



DEVELOPING ŌTEPOTI DUNEDIN'S FOOD AND DRINK TOURISM SECTOR APPROACH

RECOMMENDATIONS AND ACTION PLAN

APRIL 2022

dunedin

**FOOD + DRINK
NEW ZEALAND**

*Nau te rourou, naku te rourou,
ka ora te manuhiri*

*“With your food basket and my food basket,
the people will thrive”*

COMMERCIAL IN CONFIDENCE

This document is strictly confidential to and solely for the use of the recipient and may not be reproduced or circulated without the express consent of Food + Drink New Zealand and Enterprise Dunedin. If you are not the intended recipient, you may not disclose or use the information in this documentation in any way. The information in this document has been prepared from sources believed to be reliable but Food + Drink New Zealand does not represent it as accurate or complete.

Front cover image: Dunedin City Council



// EXECUTIVE SUMMARY	4	// PART 3. DUNEDIN FOOD AND DRINK STAKEHOLDER INSIGHTS	23
// METHODOLOGY	5	Stakeholder Engagement Summary	23
// PART 1. MACRO-ENVIRONMENT: FOOD AND DRINK TOURISM AND EVENTS IN NEW ZEALAND	6	// PART 4. DUNEDIN FOOD AND DRINK TOURISM SECTOR ACTION PLAN	29
What is Food and Drink Tourism?	6	What is the Food and Drink Tourism Opportunity for Dunedin?	29
New Zealand's Food and Drink Tourism and Events Landscape	7	Recommended Food and Drink Sector Action Plan	30
Food and Drink Events in New Zealand	13	• Foundation Work	31
// PART 2. MICRO-ENVIRONMENT: FOOD AND DRINK TOURISM AND EVENTS IN DUNEDIN	16	• Collaborations and Partnerships	33
Dunedin's Food and Drink Tourism and Events Landscape	16	• Events	35
How does Food and Drink link to existing Dunedin City Council Plans?	18	• Product Development	37
Dunedin Food and Drink Events Assessment	19	• Long-Term Marketing	40
• SWOT Analysis – Dunedin Food and Drink Events	21	// REFERENCES	42

EXECUTIVE SUMMARY

Dunedin's food and drink tourism landscape is in an early development phase. With a combination of established offerings such as the weekly Otago Farmers' Market, a handful of superb top-end restaurants gaining national recognition, investment to attract culinary talent back to Dunedin from overseas, and a growing food and drink events portfolio, the Dunedin food and drink offering has good bones.

However as with many regions across the country there is no well-articulated "Dunedin Food Story" in the same way that people understand the Fashion or Art story for Dunedin.

At present, the portfolio of food and drinks events in Dunedin predominantly caters to the local market; the events themselves agree on this. Their creation and evolution were based on filling a gap or 'need' for a local audience and over time, the events have organically grown and attract some out-of-town visitation.

The Dunedin Craft Beer & Food Festival and the Port Chalmers Seafood Festival both report out-of-town attendance of around 30%, whilst Dine Dunedin attracts roughly 5% visitors. The Dunedin Craft Beer & Food Festival cites challenges in growing their event, mostly due to venue capacity limitations, whereas both the Port Chalmers Seafood Festival and Dine Dunedin have significant opportunity for growth in attendance. That said, all three events, with the right investment and support (public relations, social media, above the line marketing), could attract a higher proportion of out-of-town visitors versus local attendees, driving up the value of these events to the Dunedin tourism economy.

This report contains a review of these three events and includes a SWOT analysis which identifies key outcomes designed to evolve all three events, particularly focusing on collaboration with Enterprise Dunedin and Dunedin City Council, and the steps required to elevate to events of national status.

In January 2022, Food + Drink New Zealand facilitated two workshop sessions in Dunedin. The first with an internal Enterprise Dunedin team, and the second with an external stakeholder group encompassing a broad range of representatives of restaurants, events, producers and hospitality industry from Dunedin. The purpose of these sessions was two-fold:

1. To share with the group the opportunity that culinary tourism and events provides Dunedin; and
2. To understand the two stakeholder group's views on the food and drink tourism sector, the opportunities it provides, points of difference and product development opportunities.

A series of questions were posed to the attendees which were discussed and workshopped in table groups.

Finally, a Recommended Action Plan is included in this report providing a practical list of next steps for Dunedin's Food and Drink Sector Tourism Approach. The Action Plan is divided into these five key areas:

1. **Foundation Work** – creating an authentic and meaningful starting point to establish the Dunedin Food Story, and from which all other elements of the Dunedin food and drink offering are based
2. **Collaborations and Partnerships** – details what relationships need to be developed to support the food and drink tourism sector, remove the red tape, and build a strong ambassador programme for Dunedin to build pride
3. **Events** – enhancements and investments required to elevate some of Dunedin's food and drink events to national status
4. **Product Development** – longer-term projects that will offer direct benefits to the food and drink tourism sector, drive long term capability building and product development that contributes to the Dunedin food and drink narrative
5. **Long-Term Marketing** – once the building blocks are in place, tell the rest of New Zealand (and the world) about Dunedin's food and drink tourism offering to drive visitation.



Photo: Dunedin City Council

METHODOLOGY

This Food and Drink Tourism Sector Approach for Dunedin was developed by Food + Drink New Zealand for Enterprise Dunedin during the period of January – April 2022 and involved:

- // Internal discussions with Enterprise Dunedin
- // 1 x Regional Familiarisation visit (January) including producer meet-and-greets
- // 1 x Internal Stakeholders Workshop
- // 1 x External Stakeholders Workshop
- // Meetings and discussions with key Dunedin food and drink events – Dine Dunedin, Dunedin Craft Beer & Food Festival and the Port Chalmers Seafood Festival
- // Secondary research review – a review of a wide range of research sources (documented in the References section of this report).

PROJECT DELIVERABLES

The key outputs of this work are to:

- // Outline how to differentiate Ōtepoti Dunedin city's food and drink offering over other South Island destinations
- // Benchmark Ōtepoti Dunedin city's food and drink offering over other South Island destinations and comment on opportunities for differentiation

- // Identify how food and drink events in Ōtepoti Dunedin might be enhanced and what might be required to elevate such an event/s to national status
- // Comment on any other aspects on Ōtepoti Dunedin's food and drink offering (opportunities/threats) that might contribute to enhancing the sector.

PROJECT APPROACH

This project and report have been broken down into four key elements:

- // Part 1: Macro-Environment: Food and Drink Tourism and Events in New Zealand
- // Part 2: Micro-Environment: Food and Drink Tourism and Events in Dunedin
- // Part 3: Dunedin Food and Drink Stakeholder Insights
- // Part 4: Dunedin Food and Drink Tourism Sector Action Plan

OUT OF SCOPE

This is not a full, holistic Food and Drink Strategy for Dunedin. This is a Recommended Food and Drink Tourism Sector Approach that should be used in conjunction with other relevant reference documents including Dunedin's Economic Development Strategy 2013-2023, Dunedin Destination Plan, Brand Dunedin Guidelines and the Festival and Events Plan 2018-2023.



PART 1. MACRO-ENVIRONMENT **FOOD AND DRINK TOURISM AND EVENTS IN NEW ZEALAND**

Photo: Dunedin City Council

WHAT IS FOOD AND DRINK TOURISM?

Food and drink are the foundation of all tourism - all visitors eat and drink. In its broadest sense, food and drink tourism is any experience where a consumer can have a taste or a 'taste of place' of a product or ingredient that reflects the characteristics (the *terroir**) of a destination. These are the ingredients that reflect the lands, lakes, rivers, oceans, and skies of a destination and how that is interpreted either through such things as an agritourism experience, a pick your own operation right through to a farmers' market, food trucks and fine dining restaurants, an attraction that has a food and drink offering, a food festival, food event or a culinary tour. Food and drink tourism is where food connects us all and where we come together to really understand a destination's community, their society and culture.

Food and drink tourism is important because it:

- // contributes to the **intangible heritage** of a destination and it is a unique point of differentiation from other places – no two destinations are the same when it comes to food
- // attracts visitors who **spend more** and **spread benefits** across the whole value chain
- // is a **great economic development driver** for lesser visited destinations and communities and it can help small-scale producers diversify their product range and revenue opportunities
- // helps visitors **connect emotionally** to a region and creates lasting visitor loyalty to the place and the products produced.

* *terroir* - the complete natural environment in which a product is produced, e.g. soil, topography, climate and other environmental factors

NEW ZEALAND'S FOOD AND DRINK TOURISM AND EVENTS LANDSCAPE

New Zealand food is very much a reflection of 'Kiwi life' and to many visitors to New Zealand that is the very experience and connection they are seeking... 'what is it like to be a New Zealander?', 'what do Kiwi's eat?'. It is about authenticity and experiencing food and beverage 'of that place'. For New Zealanders travelling around our country, their knowledge is deeper, and they are really seeking local nuance and specialities. They have much more knowledge about what to expect (or think they know) and not surprisingly will be seeking that Dunedin cheese roll, West Coast whitebait or Central Otago Pinot Noir.

A genuine food-visitor wants to discover the real stories, seek out the real talent and find for themselves the real seasonal delicacies. And our stories will mean different things in different seasons and will mean different things in different regions.

They will mean different things to different budgets, different tastes, and different areas of interest. We need to ensure we deliver these stories through genuine experiences; nothing manufactured, or "especially for tourists." Essentially, getting others to tell their food story (chefs, media et al) is the most trusted source for consumers.

Customers are increasingly looking for experiences that tell an authentic local food story:

- // exclusivity – unique and / or behind the scenes experiences
- // meeting producers / brewers / chefs
- // tasting new food and drink, insights into new flavours and food
- // locally sourced, seasonal ingredients
- // businesses with a focus on social and economic sustainability
- // hands-on experiences, e.g., visiting a seafood market to learn about 'today's catch'; selecting your fish then returning to a location to cook, learn, share and eat.

