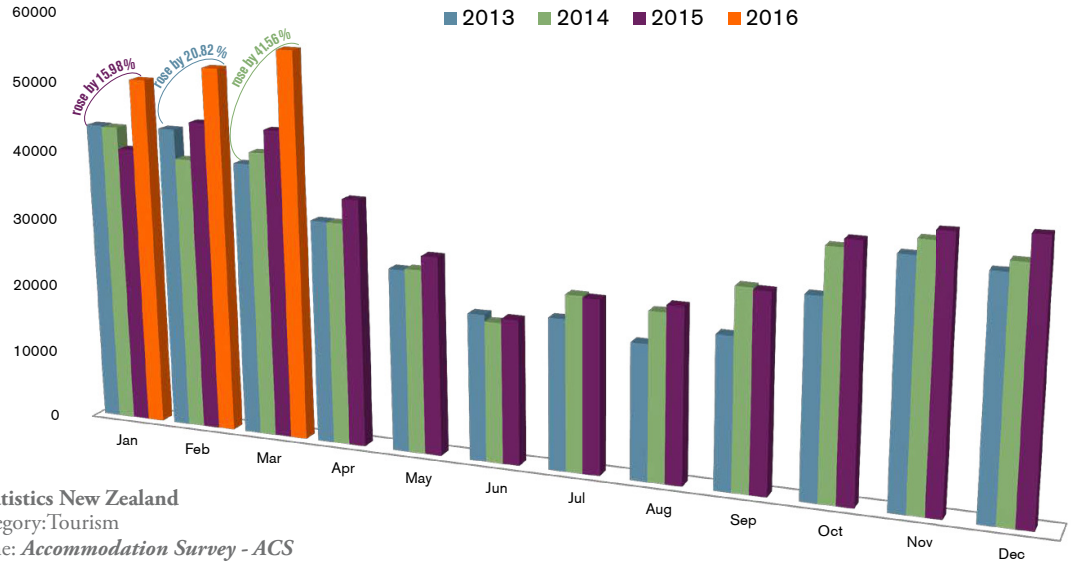
DOMESTIC VISITORS [in comparison to] INTERNATIONAL VISITORS

72.3% The female % of visitors 58.8%

Family Common travelling groups Friends

SOUTHLAND RTO

Southland RTO Total Guest Nights - latest four years

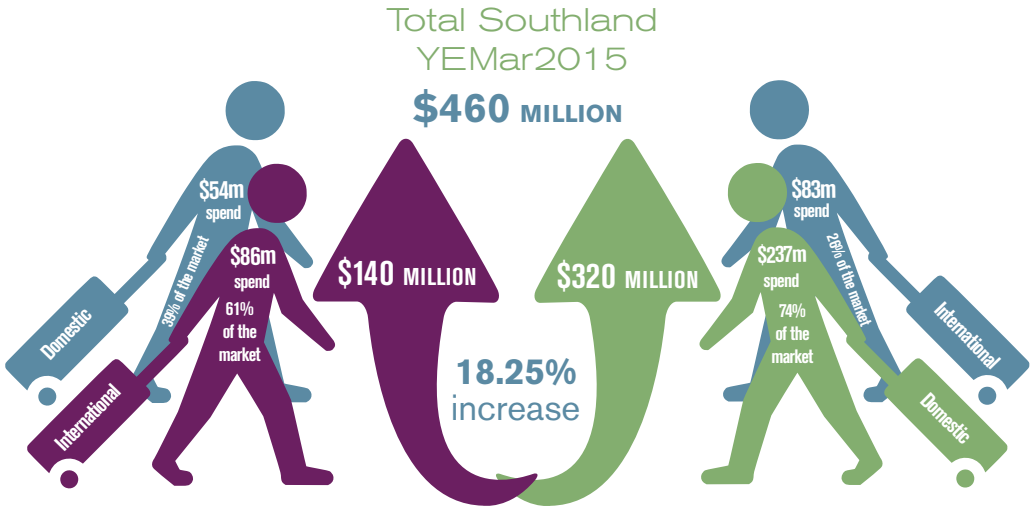


Source: Statistics New Zealand
Subject category: Tourism
Survey name: ***Accommodation Survey - ACS***

Expenditure Southland (Fiordland & Southland)

Continued robust growth in domestic visitation is being complemented by a substantial increase in the number of international travellers taking in the Southland experience.

FIORDLAND in comparison to SOUTHLAND



4.1 The Vision

The Catlins is one of New Zealand's most popular eco tourism destinations with a thriving community, wildlife and environment that are respected and cared for by all.

4.2 The Purpose And Guiding Statement

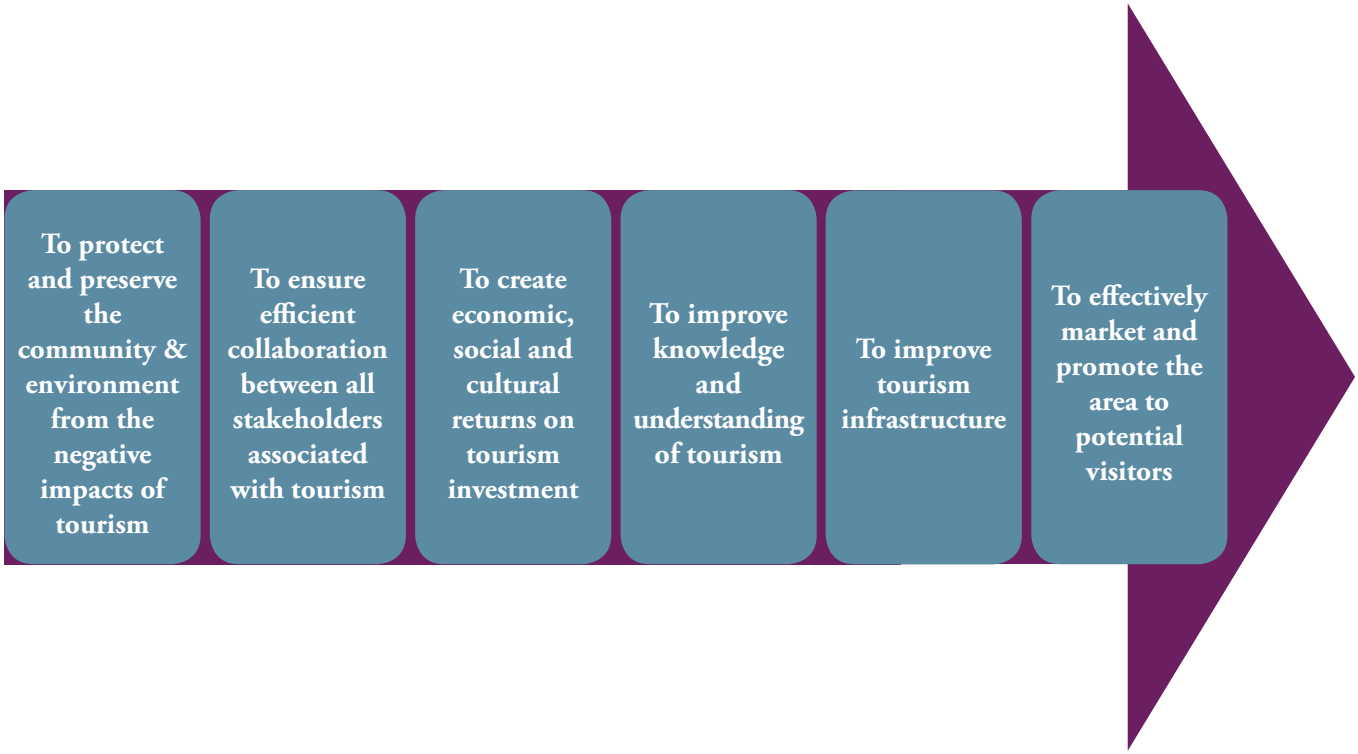
To manage tourism growth and maximise opportunities for the future while maintaining and protecting the integrity of the community, wildlife, and the environment.

4.3 Key Principles Underpinning The New Framework

- It reflects the continuation of a "Whole of Catlins" approach
- It is a 'living' document which can evolve as required
- Its purpose is to guide and direct
- Simplicity and common sense are essential
- It aims to celebrate success

4.4 Six Goals

Six key goals have been identified based on the original 2004 Catlins Tourism Strategy and the research and surveys undertaken:



4.5 A New Strategic Framework

The strategic framework from 2004 was revised in order to ensure that the recommendations within it can be implemented. Reviewed and confirmed, the vision remains the same, but the goals and the objectives altered based on feedback from surveys and key partner interviews. Monitoring and evaluation are seen as essential moving forward.

The table below summarises the vision, purpose and key principles. It also details the new goals and shows how the objectives from 2004 are still relevant and align with new goals. This ensures continuity.

VISION

The Catlins is one of New Zealand's most popular eco-tourism destinations with a thriving community, wildlife and environment that are respected and cared for by all.

PURPOSE

To encourage and enable tourism growth along with protecting and preserving The Catlin's community, wildlife and environment.

KEY PRINCIPLES

- Whole of Catlins approach
- A 'living' document to evolve as requiered
- Guide and direct
- Simplicity & common sense
- Celebrate success

GOALS

To protect and preserve the community and environment from the negative impacts of tourism.	To ensure efficient collaboration between all partners.	To create economic, social and cultural returns on tourism investment.	To improve knowledge and understanding of tourism.	To improve tourism infrastructure.	To effectively market and promote the area to potential visitors.
#2	#1	#3 & #4	#7	#5, #6, #8 & #10	#9

OBJECTIVES FROM 2004 STRATEGY

#1 To provide for the implementation of The Catlins Tourism Strategy through the development of an appropriate body (or bodies) with appropriate mandate, representation and funding.

#2 To provide for the absolute protection of the natural and cultural resources that are integral to Catlins tourism from the negative physical impacts of tourism.

#3 To optimise the value of tourism for local residents, including social and economic benefits.

#4 To develop opportunities to enhance the existing visitor experience, in terms of attractions and activities.

#5 To optimise information flow to visitors in The Catlins through the provision of appropriate signage, information, interpretation and associated services.

#6 To cater for the hospitality service needs of The Catlins tourist through provision of appropriate accommodation and food services.

#7 To learn more about the visitor and their relationship with the community and the environment in The Catlins.

#8 To ensure that the infrastructural requirements of The Catlins tourism industry are addressed.

#9 To match the visitor with The Catlins tourism product through appropriate marketing and promotion.

