



DESTINATION ŌTEPOTI

A Destination Management Plan for Ōtepoti Dunedin

dunedin



DUNEDIN | kaunihera
CITY COUNCIL | a-rohe o
Ōtepoti

CONTENTS

PART ONE

Introduction	5
Our shared vision	6
The Plan at a glance	7
Ōtepoti Dunedin's current strategic context	8

PART TWO

The journey here	10
Ōtepoti Dunedin as a visitor destination	11
Considering the strategic context	12
Understanding the drivers for change	13
Listening to our communities	14
Listening to the visitor sector	15
Bringing it together	16
Insights into our visitors	17
Recognising risk	19

Photography acknowledgement:
Dunedin City Council

Published August 2023

PART THREE

Destination Management Priorities	21
Pathway to resilient destination management	22
Pathway to transformational destination development	23
Pathway to effective destination marketing	24
Pathway to developing world-leading environmental practices	25

PART FOUR

Getting Started	27
First steps	28

APPENDICES

Supporting documents and links	29
Acknowledgements	30



KO TE TŪHONO

Ko te Tūhono is a replica of the doorway into the Ōtākou wharenui Tamatea and positioned right in the heart of Dunedin City – the Octagon.

Described as ‘a doorway of different dimensions’ Ko te Tūhono represents a passage into the landscape, life and wairua of this place.

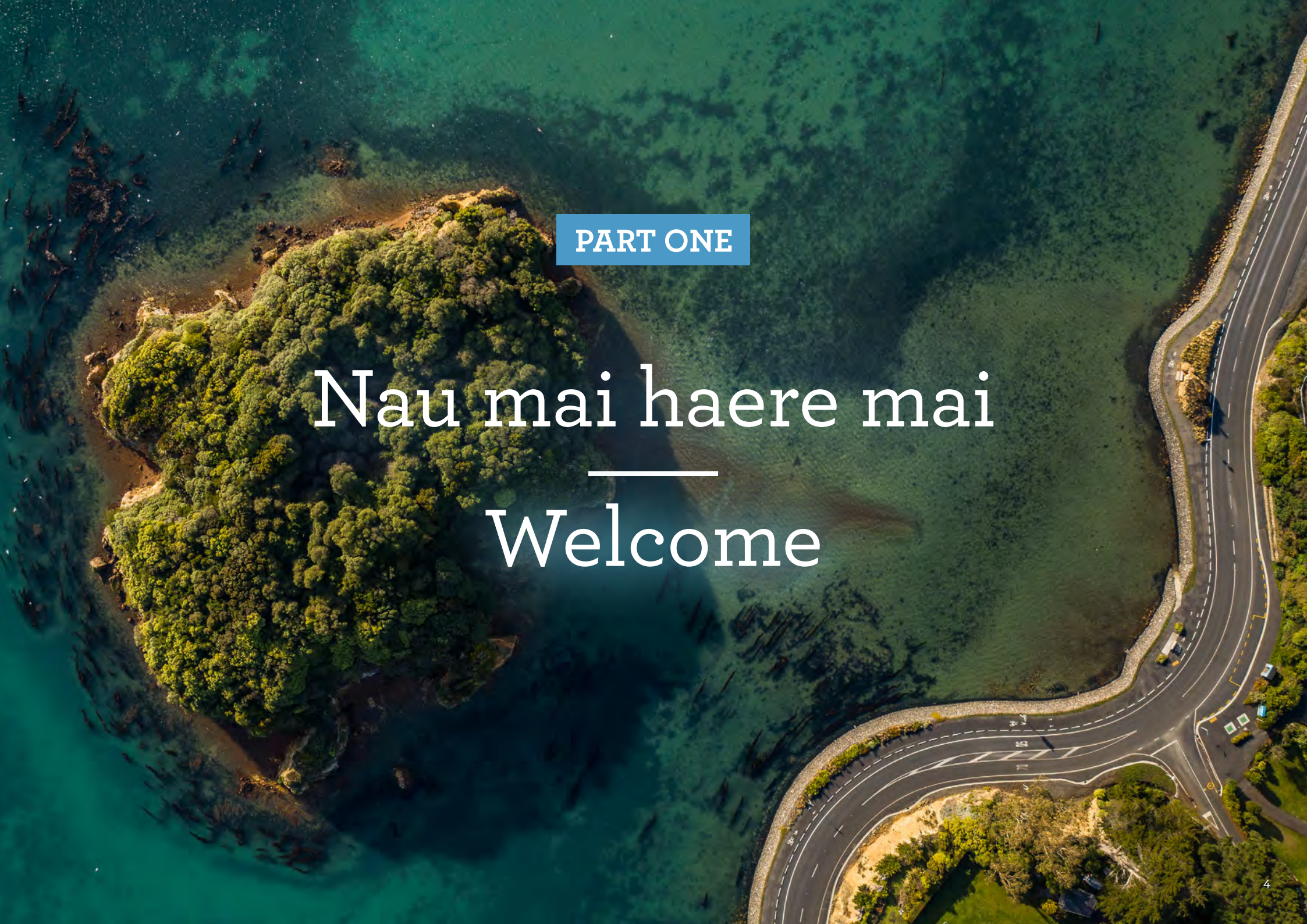
In the words of the artist Ayesha Green, “When you move through Ko te Tūhono, you are inside and outside, you are coming and going.

As a monument to our tipuna (ancestors) and our tamariki (children) Ko te Tūhono transcends time and space”.

We invite our manuhiri (visitors and guests) to enter our world.



Artist: Ayesha Green Kāi Tahu/Ngāti Kahungunu

An aerial photograph of a coastal landscape. On the left, a small, densely forested island is surrounded by clear, turquoise water. To the right, a winding asphalt road with white lane markings curves along the shoreline. The water is a vibrant greenish-blue, and the overall scene is captured from a high angle, looking down.

PART ONE

Nau mai haere mai

Welcome

INTRODUCTION

Ōtepoti Dunedin has an abundance of extraordinary people and places. It is truly one of the most unique destinations in the world.

Promoting and managing it as a visitor destination in a way that benefits our people, taoka and environment, now and in the future, is essential.

Through this plan, we view destination management as a shared journey – one that will be navigated using our collective resources, experience and wisdom.

The installation of Ko Te Tūhono in Ōtepoti Dunedin's Octagon in 2021 invited a new generation of thought leadership and the stronger expression of te ao Māori in the ways in which the city faces the future.

As a waharoa, or gateway, it reflects Ōtepoti Dunedin's past and present. It anchors us to the wisdom of the past, while also inviting us to journey towards a new vision – or a new destination.

This Destination Management Plan has captured our collective aspirations and knowledge to provide the map that will initially lead us through the gateway and then onto the various pathways that will lead us towards a shared vision.

Some pathways will only become clear once we cross the gateway's threshold and begin the journey. While we will need to adapt and refine this plan as we go, we are committed to keeping sight of the vision and aspirations to ensure we continue in the right direction – one determined in conjunction with mana whenua, our community and the visitor sector.

PURPOSE AND OVERSIGHT

The Ministry of Business, Innovation and Employment describes destination management planning as bringing together different stakeholders to achieve the common goal of developing a well-managed, sustainable visitor destination.

It is an ongoing process that requires us to plan for the future and consider the social, economic, cultural and environmental risks and opportunities.