NEW ZEALAND FOOD AND DRINK TOURISM AND THE INTERNATIONAL MARKET

Having steadily grown over the last decade, visitor arrivals from New Zealand's top markets prior to COVID-19 (arrivals to the year-end December 2019) were Australia (1.54 million visitors), China (407,000), the United States (368,000) and the United Kingdom (232,000). Robust growth from all these visitor markets (and others) has predominantly been off the back of significant growth in airline capacity into New Zealand.

TOURISM NEW ZEALAND

Tourism New Zealand (TNZ) is the lead agency for marketing New Zealand as a visitor destination. New Zealand's target market is the 'Active Considerer'. "An Active Considerer is someone who is considering coming to New Zealand for their next holiday, and New Zealand is one of their top five destinations they would most like to visit" (TNZ, 2019).

TNZ has traditionally focused on the natural environment in positioning New Zealand internationally. There is a lesser focus on a number of Secondary and 'Special Interest' targets including:

Secondary Focus

- // Film Tourism
- // Backpacker
- // Business Events
- // Cruise
- // Premium

Special Interest

- // Cycling and Mountain Biking
- // Golf
- // Skiing
- // Walking and Hiking
- // Wine & Food*

*Not actually listed on [tourismnewzealand.com](https://www.tourismnewzealand.com) as a special interest but there is information about "Wine and Food" available after a deep dive.



TNZ's current focus in New Zealand's international markets is to "keep the New Zealand's brand alive internationally not only for when New Zealand's borders reopen but also for trade and export purposes." They are encouraging future visitors to experience New Zealand through digital content so they can continue to dream of their visit here. Food and drink are always an underlying theme, but not often the core promotional message.

INTERNATIONAL VISITOR MINDSETS

TNZ's purpose is "to enrich Aotearoa through the contribution of visitors to our economy, nature, society and culture." To achieve the greatest return on investment, they take a very targeted approach to reaching consumers in key international and domestic markets. To do this, they have evolved how they target visitors to increase their understanding of the needs and travelling behaviours of different types of people. This approach allows TNZ to target high-quality visitors who are an even greater match to New Zealand's tourism aspirations and objectives – across the four well-beings of culture, society, nature and economy.

From the international markets, there are seven key mindsets. These mindsets have been tested against a wide range of activities including:

- // Bars and nightlife
- // Shopping at local markets
- // Trying local/craft beer
- // Trying local cuisine
- // Trying local wines

Based on these food and drink activity preferences, the mindsets that are consistent from the international markets are:

Experienced Connectors	Know what they're doing, and they're free to go out and do it.
Organised Joy Seekers	Like things well organised and planned. They like knowing exactly what they're going to be doing well before they do it.
Vibrant Adventurers	Feel alive when they travel. They love the promise and thrill of adventure.

For more detailed information about these mindsets visit: insights.tourismnewzealand.com/int/mindsets/#/

NEW ZEALAND TRADE & ENTERPRISE

In July 2020, the 'Messages from New Zealand' campaign, developed in partnership with New Zealand Trade and Enterprise (NZTE), Ministry for Primary Industries (MPI), Education New Zealand (EdNZ) and New Zealand Story was launched to promote New Zealand's brand on the world stage and, among other things, reinforced New Zealand's global reputation for producing some of the world's finest food and drinks.

More recently, in Sydney, there has been a focus on food and drink with projects such as 'A Taste of Aotearoa' dinner held in February 2022 in partnership with Gourmet Traveller magazine and NZTE, continuing inclusion throughout the International Media Programme, and more prominent inclusion of 'Food and Drink' messaging on newzealand.com.

On a broader scale, TNZ is continuing to explore what the New Zealand food and drink narrative is and how this can be integrated into existing tourism messaging.

TNZ conducts quarterly research with Kantar to understand the impact of the COVID-19 pandemic on intentions to travel among consumers. The latest release of this data is November 2021.

Quality food and drink experiences rank as a high priority from a number of key international markets when assessing the attributes considered when choosing a destination after Covid-19:

COUNTRY	IMPORTANCE AS A DESTINATION ATTRIBUTE
Germany	43%
Japan	37%
Singapore	46%
United Kingdom	56%
United States	48% (Rank #1)

NZTE launched the 'Made with Care' global campaign in October 2020 which was designed to grow awareness, preference and demand for New Zealand food and drink products. It focuses on the principles of kaitiakitanga and manaakitanga, as well as accessibility of New Zealand products to drive demand to purchase products overseas. In the most recent results of this work (Kantar, December 2021), some of the key findings were:

- // awareness of New Zealand as a premium producer varies by market
- // wine is New Zealand's most recognised food and drink product
- // New Zealand food and drink are rated highly for ethical and environmental aspects

Made with Care is currently in market via consumer campaigns in Australia, Japan, México, Singapore, the United Arab Emirates, Vietnam, the United Kingdom and the United States. Where appropriate, TNZ works in partnership to support this work.

NEW ZEALAND FOOD & AGRI TOURISM INDUSTRY INSIGHTS REPORT

In 2018, MPI, together with ANZ Bank commissioned the New Zealand Food & Agri Tourism Industry Insights Report. This report drew data from an online survey of USA and Australian citizens in July 2018. 1,000 survey responses were collected from each country from people who had visited another country in the previous three years. The top line findings were:

Figure 1: Top line findings of the New Zealand Food & Agri Tourism Industry Insights Report, 2018



The impetus for this report was to explore and drive a deeper understanding about connecting our two biggest export earners, food and beverages and tourism, which presented an opportunity for New Zealand businesses both here at home and in global export markets.

These insights reported that for people who have visited New Zealand, being able to access our products at their local supermarket, farmers' market or food outlet is about creating a lasting connection with New Zealand and that we can create a lasting emotional connection with every single visitor to and around New Zealand through food.



Photo: Dunedin City Council

NEW ZEALAND FOOD AND DRINK TOURISM AND THE DOMESTIC MARKET

There is limited research on domestic food and drink visitors in New Zealand, and as a result, little is known about the drivers and motivators behind domestic visitation related to food and drink. Some Regional Tourism Organisations (RTOs) do conduct their own perceptions research where potential visitor expectations are measured around restaurant and hospitality experiences, but not specifically about the types of experiences expected.

DOMESTIC VISITOR MINDSETS

Like for the international markets, TNZ has identified five key domestic visitor mindsets and have tested these against the same range of activities including:

- // Bars and nightlife
- // Shopping at local markets
- // Trying local/craft beer
- // Trying local cuisine
- // Trying local wines

Based on these food and drink activity preferences, the mindsets that are consistent from the domestic market are:

Here and Now-ers	Holidays mean fun. They just want everyone to enjoy the break and have a great time.
Lux Adventurers	Want their holiday to be an enjoyable exploration and they're willing to splurge for it.

For more detailed information about these mindsets visit: insights.tourismnewzealand.com/int/mindsets/#/

DOMESTIC GROWTH INSIGHT TOOL

More recently some food and drink insights have been made available through the Domestic Growth Insight Tool (DGIT) site, established by the Activating Domestic Tourism Working Group (spearheaded by Tourism Industry Aotearoa) in 2016 and purchased by TNZ in 2020. The DGIT offers insights from research conducted by Colmar Brunton and segments the New Zealand domestic leisure travel market, enabling tourism operators to effectively target their intended customers. This report for Dunedin has utilised this tool to develop an understanding of the market for food and drink experiences within the domestic market.

DGIT offers pre-segmented markets and identifies wine, food and scenery (travellers) as representing 10% of the travelling population in New Zealand.

These travellers take an average of 6.4 overnight trips per year and 8.4 day trips making them more frequent than average travellers. This segment is typically older adults and travel without children, instead opting to travel with, or visit friends. They are most likely to stay in a hotel (48%) and travel by car.

Figure 2: Domestic Traveller Segment Summary: Wine, Food & Scenery, DGiT 2021



The DGiT can be used in conjunction with the Domestic Travel View Report, released quarterly by TNZ, the latest of which is November 2021.

DOMESTIC TRAVEL VIEW REPORT

The most recent Domestic Travel View Report (November 2021) provides some domestic food and drink visitor insights:

- // 52% of people want to take a short trip, such as a weekend trip and 49% want to take a 4-5 day trip
- // 53% of people want to travel to another island in New Zealand (and 53% want to stay in the same island)

// “Good local food and beverage experiences” consistently ranks as the fifth most important consideration behind relaxation, visiting places not previously visited, landscape and accommodation options.

Figure 3: The main aspects that New Zealanders look for in a domestic holiday location, Domestic Travel View Report, November 2021



- // Food and drink options slightly outperform the average in terms of how well New Zealand delivers on various holiday experiences:

Figure 4: How well New Zealand delivers on holiday experiences, Domestic Travel View Report, October 2021