#10 To assist The Catlins tourism operators (and associated services) to achieve an outstanding level of service to their clients

4.6 Monitoring And Evaluation

Regular ongoing monitoring and evaluation will be essential to ensuring the strategy is achieving what it set out to do, and will occur at multiple levels.

Creating a collaborative monitoring and evaluation plan has been included as an action in the implementation plan, which will see all partners coming together to determine data that is already being captured through the district, region, and even on a national scale that will be of benefit, and to determine the most effective ways to obtain desired data not currently being captured.

Implementation monitoring will also occur by regularly reporting on a series of 'Monitoring Measures' and 'Key Performance Indicators' (KPI's) within the strategy's implementation plan.

4.7 Strategy Review Cycle

Given the dynamic nature of tourism, the Strategy will be reviewed every ten years, with the next review scheduled to commence in 2025 to be completed by 2026.

4.8 Implementation

'How to make it happen'

There are two approaches to achieving the six identified goals outlined above – both of which complement each other. They also need to be complemented with a management structure and allocation of resources to implement.

The first approach requires the development of a detailed implementation plan which would consist of a series of focused strategies and actions to:

- Guide and direct implementation
- Give effect to the goals and help achieve the objectives
- Identify each partner's respective responsibilities
- Specify target completion dates and key performance indicators

An example and explanation of how to potentially structure the plan is suggested below. It is anticipated that this would be a key role of the advisory group or subcomittee tasked with implementing the strategy.

GOAL 4: To Improve Tourism Infrastructure and Services

Objectives (just examples)

1. To improve the physical infrastructure such as roading and waste management etc. critical to tourism
2. To optimise information flow to visitors through the provision of appropriate signage, interpretation and associated services.
3. To cater for the visitors' hospitality service needs through provision of appropriate accommodation and food services.
4. To assist all operators and service providers to achieve consistently high levels of service.

EXAMPLE

Strategy Number	Strategy/ Project	Lead Partner	Actions	Year 1-4/ High-Low	Funding	Monitoring Measure KPI
Generic example	E.g. Develop and Implement a physical infrastructure improvement plan	Venture Southland Support Partners: CDC, SDC, ICC, ES, DOC etc.	• Relevant partners meet to document all physical infrastructure requirements, identify those already scheduled to commence and develop criteria to aid with prioritising those remaining, considering urgency, impact on tourism, safety, likelihood of funding etc. • Finalise plan and start actioning • Review plan at the end of each year	1	Within existing budgets	Plan produced Plan annually reviewed

EXAMPLE

The second approach identifies four key sections which the goals (and various projects and initiatives to achieve these goals) fit into:

- Product development
- Infrastructure
- Promotion and marketing
- Environment and heritage

Section 5 provides detailed information about these sections and projects.

4.9 A Suggested Management Structure

The following management structure is suggested to be considered and adopted to oversee and implement the strategy, ensuring the collaborative approach taken to revise the strategy remains and maximum collective impact can be achieved. Please note the following management structure is a work in progress. Feedback is encouraged and welcomed and at the time of producing this document, stakeholders had not been consulted.

4.9.1 Memorandum Of Understanding

Both governance and operational representatives from all partner organisations will sign a Memorandum of Understanding (MoU) formalising and reinforcing their collective commitment to working collaboratively to implement the strategy.

4.9.2 Catlins Coast Inc

Catlins Coast Inc was established with the express purpose of implementing the strategy. During the investigation process, it was suggested that like-minded groups could potentially have a robust working in alliance with this group, thus providing a more unified approach for the area presented. In addition, such alliance would avoid unnecessary duplication of meeting attendance and reporting. In order to best utilise the expertise of this enlarged group, four sub-committees would need to be formed, each one working on one of four key section identified in the strategy.

The subcommittees would be:

1. Product Development (includes events, working with local communities and businesses, Venture Southland and Clutha Development)
2. Infrastructure (strong connection with local government and DOC)
3. Promotion and marketing (produces brochure, website, tear-off maps, etc... working closely with Venture Southland and Clutha Development)
4. Environment and heritage (working closely with DOC, Iwi and councils)

Catlins Coast, Inc would serve as a unifying overarching entity. Section 5 provides more information about the key sections of the strategy.

4.9.3 Advisory Group Established

It is also suggested that consideration be given to establishing an advisory group. This group, which has a manageable number of members, would aim to provide high level strategic governance, guidance and input. It could possibly meet once a year and could have representatives from the following, but not limited to:

- Catlins Coast Incorporated (more than 1 person to ensure local community are appropriately represented)
- Southland District Council
- Environment Southland
- Clutha District Council
- Department of Conservation
- Awarua Runanga
- Otago Regional Council
- Venture Southland
- Clutha Development Inc.
- South Catlins Promotion
- Catlins Promotion Inc.

4.9.4 Project Coordinator

An integral reason for the success of the original Catlins Tourism Strategy can be attributed to the project coordinator who was employed for 20 hours a week by Tourism Catlins/Catlins Coast Inc. This person was the 'arms and legs' of the community and while managed by Tourism Catlins/Catlins Coast Inc, they were responsible for coordinating the implementation of the strategy. It is highly recommended that this role continue with this function and if possible, the hours per week be extended to ensure higher productivity and quicker timeframes to achieve goals. This person will:

- Support Catlins Coast Inc to implement the strategy
- Organise the advisory group (4.9.3), subcomittee (4.9.2) and community hui (4.9.5) meetings
- Ensure implementation momentum is maintained or enhanced
- Maintain a broad overview of implementation progress

4.9.5 Regular Community Hui

An open community hui will be held every six months, combined with annual advisory meeting linked in with the AGM at Catlins Coast; where both advisory group and subcomittee members will report on implementation progress to the wider community, to keep them informed, celebrate success and ensure they have the opportunity to provide input, have involvement, and raise any concerns, enabling the strategy to be a 'Living Document' that is responsive to community needs. The hui will also create an effective platform for other community development opportunities.

Section 5: Implementing By Section

Four key sections have been identified as follows:

- Product development
- Infrastructure
- Promotion and marketing
- Environment and heritage

This section provides information about what has been achieved in the past ten years, what the current goals and objectives are and the focus for the next ten years (including the identification of key projects).

Curio Bay

Product Development

Product development in The Catlins is a key focus and will optimise the value of Tourism for the local community. Key projects will be supported relating to heritage, walking, cycling, iwi, and interpretation. Local business growth is important, as is understanding challenges such as seasonality, staff and accommodation shortages and increased costs due to geographic location.

ACHIEVED IN THE LAST TEN YEARS BY CATLINS COMMUNITY

Greater recognition of the area through promotion and a programme of events
- Catlins Coastal Walk, Catlins Great Escape, Pawakataka Trail, Tri Pounawea, Catlins Coastal Challenge.

The development of major projects
- Nugget Point, Owaka Information and Heritage Centre, Waipapa Point.

Worked with partners to develop walking tracks
- Waipohatu, Curio Bay Living Forest, Catlins River Wisp Loop Track, Matai Railway Walk.

Improved interpretation panels
- Florence Hill, Waipapa Point, Catlins Lake and Papatowai and entry point kiosks at Fortrose and Telford.

Enhancement of key attraction,cataloguing of new Maori collections at Owaka and Waikawa and Districts museums.

Owaka Waka Project

'Our Hut' Project Tahakopa

Tokanui Skate Park

> "95% of all businesses believe there is room for more development in The Catlins"

CURRENT GOALS

1 To optimise the **value of tourism** for the local community (including businesses), including social and economic benefits.

2 To develop opportunities to **enhance the visitor's experience**, in terms of providing attractions and activities to meet their needs and expectations.

3 To **support local operators** and enhance their product and service, by ensuring they have opportunities to be up-skilled and educated.

4 Support the provision of product, infrastructure and facilities which **enhance the quality of life** for local residents.

5 To develop and enhance product which preserves and **celebrates local heritage**, stories and the overall uniqueness of The Catlins.

Focus for the next ten years

Support Development of Tourism, Heritage & Iwi Projects

- Curio Bay Natural Heritage Visitor Centre and overall upgrade of the Curio Bay area and associated infrastructure (car parking, waste water, walking tracks, interpretation).
- Support the Kaitiaki Southland Coastal Heritage Inventory Project that includes identifying, managing, protecting and enhancing coastal heritage.
- Look at bilingual place names throughout the area.
- Cathedral Caves
- Support local organisations to continue to preserve, celebrate and promote local heritage (Owaka & Waikawa Museums).
- Long Point/ Irahuka Seabird Project

RESEARCH FEEDBACK

Visitors interested in Maori culture and Maori/iwi stakeholders provided feedback that they wanted to develop more maori product e.g. maori mythology, identifying areas significant to iwi, bilingual place signs.

Development of Walking & Cycling Tracks

- **The Catlins Cycle Trail** – investigate the development of a cycle trail (or network of trails) in the area which could link to other trails in the region (Around the Mountains Cycle Trail and Clutha Gold Trail) or Invercargill, Balclutha and Gore
- **Catlins Coastal Walk** – developing a coastal walk along The Catlins coast
- Multi-Day **Inland Forest Walk**
- **Possumers Track - upgrade**
- **Curio Bay Living Forest Walkway** – continue to support the local community to develop a walkway through a living replica of a 180 million year old petrified forest (the only example in the world where they can be found side by side)
- Partnership with DOC and local community to maintain existing tracks e.g. Waipohatu, Catlins River Wisp Loop Track, Matai Railway Walk

RESEARCH FEEDBACK

Visitors' attention drawn by key products, e.g. Milford Track, was mentioned as the reason why NZ tourists chose not to go to The Catlins. The Catlins has limited 'major' products currently to compete.