Development of this plan has been overseen by the Ōtepoti Dunedin Destination Plan Steering Group – which includes representatives from Dunedin City Council (staff and governance), mana whenua, and the local visitor and business sectors.

For the purposes of this plan, 'visitor' is defined as someone who lives/works outside Dunedin City Council's boundaries and whose travel is not part of normal business. This definition includes international students.



The background of the slide is a photograph of a night sky. A bright, horizontal band of green aurora borealis stretches across the middle of the frame. Above the aurora, the sky is dark with many small, distant stars. Below the aurora, the dark silhouette of a coastline is visible, including a prominent rocky cliff on the right side. The overall mood is serene and natural.

Matawhānui

Our shared vision

Growing the value of our visitor economy to the benefit of the wider Ōtepoti Dunedin area, and partnering to protect and enhance our environments, taoka and communities.

THE PLAN AT A GLANCE

PATHWAYS TO EFFECTIVE DESTINATION MANAGEMENT

Resilient destination management

- Establishing leadership
- Resourcing for success
- Creating partnerships – local, regional, national
- Strengthening data insights
- Planning and investment to future-proof infrastructure

Transformation destination development

- Developing quality experiences
- Investing in strategic workforce
- Cross-sector experience development
- Regional experience packages
- Strategic planning for business and leisure events
- Natural, cultural and environmental heritage experiences that resonate

Effective destination marketing

- Developing strong media alliances
- Developing marketing strategies building on the brand story and developing awareness
- Identifying our unique brand and story positioning
- Identifying target markets that resonate with our brand

World-leading environmental practices

- Developing environmental standards and guidelines
- Developing initiatives to support and improve the environment and connecting visitors to these
- Understanding cruise sector impacts and developing an action plan
- Determining sector approach to climate change/waste adaption

OUR VISION

Growing the value of our visitor economy to the benefit of the wider Ōtepoti Dunedin area, and partnering to protect and enhance our environments, taoka and communities

OUR ASPIRATIONS



Social

Enable communities to make the most of the visitor sector to build resiliency and maximise benefits



Economic

Grow the economic benefit of the visitor economy for all of Ōtepoti Dunedin's communities



Cultural

Celebrate and protect our diverse natural, built and cultural heritage



Environmental

Leverage the visitor economy to enhance all environments

FOUNDATIONS FOR SUCCESS

People

Effective leadership, capability building, cross sector collaboration, workforce development

Place

Visitor economy supports environments, minimises the negative impacts of the sector on natural and cultural environments, world leading best practice environmental management

Share of voice

Build awareness, build intention and drive conversion



This plan will be reviewed and updated to ensure alignment with any changes to the framework and integration with other relevant strategic priorities and activities – both local and national.

ŌTEPOTI DUNEDIN'S CURRENT STRATEGIC CONTEXT

One of the purposes of local government is to support the social, economic, environmental, and cultural wellbeing of communities in the present and for the future (Local Government Act 2002, Part 2, Subpart 1) – known as the four wellbeings.

Destination management can promote these wellbeings in several ways – including activation and development of partnerships, support for environmental sustainability, development of community assets and infrastructure, and upholding and fostering relationships with kā rūnaka and mataawaka Māori in accordance with Section 4 of the Local Government Act.

Dunedin City Council has a Strategic Framework aligned to the four wellbeings and underpinned by two key principles – sustainability, and respect for and commitment to the Treaty of Waitangi.

The four wellbeings and each of the strategies within the framework have informed this Destination Management Plan.

The Strategic Framework is currently being refreshed and the Destination Management Plan will inform this refresh – including updates to the Economic Development Strategy and other strategies and plans within the framework.

The refreshed Framework will then inform the review and progression of destination management going forward.

We have also considered the national strategic context, further outlined on page 12.

PART TWO

Whakamahere Map-making



THE JOURNEY HERE

EXTRAORDINARY ENVIRONMENTS AND BOLD IDEALS

Much like Ko te Tūhono – a doorway to different dimensions – this plan has many different dimensions.

To shape the future contribution of the visitor industry to Ōtepoti Dunedin, we have looked to the past and into the future – seeking to understand what has led us to here, while considering emerging trends and the impact of challenges confronting the visitor industry locally and internationally.

This plan has also been informed by a series of workshops and discussions and an extensive piece of custom designed community research, along with earlier work that was undertaken on the development of the plan.

This work has enabled us to map a path inspired by a bold ambition, grounded in some critical reality checks and designed to deliver improved outcomes,

development and marketing of Ōtepoti Dunedin as a visitor destination.

The following pages provide a snapshot of this work, with links to detailed supporting documents provided on page 29.





ŌTEPOTI DUNEDIN AS A VISITOR DESTINATION

EXTRAORDINARY ENVIRONMENTS AND BOLD IDEALS

Ōtepoti Dunedin has an extraordinary portfolio of visitor assets born of its early settlement and inspiring natural, cultural, social and economic heritage.

Located on the foreshore of a spectacular harbour, and encompassing communities from Middlemarch to Waikouaiti, it offers all the experiences and services visitors might expect from a sophisticated urban destination – including world-class arts and culture, food and beverage experiences, retail, and educational opportunities.

The city is home to New Zealand's first university – the University of Otago – and some of the country's leading secondary schools, which attract significant numbers of international students and their families to the city every year. Ōtepoti Dunedin also holds pride of place as New Zealand's only UNESCO designated City of Literature.

What also sets the city apart from any other destination in New Zealand, is that these city experiences are embedded within a stunning built and natural environment – including an abundance of heritage buildings and culturally significant sites – which are coupled with a range of outdoor and wildlife experiences that visitors might not expect to find on the edges of a city.

Within easy reach of varied coastal landscapes, a vast and impressive hinterland and spectacular southern neighbours, Ōtepoti Dunedin is a hub from which there is much to explore. It truly is a unique destination.

The opportunity for Ōtepoti Dunedin as a visitor destination is to unlock the value of this portfolio, to share our unique stories, and to extend the visitor offering to deliver enduring value that will enrich and sustain our communities, taoka and environment.

“

Proximity is a big positive for Dunedin – with an exceptional harbour, wonderful and stunning hills and beaches all within 15 minutes' drive or less from the city centre. We also have fantastic cultural offerings – all again within close proximity.

”



CONSIDERING THE STRATEGIC CONTEXT

INTEGRATED PLANNING FOR OPTIMAL DELIVERY

ŌTEPOTI DUNEDIN CONTEXT

Destination management planning is not completed in isolation. To be meaningful and impactful, implementation of this plan will be considered and integrated within a broader context of strategies, plans, policies, investment, and community and sector initiatives.

As outlined on page 8, Dunedin City Council has a Strategic Framework focused on delivering on a range of community outcomes, all centred on improving the social, economic, environmental and cultural wellbeing of our communities in accordance with the Local Government Act 2002. This Strategic Framework supports the development of associated plans and policies and informs decision-making and investment.

Key documents within the Framework include:

- *The Economic Development Strategy* – sets out priorities for creating jobs, incomes and opportunities.
- *The Social Wellbeing Strategy* – outlines how the DCC will foster inclusive communities and quality lifestyles.
- *The Integrated Transport Strategy* – sets priorities for how the safe and efficient movement of people and goods will be supported.