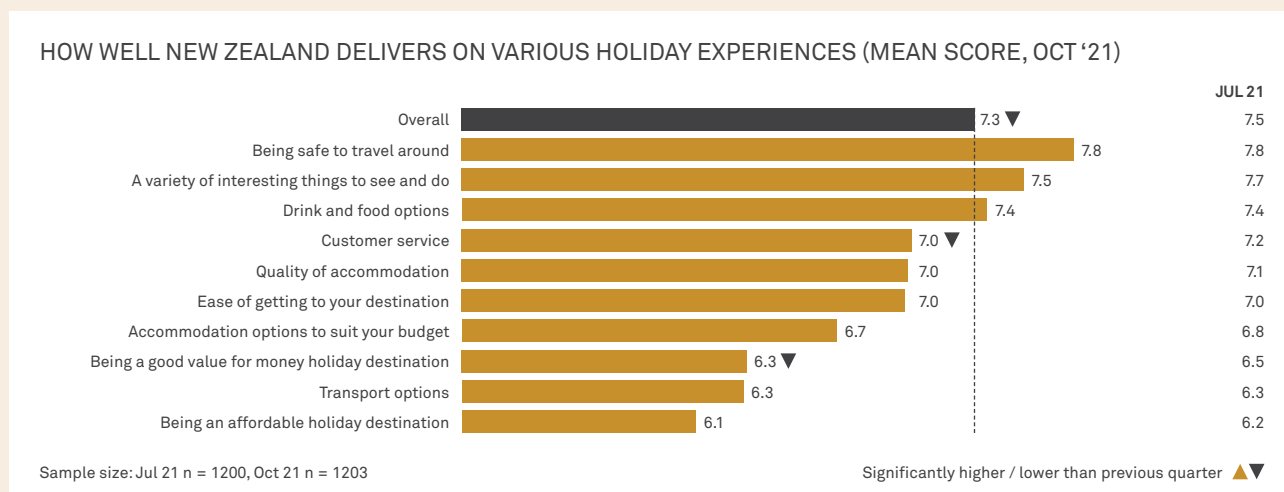
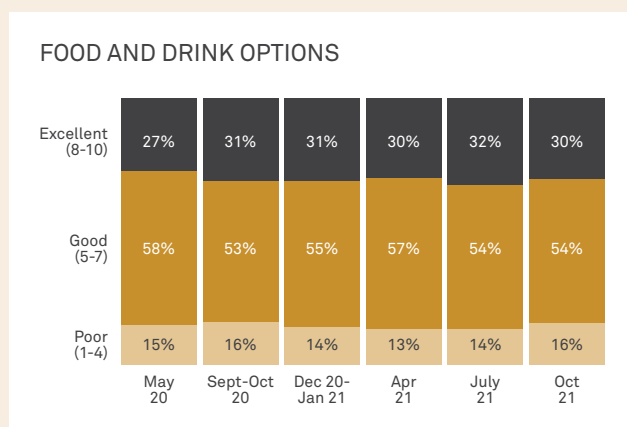




Photo: Dunedin City Council

// The majority of New Zealanders think that food and drink options are reasonably good value for money; in fact, food and drink performs better than all other categories – accommodation, activities and transport – and has remained very consistent since May 2020.

Figure 5: How Food and Drink options rate in New Zealand, Domestic Travel View Report, October 2021



FOOD AND DRINK EVENTS IN NEW ZEALAND

There are hundreds of 'food and drink events' in New Zealand, ranging from significant multi-day festivals to small producer-led event experiences. Some of these do an outstanding job of helping to tell a regional (and New Zealand) food story, whilst some of these are not so successful.

The food and drink events sector in New Zealand is not well established, with a handful of regions only developing multi-day offerings within the last decade. Prior to this, the food and drink landscape was predominantly a range of "wine festivals" (with food) rather than a broader sector celebration.

WHAT MAKES A SUCCESSFUL FOOD AND DRINK EVENT?

Successful food and drink events are a success for quite different reasons, dependant on the event format, but the winning formula for an event is a combination of the following elements:

Figure 6: What makes a successful Food and Drink event?



* By "well" funded, this means that the event has a diversified income stream (i.e., not heavily reliant on one income source), can appropriately market the event to meet its objectives and does not make a monetary loss. Ultimately the ideal outcome is that a successful event is self-sustaining.

FOOD AND DRINK EVENTS IN NEW ZEALAND

Detailed in this section is a snapshot of a range competitor food and drink events in New Zealand. This is by no means an exhaustive list, but represents some of the most significant in operation across three key categories – multi-day food festivals, beer festivals and seafood festivals:

1. Multi-Day Food and Drink Festivals

VISA WELLINGTON ON A PLATE – visawoap.com:



- // Wellington region (Wellington, Kāpiti, Porirua, Wairarapa, and Hutt Valley)
- // Annual festival held in August
- // 31 days
- // 14 years old in 2022
- // Owned and managed by the Wellington Culinary Events Trust, a not-for-profit trust
- // 12 staff
- // Visa WOAP's vision is "To feed people's appetite for life by bringing them together to share different, inspiring and provocative culinary experiences."
- // Over 300,000 culinary experiences delivered annually.

FOOD AND WINE CLASSIC (HAWKE'S BAY) – fawc.co.nz:



- // Hawke's Bay region (Wairoa to Pōrangahau)
- // Bi-annual festival held in June and November
- // Two x 10-day festival programmes
- // 11 years old in 2022
- // Coordinated by Hawke's Bay Tourism
- // Staff seconded from the RTO to work on the event
- // Very events focused (as opposed to restaurants)
- // "The vision of F.A.W.C! is to showcase the exceptional quality of Hawke's Bay food and beverage with a focus on the region's fresh seasonal produce, championing great local and national talent creating innovative events in truly amazing landscapes"

EAT.TASTE.CENTRAL – centralotagonz.com/eat-taste-central/:



- // Central Otago region (Cromwell up to the Lindis Pass, across to Naseby and down to Roxburgh and everything in between).
- // Annual festival held in September/October across the Central Otago region
- // 31 days
- // 6 years old in 2022
- // Coordinated by Central Otago Tourism
- // Staff seconded from the RTO to work on the events
- // Local cafés, restaurants and cellar doors collectively produce a 'Central Otago Regional Menu' and a range of events and experiences that celebrate the produce of the region.
- // People's Choice Award and Passport to encourage participation around the wider region.

Over the last decade there has been good growth in multi-day food festivals around New Zealand. That said, by way of comparison, there are few established multi-day food festivals in the South Island aside from *Dine Dunedin*. *Eat.Taste.Central* was launched in Central Otago in 2017 showcasing the wider Central Otago region through events and experiences. Christchurch previously had planned a multi-day food festival, *Feast of Canterbury*, but this was never revived after the earthquakes. The *Savour the South* festival started in the Southland region in 2021, backed by the Hospitality Association and their 'Eat, Drink, Play' promotion. This is a two-month activity that runs throughout April and May. The majority of 'food festivals' in the South Island are short in length, largely single day, such as the *Marlborough Food & Wine Festival*, *Hokitika Wildfoods Festival* and the *South Island Wine & Food Festival* (Christchurch).

2. Beer Festivals

BEERVANA – beervana.co.nz:



- // Annual event held in August in Wellington
- // 2 days (4 sessions) plus a Trade Day
- // 21 years old in 2022
- // Owned and managed by the Wellington Culinary Events Trust a not-for-profit trust
- // Largest event of its kind in New Zealand (2021):
 - 15,500 ticketholders
 - 1,500 exhibitors and trade
 - 89 breweries and cideries from New Zealand, Australia, UK, USA
- // Absolutely no wine or cocktails
- // Key focus on education and appreciation
- // Entertainment is a secondary focus; Beer and the experience is the reason people attend
- // Significant investment made by breweries to showcase their beer via experiential exhibition stands.

THE GREAT KIWI BEER FESTIVAL - greatkiwibeerfestival.co.nz:



- // Annual event held in January in Christchurch
- // 1 session
- // 12 years old in 2022
- // Owned by Team Event (Christchurch events company)
- // Event platform launched in Hamilton
- // 35 breweries in 2022
- // Strong music and entertainment focus with a main stage
- // Dedicated VIP area and experience
- // Outdoor venue with breweries in marquees

The growth in beer festivals in New Zealand in the last decade has been significant, with almost every region hosting an event. *Beervana* is the longest running and attracts the largest audience of both exhibitors and attendees. Across the South Island, aside from *The Great Kiwi Beer Festival*, *Marchfest* in Nelson is a regular on the calendar. There have been other intermittent festivals, such as the *Queenstown Summer Beer Festival* as well as smaller regional such as the *Wānaka Beer Fest* but their regular delivery has not been consistent.

3. Seafood Festivals

WHITIANGA OCEANS FESTIVAL - oceansfestival.co.nz:



- // Previously known as the Whitianga Scallop Festival
- // Annual event held in September (cancelled in 2021)
- // 1 day
- // 17 years old in 2022
- // Owned by Whitianga Scallop Festival Inc.
- // 30 food stalls and trucks, local wineries, some craft beer and Lion product (Corona, Mac's Beer)
- // "Celebrity Chef" demonstrations and strong focus on ocean sustainability
- // Strong local community attendance.

BLUFF OYSTER AND FOOD FESTIVAL - bluffoysterfest.co.nz:



- // Annual event held in May
- // 1 day
- // Well over 20 years old
- // Strong point of difference focusing on Bluff's 'taste of place'
- // Managed by an "organising committee" – formed in 2007 after Venture Southland wanted to move it to Invercargill. No paid employees
- // Approximately 6,000 attendees
- // Tagline is... "Unsophisticated and proud of it!"
- // Recent partnership with Air New Zealand has driven up profile of event.

Surprisingly for an island nation, New Zealand has not been very successful at delivering seafood festivals. Bluff and Whitianga are two of the longest running and both are still limited in size, run by volunteer groups and have a largely local audience. The largest seafood festival was the *Auckland Seafood Festival*, but this event has not operated since 2016. The other seafood festival of note is the *Havelock Mussel and Seafood Festival*.



PART 2: MICRO-ENVIRONMENT **FOOD AND DRINK TOURISM AND EVENTS IN DUNEDIN**

Photo: Dunedin City Council

DUNEDIN'S FOOD AND DRINK TOURISM AND EVENTS LANDSCAPE

A (VERY) BRIEF HISTORY OF DUNEDIN FOOD AND DRINK

It has been suggested¹ that Māori first settled in the inland Otago region around 600 years ago. Named for the Ōtākou Marae at Taiaroa Head, Otago was prosperous hunting grounds, and the Otago Harbour was and still is, an important source of seafood and birdlife as food for early Māori. The regions abundance of resources (notably gold) was very much part of the draw to the area by early European settlers as well as being an important trading centre for whalers along with potatoes, pigs and flax².

As the gateway to the goldfields of Central Otago and the numerous vast farms of the greater region, Dunedin and its port have supported significant food and drink development throughout New Zealand's history including the first shipment of refrigerated meat from New Zealand to London in 1882. As a flourishing pioneering city, its citizens demanded the finer things in life, so many food and drink businesses established themselves in Dunedin to fuel this hunger. Today, there are still a handful of nationally recognised food and drink brands from Dunedin that tell a story of Dunedin's food heritage including Speights Brewery, Wests Cordials and Syrups, Gregg's and Bell Tea.