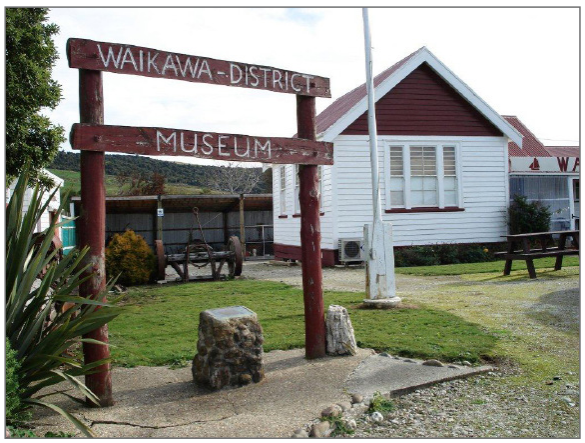
Artist's impression of Curio Bay Natural Heritage Visitor Centre

Waka project at Owaka

Cycling & Walking in The Catlins

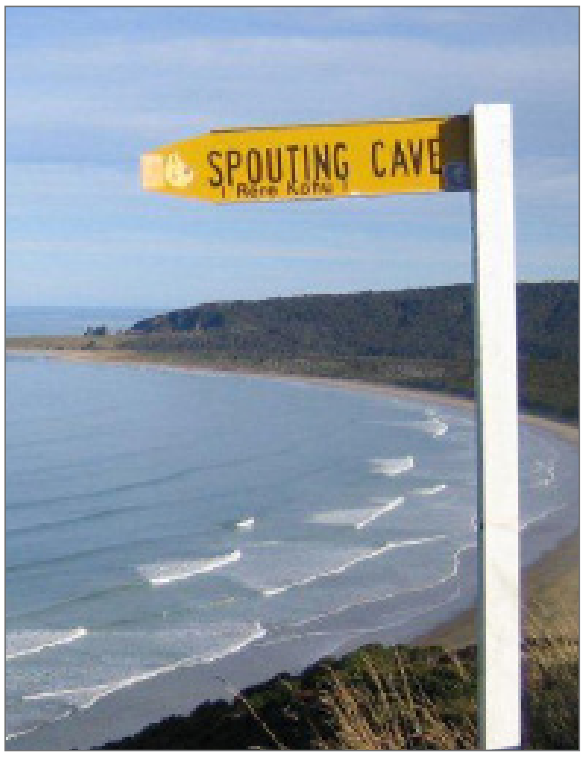
Tautuku Bay Florence Hill

Fortrose Shore



Waikawa and District Museum

Florence Hill interpretation panels



Spouting Caves bilingual signpost

Focus for the next ten years

Support Community Projects & Events

- **Fortrose Foreshore upgrade** – support this collaborative venture to redevelop and enhance the Fortrose foreshore area with interpretation panels, new toilets, signage, playground and beautification.
- **Waikawa and District Museum upgrade** – looking at solutions for storage and overall long term preservation of collections.
- **Catlins Coastal Challenge and other events supported** (e.g. car rallies).

RESEARCH FEEDBACK

The host community, economic development entities, and regional tourism authorities saw an increase in a desire for involvement in planning by the community. Events play a key role in attracting people to live, work and visit an area.

Business Support and Growth

- Explore new activity products which appeal to international markets - particularly trade and commissionable products.
- Understand challenges for businesses to grow including seasonality and staff availability.
- Link to significant projects such as Curio Bay Natural Heritage Visitor Centre.

Support the development of interpretation panels and/or material at the following sites:

- Catlins Lake
- Cathedral Caves
- Cannibal Bay
- Gibbs Hill
- Waikawa
- Purakaunui Bay
- McLean Falls
- Tautuku Peninsula and Bay
- Matai Falls
- Tahakopa Bay Reserve
- Tokanui
- Pine Bush
- Mokoreta
- Slope Point
- Long Point / Irahuka
- Owaka
- Nugget Point

RESEARCH FEEDBACK

Visitors valued beach/bush walks, penguin & dolphin viewing. Interpretation panels provide these visitors valued background so they can engage more with nature.

OTHER CONSIDERATIONS

Support existing product and services while exploring new opportunities

The provision of infrastructure and amenities will affect product development

Many of these projects are delivered by volunteers - need to acknowledge and support where possible

Significant resource required to source funding for projects - support required for community groups

Essential that there is an understanding of visitors to the area (statistical profile, visitors numbers) need to ensure products meet their needs

There will be a balance of commercial and non-commercial product (much of the economic benefit realised is from commercial product)

> "Balance" is the key – in our approach and what we develop and where it fits with the rest of our community

Porpoise Bay, 'New Year Big Day'

Implementation

PROJECTS	KEY DRIVERS
Curio Bay Natural Heritage Visitor Centre	South Catlins Charitable Trust
Owaka Waka Project	Owaka Going Forward, Catlins Promotions Inc
Bilingual Place Names	Catlins Coast Inc, Iwi
Cathedral Caves Opportunities	Cathedral Caves Trust, Catlins Coast, DOC
Catlins Cycle Trail	Catlins Coast Inc, Venture Southland, Clutha Development Inc
Catlins Coastal Walk	Catlins Coast Inc, Venture Southland, Clutha Development Inc
Possumers Track	Catlins Coast, DOC, Papatowai & District Community Association
Curio Bay Living Forest Walkway	South Catlins Charitable Trust
Fortrose Foreshore Upgrade	Catlins Coast Inc, Venture Southland, South Catlins Promotions
Catlins Events	Catlins Coast Inc
Local business support and development	Venture Southland, Clutha Development Inc
Research and statistics	Venture Southland, Clutha Development Inc
Long Point Seabird Project	Yellow eyed Penguin Trust, Forest & Bird Society, Catlins Coast Inc

Promotion & Marketing

The past ten years has seen the emergence and acceptance of The Catlins brand and the area's tourism offerings. Effort should now fall to assessing effectiveness of current marketing, on-going upgrades of digital tools and alignment with the Southern Scenic Route. It is also acknowledged that many international visitors arrive via Christchurch International Airport and the need for promotion to reflect this.

ACHIEVED IN THE LAST TEN YEARS BY CATLINS COMMUNITY

Development and promotion of The Catlins' brand and logo

Successful promotion as a single destination reflecting a collaborative Catlins community

Development of the main website for The Catlins www.catlins.org

Assistance to update, reprint and distribute the purple Catlins brochure and the popular Catlins tear off map & development of The Catlins newsletter

Development of a Passport of Events for The Catlins – including the Catlins Great Escape and Catlins Coastal Walks

Collaborative marketing in conjunction with Venture Southland and Clutha District Council and local Catlins operators

CURRENT GOALS

1 To ensure the tourism product available in The Catlins meets the needs and expectations of visitors through **appropriate and targeted marketing and promotion**

2 That The Catlins should maintain its key positioning around the themes of nature and wildlife, but should look to **expand to include heritage** and promote that which sets the region apart and makes it unique from other areas in the South Island

3 That greater attention be given to The Catlins as a **family destination** for the domestic market

4 That Catlins Coast Inc in collaboration with existing destination marketing organisations develop a programme to **evaluate the effectiveness of marketing** programmes for The Catlins, and of destination awareness in general

5 Market to the inbound tour industry to attract higher paying overseas visitors to stay longer in self - catering and hosted quality accommodation.

Focus for the next ten years

Development of a Marketing Strategy

- Will assess current marketing and promotion initiatives and tools and its overall effectiveness, with a view to identifying improvements
- Will detail how to use the media (including social media & apps) to increase the profile of The Catlins and enhance communication

RESEARCH FEEDBACK

'Word of mouth' extremely important form of promotion.
Tear off map is the key tool that visitors use while visiting (80% rated it as very important).

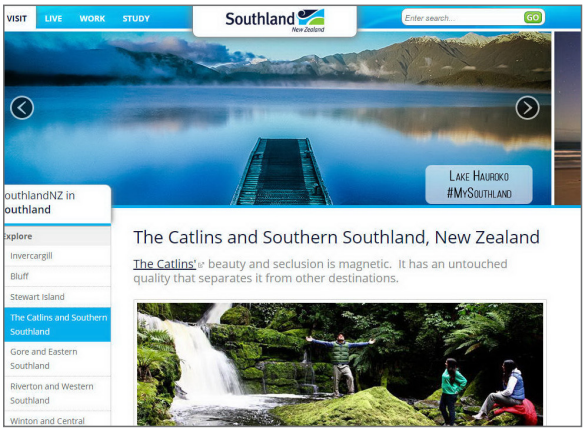
Catlins tear off map

Website Redevelopment

- Upgrade the current site to ensure it best serves the needs of users, operators and the local communities
- Continue to target both visitors and local people with information about the local area, events, local amenities and facilities, accommodation and other tourist product

RESEARCH FEEDBACK

Overall visitors see the www.catlins.org website as the key site for the region – however, locals use it more than international visitors (who prefer www.southlandnz.com).



Southland NZ website

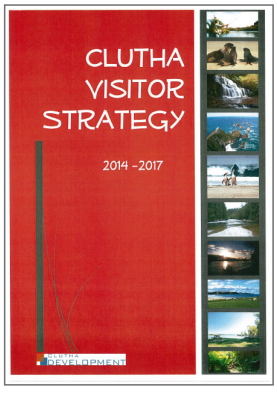
Ensure The Catlins is included in other Planning Documents

- Review of the Southland Visitor Strategy 2016-2025 and Clutha Visitor Strategy 2014-2017
- Work alongside partners and other stakeholders
- DOC Conservation Management Strategy
- Other planning documents
- Awareness of national strategies, including Tourism 2025.

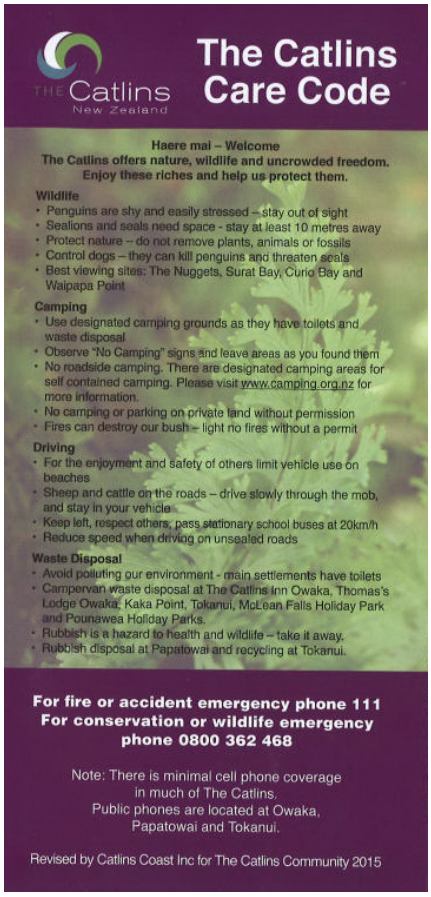
RESEARCH FEEDBACK

Locals currently happy with how they are being kept informed (newsletter, emails, website etc) but still want involvement and to be listened to regarding development of key strategies and planning documents for the region.