- *Te Ao Tūroa, Dunedin's Environment Strategy* – delineates Ōtepoti Dunedin's climate change impact plan and connects the communities with sustainable ecology and environmental actions.
- *Ara Toi Ōtepoti Arts and Culture Strategy* – roadmaps strategic actions which support the creative sector in Dunedin and develop an environment which acknowledges the intrinsic value of the arts.

NATIONAL CONTEXT

Several strategic documents have been developed at a national level to inform and direct visitor destination management in New Zealand. These have been considered in developing this plan and include:

- The Ministry of Business, Innovation, and Employment Destination Management Guidelines (MBIE, 2020)
- New Zealand-Aotearoa Government Tourism Strategy (MBIE/Department of Conservation, 2019)
- Tourism 2025 & Beyond: A Sustainable Growth Framework Kaupapa Whakapakari Tāpoi (Tourism Industry Aotearoa, 2019)

Links to these and other relevant strategic documents are included on page 29.

Strategic opportunities identified for Ōtepoti Dunedin within strategic documents include:

- driving economic growth and region-wide prosperity by investing in a thriving circular economy
- managing growth and development within ecological limits
- partnering with mana whenua in active recognition of the Treaty of Waitangi
- strengthening social foundations
- celebrating Ōtepoti Dunedin's rich natural, cultural and built heritage.

STRATEGIC CHALLENGES

Nationally and internationally, there are multiple factors at play that influence the strategic context within which we plan for destination management, including:

- the impact of global disruptors and challenges of recovery – social and economic
- changes needed to meet the environmental, economic, social and cultural impacts of climate change
- changing intergenerational values – social justice, diversity, environment and equity
- legislative reforms
- changing geopolitical landscapes and growing international tensions.



UNDERSTANDING THE DRIVERS FOR CHANGE

CHANGE OR BE CHANGED

In parts of New Zealand, destinations are under pressure from visitors. There is concern that tourism and recreational activities are negatively affecting the natural environment, which is reducing the sector’s social license in these communities.

Some host communities have increasingly struggled with the demands of visitors and have been left to carry the financial burden of paying for the infrastructure required to support visitor populations on top of resident populations. There have also been concerns about the broader environmental impacts of tourism, with no form of compensation to restore the environment and correct damage to habitats and sensitive ecologies.

While Ōtepoti Dunedin has not experienced these issues to the extent some other communities have, valid concerns have been raised in feedback.

There are no simple answers when it comes to meeting these challenges, however, there are new ways of doing things that can bring the system back into better balance, which is the vision for this plan.

This plan has been developed to shape a future where there is balance between optimising the benefits of having a visitor economy and mitigating the burdens that can arise when visitor populations are not paying their way or respecting the values of host communities and our environment.

The community research undertaken provided a very clear understanding of the aspirations of Ōtepoti Dunedin’s communities. Their needs and aspirations are therefore at the heart of this plan and are summarised on the following page.

CHANGING THE PARADIGM

The diagram below highlights a fundamental shift in the way in which the visitor industry will be managed into the future. Rather than host communities serving the needs of the visitor industry, things are being flipped to ensure that the visitor industry is making a net positive contribution to host communities – also known as ‘regenerative tourism’.



OTHER KEY DRIVERS:

- Workforce: Competition for talent and the need to develop the tourism workforce, with consideration to changes in the future of work. Additionally, the challenges associated with seasonality
- Resourcing: Recognising that financing and funding the future of tourism development will require new tourism models



LISTENING TO OUR COMMUNITIES

WHAT MATTERS MOST

Extensive community research was undertaken in developing this plan – including several hui and discussion groups from Waikouaiti to Middlesmarch, and a community-wide survey with a diverse range of stakeholders.* The following shared aspirations for destination management emerged from this work:

MANA WHENUA

Aspirations for mana whenua are multi-generational, looking to the future to ascertain what future generations would need to thrive in Ōtepoti Dunedin:

- Ensuring that any developments or opportunities embraced by the visitor sector to not come at the expense of the land
- Enable whānau to return home in the future – this includes ensuring there is adequate employment, housing, educational facilities and social and cultural amenities to support them
- Allowing the transference of traditional knowledge from older generations to younger generations

*See page 29 for a link to the report:
Ōtepoti Dunedin Community Views on Tourism and Destination Development

“ We must use this opportunity to create tourism activities that have a positive impact on the city and its biodiversity rather than just trying to minimise impact. ”

ŌTEPOTI DUNEDIN'S COMMUNITIES

Our communities are aware that tourism brings with it both benefits and burdens. Communities aspire to a future where the visitor industry is managed effectively to:

- Contribute to a thriving economy, and the amenities and services this supports
- Mitigate negative impacts on the environment
- Share in fit-for-purpose infrastructure that will better serve resident communities along with the needs of visitors today and tomorrow
- Play to the strengths of Ōtepoti Dunedin's offering with an emphasis on natural, built and cultural heritage
- Better distribution of visitors around the wider or 'greater' region
- Offer a wider range of experiences and support more communities
- Ensure that visitors are being encouraged to adopt sustainable travel practices
- Address the perceived imbalance between the benefits and burdens of the cruise industry

SOME KEY INSIGHTS:

96% of Ōtepoti Dunedin residents interviewed think domestic tourism is good for NZ and Dunedin

89% support international tourism

80% of these residents indicate they have experienced some negative impact of tourism in their area – such as litter and waste, and pressures on community infrastructure

54% of Ōtepoti Dunedin residents interviewed who work outside the visitor sector (i.e. not in tourism, accommodation or food services) believe that the city's tourism activities and recreational assets are important to the success of the sector in which they work

BRINGING IT TOGETHER

CONCEPTS FOR SUPPORTING VISITOR EXPERIENCES AND 'MUST DOS'

Ōtepoti Dunedin residents, mana whenua and sector representatives emphasised through their feedback that they are most supportive of a visitor destination future for Ōtepoti Dunedin that is based on these nine concepts (right).

These were ranked in order of support – although it is worth noting that this shifts to some extent by community. For example, residents of Otago Peninsula, Waikouaiti and West Harbour all elevate "a global leader in conservation" to first place in their thinking about the type of place they would like Ōtepoti Dunedin to be.

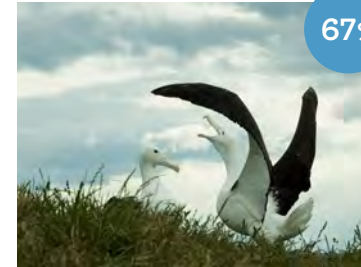
According to residents, four out of six of Ōtepoti Dunedin 'must-dos' for visitors relate to outdoor experiences and the environment: **nature and beach experiences, wildlife experiences, scenic tours (harbour and land) and walking and hiking experiences.**

Rounding out the top six are experiences of the region's heritage, and **food and drink experiences.** A close seventh is arts and cultural experiences.