In more recent years, the burgeoning artisan food and drink producer industry that is helping to broaden this story – chocolate, peanut butter, mustard, several breweries, a number of small distilleries, cheesemakers, apiarists, piemakers, bakeries, specialist butcheries and more are starting to help create a food story for Dunedin. Many are championed by the Otago Farmers' Market as a pathway to market, as well as through small independent retail outlets and if you look hard enough, in the bigger supermarket chains. There is a real opportunity to grow access to these products further.

1. en.wikipedia.org/wiki/History_of_the_Otago_Region

2. teara.govt.nz/en/whaling/page-2

DUNEDIN VISIT OBSERVATIONS

Dunedin's food and drink tourism landscape is in an **early development phase**. With a combination of established offerings such as the weekly **Otago Farmers' Market**, a **handful of superb top-end restaurants** gaining national recognition, investment to attract culinary talent back to Dunedin from overseas, and a **growing food and drink events portfolio**, the Dunedin food and drink offering has good bones. However as with many regions across the country there is **no well-articulated "Dunedin Food Story"** in the same way that people understand the Fashion or Art story for Dunedin.

With the total population estimated to be 133,000³, 20% of the population is a transient student population aged between 16 and 24 years, and the food and drink offering reflects this. For a city of its size, Dunedin has **a lot of dining establishments**, most notably 'cheap eats'. There is no end to the all-day breakfasts, hush puppies, bagels, burgers, poutine, fried chicken, sushi, baked potatoes and a lot of carbohydrates. They have their place. But it is the evolution of some more sophisticated restaurants and cafes that have opened in Dunedin in recent years, to join a small handful that have been going it alone for several years. **Old favourites** such as Best Café and Plato, still rate very highly by nostalgic past students, visitors and chefs.

Prompted by real estate improvements in areas such as Vogel Street, the development of **dining precincts** has seen the establishment of new-era Dunedin restaurants and consequently having them recognised on national dining lists, such as the annual *Cuisine Magazine Good Food Awards Guide*. A continuing focus on growing the pool of recognised restaurants will help to evolve Dunedin's food story, along with identifying key personalities and ambassadors for the sector who champion Dunedin to the rest of New Zealand and beyond. Right now, there are **no contemporary nationally recognised food personalities from Dunedin**.

One of the most surprising observations of Dunedin is the **lack of inclusion of seafood** (particularly the locally sourced Little Neck Clams and Blue Cod) on local restaurant menus. These seafood varieties are sourced from in and around Otago Harbour and surrounds, very much speak of the place ("Taste of Place"), but do not seem appear on many menus. **Provenance** referencing in general appears to be quite light on menus across Dunedin, which is very much against a national trend of noting the source of all key menu items (and sometimes even the distance from the restaurant). This may be because menu items aren't

sourced locally (although that's unlikely to be the case) or simply that it is overlooked as local consumers don't value this information. To help build pride in a food story, educating consumers on where food comes from is a key piece of the puzzle.

Most of Dunedin's visitor attractions are culture, heritage and nature attractions including, but not limited to, Larnach Castle, Otago Museum, Lan Yuan Dunedin Chinese Garden, Toitu Otago Settlers Museum, The Royal Albatross Centre, Olveston Historic Home and Dunedin Public Art Gallery. Food and drink are a feature of all these attractions, to a varying degree – of quality and experience.

There appears to be an **untapped opportunity** to create a much stronger food and drink experience at venues such as the Chinese Garden (there is currently a Chinese Tea Shop) to capture a longer stay (and higher spend) from visitors, for a Chinese lunch for example. Several of the attractions have small cafes, many offering very similar food to one another (a lot of the product appeared to be sourced from the same producer). Both Larnach Castle and Olveston mentioned their food and drink events as key offerings, but little information is available about these on their website making it very hard for visitors to include this as part of an itinerary.



Taste Nature Organics Shop:
Stockist of a number of local products



"Crafted in Dunedin" signage at
Ocho Chocolate



"Local Product" signage at Dunedin City New World Supermarket.
Small but there.

3. infoshare.stats.govt.nz/ViewTable.aspx?pxID=e72c8643-5589-4853-b9a6-d740ce22b7b1

HOW DOES FOOD AND DRINK LINK TO EXISTING DUNEDIN CITY COUNCIL PLANS?

Dunedin has several strategy and plan documents that are relevant to the role of food and drink as a tourism attribute. A summary of the relevant plans are:

FESTIVALS AND EVENTS PLAN 2018-2023

There is limited recognition of the food and drink sector in the Dunedin City Council *Festivals and Events Plan 2018-2023*. There are only two specific mentions of anything linked to food and drink – the Port Chalmers Seafood Festival is noted as an example of a 'Major Community Event' receiving some Council funding support (Page 12), and 'Hospitality' is noted as a key stakeholder with whom bids for major city events should be co-ordinated with, along with the retail sector etc (Page 18). It is very surprising that there is not one single further mention of food and drink playing a role in the Dunedin events landscape. With the period of this Plan nearing its end, it is recommended that the role of food and drink (in all its forms) as a contributing stakeholder is reconsidered in the Dunedin Events Plan.

DUNEDIN DESTINATION PLAN

There is no mention or reference to food and drink, the sector or stakeholders in the *Dunedin Destination Plan* document. Organisations such as Cadbury World, Otago Farmers' Market and Our Food Network – Dunedin are noted as Contributors.

ARA TOI ŌTEPOTI – OUR CREATIVE FUTURE

Dunedin's Arts and Culture Strategy 2015 was developed 'to set the direction for further strengthening arts and culture in Dunedin.' "Dunedin's definition of arts and culture builds on existing definitions, for example that of Creative New Zealand, and encompasses community and professional activities, including creative, technology and knowledge-based industries."⁴ The 'Culinary Arts' including food presentation and restaurant critiquing are included among this definition. Key stakeholders in this are the Food Design and Culinary Arts School at Otago Polytechnic.



Photo: Dunedin City Council

DUNEDIN'S ECONOMIC DEVELOPMENT STRATEGY (2013-2023)

Dunedin's Economic Development Strategy sets out a vision for the city to be known as 'one of the world's great small cities.' This strategy addresses several key themes for Dunedin to be not only a great place to live, to do business, but also to visit. A number of critical city elements are noted such as sport, public art, cultural, leisure and recreational amenities, however culinary or food and drink amenities are not mentioned at all throughout the strategy as a contributor or a stakeholder. Perhaps it is inferred as a 'cultural amenity', but it is not explicit. There is limited reference to dining offerings as part of the city centre revitalisation.

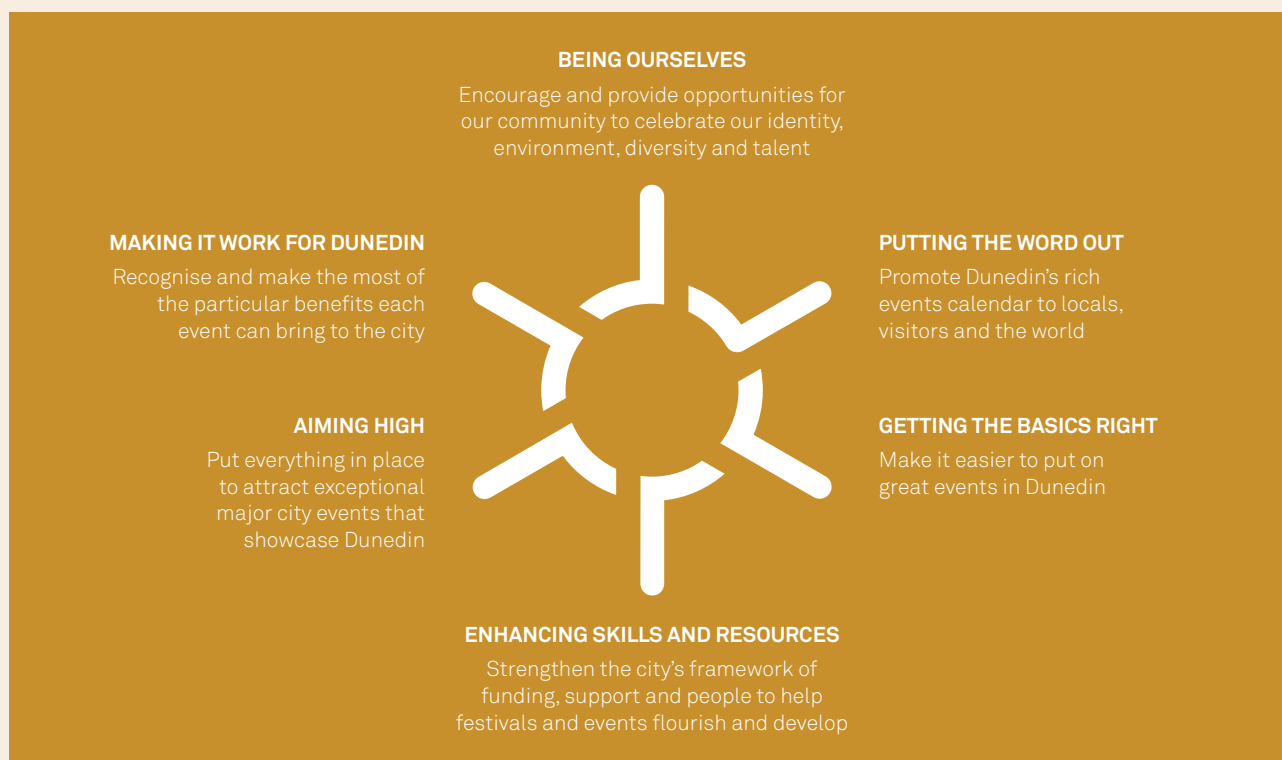
DESTINATION MANAGEMENT PLANNING

In 2020 the Ministry of Business, Innovation & Employment (MBIE) launched guidelines for the development of a Destination Management Plan (DMP) to be completed by each region to achieve the common goal of developing a well-managed, sustainable visitor destination. As a result of this, all regions of New Zealand have been updating or creating their DMP. Enterprise Dunedin has commissioned Stafford Strategy to complete a refresh of Dunedin's DMP which will be completed in 2022. For food and drink to be a true tourism asset for Dunedin, the outcomes sought by the city for food and drink need to be part of the wider DMP.