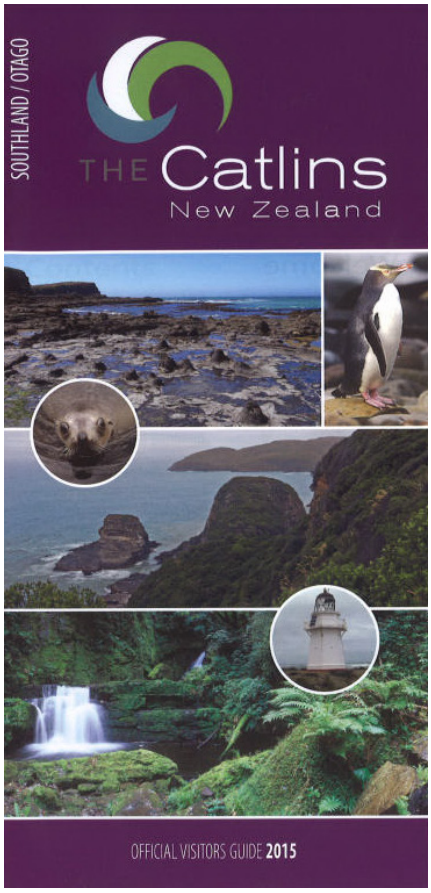
Screenshot of current website



New Zealand Tourism Strategy (left) & Clutha Visitor Strategy (right)



Catlins Care Code



Catlins purple brochure

Focus for the next ten years

Closer Alignment with the Southern Scenic Route (SSR) Promotion & Alliances

- SSR is a key product associated with The Catlins. Opportunities to explore include alignment with Queenstown, Regional Tourism Organisations (RTOs), and international marketing alliance partners (Pure Southern Land International Marketing Alliance - IMA).
- Aligning with branding, signage, promotion.
- SOUTH campaign - importance of Christchurch International Airport and working with RTOs.

RESEARCH FEEDBACK

Majority of international visitors are there for the first time (88%), while many locals have visited multiple times.

Visitor Education

- The aim is to improve visitor knowledge (in particular international visitors, campervan users and other self-drivers) regarding waste management practices, driving on our roads safely and the location of dump stations and other services/facilities.
- Continuing to use the Catlins Care Code as well as other forms of promotion and marketing.
- Consideration for a durable all-weather proof signs to be erected.

RESEARCH FEEDBACK

All research indicated that more visitor education was needed – especially regarding freedom camping and for international drivers.

Promotional Material

- Continue with existing successful marketing material - Catlins tear off map, Catlins purple brochure and The Catlins newsletter
- Consider the needs and preferences of visitors.

> "Tear off map most important tool for visitors"

OTHER CONSIDERATIONS

It will be important to ensure there is realistic promotion of the area and the expectation of people and businesses can be met or exceeded, as opposed to over promising and under-delivering.

As an area marketing itself around its environment or 'eco-tourism', preservation and protection of the natural environment from potential threats are paramount.

Need to manage and use the perception that the area is remote, has challenging roads and sporadic cellphone coverage.

Beauty and remotness are corresponding with wilderness experience, which could easily be lost by overcrowding, whether it is real or perceived.

Cell Tower at The South Catlins

Implementation

PROJECTS	KEY DRIVERS
Marketing Strategy	Catlins Coast Inc & RTOs
Social Media Opportunities	Catlins Coast Inc, Venture Southland, Clutha Development Inc
Website Redevelopment	Catlins Coast Inc
Southland and Clutha Strategies	Venture Southland, Clutha Development Inc
Southern Scenic Route Promotion	Catlins Coast Inc & RTOs
Visitor Education Opportunities	Catlins Coast Inc, Councils & RTOs, South Catlins Promotion Inc, Catlins Promotions Inc, DOC
Catlins Care Code	Catlins Coast Inc
Tear Off Map	Catlins Coast Inc
Purple Brochure	South Catlins Promotion Inc, Catlins Promotion Inc, Catlins Coast Inc
Catlins Newsletter	Catlins Coast Inc
Project Obtaining & Using Catlins' Statistics	Catlins Coast Inc, Venture Southland, Clutha Development Inc

Infrastructure

There has been significant improvements in infrastructure in the past ten years - road sealing, cell coverage, toilets and parking. The goal is to continue to build on progress to enhance and protect the local environment, ensure safety and meet the needs of locals and visitors. This is particularly important with the number of self-drive tourists continuing to grow.

ACHIEVED IN THE LAST TEN YEARS BY CATLINS COMMUNITY

Improved infrastructure has enhanced and revitalized communities such as Owaka.

Dramatically improved telecommunications (cell coverage and internet) through the Rural Broadband Initiative and installation of fibre optic cable and the Vodafone Community Cell Site Scheme. Areas benefiting include Papatowai, Kaka Point, Slope Point, Waimahaka, Tokanui and Owaka. Not only is there cell coverage where there was once none, but also now a choice of Vodafone, 2 Degrees or Spark.

Sealing of the Chaslands Highway section of the Southern Scenic Route ensuring improved access to and through The Catlins.

Two new campervan parks in the North Catlins as well as the New Zealand Motorcaravan Association's arrangement with Southland District Council to provide a parking site for their members at Niagara.

Upgrade of key sites in the area:

- Purakaunui Bay - new toilets, car parking and rubbish removal
- Curio Bay - viewing platform built over looking Curio Bay Petrified Forest
- Waipapa Point – new toilets, car parking and interpretation, lighthouse repainted
- Nugget Point – new toilets, car parking, tracking and interpretation
- McLeans Falls - new toilets
- Tunnel Hill – new car park
- Surat and Jacks Bay – new public toilets
- Papatowai Camping ground – reopened and upgraded waste water system, including public toilets
- Pounawea Camping Ground – upgraded, new sewerage pipeline to Owaka
- Kaka Point – new waste water system
- Owaka and Tokanui – new dump stations for campervans and recycling facilities
- Cathedral Caves – improved access
- Fortrose – new toilets, playground and interpretation
- Papatowai - public toilets upgrade

CURRENT GOALS

The Catlins requires a range of infrastructure:

1 **To meet the needs** (and enhance the overall experience) of increasing numbers of visitors.

2 To **enhance and protect the local environment** which they are attracted to.

3 To **ensure overall safety** while considering the needs of the local community.

RESEARCH FEEDBACK

Significant progress to improve infrastructure in the past ten years than ever seen before.

Focus for the next ten years

Signage

- Directional signage to assist visitors to find and access The Catlins e.g. from Balclutha and Invercargill.
- Signage to assist with visitor education, improving driving safety and locating key attractions within The Catlins e.g. location of toilet and camping facilities drawing white arrows on roads to show international people the correct direction.
- Option of bilingual signage for names of places.
- Need to plan to avoid a 'proliferation' of signage – needs to be the right amount and in the right places. Look at not only new signage, but tidying existing signage to ensure messages are clear with tidy presentation.

RESEARCH FEEDBACK

One of the top five issues of a developing tourism industry is signage. This has increased from being eighth place in 2003 to third in 2012.

The Chaslands - Educating visitors about roads

Example of cluttered signage

Roads

- Continued improvements to the roading network (sealing of Haldane and Slope Point Roads – the coastal route from Curio Bay to Fortrose and the road to Nugget Point lighthouse also known as 'Penguin Highway').
- Maintain existing roading network to high standard.

RESEARCH FEEDBACK

One quarter of all visitors specifically mentioned that the quality of roads was the thing they least liked about their visit to The Catlins.

Roads were tourists least-liked aspect of The Catlins

Toilets & Wastewater

- Still demand for more public toilets of high quality, in key locations, clean and tidy, well signposted and able to be accessed 24 hours. New toilets or upgrades are planned for Tautuku, Owaka and Curio Bay.
- Consideration of long term waste water solutions for high visited areas and subsequent provision of appropriate infrastructure. E.g. Curio Bay, Papatowai, Pounawea and Long Point.

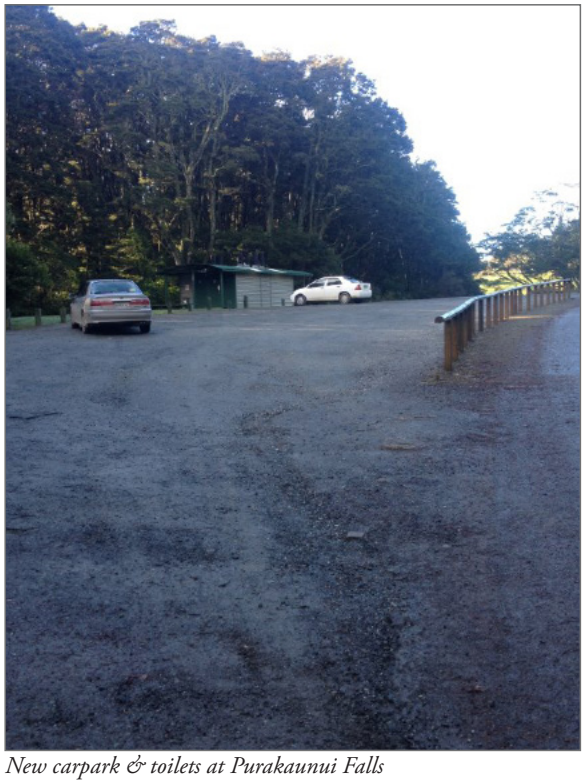
RESEARCH FEEDBACK

Agreed that quality infrastructure benefits both visitors and local people. However, it is costly to provide in this area because of the low rating base and lack of government subsidies from which to fund it as well as the area's isolated location which can mean higher costs.

Dump Station

Camping at Curio Bay

Curio Bay campground and Petrified Forest Platform



New carpark & toilets at Purakaunui Falls

Focus for the next ten years

Safety

- Consideration of improvement of emergency services.

RESEARCH FEEDBACK

Increased pressure on the emergency services with increasing visitors and traffic numbers.

Camping

- New campervan park opportunity for Hina Hina Reserve Committee, upgrades to Curio Bay camping ground.
- Ensure appropriate education, facilities and infrastructure for freedom campers.
- Investigate consistent by-laws for freedom camping and their enforcement in The Catlins.

RESEARCH FEEDBACK

Stakeholders agreed that the nature of the sensitive natural and cultural environment means careful planning is required to ensure solutions that are identified now to deal with current issues are also long term solutions.

Community Projects

- Support for major projects at Owaka, Fortrose and Curio Bay which will also provide important infrastructure such as parking, toilets, walking tracks and a camping ground (Curio Bay).

RESEARCH FEEDBACK

Improvements in infrastructure need to mirror development in product and benefit for the local community.