73%

A place where education and lifelong learning are valued and celebrated



67%

A place where visitors enjoy and learn about local wildlife



66%

A global leader in conservation, where protecting biodiversity and the environment are top priorities



56%

A place with a highly connected network of tracks and trails which provide opportunities for travel, transport and active recreation



55%

A place with a diverse and thriving food and drink scene



49%

A place with a full year-round calendar of sporting, arts, music, culinary, and cultural events



49%

A place that celebrates early settler history and achievements, where visitors can explore old parts of the region and their heritage buildings/sites



46%

A place that celebrates the sites, stories and histories of significance to mana whenua



44%

An inclusive society that celebrates diversity

LISTENING TO THE VISITOR SECTOR

INSIGHTS FROM THE INSIDE

Our visitor sector supports the need for change and are highly motivated to work together towards the following shared ambitions:

- clear leadership for the sector at all levels
- a clear destination plan that is future-focused and capable of attracting the investment that will be needed to realise that future
- cohesive partnerships with local/regional stakeholders that encourage high levels of transparency and accountability
- stronger external partnerships – with other agencies, other regions and cross-sector
- capability programmes available to develop the Ōtepoti Dunedin visitor sector, including start up businesses
- a resilient workforce
- a destination value proposition and brand that connects internally to build pride and connects externally to encourage visitation and positive word of mouth recommendations
- the definition of key performance indicators and the ongoing measurement and reporting of progress towards agreed goals.

BIGGEST REPORTED CHALLENGES FOR ŌTEPOTI DUNEDIN'S VISITOR SECTOR:

58%

of visitor sector businesses interviewed said attracting and retaining staff was their biggest challenge

50%

said the impacts of climate change were also a big challenge

41%

were concerned about managing the impact of tourism on the environment

BIGGEST OPPORTUNITIES:

53%

saw an opportunity to increase visitor expenditure

42%

wanted greater collaboration between tourism operators

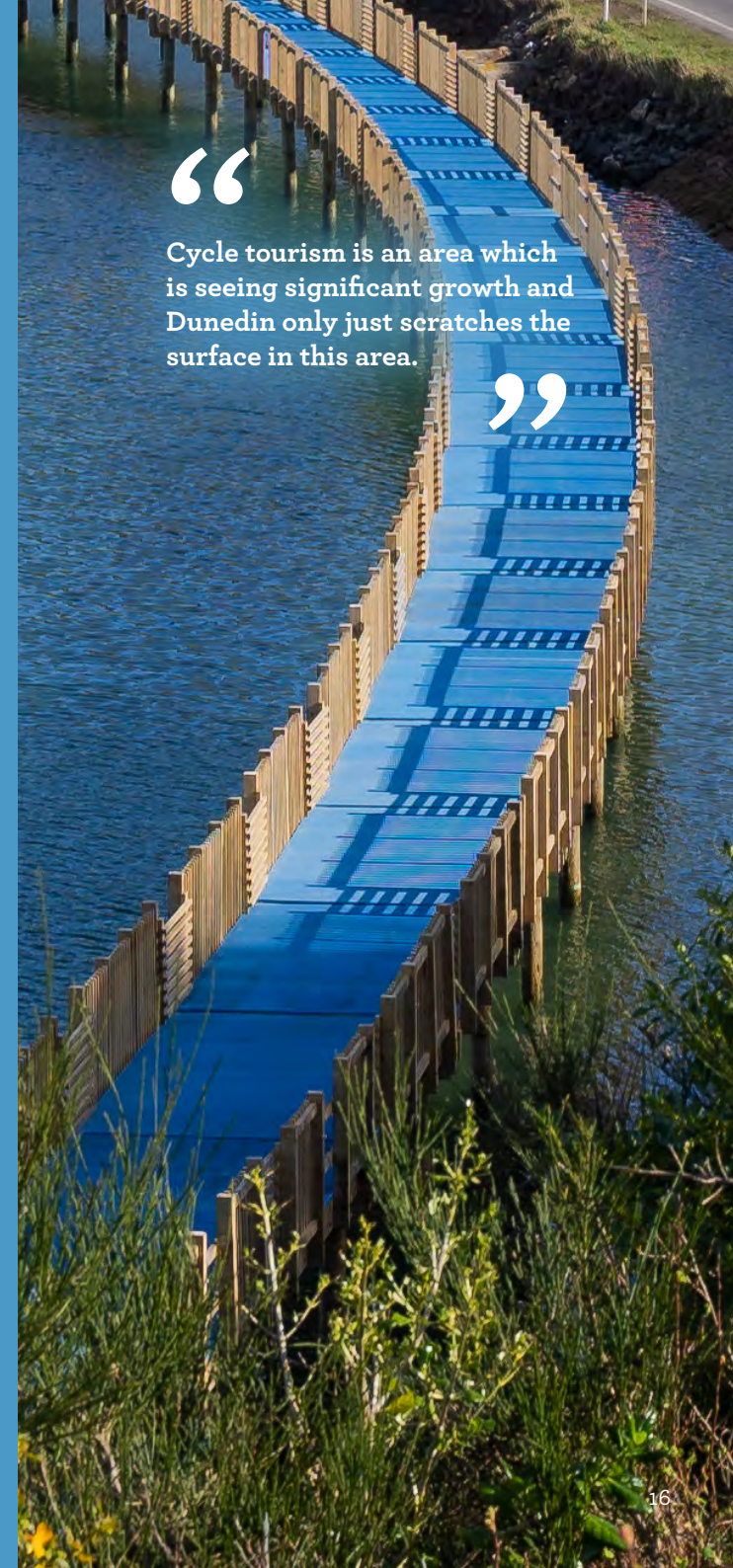
40%

wanted to see cycle tourism/trail development

“

Cycle tourism is an area which is seeing significant growth and Dunedin only just scratches the surface in this area.

”



INSIGHTS INTO OUR VISITORS

KEY TRENDS

The tourism industry contributed \$276M towards GDP in Ōtepoti Dunedin in 2022. This amounted to 3.7% of the city's economic output in 2022, up from 3.4% ten years ago.

Economic output in the city's tourism sector increased by 16.3% in 2022, compared with a 4.3% increase in New Zealand.

Growth in the tourism sector in Ōtepoti Dunedin has averaged 3.5% over the last ten years, compared with 2.4% in New Zealand.

The tourism sector employed an average of 4,683 people in Ōtepoti Dunedin in 2022. This amounted to 7.1% of the city's total employment in 2022, down from 8.6% in 2012.

Employment growth in the sector in Ōtepoti Dunedin has averaged -0.8% over the last ten years, compared with -1.9% in New Zealand. Employment in the tourism industry increased by 8.5% in 2022, compared with a 2.6% increase in New Zealand.

Average visitor nights in Ōtepoti Dunedin increased to 1.92 for the year ending April 2023, compared to 1.4 for the year ending April 2022. During the same comparative periods, occupancy increased from 59% to 64%.

Sources: Dunedin City Annual Economic Profile 2022, Infometrics. Accommodation Data Programme MBIE. AirDNA - short-term vacation rental data and analytics, tracking the daily performance of listings on Airbnb, Vrbo, and more.

STRATEGIC CHALLENGES

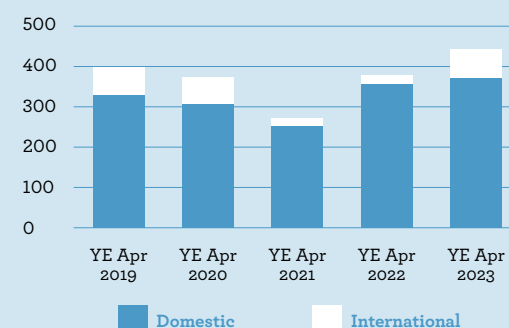
Until the impact of COVID-19 and border restrictions, 5,000 international students studied in Ōtepoti Dunedin each year – contributing approximately \$200M in economic value to the city.