DUNEDIN FOOD AND DRINK EVENTS ASSESSMENT

Dunedin's current Festival and Events Plan 2018-2023 sets out a plan structured around six action areas:

Figure 7: Dunedin Festival and Events Action Areas, Dunedin City Council, Festival and Events Plan 2018-2022



Dunedin City events are classified in four ways:

- // Major Events – events of international significance that attract at least 10,000 visitors, 10,000 visitor nights and/or \$5 million in economic benefit.
- // Premier Events – a targeted event to a particular audience (i.e., fashion, science etc) that attracts up to 2,500 visitors, up to 10,000 visitor nights and has up to \$5 million in economic impact
- // Major Community Events – these events are important to the city and its identity and drive community connection. They attract up to 10,000 attendees (residents and visitors)
- // Community Events – these events deliver specific community outcomes for up to 2,000 attendees and have a largely local audience.

At present, the Dunedin food and drink event offering sits between Major Community Events and Community Events. As set out as key objectives of this review project, there is a desire by Enterprise Dunedin to:

- // Benchmark Ōtepoti Dunedin city's food and drink offering over other South Island destinations and comment on opportunities for differentiation
- // Identify how food and drink events in Ōtepoti Dunedin might be enhanced and what might be required to elevate such an event/s to national status

ASSESSMENT OF THREE KEY DUNEDIN FOOD AND DRINK EVENTS

For the purposes of this assessment, the three key Dunedin food and drink events that have been reviewed are:

- // Dine Dunedin
- // Dunedin Craft Beer & Food Festival
- // Port Chalmers Seafood Festival

These assessments have been conducted following a discussion with each of the events creators / managers and broad desktop research. Whilst not intended to be a critical review, some operational issues and challenges have been identified. Almost all these issues can be remedied but will require further commitment - from the events, industry and Enterprise Dunedin - clear operational processes implemented, and ultimately, investment from funding partners to grow them to be events of national status.

Most large-scale arts and culture events operate in an environment of market failure; in essence they rely on public funding grants and support to sustain their core business operations.

Building a pathway to self-sustainability is and should be the long-term goal, but in the short to medium term; events such as those noted in this assessment, will rely on public funds to deliver their core outcomes.

It should be noted that to attract long-term, sustainable commercial partnerships, events often need the support of the local council (in cash) to prove to the commercial partner that they are viable and supported by the city. In the eyes of the commercial partner, if the city sees value in making an investment, it gives the commercial partner the confidence in also making an investment. This can often be a 'Catch 22' for events, but councils need to be aware of this.



At present, the portfolio of food and drinks events in Dunedin predominantly caters to the local market; the events themselves agree on this. Their creation and evolution were based on filling a gap or 'need' for a local audience and over time, the events have organically grown and attract some out-of-town visitation.

The Dunedin Craft Beer & Food Festival and the Port Chalmers Seafood Festival both report out-of-town attendance of around 30%, whilst Dine Dunedin attracts roughly 5% visitors. The Dunedin Craft Beer & Food Festival cites challenges in growing their event, mostly due to venue capacity limitations, whereas both the Port Chalmers Seafood Festival and Dine Dunedin have significant opportunity for growth in attendance. That said, all three events, with the right investment and support (public relations, social media, above the line marketing), could attract a higher proportion of out-of-town visitors versus local attendees, driving up the value of these events to the Dunedin tourism economy.

A summary of competitive food and drink events in New Zealand across the categories of Multi-Day Food and Drink Festivals, Beer Festivals and Seafood Festivals on Page 14 of this report.

SWOT ANALYSIS – DUNEDIN FOOD AND DRINKS EVENTS

A SUMMARY ANALYSIS OF DINE DUNEDIN, DUNEDIN CRAFT BEER & FOOD FESTIVAL AND THE PORT CHALMERS SEAFOOD FESTIVAL (LISTED IN NO PARTICULAR ORDER)

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> // There is an ever-growing number of artisan food producers and suppliers constantly expanding Dunedin's food and drink offering // Dunedin has a rich pedigree as a food producer and supplier dating to before European settlement // The presence of key stakeholders such as the Food Design and Culinary Arts School at Otago Polytechnic and Otago Farmers' Market // Recent investment in real estate revitalisation such as the Warehouse Precinct has attracted new and innovative food and drink makers and restaurants and provide a great location for events // Great venue portfolio – interesting spaces (heritage locations etc) and locations for food and drink events // A reasonably affluent population; students are young and more inclined to try new things // A growing and evolving restaurant and dining scene that is gaining national recognition and awards <p>DINE DUNEDIN</p> <ul style="list-style-type: none"> // Very passionate and driven voluntary Event Director who is focused on success <p>DUNEDIN CRAFT BEER & FOOD FESTIVAL</p> <ul style="list-style-type: none"> // Successful event formula that sells out each year <p>PORT CHALMERS SEAFOOD FESTIVAL</p> <ul style="list-style-type: none"> // Limited competition focusing on a food sector of strength for Dunedin 	<ul style="list-style-type: none"> // No strong food narrative for Dunedin like fashion or art // The general feeling is that "everything in Dunedin is trying to not be from Dunedin"/ overall feeling of a lack of pride // No food or drink events are distinctly/uniquely Dunedin. Where are the event connections to the city's Scottish, Chinese, Māori heritage etc? // The local restaurant and hospitality industry isn't very collaborative – need to be convinced of the benefits of working together // Events and city calendar is busy which limits when food and drink events can be delivered successfully // Except for the Dunedin Craft Beer & Food Festival, events are run by volunteers who have full-time jobs. They can only commit limited time to these events which questions their long-term sustainability // A fractured and disenfranchised restaurant and hospitality sector – focus needs to be put on creating a sector group to champion food and drink operator's success and role in Dunedin's tourism offering // Food and drink events are not resourced well enough to be sustainable – it's a vicious cycle, if events aren't marketed well, tickets won't sell, and participants lose interest // Lack of investment in the operation and marketing of food and drink events means that they will stagnate and inevitably fail as the organisers will run out of energy // Dunedin does not have a strong food and drink event brand outside of Dunedin. There's more to Dunedin aside from rugby and Ed Sheeran. Ed Sheeran visited Dunedin four years ago in 2018...what's the next story? // Lack of data on the economic impact of the food and drink events on Dunedin and the visitor economy // Food and drink events inherently find it difficult to fit city event support/funding criteria as they aren't easy to measure like a ticketed stadium event // General feeling that there are too many roadblocks put in the way by the Dunedin City Council <p>DINE DUNEDIN</p> <ul style="list-style-type: none"> // No distinct point of difference for Dine Dunedin from other food and drink events around New Zealand; structure has copied other festivals, i.e., Wellington does burgers. How does the event become distinctly Dunedin? <p>DUNEDIN CRAFT BEER & FOOD FESTIVAL</p> <ul style="list-style-type: none"> // Event is at capacity with little appetite from exhibitors to extend the offering. Consumers missing out on tickets builds resentment for the event <p>PORT CHALMERS SEAFOOD FESTIVAL</p> <ul style="list-style-type: none"> // Limited marketing funds means that the event can't tap into potential audiences in Central Otago, Southland and Christchurch which offer greatest (closest and easiest to attract) opportunity for growth

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> // Lean into the “darkness”...Dunedin's Gothic heritage is a very unique feature of the city that no other city in New Zealand can challenge // Seafood! Dunedin hasn't realised the potential of the seafood offering on its doorstep as a reason for foodie visitors to choose Dunedin – blue cod, littleneck clams. How do we make these famous for Dunedin? // The Otago Farmers' Market is considered to be one of the best in New Zealand // Cheap eats, cafes and student culture – embrace these! // Use the Dunedin provenance story to build a strong “Dunedin Food Story” // Harness the wider Dunedin ‘diaspora’ around New Zealand and overseas as the lead storytellers and story sharers // Create more opportunities for the food and drink sector to collaborate – they work well together when they are given an opportunity, e.g., Ed Sheeran weekend // Plenty of food and drink events gaps – no wine festival, no cocktail festival, no night noodle market (despite the large Chinese population), no unique cultural celebrations (i.e., St Andrew's Day), more significant Chinese dining experience at the Chinese Garden // Exploring opportunities to collaborate with commercial partners, such as Dunedin Airport, Air New Zealand, Forsyth Barr and Silver Fern Farms // Provide events with access to event and tourism research to help inform decision making // Small, yet sophisticated dining scene. New chefs moving to Dunedin such as Marcus Verberne to Nova are a great way to help tell “The Dunedin Food Story” // Enterprise Dunedin recognise the opportunity of food and drink events for Dunedin and are undertaking a review of their approach. Furthermore, over the next 12 months a number of Council strategies (i.e., Festival and Events Plan and the Dunedin Economic Development Strategy) are up for review that should incorporate food and drink sector content // Instil pride in the wider food and drink sector – of themselves and each other // Identify more opportunities to retail Dunedin-made artisan products. // Encourage restaurants to cite more provenance stories on their menus 	<ul style="list-style-type: none"> // Lack of long-term sustainable funding options for food and drink events // Commercial sponsorship investment in events comes with the need to deliver on sponsor expectations which are not always fully aligned with the outcomes sought by the event // Lack of understanding of the support provided by Enterprise Dunedin and difference between Enterprise Dunedin and DCC. Many events hold an outdated view of what's on offer. // Volunteers are passionate and well-meaning, but many don't possess the commitment or skills required to help the events succeed // Low population base – whilst locals are the key audience, long-term success needs visitors to bring the numbers and economic benefit. Investment in marketing is required to achieve this
DINE DUNEDIN	DINE DUNEDIN
<ul style="list-style-type: none"> // Developing to be an “all year” offering, so not time bound to August. Develop website platform to support this as well as more pop ups throughout the year 	<ul style="list-style-type: none"> // No shared vision for the event by the Dunedin food and drink sector. Without understanding the big picture, the sector will lose interest and support of the event
DUNEDIN CRAFT BEER & FOOD FESTIVAL	DUNEDIN CRAFT BEER & FOOD FESTIVAL
<ul style="list-style-type: none"> // Grow the “Tasting Rooms” experience programme in the lead up to the event // Support from Enterprise Dunedin to brand the local breweries and food vendor stands – “Crafted in Dunedin” 	<ul style="list-style-type: none"> // Events that are at capacity have limited opportunity to provide increased economic benefit to Dunedin
PORT CHALMERS SEAFOOD FESTIVAL	PORT CHALMERS SEAFOOD FESTIVAL
<ul style="list-style-type: none"> // Very low levels of competition nationally in the seafood events space 	<ul style="list-style-type: none"> // Not planning strategically - being unable to manage growth in a sustainable way // Don't know how to “make money” from the event



Photo: Dunedin City Council

STAKEHOLDER ENGAGEMENT SUMMARY

In January 2022, Food + Drink New Zealand facilitated two workshop sessions in Dunedin. The first with an internal Enterprise Dunedin team, and the second with an external stakeholder group encompassing a broad range of representatives of restaurants, events, producers and hospitality industry from Dunedin. The purpose of these sessions was two-fold:

- // To share with the group the opportunity that culinary tourism and events provides Dunedin; and
- // To understand the two stakeholder group's views on the food and drink tourism sector, the opportunities it provides, points of difference and product development opportunities.