Telecommunications

- Continue to investigate improvements in cell phone coverage and internet access through out the area (central government funding opportunities)
- Connectivity is important for local businesses to operate as well as safety for visitors, farmers and the local community

RESEARCH FEEDBACK

Over half of all visitors were dissatisfied with the lack of cell phone coverage and internet access. Saying that, overall satisfaction rates of visitors were still high – so the value and experience that The Catlins offers does not detract from the issues associated in getting there, driving around and not being able to use a cell phone or access the internet.

ADDITIONAL RESEARCH FEEDBACK

However important infrastructure is, locals do not wish to pay for it - there was a dramatic increase in the number of local residents who are most concerned about rates increasing to cover the costs of it.

Agreed that it is essential that the partnership approach continues to meet the infrastructural needs of the area and community. This includes the local territorial councils (SDC and CDC), NZTA, telecommunications companies, regional councils, private businesses and community organisations.

Today's solution has to work in 20 year's time

Feedback similar to 2003 that The Catlins is known for its remoteness and this is part of its appeal. Improving infrastructure and telecommunications in particular could mean it loses its attraction for some people while the benefits of running businesses, communicating are obvious for others.

Implementation

PROJECTS	KEY DRIVERS
Directional Signage (Balclutha, Invercargill)	Catlins Coast Inc & South Catlins Promotions Inc, Catlins Promotion Inc, Councils
Improved Visitor Education through Signage	Catlins Coast Inc
International Visitor Driving Safety Programme	Catlins Coast Inc, RTOs & Councils, TIA, NZTA
Bilingual Signage	Catlins Coast Inc, DOC, Councils
Sealing of Key Roading Networks	Councils, NZTA
New Toilets/upgrades, Tautuku, Owaka & Curio Bay	Councils & DOC
Wastewater Curio Bay	Southland District Council
New Campervan Park-Hina Hina	Clutha District Council
Upgraded Camping Ground-Curio Bay	South Catlins Charitable Trust, SDC
Freedom Camping Bylaw Investigation	Catlins Coast Inc & Councils
Telecommunications Enhancements	Councils & Venture Southland

Environment & Heritage

A spectacular natural environment and a unique heritage story are both key drawcards for visitors. There remains concern around "killing the golden goose"- visitors want the wilderness and eco experience but this in turn puts it at risk. Freedom camping, coastal erosion and flora/fauna management remain high priority and a collabrotive approach is essential alongside DOC, iwi, Councils conservation NGO's such as the Yellow Eyed Penguin Trust and Forest and Bird Society and the local community.

ACHIEVED IN THE LAST TEN YEARS BY CATLINS COMMUNITY

Agreement, commitment and significant progress from various stakeholders and the local community to look after the local environment, e.g. a number of planting projects including flax and other natives; pest control; maintaining waterways and mahinga kai, collaboration on a number of projects.

Development and distribution of the Catlins Care Code which provides information for visitors on how to respect and behave in The Catlins when visiting.

Ability for people to recycle waste at Owaka and Tokanui.

Provision of a range of infrastructure which helps manage visitors and their impact on the environment e.g. Dump stations at Tokanui and Owaka (see Infrastructure section).

Annual Catlins Clean Up event – educating and encouraging the community to participate in keeping the highways clean and tidy by picking up rubbish.

Adopt the SSR Highway cleanup initiative.

Awareness of the negative impacts of freedom camping and efforts to mitigate these through education, policy development and signage.

CURRENT GOALS

To attract visitors to The Catlins and encourage a tourism industry which considers the following:

1 Shows **respect for the area** as it is, protects the wildlife, the environment and the community

2 **Preserves the area's uniqueness** and point of difference

3 Appropriate land use ensuring **the future health and wellbeing of people & the environment**

4 Preservation of water quality, **maintenance of biodiversity, flora and fauna** and consideration of pest management strategies and eradication

5 The local environment continues to provide **recreational opportunities** for not only visitors but the local community

ACHIEVED IN THE LAST TEN YEARS BY CATLINS COMMUNITY

Kaitiaki Southland Coastal Heritage Inventory Project – a collaboration between NZ Historic Places Trust, SDC, DOC, Environment Southland and Ngai Tahu to monitor, preserve, protect and promote a greater understanding of Maori and European sites and artifacts.

Establishment of Mataitai reserves in The Catlins (Curio Bay, Waikawa River site) acknowledging the significance of these sites and the area for local iwi.

Development of various types of interpretation (panels, website, brochures, signage) which all aims to educate visitors about how to treat the environment when travelling through the area.

Changing land use in The Catlins and introduction of intensive farming practices including dairying. There has been care and due diligence to ensure effluent run off is managed to ensure protection of shellfish and other kai moana and water quality.

Annual Clean Up Catlins event

Focus for the next ten years

Preservation

- Preservation of significant environmental and/or cultural areas such as Lake Brunton and Catlins Lake.

RESEARCH FEEDBACK

Visitors are attracted to The Catlins because of the environment and wildlife – this has not changed since the last surveys in 2003.

Coastal erosion at Porpoise Bay

Stakeholder Collaboration

- More stakeholder collaboration to undertake further environmental projects and initiatives such as replanting, pest control, ensuring zero roadside waste and provision of further recycling and waste management infrastructure.
- The Yellow Eyed Penguin Trust.
- South-East Marine Protection Forum - representation, involvement and consideration of the perspective of local communities and tourism opportunities.

RESEARCH FEEDBACK

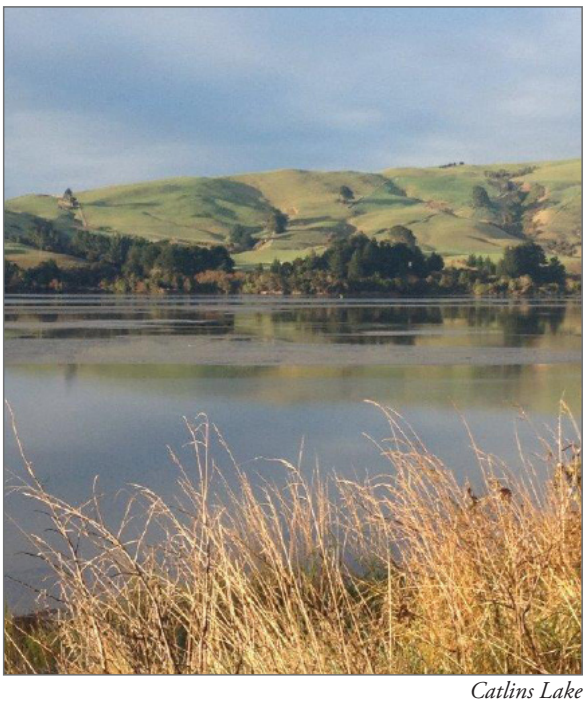
Key partners agreed that everyone needs to read and be aware of The Catlins Care Code information.

Coastal Erosion

- A need to further identify and if possible protect sites under threat.
- An example mentioned was the sand dunes at Porpoise Bay and Cathedral Caves.

RESEARCH FEEDBACK

78% of visitors rated The Catlins as very good or higher for its scenic and wildlife attractions.



Catlins Lake

Papatowai Beach

McLean Falls

Purakaunui Bay

Focus for the next ten years

Development of a Catlins Eco Pass

Management of Recreational Areas

- Sustainable management of recreational areas – consider environment plus public access and use e.g. motorized access at beaches.

RESEARCH FEEDBACK

Concern about "killing the golden goose" or "loving it to death" – visitors attracted to the wilderness and this experience, but this in turn puts it at risk.

Interpretation

- Enhancement of sites through interpretation as mentioned in Product Development section.

RESEARCH FEEDBACK

Visitors mention that they have a unique opportunity to view and interact with and get very close to wildlife and the unique natural environment.

Freedom Camping

- There is awareness of the negative impacts and efforts have been made to mitigate these through education, provision of signage and development of policy in both the Southland and Clutha Districts. While this needs to continue, a further step needs to be taken in terms of enforcing freedom camping policies.
- Awareness of "hot spots" e.g. Waikawa and need to work alongside the councils to monitor and identify solutions.

RESEARCH FEEDBACK

Agreement that there has been significant progress to plan tourism alongside the environment, however, this needs to continue and adapt to changing tourist needs, numbers and demands.

State of Environment Reporting

- Modify and improve the State of Environment reporting (survey monkey email survey).
- Look at visitor research to help identify visitor needs, numbers and demands.

RESEARCH FEEDBACK

There is a need for more regular and robust environmental monitoring, especially if product is developed and more people are attracted to the area.

OTHER CONSIDERATIONS

Temptation to Kill the Golden Goose

All respondents stated at some stage during their interview that they did not want to see the area become over-developed and commercialised destroying the very essence of the area, or 'Killing the Golden Goose'. As the area is valued for its natural beauty, it is imperative that it is preserved and protected.
There was consistent feedback that the area cannot become another Queenstown for example, full of tour buses, and large national tourism operators to the detriment of the local community, environment and wildlife.

Environment, Sea Life and Wildlife Damage

As an area marketing itself around its environment or 'eco-tourism', preservation and protection of the natural environment from potential threats such as those listed below was identified as paramount.

- Gas and oil exploration
- On and off shore mining
- Land use intensification – impacts on biodiversity, water quality, visual amenity values
- Land development in catchment areas – increase in sediment through clearing of vegetation
- Climate change and coastal erosion – could flood low lying areas, and affect heritage sites
- Declining bird species – e.g. mohua, tom tit, and rifleman, need to retain bush remnants and fence waterways
- Maintain and improve pest control

Over-fishing from increased number of visitors to the area, potentially depleting fish stock which could also decrease number of marine species frequenting the area for food, negatively impacting on a tourist attraction.

Decreasing water quality (e.g. Owaka River).

Lack of care and respect for the area by 'Free Independent Travelers' is still a concern.

It was mentioned there used to be annual clean ups where the whole community came together to keep the areas natural environment healthy and clean. There was a desire to see these reinstated.

Implementation

PROJECTS	KEY DRIVERS
Representation on SE Marine Group	Catlins Coast Inc, Catlins Promotions Inc
Investigate Coastal Erosion Issue	Catlins Coast Inc, RTOs & Regional Councils
Catlins "Eco Pass"	Catlins Coast Inc
Investigation Into Vehicle Access To Beach	Councils
Freedom Camping "Hot Spots"	Catlins Coast Inc, South Catlins Promotions Inc, Catlins Promotion Inc, Councils, DOC,
State of Environment Reporting	Catlins Coast Inc & Regional Councils
Catlins Care Code	Catlins Coast Inc
Flora/Fauna Perserving and Management	DOC
Catlins Clean Up	Catlins Coast
Enhancement Catlins Lake	Catlins Coast Inc, South Catlins Promotions Inc, Catlins Promotion Inc

APPENDIX A: REVIEW OF 2004 IMPLEMENTATION PLAN

- Significant progress has been made actioning the implementation plan, which contains 91 recommendations giving effect to 10 Strategic Objectives

- 90% of all recommendations are either fully achieved (77%) or partially achieved (13%).