Approximately one fifth of international students enrolled in our secondary schools and the rest in tertiary (with the majority enrolling at University of Otago).

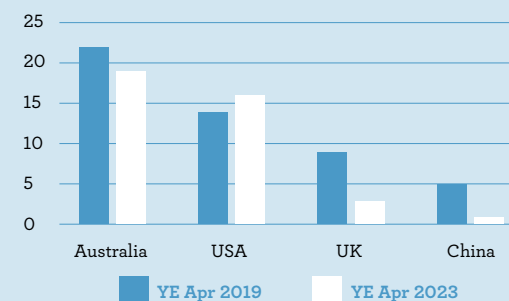
Source markets are different for secondary and tertiary, but in general China, Japan, Thailand and USA are the biggest markets across both.

Source: TECT (MBIE's Tourism Electronic Card Transactions)

ŌTEPOTI DUNEDIN'S ANNUAL VISITOR SPEND (\$M) DOMESTIC & INTERNATIONAL



ŌTEPOTI DUNEDIN'S TOP 4 INTERNATIONAL VISITOR MARKETS BY SPEND (\$M)





INSIGHTS INTO OUR VISITORS

OPPORTUNITIES FOR ATTRACTION

Consumer trends in both domestic and international visitor markets are underpinning growth in demand for:

- authentic, immersive, enlightening experiences
- opportunities to connect with nature
- opportunities to reduce their environmental footprint
- enjoying locally sourced/produced food and beverages, and art, music, fashion, design and events
- opportunities to 'give back' and contribute to a better future
- seamless connectivity of transport systems; and
- connectivity to digital platforms.

“

Our trip to the Otago Peninsula was extraordinary. We spent 10 hours there. We watched Albatross soar through the air, sea lions interact on the beach, and yellow-eyed penguins try to beat the odds. Larnach Castle, Taiaroa Head, and Sandymount provide magnificent views of the peninsula and ocean.

”

OUR LARGEST INTERNATIONAL VISITOR MARKETS

Australia

Visitors from Australia are Ōtepoti Dunedin's biggest market. According to Tourism New Zealand, on average they return to New Zealand 3-4 times in their lifetime.

Nationally, Australian holiday arrivals were balanced throughout the year. They made up 27% of holiday arrivals – but over winter this jumped to 43%. Australian visitors are most likely to join in wildlife activities, water activities, adventure tourism, and museums, galleries and live performances.

United States

Visitors from the United States are Ōtepoti Dunedin's second biggest market, and compared to our other top three markets, is the only one to have grown since 2019. Nationally, this has been attributed to increased air capacity and more direct airline routes, however, it is worth noting that many cruise passengers who visit Ōtepoti Dunedin are also from the United States.

According to Tourism New Zealand's visitor monitor research, travellers from the United States are the most satisfied with their New Zealand holidays. During their visit, two-thirds of Americans travelled beyond New Zealand's main tourist centres to the regions.

Visitors from the United States are most likely to join in wildlife activities, water activities, museums, galleries and live performances, and geothermal attractions.

RECOGNISING RISK

WHAT CAN TAKE US OFF TRACK

NATURAL DISASTERS

We acknowledge that risk management is vital, given New Zealand's propensity to natural disasters such as earthquakes, volcanic eruptions and severe weather events.

Dunedin City Council (DCC), recognising its responsibility under Section 64(1) of the Civil Defence Emergency Management Act 2002 to plan and provide for civil defence emergency management within its district, carries out and promotes effective and integrated emergency and risk management which covers all phases of emergencies: Reduction, Readiness, Response, and Recovery

There is also a National Disaster Resilience Strategy for all who live in, work in or visit our country. This outlines the long-term goals for Civil Defence Emergency Management. This will be referred to and considered in risk management planning going forward.

CLIMATE CHANGE

Climate change presents significant risk and challenges for all communities and business sectors in New Zealand – including the visitor sector. Planning is well underway at both a local and national level to mitigate and adapt to climate change.

OTHER RISKS

Engagement with stakeholders identified the following key risk areas for visitor destination management for the Ōtepoti Dunedin area:

- decision-making, planning and leadership
- connectivity/infrastructure/facilities
- too few visitors
- changing character of Ōtepoti Dunedin
- over-promising
- narrow focus/over-reliance on tourism
- business impacts
- excluding/pricing out locals
- too many visitors eroding quality of experience and impacting environments

These have been considered in the plan's priorities and will inform implementation. Available visitor sector best practice guidance and resources, along with Government policy and guidelines, will be referred to and used to inform risk management, along with local sector knowledge and experience.

Risk management will also be considered and undertaken within the context of DCC's Strategic Framework and associated plans and policies.



A scenic coastal landscape featuring a large body of water under a blue sky with scattered clouds. In the foreground, a person wearing a red and white checkered shirt and a yellow backpack is riding a bicycle on a paved path with a wooden railing. To the right, a small white building with a blue window is situated on a wooden pier extending into the water. The background shows a green hillside with some houses and a large, dark evergreen tree on a rocky outcrop. The overall atmosphere is peaceful and scenic.

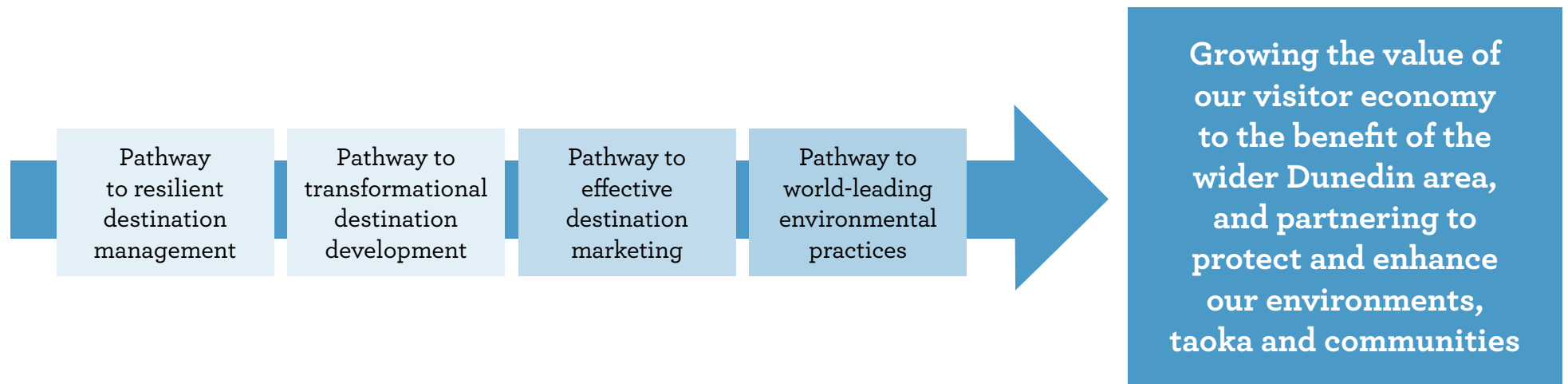
PART THREE

Huanui

The way forward

DESTINATION MANAGEMENT PRIORITIES

After reviewing and considering the extensive feedback from stakeholders, the Destination Management Plan Steering Group confirmed four priority pathways for achieving the Vision:



The following pages provide an overview of the priorities and key supporting actions.