A series of questions were posed to the attendees which were discussed and workshopped in table groups. The outcomes of these discussions are summarised as follows:

// **What food and drink destinations and experiences do you admire / envy and why?**

- Who is doing cool stuff?
- Think about enabling the idea in the context of Dunedin

INTERNAL STAKEHOLDERS		EXTERNAL STAKEHOLDERS	
DESTINATIONS & EVENTS	EXPERIENCES	DESTINATIONS & EVENTS	EXPERIENCES
// Hobart // Central Otago - Bannockburn Hotel, not pretentious, exceptional quality, food stalls // Melbourne – Victoria Market, premium food experiences/events, loads of deals // Hurunui // Japan // Portland - Food cycling tours, Food walking tours // Napa // Scotland // Sydney – Restaurants, Experimental	// Immersive food experiences - Sister cities, Silver Fern Farms opportunities // Indoor market with dining – permanent stallholders // Food Design School // A “Chinatown” // Night Market // Rooftop Bars	// Hobart – Dark Mofo (arts/ food/drink altogether) // Oamaru – Victorian/ Steampunk/eating local // Alps2Ocean // Edinburgh Fringe Festival – collaborating with hospitality // Spain/Italy – strong focus on food, being open late is part of the culture // Melbourne – night markets, celebration of cultures, Victoria Market, laneways, smaller, maps, secret finds // Rotorua – Bespoke eating precinct – ‘Eat Street’ // Tasmania – Food Trails // Europe – streets festivals, city supplies infrastructure (tables, stalls for lease etc), family-friendly // Scotland – Whisky, shortbread (brilliant marketing to sell biscuits worldwide) // Arrowtown – food scene, proximity – everything is in walking distance // Waiheke Island – supported by wine marketing, landscape // Riverstone Kitchen in Waitaki - niche, grow lots of stuff, destination, kids can play, shop // Friday Shop in Roslyn – destination, well known, specific // October Festival Munich – heritage, family, food, culture // Wellington – Visa Wellington On a Plate // Daylesford, UK // Babylonstoren, South Africa – gardens and lovely food shops and cafes	// Experiences that are iconic of a place // Fondue in Switzerland // Eating seafood in the water in Bali // Christchurch Riverside Market – long term stallholders, draws people away from the supermarkets // Wineries // French regional festivals, e.g., vintage celebrations // Europe – there's a festival to celebrate everything! Onions, garlic, you name it! // Food and Drink passports // Food Trails – walking, driving or ferry. How could these be matched with street art trails or distillery trails? // Producers working with restaurants // Celebrate the REGION, not just the city // Timing of events – run into evenings to evolve from family time to adult time with alcohol etc // Open air fish markets anywhere in the world (vs Seafood Festival) // Southeast Asian street food and night markets // Gas Lamp Museum, Ukraine // Storytelling, sharing the history behind it // Connection between who we are and what you're eating and environment // Matariki Night Market – Local iwi and marae, Matariki clams, seafood harvest, sustainable seasonal celebration // Soil, water, sea...a meal from each sector

// What food and drink is Dunedin famous for?

- What would a visitor choose Dunedin as a food and drink experience for?
- What are your food and drink tourism points of difference? Who are the key players?

INTERNAL STAKEHOLDERS	EXTERNAL STAKEHOLDERS	
WHAT IS DUNEDIN FAMOUS FOR?	WHAT IS DUNEDIN FAMOUS FOR?	WHAT ARE THE POINTS OF DIFFERENCE?
<ul style="list-style-type: none"> // Bacon Butties // Carey's Bay Pub Seafood Platter // Cheese Rolls // El Trusco at the Savoy // Farmers' Market // Fish & Chips // Fresh // Fusion // Moiety // Pies // Plato Restaurant (seafood) // Quality // Seafood // Variety 	<ul style="list-style-type: none"> // Adjo Café // Alliance Meats // Bacon Butties // Beam Me Up Bagels // Blue Cod // Blueskin Bay // Bracken // Breweries – Speights, Emersons, Arc, New New New // Cadbury (but that's gone...) // Carey's Bay Hotel // Cheese Rolls (until Southland stole them...) // Chocolate // Crepes // Distilleries – Gin, Whisky // Glenfalloch Gardens – café and restaurant // Harvey Street Merchant // Hidden Gems // Injectable Donuts // Lamb // Littleneck Clams // Moiety // Otago Farmers' Market // Scottish heritage – Haggis, Larnach Castle // Silver Fern Farms // St Clair Esplanade Strip – surf and beach scene // Student-related food and drink experiences // Vault 21 // Vegan Scene – Vegan Festival!?!) // Wharfsider // Whitebait 	<ul style="list-style-type: none"> // Very foodie oriented, supportive locals // Small but sophisticated // People that are doing something different/experiences/tying it to local story // Otago Polytechnic laid foundations in food sector // Otago Farmers' Market as an incubator – chefs source from the farmers' market // Larnach Castle – unique location // New New New – unique location // Willingness to collaborate (e.g. Ed Sheeran weekend) // Harbourfront underutilised – could there be a night food market? // Precincts e.g. Vogel Street, arts precinct, street art

// What would you like Dunedin to be famous for?

- What are the product development opportunities?

INTERNAL STAKEHOLDERS		
THEMES	PRODUCT DEVELOPMENT OPPORTUNITIES	
<ul style="list-style-type: none">// Seafood// Food Innovation (way out food)// Regional Story – Link to Otago Central Rail Trail, Southland, Waitaki// “Only in Dunedin”// Sustainability in Food - Restaurant composting etc	<ul style="list-style-type: none">// Hidden bars// Alleyways// Seasonal dining// Pop Ups// Gin// High Tea at Olveston	
EXTERNAL STAKEHOLDERS		
THEMES	PRODUCT DEVELOPMENT OPPORTUNITIES	
<ul style="list-style-type: none">// Source to plate – chefs bringing it to life// Eat fresh – every night// Amazing food and drink// Championing small producers / local people// Food story – future focus, new wave of dining, different dietary requirements (GF, Vegan)// Healthy food – New Year, New You// Service – tell the story// Shift the primary focus of the food service industry from the kitchen to front of house// Unique experiences, characters, locations – food quality and innovation will be inspired with a move of focus.// Brilliant food AND brilliant service// Enable/support food and drink venue investment – loosen DCC restrictions to enable outdoor dining, for example// Doesn't have to be high end – make it accessible – no brainer to come to Dunedin for all budgets// Creating our food communities// Engaging the school community// Connecting communities// Accessibility for diversity// Sustainability – making it the norm// Diversity – “something for every taste”<ul style="list-style-type: none">• Sheer variety of food types on offer• Good prices and good value• Reflects the melting pot of cultures and being a university town• It's ok to be different, no matter what culture	<ul style="list-style-type: none">// Chef's evenings// Organic food// Tactile foods – play with your food// Experiential dining// Food festival – food trucks / outside the restaurant environment// Seasonal downtime events / activations// Street art and food tour// Restaurant on train// “Walking Fork” – progressive dining experiences// Food precincts// Food Hall – like Riverside (CHC), Victoria Market (MEL), Moore Wilson (WLG), Farro Fresh (AKL)// Permanent Market – Harbourside, Dunedin outskirts (Waitati, Mosgiel, Outram), farmers, speciality// An event like Dark Mofo// Chef Shuffle – potential collaborations// Spirits Festival – dark spirits/gothic – include Scottish food// Stone Fruit Festival// Otago Food Festival – local produce – restaurants, ‘Plate of Origin’ menu development to show provenance// Craft distillery trails with unique narratives// Gin Festival – Dunedin-owned// Octagon renovation into public space// Seafood – local fishers, Harbour Fish, clams, salmon hatchery. Building on the Seafood Festival and make this national. Clam Festival// Harbourside Dining Outside// Collaborative projects like “The National Gin Day”// Craft Beer Trail	<ul style="list-style-type: none">// Epic Food Trails around the growers, kaimoana, breweries and more// Art and food and music// Food Harvest Trail – Dog Town, Port Chalmers, bees, kaimoana, growers, peanut butter, distillers, celebrating the chain from paddock to plate// Meet the Fisherman – Careys Bay// Music/food connection and the history associated with both// Cheese Roll Festival// Align with Eat New Zealand events - Support Kaitaki Collective to help tell the Dunedin story// Bars – Gin Bars, Fruit Bars, Vegetable Bars// Food experiences timed with carers/ parents dropping their kids at university – give them an extra incentive to take kids out and create memories// Targeting the mature, female audience – move away from the beer culture and students to something more sophisticated – wine, chocolate// Chocolate Tours – Ocho// Stop thinking of Dunedin as a single destination, and start thinking of Dunedin as “destinations” (as in New York neighbourhoods); one of these could be a food/drink cluster// Better wayfinding required// Harness the heritage buildings and turn them into a destination/precinct, i.e., support for the ‘Bond Quarter’ around No Name Alley etc// Champion, nurture, incubate the development of a ‘destination restaurant’ to make Dunedin a ‘must visit’ destination for real foodies. Possibility of partnering with Ngai Tahu around Māori cuisine?