- 100% of all 'High' priority recommendations are either achieved (92%) or partially achieved (8%), 91.5% of 'Medium' priority recommendations are either achieved or partially achieved and 72% of 'Low' priority recommendations are either achieved (61%) or partially achieved (11.2%).

- Only 9 of the 91 of recommendations (10%) were not actioned, with only 3 remaining a priority, requiring review and 1 being deemed no longer a priority. The recommendations not actioned were a mix of 'Medium' (4) and 'Low' (5) priority recommendations.

- In relation to the Strategic Objectives, five of the ten objectives (One, Seven, Eight, Nine and Ten) had 100% of recommendations either achieved or partially achieved. Two of those objectives (One and Nine) relating to the establishment of appropriate management structures to oversee the strategy's implementation, and promotion and marketing, achieved all recommendations.

- The Strategic Objectives that had the highest proportion of unactioned recommendations (Six, Four and Three) related to catering to tourists' hospitality needs, enhancing visitors' experiences through attractions and activities, and optimising the value of tourism for locals. While this potentially indicates further work is required in these areas, it may also be a reflection of the prioritisation and sequential nature of the recommendations as an entire group.

- A significant proportion of recommendations (76%) have been identified as 'ongoing' or 'remaining a priority', therefore many of the existing recommendations are likely to flow through to the revised implementation plan albeit in a revised form.

- 10% of the current recommendations have been identified for 'review' to determine their relevance before considering them for inclusion in the revised implementation plan.

- Many recommendations could be simplified or combined to aid in more effective implementation.

- The current management structures in place to oversee the implementation of strategy appear to be working effectively.

- Significant progress has been made across a number of areas, in particular those that relate to the physical (e.g. cell phone coverage, improvements to roading, public toilet provision and signage) and professional infrastructure (e.g. marketing and promotion, website, forums and networks) resulting in an environment that is now much more conducive to sustainable tourism development.

- It appears a significant proportion of the revised implementation plan will be about further enhancement of work undertaken to date, while continuing to maintain and where possible grow implementation momentum among key partners and the wider community.

Goals		Priority	Current Status at April 2015
GOAL 1: To provide for the implementation of The Catlins Tourism Strategy through the development of an appropriate body (or bodies) with appropriate mandate, representation and funding			
1.1.1	That a community body be created with the key task of overseeing the implementation of this Strategy. That this body be known provisionally as "Tourism Catlins".	High	ACTIONED - ONGOING Tourism Catlins (TC) was established back in 2004 to give effect to the Catlins Tourism Strategy, and while still responsible for facilitating events, it has by in large been superseded by the establishment of Catlins Coast Incorporated (CCI) in 2009 which while born out of Tourism Catlins has a broader community, environment and cultural focus. CCI is a non profit organisation with charity status.
1.1.2	That Tourism Catlins have the following specific objectives: 1. To overview the implementation of the Catlins Tourism Strategy 2. To liaise with central, regional and local government service providers over specific projects outlined within the Catlins Tourism Strategy 3. To liaise and communicate with the Catlins community concerning Catlins Tourism Strategy issues	High	ACTIONED - ONGOING TC has these specific objectives and still has a role facilitating events, however the key organisation is now CCI. which has more community, environment and culturally focused objectives that include but are not limited to tourism. CCI strives and succeeds to develop mutually beneficial working relationships for the Catlins community
1.2	That logistical support be provided for Tourism Catlins in order for that body to fulfil its objectives.	High	ACTIONED - ONGOING All partners provide support.
1.3	That this Strategy in all its recommendations give implicit recognition of the significance of The Catlins to Ngai Tahu, and that in recognition of this, that relevant Runanga be incorporated into tourism management, development and decision-making processes in The Catlins in a meaningful way.	High	ACTIONED - ONGOING CCI are currently reviewing their relationship, and ongoing communication channels and contacts with Iwi. This remains a high priority
1.1.4	That progress in the implementation of the recommendations of this Strategy be reviewed not more than twelve months after the accepted final version of this Strategy becomes publicly notified, and every 12 months thereafter as necessary. And that this review be widely disseminated in the Catlins community and tourism industry.	Medium	ACTIONED - ONGOING CCI review implementation progress on an annual basis, key findings are disseminated to all partners and communicated to the wider community via The Catlins website and newsletter.

Goals		Priority	Current Status at April 2015
GOAL 2: To provide for the absolute protection of the natural and cultural resources that are integral to Catlins tourism from the negative physical impacts of tourism.			
2.2	That a "Catlins Care Code" be developed, and that this be consistently presented to visitors through the above media.	High	ACTIONED - ONGOING The Care Code was developed in 2006, has been regularly updated since, and continues to be well promoted through a variety of media.
2.2.2	That Tourism Catlins and the Department of Conservation investigate opportunities to foster community stewardship in The Catlins by actively communicating with the community through media releases, public workshops and information sessions, training and education.	Medium	ACTIONED - ONGOING CCI relationship with DOC is strong and both organisations work together effectively to educate and deliver key messages to the Catlins community and Catlins visitors wherever possible. E.g. collaborating on events like The Catlins Great Escape Bike Journey, and the Coastal Walk.
2.2.3	That with a view to improving visitor management, interpretation be provided at all key visitor sites with significant conservation or heritage values.	High	ACTIONED - ONGOING - PRIORITY A ten year Interpretation Plan was developed in 2008 implementation has commenced, and is approximately half way through.
2.2.4	Those opportunities for visitors to contribute to funding of conservation management projects in The Catlins are maximised. And that these include the development of a Catlins Eco-pass or similar product.	Medium	ACTIONED - ONGOING - PRIORITY Earlier on this was not considered as high a priority project as others, however recently CCI has started looking at ways to give visitors the opportunity to contribute financially to current and future Catlins projects.
2.2.5	That further opportunities be investigated for the provision of concession activities in The Catlins that would provide for revenue generation and enhanced visitor management and protection of conservation values.	Low	ACTIONED - ONGOING This occurs between private operators and DOC on an ongoing case by case basis.
2.3	That Tourism Catlins play a role in statutory advocacy for the protection of conservation and heritage values through input to conservation planning and resource management processes where appropriate.	Medium	ACTIONED - ONGOING CCI has been actively involved in relevant conservation planning and resource management processes, writing numerous submissions over the years to the relevant organisations (e.g. SDC). It is now recognised as the local representative collaborative and considered a key planning partner for the area by relevant organisations, so is often directly consulted with early in planning processes

2.4.1	That Tourism Catlins facilitate the identification of a programme to monitor the environmental impact of tourism in the region. That this be a joint programme with resourcing based upon ownership or management responsibility of the sites/values to be monitored.	High	ACTIONED - ONGOING Twice a year CCI work with the local community to produce an environmental report, the findings and/or issues from which are then discussed with key stakeholders to determine required actions. Community involvement in this process has been extremely beneficial, increasing community ownership, monitoring, and responsibility for the local environment, alleviating initial concerns around potential detrimental environmental effects and loss of control resulting from tourism.
2.4.2	That the programmes (2.4.1) include a biennial "State of the Environment" reporting process based upon an environment and visitor-monitoring programme. And that this information be made widely available, as a key indicator of the sustainable tourism performance of the region.	High	ACTIONED - ONGOING The report findings are made available to all partners, and to the wider community via the website and newsletter for example.
2.4.3	That Tourism Catlins identify research priorities for visitor impact management within the area, and promote these priorities to potential research providers.	Medium	YET TO BE ACTIONED – STILL A PRIORITY
2.5.1	That Tourism Catlins work closely with the Department of Conservation to advocate tourism operator compliance with the concession/permit system	High	ACTIONED - ONGOING
2..5.2	That Tourism Catlins provide input to Department of Conservation concessions through the appropriate processes (i.e. Conservation Management Strategies; Conservation Management Plans; and publicly notified concession applications when relevant).	Medium	ACTIONED - ONGOING
2.6.1	That tourism operators in The Catlins be provided with information on accreditation systems.	Low	ACTIONED - ONGOING Information and education opportunities are provided and promoted by VS, SDC and CDC.
2.6.2	That The Catlins local authorities seek to improve overall destination environmental performance through investigation of the benefits of participation in programmes such as 'Zero Waste by 2020'.	Low	ACTIONED - ONGOING, REVIEW PRIORITY The prioritisation of participation in such programmes should be reviewed as the areas effective environmental management becomes increasingly important.

2.7.2a	That a consistent regulatory approach be adopted throughout The Catlins with respect to freedom camping. Such an approach would clearly identify freedom camping opportunities and restrictions to visitors and enforce existing bylaw/policy.	High	ACTIONED - ONGOING There are now designated freedom camping areas, and necessary bylaws and policies in place to aid enforcement which are reviewed annually.
2.7.2b	That education of the freedom camper about appropriate sites to camp, prohibited areas and environmental care is undertaken through a variety of media, including on site signage and the Catlins Care Code.	High	ACTIONED - ONGOING Freedom Campers are educated through the website, interpretation panels, area maps, brochures and other marketing material.
2.9.1	That Tourism Catlins actively seek relationships with key organisations and individuals that hold important information on the natural, cultural and historic resources of the region. And that information on these sources be developed into a database that is readily accessible for tourism operators	Low	ACTIONED - ONGOING - PRIORITY CCI have worked closely with key partners to obtain some information which has been placed on the website. More data could be captured and the database is yet to be developed. This could be considered a higher priority.
2.10	That the Department of Conservation and relevant local authority liaise to give consideration to discouraging motorised access to beaches of high wildlife or recreational significance.	Medium	ACTIONED - ONGOING Significant progress has and is continuing to be made in this area, with a community education approach being adopted as opposed to an enforced regulatory approach. This has resulted in greater community understanding and respect for areas, enabling the community to have flexibility and respectful use of beaches with high wild life or recreational significance.