PRIORITY 1

PATHWAY TO RESILIENT DESTINATION MANAGEMENT

For Destination Ōtepoti Dunedin to thrive, and for us to work toward achieving the shared vision articulated within the destination management plan, the right foundations must be laid in order for the benefits identified within the plan to be achieved.

These foundations are designed to ensure that the visitor economy and sector as a whole are resilient, and can weather any future local, regional, national, climate or global disruptors.

	SUPPORTING ACTIONS	WHY THESE ARE NEEDED	POTENTIAL PARTNERS (not limited to)	DESIRED OUTCOMES
1.1	Determine and enable effective leadership of Ōtepoti Dunedin's visitor sector	To maximise the opportunities and benefits outlined within this plan, and to work towards achieving community aspirations, it is imperative that there is strong leadership within the city for the sector.	Dunedin City Council (DCC) Mana whenua Destination Management Plan (DMP) Steering Group	Visitor sector and community confidence in leadership structure Leadership skillsets aligned to DMP's aspirations and priorities Progression of DMP priorities and deliverables
1.2	Resource destination management within the region	To ensure there is adequate funding and resourcing available to implement the recommendations within this plan, as well as ensuring business as usual activities and focus remain. We know additional funding from alternative sources will be required to ensure that the recommendations can be implemented, and milestones can be achieved.	DCC Funders and investors Visitor Sector	Council budgets make provision for destination development, management and marketing Investors and external funders are investing in the region
1.3	Strengthen data insights	Quality, relevant insights and data will be imperative to track the delivery of this destination management plan, to measure and report on the success of recommendations and to inform decision making across the sector. It is also integral that industry are tracking consistent data and supplying that data to the tourism authority to assist with this recommendation.	Enterprise Dunedin (DCC) Visitor Sector Events Sector	Insights are readily available to sector partners to ensure decision making is informed
1.4	Develop local/regional/national partnerships that enable sector growth	The visitor sector is one that is built on the relationships between people and place. For Ōtepoti Dunedin to grow the visitor economy and maximise the benefits back to our communities, we need to ensure that we are building strong and collaborative networks that provide mutual benefit. Strategies should be developed to determine what relationships would assist the destination in achieving the shared vision and determine ways of working with these partners to optimise the opportunities presented.	Visitor Sector DCC Regional Tourism NZ (RTNZ) Mana Whenua Dunedin Airport Port Otago Otago Regional Council (ORC) and Lower South Island Councils	Strengthened relationships are formed within the sector Shared strategies, initiatives and investment opportunities Regional dispersal is achieved
1.5	Develop appropriate infrastructure plans	Strong, sustainable internal transport networks are a vital asset for the destination, and will assist with a growing visitor sector. Amenities and community wealth building projects will support our local communities, but will also benefit the visitor sector.	Waka Kotahi ORC Kiwi Rail DCC Dunedin Airport Port Otago	Transport networks and other infrastructure assets meet the needs of the destination Community wealth and environmental wellbeing is built through the development of amenities

PRIORITY 2

PATHWAY TO TRANSFORMATIONAL DESTINATION DEVELOPMENT

Destination development ensures that there are experiences, events, packages and opportunities for visitors to engage with the destination at multiple levels.

A destination requires a range of experiences to ensure that visitors will not only take the time to come to Ōtepoti Dunedin, they will stay longer and engage with people and the place that make this destination unique.

	SUPPORTING ACTIONS	WHY THESE ARE NEEDED	POTENTIAL PARTNERS (not limited to)	DESIRED OUTCOMES
2.1	Develop quality experiences that strengthen Ōtepoti Dunedin's positioning and value proposition	Although there is a significant breadth of experiences available in Ōtepoti Dunedin, there is room for others or product extensions with existing operators. An experience development strategy that identifies experience gaps and opportunities to strengthen the unique positioning of the city would be advantageous.	DCC including Events and Enterprise Dunedin Fundors and investors Professional Conference Organisers DVML Visitor Sector	A greater range of quality experiences developed that fill identified gaps A range of appealing, commissionable and easily marketable packages are available to trade Uptake of experiences by visitors and growth in visitor nights/spend
2.2	Invest in strategic workforce and capability development pathways	Skilled and available workforce and people are integral to a successful visitor sector and growth of the visitor economy. Disruptors in recent years have shown that sector workforce has been heavily affected. In addition, we need to ensure tour operators have programmes available to them to build their own capability and business capacity.	Visitor Sector Service IQ Business South Education Providers Workforce Development Programmes	A greater range of capability building programmes for operators Skilled workforce available and meeting sector ebbs and flows Greater visitor sector businesses resilience
2.3	Enable and support cross-sector experience development	Ōtepoti Dunedin enjoys a range of economic drivers and sectors that would work well partnering with the visitor sector. There are opportunities to create cross sector experiences that diversify income streams and widen the scope of community benefit – including tech, food, wine, arts etc.	Visitor Sector Business South Arts/Events sector Sector Development	A greater range of experiences that highlight Ōtepoti Dunedin's diverse sectors are available to be booked Uptake of experiences by visitors and growth in visitor nights/spend
2.4	Develop strategic plans to build and enhance major, business and leisure events	Events are an enabler and drive visitation to Ōtepoti Dunedin, and can encourage visitors throughout the year. Resources and funding to attract, retain, and grow events are needed to ensure this area of the sector continues to thrive. Strategies that provide direction for both business and leisure events for the city will help guide and potentially attract investment.	DVML Event sector Enterprise Dunedin (DCC) Visitor Sector Professional Conference Organisers	Event strategies that align with and strengthen the destination positioning of Ōtepoti Dunedin are developed Increased investment to attract, retain and grow events Growth in number of and attendance at major, business and leisure events in the region
2.5	Develop experience packages that drive regional dispersal of visitors and economic benefit	Strengthening relationships with arterial links into Ōtepoti Dunedin (including Dunedin Airport and Port Otago) could maximise the time visitors spend within Ōtepoti Dunedin and enable them to get out to experience the wider region. Packaging regional experiences can increase length of stay and enable benefits to flow into the wider Ōtepoti Dunedin area.	Visitor Sector Enterprise Dunedin (DCC) Dunedin Airport Port Otago	Multiday packages that include stays in the wider Ōtepoti Dunedin area available for sale across multiple platforms Increased length of stay Regional dispersal is achieved
2.6	Develop experiences for visitors to engage with our natural, cultural and environmental heritage in ways that resonate most with them	Developing strategies for experiences that encourage people to engage with the outdoors through walkways, cycleways and on water activities. Ōtepoti Dunedin should be seen as a gateway to the Central Otago region and the trails that are available there.	Enterprise Dunedin (DCC) Cycle Network Landowners Department of Conservation (DoC)	Evidence-based strategies are in place that align with desired destination plan aspirations The Ōtepoti Dunedin region is known for a range of activities that take place in the natural environment and seen as a gateway to engage with nature, wildlife, people and place

PRIORITY 3

PATHWAY TO EFFECTIVE DESTINATION MARKETING

Effective destination marketing creates opportunities for potential visitors to build awareness of what the positioning is; what experiences are available and are encouraged to visit.