// What food and drink events have the greatest visitor attraction opportunities and why?

INTERNAL STAKEHOLDERS	EXTERNAL STAKEHOLDERS
<ul style="list-style-type: none"> // Dine Dunedin <ul style="list-style-type: none"> • Potential • Keen to support • Not weather dependant • Winter – good for locals too • Showcases diversity of offerings // Port Chalmers Seafood Festival <ul style="list-style-type: none"> • Biennial in October • Space challenges • Targets locals • Kids fishing events • Existing restaurants and products • Entertainment & demonstrations // Saint Andrews Day <ul style="list-style-type: none"> • Celebrates ties to Scotland • February • Haggis, Harraway's, pasties, distillers • Octagon • Currently small scale // Mid-Winter Carnival <ul style="list-style-type: none"> • Lanterns (made by kids) • Food truck offering // Dunedin Craft Beer & Food Festival <ul style="list-style-type: none"> • 15-29% Out of Towners • Airport – Grabaseat (Air New Zealand) • Promoted at Auckland Beer Festival • Brewery events • Expanded offering? 	<ul style="list-style-type: none"> // Port Chalmers Seafood Festival <ul style="list-style-type: none"> • Celebrating our southern oceans kaimoana harvest, fishers, meet the fishermen etc. • Make it more commercial so that it is viable long-term // Dine Dunedin // Craft Beer Festival <ul style="list-style-type: none"> • Create extension of beer and food trails // Vegan/Vegetarian Week – menus or festivals // Support non-food events to integrate a food element // St Andrew's Day // Matariki // Science Festival – food events are well attended, and festival brings in greatest numbers // Fringe Festival // Farmers Markets and Night Markets – special themes/focus // Midwinter Carnival // iD Fashion Week // Taste Organic Otago – Organic Wine and Food Festival – first of its kind in New Zealand <ul style="list-style-type: none"> • Food focus centre • Engage students • No menu, only use food available at the time – forage • One glass of wine at a time • Food stalls and education stalls • Street party with live entertainment, visual art, performance • Grow food now for season events in October • Engage consumer in climate change at base level – level where they can make change. Climate change is overwhelming for consumers // Otago Farmer's Market // Scottish Cuisine Festival/Event // Celebrate the food history of Dunedin <ul style="list-style-type: none"> • Harraway's • Gregg's • Cadbury/Hudson's • Speights • Emersons • Cal's Pavlova // Organic agriculture bowl <ul style="list-style-type: none"> • Sustainability • Wild Dunedin – the wildness of the natural landscape • Best types of landscapes to draw food supply from // Wild Dunedin <ul style="list-style-type: none"> • Celebrates Dunedin at its best • Diversity • Scope to grow // Larnach Castle events <ul style="list-style-type: none"> • Piping of the haggis • Ceremony/Castle // Regional food hubs – local training on how to cook, share a meal // Street food / hawker markets – streetfeast.com/london-union – bringing derelict spaces to life and giving young entrepreneurs the chance to 'get in the game' without large amounts of capital.

// What steps needs to take place for this to be possible?

- What would you like to see happen for this sector?
- Are there any challenges / politics / roadblocks?

EXTERNAL STAKEHOLDERS

Covid-19 is undoubtedly the most challenging issue facing all food and drink operators in the current times, but the external workshop attendees were asked to think beyond this and identify the other challenges they face in delivering food and drink experiences in Dunedin.

GENERAL "COUNCIL" CHALLENGES/HELP REQUIRED

- // Consent process
- // Compliance costs
- // Liquor Licensing restrictions
- // Health and Safety
- // Business consultant from council i.e., before making applications, "how to get to a YES"
- // Red Carpet, NOT Red Tape
- // Funding process a struggle for some small organisers
- // Lack of communication – Dunedin City Council role vs Enterprise Dunedin's role within the council – people are confused
- // Enterprise Dunedin could be more proactive, transparent, holistic, and accessible
 - Marketing support – who gets what?
 - Calendars
 - Funding process
 - Connecting existing events and festivals with food and drink operators
 - Offering opportunities to everyone, not just the best
- // Short term vision
- // Invest in key food and drink infrastructure to enable food and drink start-ups to flourish, i.e., a night market, cheap eats venue

INFRASTRUCTURAL CHALLENGES

- // Affordable space for outdoor night market
- // Octagon is tired and needs a refresh
- // Poor transportation - extra buses to events

EVENT ORGANISATION CHALLENGES

- // Cost of pulling things together
- // Budget – marketing / margins
- // Supply and demand
- // Staffing
- // Community putting money where their mouth is
- // Hospitality less of a 'career' option
- // Engagement from stakeholders – only a few people contribute to a project
- // Lack of capacity (event delivery)
- // Lack of event strategy and leadership
- // Lack of commitment
- // Lack of industry/producer/hospitality cooperation/engagement
- // Funding and financials – small pool of local audience
- // Limited pool of talent – chefs etc
- // Never enough time!

ATTITUDES

- // Positive social license – Dunedinites will come! Needs maintained
- // Dunedin people don't like new stuff – can take two years to be 'accepted'
- // Short term vision
- // Perception of Dunedin around New Zealand - cold, far away, Gothic, drunk students etc

THINGS THAT COULD HELP

- // Better unity within the food and drink sector
- // More collaboration/information sharing
- // More sector workshops and ability for industry to collaborate - communicating and connecting the people that produce the food to get businesses that are going to make it work
- // Coordination between events
- // Food and Beer Trail of unique businesses that cannot afford to attend events

THINGS WE CAN'T CHANGE/INFLUENCE!

- // Weather (climate change)
- // Pandemic
- // Population density



PART 4: **DUNEDIN FOOD AND DRINK TOURISM SECTOR ACTION PLAN**

Photo: Dunedin City Council

WHAT IS THE FOOD AND DRINK TOURISM OPPORTUNITY FOR DUNEDIN?

Dunedin's food and drink landscape is in "an early development phase"; essentially it has "good bones", but there are challenges that are evident from the stakeholder feedback and visit observations that need addressing before Dunedin will be able to differentiate itself in New Zealand as a food and drink destination.

On the positive, there is a strong and growing community of artisan food and drink producers, the city has a strong history and heritage plays a key role in its overall brand and there are some solid, largely local food and drink event platforms that with greater focus could become genuine food and drink tourism drivers for Dunedin. There are also a number of product development opportunities in the food and drink space, many of which could be good revenue drivers in the post-Covid economy.

On a not-so positive note, the food and drink sector in Dunedin feels fractured. Some feel the sector is well connected, but many feel the complete opposite. Some operators are disenfranchised by a lack of focus from the Council on their sector and they don't feel valued as a key part of the tourism offering; they feel like they have had to 'go it alone' for too long. There is no apparent 'food story' for Dunedin. There are strands of a narrative, but no consistent view on how Dunedin should be pitched and how that story

is part of the wider "Brand Dunedin." Some feel that there's too much copycat activity of other destinations – "everything in Dunedin is trying to not be from Dunedin".

The lack of a food story means that there is no 'Unique Selling Point' for Dunedin food and drink. Yes, Dunedin has a great food and drink community, great people. But all destinations in New Zealand have passionate food and drink producers / growers / makers / fishers / farmers who believe in what they do and believe do it in the best place in the world. This is not a unique or defining feature, but it is a vital element of any food and drink community. No passion means no pride, no loyalty and ultimately no food story. Without commitment from the industry, there is no food and drink offering. It's a cycle.

By undertaking this assessment, Dunedin is taking the exciting first step to work towards developing its food story. There is momentum and willingness to collaborate and this needs to be harnessed to drive the food story forward. Detailed over the next pages is a Recommended Food and Drink Sector Action Plan for Dunedin. Not all of this will be able to be achieved, but this approach outlines a range of steps that could be taken to help Dunedin develop its story, create partnerships, enhance and build a strong food and drink events programme, grow product offerings and position itself as a must-visit food destination.

Successful storytelling around food and drink needs to bring together three things:

Figure 8: The Winning Formula: the Dunedin Food Experience



Dunedin's food and drink tourism narrative lies in defining your WHERE (Place), your WHAT (Product) and your WHO (People). This is your WHY. WHY Dunedin food and drink?, WHY experience it in Dunedin?, WHO is creating it and WHY do they do it in Dunedin?

RECOMMENDED FOOD AND DRINK SECTOR ACTION PLAN

This Action Plan recommended by Food + Drink New Zealand setting out an approach for food and drink tourism in Dunedin. The recommendations have been drawn from both proven experience in other destinations as well as first-hand feedback from the internal and external stakeholder insights. The Action Plan is divided into five key areas:

1. **Foundation Work** – creating an authentic and meaningful starting point to establish the Dunedin Food Story, and from which all other elements of the Dunedin food and drink offering are based
2. **Collaborations and Partnerships** – details what relationships need to be developed to support the food and drink tourism sector, remove the red tape, and build a strong ambassador programme for Dunedin to build pride
3. **Events** – enhancements and investments required to elevate some of Dunedin's food and drink events to national status
4. **Product Development** – longer-term projects that will offer direct benefits to the food and drink tourism sector, drive long term capability building and product development that contributes to the Dunedin food and drink narrative
5. **Long-Term Marketing** – once the building blocks are in place, tell the rest of New Zealand (and the world) about Dunedin's food and drink tourism offering to drive visitation.

Please note:

- // some of these projects will require additional funding
- // some projects make sense for Enterprise Dunedin to take a lead, whilst others should be led by different entities. All will require industry-wide involvement, participation, and ownership to be successful.

Each Action has been given a Priority Rating and Objective in line with the Project Definition of this Food and Drink Tourism Sector Approach Report.