Goals		Priority	Current Status at April 2015
GOAL 3: To optimise the value of tourism for local residents, including social and economic benefits.			
3.1.1	That a tourism "community outreach" programme be developed, through which the community can learn about Catlins tourism industry news and participate in an informed manner in the tourism planning process. That the programme be facilitated through the use of appropriate media and forums (press, public meetings, displays, mail-outs).	Medium	ACTIONED - ONGOING The website and newsletter are the key communication vehicles for this.
3.1.2	That the above "community outreach" programme provide information and guidance to the community regarding their potential participation and entrance into the local tourism industry. And that opportunities to participate in existing tourism business mentoring programmes be identified and promoted to the community.	Medium	ACTIONED - ONGOING Information and opportunities are provided and promoted by VS, SDC and CDC.
3.1.3	That the wider community be represented in the organisation of Tourism Catlins. And that additional opportunities be identified for interested community members to actively join the tourism planning and development process.	High	ACTIONED - ONGOING Under the new structure of CCI anyone from the community can be a member and is welcome to be involved and attend meetings.
3.1.4	That an ongoing programme of monitoring Catlins residents' satisfaction with tourism be established. And that this programme be identified within the Venture Southland Tourism Research Strategy.	Medium	ACTIONED - ONGOING There is not a specific ongoing monitoring system in place for residents satisfaction with tourism as such, however the six monthly 'State of the Environment' reports from residents often incorporates tourism related information, and as part of this review the original Catlins Residents Survey from 2003 has been repeated. Links with 7.1
3.2a	That opportunities for the development of further high quality accommodation, food services, retail opportunities and commercial tourist activities be identified and promoted to the local community and investors.	Low	ACTIONED - ONGOING VS has and will continue to provide opportunities and support to businesses to develop, diversify, and expand etc. However, it is up to individual businesses whether this is actioned.
3.2b	That a marketing strategy be developed for The Catlins that targets visitors who have a higher than average daily holiday expenditure. That this marketing strategy be developed in co-ordination with relevant destination organisations.	Low	YET TO BE ACTIONED - REVIEW There has been no progress to date on this action, however it would be a good time to revisit it, as the environment has changed significantly and is now more conducive for the development of such a strategy and there is the additional support now with CDC employing a destination marketing manager. It could potentially be moved to a Medium priority in the revised plan.

3.2.1	That The Catlins develop a programme of educational/interpretive evening events for the peak visitor period (January).	Medium	NOT ACTIONED - NO LONGER A PRIORITY Given the range of activities that are now occurring in the area over the peak visitor period this is no longer considered necessary.
3.2.2a	That opportunities to substitute freedom camping with the use of commercial accommodation facilities be encouraged through the use of marketing and promotion, and regulation where necessary.	Medium	ACTIONED - ONGOING This is an ongoing focus being addressed through the education and promotion of existing accommodation providers, who are effectively utilising the website to their advantage. Links with 2.6.1, 2.6.2
3.2.2b	That opportunities to generate revenue from freedom campers be investigated, including the option of introducing a Catlins-wide freedom camping pass.	Medium	YET TO BE ACTIONED - REVIEW There has been no discussion or action around this recommendation to date, hence the need for its review.
3.2.3	That opportunities for the development of tourism businesses be identified and promoted within the community and private sector.	Low	ACTIONED - ONGOING VS has and will continue to provide opportunities and to support businesses to develop, diversity, expand etc. However, it is up to individual businesses whether this is actioned. Links with 2.1.5
3.2.4a	That initial investigation and liaison be undertaken to gauge landowner/manager and local resident support for the development of coastal walks, from Papatowai to Curio Bay, and from Curio Bay to Fortrose.	Medium	ACTIONED - ONGOING, HIGH PRIORITY The initial investigation was carried out in 2002, resulting in the Catlins Coastal Walking Track Feasibility Study. CCI is organising Coastal Walk events to educate landowners of the opportunities that may be available for the future. Continued progression of walking track developments in the area has now moved to a high priority
3.2.4b	That the opportunity to develop the original Catlins Coastal Walking Track proposal (Nugget Point to Papatowai) be revisited on a regular (preferably biennial) basis.	Medium	ACTIONED - ONGOING CCI is continually looking for opportunities to develop this project.
GOAL 4: To develop opportunities to enhance the existing visitor experience, in terms of attractions and activities			
4.1.1	That Venture Southland and Clutha District Council continue to support new business development in The Catlins area and that the North and South Catlins Promotion groups along with Tourism Catlins investigate ideas for new business initiatives and promote these to the wider community and private investors.	High	ACTIONED - ONGOING All organisations work closely together to ensure they support economic development in area.

4.1.2	To identify opportunities to develop a formal Catlins rural-tourism network, whereby opportunities to participate in farming events are "scheduled", priced and promoted to visitors.	Low	ACTIONED - ONGOING - REVIEW This happens to some extent, with private businesses and through the rural tourism network e.g. Owaka Business Organisation. However there is no formal Catlins Rural-Tourism network as such. This recommendation needs to be reviewed to determine its future relevance, as it may not be a priority for farmers.
4.1.3	To identify opportunities to develop themes for self-guided "mini-heritage trails" in The Catlins, with initial themes to be investigated including: "Ghosts of the Past"; and "Shipwreck Coast"	Low	ACTIONED - ONGOING, REVIEW PRIORITY CCI with the Catlins Great Escape brand are adding themes to their events such as the Light House to Light House bike journey, and the Catlins Historical Society's Annual Heritage Trail, and the Catlins Historical Society organise a mini Heritage Trail annually. These themes are also going to be obvious in the Owaka 150 years celebration.
4.1.4	To identify opportunities to establish "attraction clusters" that offer visitors a mix of opportunities and experiences	Low	YET TO BE ACTIONED – REMAINS A PRIORITY
4.1.5	To identify opportunities to develop Maori tourism product in The Catlins. That this be driven by Ngai Tahu but in partnership with and help from Tourism Catlins, the local community and other tourism operators	Medium	YET TO BE ACTIONED – REMAINS A PRIORITY
4.2.1	That existing tourism events be reviewed with the potential to expand them beyond their current focus	Medium	ACTIONED - ONGOING Original events have grown and more events have been developed, such as the original Woodstock Music Festival now called Catlins River Festival.
4.2.2	That new tourism events are explored in terms of their market potential and the local interest in provision of them	Medium	ACTIONED - ONGOING CCI through the Great Escape Brand, has been working with local communities to establish local events and help build the brands recognition. CCI is also working with community groups to guide them in establishing new events for their area. Once the communities are comfortable with running the event CCI will transition to a more supportive role. E.g. Pawakataka

Goals		Priority	Current Status at April 2015
GOAL 5: To optimise information flow to visitors in The Catlins through the provision of appropriate signage, information, interpretation and associated services			
5.1.1	That the relevant authorities undertake to erect a 'Welcome to The Catlins' sign in the north, and that the existing sign in the south be upgraded.	High	ACHIEVED Signs are now in place at the North, South and West Entrances
5.1.2	That SDC, CDC and Transit New Zealand continue to develop appropriate signage and that this be monitored according to existing policy.	Medium	ACTIONED - ONGOING, REVIEW PRIORITY This is high priority for CCI, who provide regular feedback to the appropriate organisation. This must become high priority for the future.
5.1.3	To explore options of using the SSR brand within The Catlins, creating synergy between signage within The Catlins and that used along the SSR	Low	ACTIONED - ONGOING This is a constant focus for all partners.
5.2.2	That consistent branding be investigated and developed for the two existing heritage trails	Low	YET TO BE ACTIONED – REVIEW Nationwide there are issues with the Heritage Brand, hence the need to review this recommendation.
5.2.3	To ensure that adequate financial resources are available to allow for ongoing functions of the existing visitor centre in Owaka and that the community group development of the visitor centre a Curio Bay be encouraged to become members of Visitor Information Southland	High	PARTIALLY ACTIONED –REVIEW Waikawa Museum is a member of VIS and provides key information in the South Catlins area. Curio Bay visitor heritage centre has yet to be developed, therefore has not been able to become a member of VIS. Owaka Visitor Centre is maintained by CDC and local volunteers.
5.2.4	To develop a web page for Catlins Tourism that links to existing web pages of individual attractions and operators	Medium	ACTIONED - ONGOING, REVIEW The website is a vital communication and promotional tool that has helped enable the effective implementation of many other recommendations. There is however issues with maintaining the website and securing long term funding for its sustainability that need to be addressed.
5.3.1	That encouragement should be given to those tourism operators who have insufficient information and interpretation at sites and develop both according to visitor needs.	Medium	ACTIONED - ONGOING Encouragement, information and advice are provided to operators by relevant partners such as DOC, VS, SDC and CDC.

5.3.2	That key visitor information at popular sites with a high degree of vulnerability be provided in the languages of the main visitor markets, and that this should also apply to the Catlins Care Code.	Medium	ACTIONED - ONGOING - REVIEW Information is available via the website in the users desired language, however hard copy on site information is only provided in English. Given the change in communication means, and the way tourists access and utilise technology for information or translations, this recommendation needs to be reviewed. CCI and DOC are currently considering a downloadable iphone application for the Catlins Coast, which may be a more effective approach.
5.3.3	That more effort be made to convey Maori natural and cultural values and history in the information and interpretation at key sites.	High	ACTIONED - ONGOING This remains a high priority, and should continue to do so. New interpretation sites include information about Maori culture and history, and it is given a high profile where relevant.
GOAL 6: To cater for the hospitality service needs of The Catlins tourist through provision of appropriate accommodation and food services			
6.1.1	That consideration be given to fostering the development of accommodation types suiting the top of the market, and those desiring premium service provision	Low	YET TO BE ACTIONED - REVIEW VS see the benefit and value of this target market and will work alongside the community and businesses to target effectively if appropriate. It ultimately comes down to demand and the type of people that want to visit the area. Links with 3.2a&b
6.1.2	That information and research about visitors is made available to the public and industry, so that accommodation outlets and types meet the needs of visitors as well as the expected rise in visitor numbers.	Medium	ACTIONED - ONGOING This happens regularly through CCI in collaboration with VS and CDC.
6.1.3	That cribs/baches be investigated in relation to their economic benefit to communities, and also in terms of the potential to integrate them more usefully into the accommodation resource of the region.	Low	ACTIONED - ONGOING This has been a natural development, as the website has enabled crib owners to promote the availability of their accommodation.
6.2.1	That consideration is given in where future eating and drinking establishments are positioned, encouraging locations close to the coast (where this meets landscape protection policies), or offering vistas.	Low	YET TO BE ACTIONED – REVIEW This has not been a specific focus as such, and has been occurring naturally on a case by case basis as opportunities arise. A number of new businesses and eating establishments have open up as a result of new people moving into the district looking for income sources. It would be worthwhile reviewing the role partners can play to action this recommendation.