Work needs to be done to ensure the awareness is being built; there are pathways that turn awareness into intent to travel; and effective trade channels to ensure intention can be converted.

	SUPPORTING ACTIONS	WHY THESE ARE NEEDED	POTENTIAL PARTNERS (not limited to)	DESIRED OUTCOMES
3.1	Identify the destinations unique brand and story positioning, grounded in the destinations value proposition	Ōtepoti Dunedin has a diverse and rich story to tell. There are elements of that story that would lead to, and build powerful and unique stories that would strengthen the destinations brand, and the value proposition and positioning it enjoys. Development of a strong brand/place story will guide decision making to enhance marketing and media opportunities, ensuring it strengthens our unique positioning.	Mana Whenua DCC City Marketing Enterprise Dunedin (DCC) Visitor Sector	Strong brand/place story developed Value proposition of the destination is understood Marketing is consistent with these strategies A suite of tools exist for industry and other sectors to use
3.2	Develop marketing and media strategies that build on the brand story and grows awareness of the destination to key markets	Marketing and media strategies along with other enabler and sector development strategies (e.g Events) should work together to grow the awareness of Ōtepoti Dunedin as a destination to key markets, and strengthening the unique positioning of the destination. This could include opportunities for marketing focused on low carbon activities.	Mana Whenua DCC City Marketing Visitor Sector Media partners	Recognised marketing campaigns that speak to the unique positioning of the city Marked increase in the awareness of Ōtepoti Dunedin as a destination
3.3	Identify the target markets the Ōtepoti Dunedin brand and value proposition will resonate most with, and market to them	Identify the target market segments where the Ōtepoti Dunedin brand, experience and proposition resonate most with. Work with industry to ensure that experiences cater to these markets, or are very clear if who they target, are not the typical Ōtepoti Dunedin visitor, but they service a particular sect of the visit market.	Mana Whenua DCC City Marketing Visitor Sector	Target markets identified and understood Information on target markets accessible to stakeholders Stakeholders have a clear understanding of the region's target markets
3.4	Develop strong media and marketing alliances to build awareness	Identify and invest in the programmes and marketing channels that put the destination in front of the right people at the right time. Work with regional gateways to ensure cohesion and consistency of messaging. Ensure media partners are the right ones, speaking to the right people at the right time.	DCC City Marketing Dunedin Airport Media agencies	Cohesive campaigns developed to build awareness across multiple platforms Marked increase in the awareness of Ōtepoti Dunedin as a destination Increase in visitors' numbers and length of stay Regional dispersal is achieved

PRIORITY 4

PATHWAY TO DEVELOPING WORLD-LEADING ENVIRONMENTAL PRACTICES

Perhaps the most shared aspiration uncovered during the consultation process was the desire for Ōtepoti Dunedin to lead the way when it comes to the preservation and protection of our natural taoka – our whenua, our wildlife and our communities.

Ōtepoti Dunedin is blessed with a large number of cultural and natural assets, and many taoka call this beautiful place home, a place we need to take responsibility for to protect them for future generations.

	SUPPORTING ACTIONS	WHY THESE ARE NEEDED	POTENTIAL PARTNERS (not limited to)	DESIRED OUTCOMES
4.1	Determine environmental standards and guidelines appropriate for the Ōtepoti Dunedin visitor sector	Our shared aspirations aim to enhance greater Ōtepoti Dunedin's natural, cultural and built environments. There also needs to be alignment with existing policies e.g. DCC Te Ao Turoa – Environment Strategy (which includes carbon targets, waste etc), ORC Regional Policy Statement, Tourism Sustainability Commitment, Tiaki Promise, Dunedin Wildlife Code, Kai Tahu Otago Natural Resources Management Plan.	DoC, DCC, ORC Mana Whenua Visitor Sector Tourism Industry Association (TIA) University of Otago	Environmental strategies to support the visitor sector are consistent and aligned Environmental standards and guidelines are defined, adopted, and monitored in DMP reviews Sector engagement and compliance with guidelines Positive community feedback
4.2	Develop initiatives with industry that support and improve the environment and connect our visitors with environmental initiatives	Biodiversity should be the key focus because Ōtepoti Dunedin has unique habitats and species, which are a key attraction for visitors. There are wins all round if the visitor economy helps to improve our biodiversity. Visitor sector to work with local community initiatives to align purpose brand with visitors including – Predator Free Dunedin, Yellow-eyed Penguin Trust, NZ Sealion Trust, Dunedin Wildlife Hospital, Otago Peninsula Trust, Orokonui Ecosanctuary.	DoC, DCC, ORC Mana whenua Visitor Sector Community	Hoiho numbers stabilise and increase Other key species numbers increase Protected habitats and native plantings increase at greater rate than baseline – especially in key coastal areas Pest species decrease at greater rate than baseline More visitors actively involved in conservation
4.3	Investigate the benefits and burdens of the cruise sector	Cruise is “mass tourism” for Ōtepoti Dunedin, and places peak demand burdens on operators, buses, and CBD businesses. It is vital to identify Ōtepoti Dunedin's capacity to fulfil cruise guests' expectations, and the community's desire and ability to welcome cruise guests, as well as cater to our FIT and domestic markets.	Visitor Sector Port Otago/Cruise Association Business South Community Dunedin Railways/University of Otago	Benefits and burdens identified and quantified as a basis for ongoing planning Definition of acceptable numbers of cruise visitors to match Ōtepoti Dunedin's infrastructure
4.4	Develop a sector-led cruise action plan	Positive social license is vital for the health and wellbeing of the visitor sector, cruise sector, our communities and our visitors. This will involve taking the results from the benefits and burdens investigation and developing a sector wide plan and approach to the cruise market. This should include ensuring experiences sold to cruise passengers and supported by the district are quality experiences. Consideration should be given to exploring the consequences of capping cruise ship visits to the city.	Cruise Action Group DCC – including Zero Carbon Team Enterprise Dunedin, Transport, Waste Minimisation teams Waka Kotahi/Otago Regional Council Transport Providers University of Otago/Port Otago Cruise Association NZ/Visitor Sector Rep	Identification and application of ways of meeting increased demand Positive feedback from residents following plan implementation
4.5	Determine a sector-wide approach to climate adaptation and waste adaptation and promote individual operator plans	Climate change, waste and other issues should not be neglected, and the visitor economy should understand the impacts of their individual operations and have a plan in place to minimise carbon footprints. A Climate Change adaptation plan would also be of benefit.	DoC, DCC, ORC Mana whenua Visitor Sector Community	Green initiatives showing benefits – eg wind power, waste reduction, forestry and other green waste re-use – eg bio-fuels, compost Average visitor waste and carbon travel footprint decreases



PART FOUR

Whakataki

Beginning

GETTING STARTED

This Destination Management Plan sets out an ambitious Vision and Aspirations for Ōtepoti Dunedin. To progress our journey towards achieving them, we have identified first steps – the priority actions needed provide a basis for success and build momentum.

While this is the start of a new journey, we also acknowledge the work already done getting to this point. This includes the Dunedin City Council's Strategic Framework, currently being refreshed in collaboration with mana whenua and city stakeholders. This work will be considered and integrated into the first steps and other actions over time.

While all actions identified under the four priority pathways are important and must be progressed,

the following actions are intended to support and drive the plan forward and will require a collaborative effort. These actions are either foundational to the success of other priority actions in the Plan, or are already underway and can be achieved earlier.

Prioritising these actions will not rule out progression of other priority actions as further information and resources become available.

	2023	2024	2024	2025 + beyond
Pathway to resilient destination management	ADOPTION OF DESTINATION MANAGEMENT PLAN 1.1 Determine and enable effective leadership of Ōtepoti Dunedin's visitor sector 1.2 Resource destination management within the region	1.4 Develop local, regional and national partnerships that enable sector growth	1.5 Develop appropriate infrastructure plans 1.3 Strengthen data insights	Ongoing review and development of all initiatives
Pathway to transformational destination development		2.1 Develop quality experiences that strengthen Ōtepoti Dunedin's positioning and value proposition 2.4 Develop strategic plans to build and enhance major and leisure events and business events in the region	2.2 Invest in strategic workforce and capability development pathways 2.3 Develop and support cross-sector visitor experience development	2.5 Develop experience packages that drive regional dispersal of visitors and economic benefit 2.6 Develop experiences for visitors to engage with our natural, cultural and environmental heritage in ways that resonate most with them
Pathway to effective destination marketing	3.1 Identify the destination's unique brand and story positioning, grounded in the destination's value-led proposition	3.2 Develop marketing and media strategies that build on the brand story and grow awareness of the destination to key markets	3.3 Identify the target markets the Ōtepoti Dunedin brand and value proposition will resonate with, and market to them	3.4 Develop strong media and marketing alliances to build awareness
Pathway to world-leading environmental practices	4.4 Develop a sector-led cruise plan (underway, including benefits and burdens of the cruise sector)	4.1 Determine environmental standards and guidelines appropriate for the Ōtepoti Dunedin visitor sector	4.2 Develop initiatives with industry that support and improve the environment and connect our visitors with environmental initiatives	4.3 Investigate the benefits and burdens of the cruise sector (to incorporate into refresh of the Cruise Plan) 4.5 Determine a sector-wide approach to climate adaptation and waste management and promote individual operator plans

The schedule provides an overview of the timing and sequencing of key initiatives that will be undertaken to implement the plan. These will be subject to review and changes as resourcing becomes available and in response to any changing demands or emerging risks from within the local, national or international context.

FIRST STEPS

The initial approach for implementing the priority actions:

Priority actions	What will be done to progress this	Contributors	Key deliverables	Timeframes
1.1 Determine and enable effective leadership of Ōtepoti Dunedin's visitor sector	Review the structure required to drive the Plan's outcomes Draft ODDMP Steering Group Terms of Reference Determine future membership of Steering Group	Current ODDMP Steering Group DCC	Steering Group structure confirmed Steering Group Terms of Reference agreed Steering Group membership confirmed	By December 2023
1.2 Resource destination management within the region	A stocktake of potential resources and funding for DMP projects Identify DMP projects that potentially could be funded in the Council's 2024-34 Long Term Plan	ODDMP Steering Group in consultation with all potential partners identified in pages 22	ODDMP resources and funding identified Projects and budget proposals for DMP included in Draft 2024-34 Long Term Plan for public consultation	By November 2023
2.4 Develop strategic plans to build and enhance major business and leisure events in the region	Ensure existing ED Business Events Plan is refreshed in line with ODDMP Provide input into the Dunedin Festival and Events Plan refresh	DCC/Enterprise Dunedin in collaboration with potential partners as listed on page 23	Business Events Plan aligns with DMPs aspirations Dunedin Festival and Events Plan aligns with DMP's aspirations	Ongoing
3.1 Identify the destination's unique brand and story positioning, grounded in the destination's value proposition	Scoping of requirements by City Communications and Marketing Engagement with key stakeholders Development of branding and story positioning development to reflect engagement outcomes	City Marketing Manager in collaboration with potential partners as listed on page 24	Refreshed brand guidelines around story-telling and destination management Recognised marketing campaigns that speak to the unique positioning of the city Marked increase in the awareness of Ōtepoti Dunedin as a destination	By 30 June 2024
4.1 Determine environmental standards and guidelines appropriate for the Ōtepoti Dunedin visitor sector	Project to be scoped by the ODDMP Steering Group	ODDMP Steering Group in collaboration with potential partners as listed on page 25	Project scope agreed Resources identified Project timelines agreed	By December 2023
4.2 Develop initiatives with industry that support and improve the environment and connect our visitors with environmental initiatives	Project to be scoped by the ODDMP Steering Group	ODDMP Steering Group in collaboration with potential partners as listed on page 25	Project scope agreed Resources identified Project timelines agreed	By December 2023
4.4 Develop a sector-led cruise plan	Work already underway by Cruise Action Group Stakeholder engagement	Cruise Action Group in collaboration with partners identified on page 25	Cruise Action Plan document	By December 2023



SUPPORTING DOCUMENTS AND LINKS

The Plan and supporting documents outlined below can be found online here www.dunedin.govt.nz/otepoti-dunedin-destination-management-plan

ŌTEPOTI DUNEDIN-SPECIFIC

Enterprise Dunedin Product Development Review Summary of Findings and Next Steps (November 2021)

Developing Dunedin's Visitor Experiences Product Development Review (March 2022)

Developing Ōtepoti Dunedin's Food And Drink Tourism Sector Approach (September 2022)

Ōtepoti Dunedin Community Views on Tourism and Destination Development (November 2022)

NATIONAL

The Ministry of Business, Innovation, and Employment Destination Management Guidelines (MBIE, 2020)
www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-projects/destination-management-guidelines

New Zealand-Aotearoa Government Tourism Strategy (MBIE/Department of Conservation, 2019)
www.mbie.govt.nz/immigration-and-tourism/tourism/new-zealand-aotearoa-government-tourism-strategy

Tourism 2025 & Beyond: A Sustainable Growth Framework Kaupapa Whakapakari Tāpoi (Tourism Industry Aotearoa, 2019)
www.tia.org.nz/tourism-2025



ACKNOWLEDGEMENTS

Dunedin City Council wishes to acknowledge and thank everyone involved in the development of this plan, including:

The Ōtepoti Dunedin Destination Management Plan Steering Group (established 2021) comprising City Council elected representatives, Enterprise Dunedin staff, and representatives from Te Rūnanga o Ōtākou and Kāti Huirapa Rūnaka ki Puketeraki, Dunedin Host and Business South

Community members and representatives who participated in workshop discussions, hui and surveys, including:

- Mana whenua
- Ōtepoti Dunedin Community Boards
- Residents from across the city boundaries
- Visitor and business sector representatives

Angus & Associates

Huatau Limited

Professor James Higham, University of Otago

Stafford Strategy

The Pyjama Strategist Limited



Dunedin City Council
50 The Octagon
PO Box 5045, Dunedin 9054
P 03 477 4000
E dcc@dcc.govt.nz
www.dunedin.govt.nz



DUNEDIN
CITY COUNCIL

kaunihera
a-rohe o
Ōtepoti

dunedin