6.2.2	That eating and drinking establishments are encouraged to have regular business hours, or business hours that meet the needs of visitors	Medium	ACTIONED - ONGOING There has been a significant improvement in this area, with much more consistency and suitability with hours of operation
6.2.3	That there is investigation into creating high quality souvenirs that depict The Catlins and that these be developed locally, and made available to visitors in a variety of locations	Medium	ACTIONED - ONGOING There has been a significant improvement in this area, as originally there was nothing for people to spend money on. A range of souvenirs and products depicting The Catlins logo and brand have now been developed in the community e.g. Catlins Soap Company are now a thriving business with a shop in Owaka, who use the logo and brand, and the Waikawa Museum also sell a range of localised souvenirs for the tourist market.
GOAL 7: To learn more about the visitor and their relationship with the community and the environment in The Catlins.			
7.1.1	That a programme of ongoing research needs concerning the visitor and their relationship with the community and environment be identified.	Medium	ACTIONED - ONGOING - REVIEW There is no regular visitor survey as such, however information is gathered from time to time from various partners. The opportunity exists to have better co-ordination and consistency of visitor surveys from local businesses and partner organisations. Other forms of research are undertaken as mentioned earlier in recommendation 3.1.4.
7.1.2.	That linkages be developed between The Catlins tourism industry and potential research providers, and that research opportunities/needs concerning The Catlins be promoted widely among the research community	Medium	ACTIONED - ONGOING - REVIEW Contracting research providers has been investigated however has not been possible due to cost. Further discussion and consideration is required to develop more cost effective research opportunities, and how best to utilise and expand upon existing data already being gathered by partners.
7.2	That priority be given to improving the collection of data on visitor usage of various natural and built attractions in The Catlins.	Medium	ACTIONED - ONGOING Visitor numbers are already being gathered by DOC for Curio Bay, Nugget Point and Cathedral Caves, however the detail of information gathered could be improved.

GOAL 8: To ensure that the infrastructural requirements of The Catlins tourism industry are addressed.			
8.1.1	That public toilets be upgraded or new facilities be provided at key, high usage visitor sites, according to the schedule in Table 8.2.	High,	ACTIONED - ONGOING Toilets have been installed at high impact sites (e.g. Jacks Bay, and Surat Bay). New public toilets are planned for Owaka, Purakaunui Falls and Purakaunui Bay.
8.1.2	That a flexible approach to the funding of toilet provision and maintenance be adopted, including pubic-private partnerships, and user-pays.	Medium	ACTIONED - ONGOING At this stage a flexible approach to funding of public toilets has not been required, with funding provided by SDC, CDC and DOC. Flexible funding options may need to be explored in the future.
8.1.3	That the location of public toilets be adequately publicised through signage and published material. And that visitors be warned against indiscriminate toileting via signage and in published material, including the Catlins Care Code.	High	ACTIONED - ONGOING Significant progress has been made with regards to the publicity and promotion of public toilets, with information being provided at key entry point kiosks, the website, brochures, tear off maps and in the Care Code.
8.2	That the relevant authorities investigate options to fund the upgrading of sewage systems at Curio Bay and Papatowai Camping Grounds to meet current and projected demand.	Medium	ACTIONED - ONGOING Pleasing progress has been made with DOC completing the Papatowai sewage upgrade, and commencing planning for a similar sewage upgrade for Curio Bay.
8.3.1	That the relevant authorities undertake a detailed investigation of the campervan waste disposal issue in The Catlins, addressing the extent of the campervan waste discharge problem, and the awareness, use and capacity of existing facilities.	Medium	ACTIONED - ONGOING There are now good campervan waste disposal facilities available and better promotion and education to campervan users about appropriate practise, particularly through The Catlins and specific camping websites. Education and promotion of appropriate Campervan use remains an ongoing priority.
8.3.2	That signage and promotion of campervan dump-stations be enhanced, and that Catlins tourism authorities co-operate with relevant organisations (e.g. rental companies, New Zealand Motor Caravan Association) to promote environmentally friendly campervan practices in the region.	Medium	ACTIONED - ONGOING Detailed in 8.3.1
8.4.1	That avenues of communication be developed to encourage visitors to use existing waste management and recycling facilities.	Medium	ACHIEVED – ONGOING Detailed in 8.3.1 Links with 2.6.2

8.4.2	That the practice of "carry-in, carry-out" for solid waste continue to be advanced for the Catlins region and actively promoted to visitors through the Catlins Care Code and other appropriate means.	Medium	ACTIONED - ONGOING
8.4.3	That in support of Recommendation 8.4.2, a limited number of waste management / recycling facilities be provided in central locations where they are currently lacking.	Medium	ACTIONED - ONGOING - PRIORTY There are now good recycling options in the South of The Catlins, and Owaka residents now have recycling however a recycling centre in Owaka similar to Tokanui is vital.
8.5.1	That local authorities continue to collate information on tourist-related vehicle accidents, as well as traffic flows, throughout The Catlins, with a view to making recommendations on possible improvements. And that this information be communicated to community groups, including Tourism Catlins.	Low	ACTIONED - ONGOING Through a local promotional campaign CCI has been encouraging local residents to report tourist related vehicle accidents, which has been working well. CCI also work closely with the local Councils, Police and Transit New Zealand providing input on possible improvements.
8.5.2	That priorities for road upgrading in The Catlins be assigned based on road usage, attraction visitor counts and motor vehicle accident data, with indicative priorities for upgrading being t¬he Purakaunui Falls access and the Nuggets roads.	Low	ACTIONED - ONGOING Nuggets Road and access to Purakaunui has been upgraded, monitoring and reassessments of roading needs remain an ongoing priority.
8.6	That the relevant local authorities maintain communications with local communities (where bus traffic has been identified as an issue) and bus tour operators with a view to meeting the safety and other needs of all interested parties.	Medium	ACHIEVED This was achieved in terms of communication, however initial perceived issues around bus usage have not eventuated as the majority of vehicles use is from campervans or small vehicles.
8.7.1	That approaches to reduce tourist-related calls upon emergency services be investigated. That these include the provision of information to visitors on road safety, and other areas of concern (e.g. bush-craft, water-code).	Low	ACTIONED - ONGOING This has been addressed by providing educational information on the website and is included in the Care Code, at entry point kiosks, on tear off maps, and through the areas' various marketing materials.
8.7.2	That the need for improved emergency services (fire service, ambulance and police) be assessed in relation to the increased numbers of visitors utilising the region and its roads.	Medium	ACTIONED - ONGOING The Search and Rescue operation in the North and South has grown, and is well supported locally. Improved cell phone coverage in the area has also had a noticeable positive impact.

8.8.2	That short to medium term strategies be implemented to improve visitor-tourist operator communication. And that these include pre-visit information to visitors; enhancing the use of public telephones and free-phones for booking; and promoting the communication/booking role of information centres.	Medium	ACTIONED - ONGOING This is happening through the Information Centres Tourist Operators and Local Authorities, with support from the website for relevant communication.
8.9	That the relevant authorities (e.g. Local Authorities, Department of Conservation) liaise with landowners, local residents and tourism operators over access issues for specific attractions, with a view to improving visitor access whilst meeting landowner and residents' needs, and maintaining attraction values.	High	ACTIONED - ONGOING
GOAL 9: To match the visitor with The Catlins tourism product through appropriate marketing and promotion			
9.1.1	That The Catlins should maintain its key positioning around the themes of nature and wildlife, but should look to expand these to include culture and heritage, and promote that which sets the region apart and makes it unique from other areas in the South Island	Medium	ACTIONED - ONGOING Themes of nature and wildlife remain paramount, and information around culture and heritage is now available through the website and interpretation at key sites.
9.1.2	That greater attention be given to The Catlins as a family destination for the domestic market, by advertising the range of options of accommodation available to families	Medium	ACTIONED - ONGOING Marketing to domestic families has been a focus, with promotion through the website, fortnightly radio updates, and other media, which combined with the economic down turn has seen more domestic families exploring the region. The Catlins has become known as an affordable and enjoyable holiday location for families.
9.2	That Tourism Catlins in co-operation with existing destination marketing organisations (and external researchers when necessary) develop a programme to evaluate the effectiveness of marketing programmes for The Catlins, and of destination awareness in general.	Medium	ACTIONED - ONGOING There has been significant improvement in this area with VS Tourism, CDC and CCI working more collaboratively, and alongside community organisations in regards to community, tourism and economic development and marketing effectiveness. There is a shared respect for a ground up approach, and the value of working collaboratively with key organisations to ensure that marketing campaigns are viewed and evaluated from not only a Catlins perspective but that a wider view is taken e.g. links with SSR and the rest of Southland. Targeted research is also considered important in evaluating the effectiveness of marketing.

GOAL 10: To assist Catlins tourism operators (and associated services) to achieve an outstanding level of service to their clients			
10.1	That a Catlins-wide tourism network be developed and maintained with a focus on developing business and service skills among tourism operators.	Medium, Ongoing	ACTIONED - ONGOING The network has been developed by VS and CDC providing support and training to tourism operators, with secondary support from CCI through the website and other promotions.
10.2	That a consistent Catlins-wide programme of monitoring visitor service satisfaction be introduced to The Catlins. And that the results of this monitoring be used to identify customer service training needs for tourism operators.	Medium, ongoing	ACTIONED - ONGOING Information gathered in 10.1 flows through to operators, who can then make changes, however there are opportunities to improve regularity and consistency of research and follow up with operators. Training support is provided through VS Tourism and opportunities exist to enhance this further if demand exists. All partners understand with such a high proportion of domestic visitors (70%) that visitor satisfaction and experience are extremely important especially for word of mouth promotion and repeat visits.
10.3	That future human resource requirements of The Catlins tourism industry be assessed, with a view to planning for these needs. This may include liaison with local and regional education/training providers over relevant programmes.	Medium	ACTIONED - ONGOING This is a key part of tourism industry in The Catlins, and operators do struggle with 'seasonality' and challenges of attracting staff, let alone quality staff when they need them. Short periods of work (e.g. 3 or 4 months) and lack of places to stay while working are key issues that still need to be addressed. Progress has been made as identified in 10.1 and 10.2, however more can be done in this area.

Notes

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Printed By: ***Venture Southland, May 2016***