OBJECTIVES

As set out in the Project Definition of this Report there are three key objectives sought by the delivery of this Food and Drink Tourism Sector Approach:

- // **Differentiation** – this activity will differentiate Dunedin city's food and drink offering over other South Island destinations
- // **Benchmarking** – this activity benchmarks Dunedin city's food and drink offering over other South Island destinations
- // **Enhancement** – this activity identifies steps needed to be taken to elevate event/s to national status

PRIORITY RATINGS

Each Action has been given a Priority Rating dependant on the order in which the Action Plan recommendations should be delivered. These priorities are:

PRIORITY 1	IMMEDIATE	Should be completed within the next year
PRIORITY 2	MEDIUM TERM	1-2 years
PRIORITY 3	LONG TERM	2+ years

ACTION 1: FOUNDATION WORK

RECOMMENDATION: Develop a Dunedin Food and Drink Tourism Plan			
LEAD PARTNER: Enterprise Dunedin		OBJECTIVE/S: Differentiation	PRIORITY: 1
SUPPORT PARTNER/S: Cross sector representation:			
// Restaurants/Chefs	// Breweries	// Food and Drink Events	// Attractions
// Accommodation	// Distilleries	// Producers	// Food and Drink Tour Operators
// Hospitality Outlets	// Food Retail	// Suppliers	// Polytechnic
		// Farmers' Market	
ACTIONS / OUTCOMES			
The wider food and drink sector need the confidence and assurance that Enterprise Dunedin are a long-term partner in the food and drink tourism space. Many operators are disenfranchised by a lack of focus on their sector, and they don't feel valued as a key part of the tourism offering. They feel like they have had to 'go it alone' for too long.		// Invest resources in developing a Food and Drink Tourism Plan with key deliverables (such as those listed in this Report) and outcomes for the sector	
		// Communicate how the sector can engage and what assistance Enterprise Dunedin can provide	
		// Set measurable goals with reported milestones so progress can be tracked	

RECOMMENDATION: Establishment of a Food and Drink Tourism Sector Group			
LEAD PARTNER: Enterprise Dunedin		OBJECTIVE/S: Benchmarking	PRIORITY: 1
SUPPORT PARTNER/S: Cross sector representation:			
// Restaurants/Chefs	// Breweries	// Food and Drink Events	// Attractions
// Accommodation	// Distilleries	// Producers	// Food and Drink Tour Operators
// Hospitality Outlets	// Food Retail	// Suppliers	// Polytechnic
		// Farmers' Market	
ACTIONS / OUTCOMES			
At present, the restaurant and hospitality sector is fractured and disenfranchised – focus needs to be put on creating a sector group to champion food and drink operator's success and role in Dunedin's tourism offering.		The development of a Sector Group will:	
		// Create leadership for the sector to have a united voice	
		// Agree objectives of group and outcomes sought	
		// Ensure better unity within the food and drink sector	
		// Deliver more collaboration/information sharing	
		// Provide workshops and ability for industry to collaborate - communicating and connecting the people that produce the food to get businesses that are going to make it work.	

RECOMMENDATION: Establishment of a Food and Drink Tourism Sector Group			
LEAD PARTNER: Enterprise Dunedin		OBJECTIVE/S: Benchmarking	PRIORITY: 1
SUPPORT PARTNER/S: Cross sector representation:			
// Restaurants/Chefs	// Breweries	// Food and Drink Events	// Attractions
// Accommodation	// Distilleries	// Producers	// Food and Drink Tour Operators
// Hospitality Outlets	// Food Retail	// Suppliers	// Polytechnic
		// Farmers' Market	
ACTIONS / OUTCOMES			
At present, the restaurant and hospitality sector is fractured and disenfranchised – focus needs to be put on creating a sector group to champion food and drink operator's success and role in Dunedin's tourism offering.		The development of a Sector Group will:	
		// Create leadership for the sector to have a united voice	
		// Agree objectives of group and outcomes sought	
		// Ensure better unity within the food and drink sector	
		// Deliver more collaboration/information sharing	
		// Provide workshops and ability for industry to collaborate - communicating and connecting the people that produce the food to get businesses that are going to make it work.	

RECOMMENDATION: Define the Dunedin Food Story Narrative		
LEAD PARTNER: Enterprise Dunedin	OBJECTIVE/S: Differentiation	PRIORITY: 1
SUPPORT PARTNER/S: Cross sector representation: // Food and Drink Tourism Sector Group		
Wider Sector Consultation		
ACTIONS / OUTCOMES		
There is no strong food narrative for Dunedin like fashion or art. The general feeling is that “everything in Dunedin is trying to not be from Dunedin.”	// Research and develop the Dunedin Food Story – a distinct narrative that defines the how, what, why and where of Dunedin food and drink and clearly sets it apart from other destinations (think seafood, students, heritage, geography, nature) // Define how the Dunedin Food Story sits within “Brand Dunedin” – lean into the “darkness” of the Gothic Dunedin heritage story // Support with “Distinctly Dunedin” assets that the sector can leverage (visual look and feel, call to action, brand and style guidelines, tone of voice, key messages)	

RECOMMENDATION: Undertake a Food and Drink Sector Audit		
LEAD PARTNER: Enterprise Dunedin	OBJECTIVE/S: Benchmarking / Differentiation	PRIORITY: 2
SUPPORT PARTNER/S: Cross sector representation: // Food and Drink Tourism Sector Group		
Wider Sector Consultation		
ACTIONS / OUTCOMES		
Create a comprehensive database of all sector participants to enable communication to and connection with the people that produce food and drink. This will foster better unity within sector and will result in more collaboration and information sharing.	// Enables communication with all food and drink stakeholders // Well informed and connected industry // Effective partnerships developed with food and beverage stakeholders // Better trade and media famil fulfilment, content creation and event support	

ACTION 2: COLLABORATIONS AND PARTNERSHIPS

RECOMMENDATION: Work collaboratively with the Dunedin City Council**LEAD PARTNER:** Food and Drink Tourism Sector Group**OBJECTIVE/S:** Benchmarking/
Enhancement**PRIORITY:** 1**SUPPORT PARTNER/S:** Enterprise Dunedin**ACTIONS / OUTCOMES**

It is felt as though unnecessary development barriers are put in the way by the Council. Many believe that there is a short-term vision and that improvements are needed in communication between council and food and drink sector. The sector needs 'Red Carpet, not Red Tape.'

Encourage the Dunedin City Council to:

1. Help the sector to understand the roles of Dunedin City Council vs Enterprise Dunedin. People are confused. Who does what?
2. Establish a streamlined process to assist the food and drink sector with:
 - "How to get to a YES"
 - Consent process
 - Compliance costs
 - Liquor Licensing (and how to work through restrictions)
 - Health and Safety processes
 - Funding processes
3. Include food and drink infrastructure investments in the City Long-Term Plan. Invest in key food and drink infrastructure to enable food and drink start-ups to flourish, such as, a night market, cheap eats venue, access to electricity in public spaces (for food trucks etc), outdoor event lighting in public spaces, outdoor dining, wayfinding, Octagon and laneway upgrades etc
4. Ensure that the food and drink sector are considered and consulted in key city strategic documents such as the Festival and Events Plan and the Economic Development Strategy which are shortly up for review

Encourage Enterprise Dunedin to:

1. Review the event support model. Many feel that Enterprise Dunedin could be more proactive, transparent, holistic, and accessible.
2. Promote a 'Baseline Support Marketing Package':
 - Simply marketing support (i.e., Facebook, Instagram posts)
 - Information sharing – events calendar listings etc
 - Assistance and information to access funding process
 - Connects existing events and festivals with food and drink operators
 - Offers opportunities to everyone, not just the best
3. Implement a cross-sector event measurement model to understand the value of key food and drink events to Dunedin, such as the Fresh Info 'Event Economics' measurement tool (freshinfo.co.nz/expertise/events)
 - All events are measured using the same methodology
 - Helps to understand audience breakdown, spend and impact
 - Use of Net Promoter Score to track year-on-year performance

RECOMMENDATION: Dunedin Food and Drink Ambassador Programme		
LEAD PARTNER: Enterprise Dunedin	OBJECTIVE/S: Benchmarking/ Differentiation/Enhancement	PRIORITY: 1
SUPPORT PARTNER/S:		
// Food and Drink Tourism Sector Group	// Otago Farmer's Market	
ACTIONS / OUTCOMES		
<p>Instil pride and bust the myths and challenges associated with past perceptions of Dunedin. Build the food and drink narrative. Identify food and drink personalities and products/experiences to build credibility – people who are proud of Dunedin and want to tell everyone about it!</p>		
<ol style="list-style-type: none"> Bring the Dunedin Food Story to life – represent the key messages: <ul style="list-style-type: none"> Social and digital content Media story angles Ever changing and evolving ambassadors Develop a #LoveLocal residents-facing activity stream <ul style="list-style-type: none"> Residents should be the #1 ambassadors for Dunedin Educate on experiences, products and people Give them a reason to be proud Harness the Dunedin diaspora <ul style="list-style-type: none"> Nostalgic alumni and faculty who no longer live in Dunedin Carers and parents of new Dunedin students who visit Dunedin for graduation etc Educate on experiences, products and people Insider's secrets Build Product Partnerships <ul style="list-style-type: none"> Identify ambassador products that speak to a contemporary Dunedin Food Story – Ocho Chocolate, New New New, Bay Rd Peanut Butter, Arc Brewing, Dog Town Mustards, Distillers etc Build content bank Champion through media and social content Strong appeal to millennial audience Encourage the use of provenance labelling on restaurant menus to educate diner about local products. 		

RECOMMENDATION: Partnership with Māori		
LEAD PARTNER: Enterprise Dunedin	OBJECTIVE/S: Differentiation/ Enhancement	PRIORITY: 2
SUPPORT PARTNER/S:		
// Iwi/Hāpu	// Wider Sector Consultation	// Dunedin City Council
ACTIONS / OUTCOMES		
<p>For a Food and Drink Tourism Sector Approach to credibly move forward, consultation must be undertaken with iwi/hāpu to ensure their partnership and consultation.</p>		
<ul style="list-style-type: none"> // Work cooperatively with iwi and hāpu partners to identify business opportunities and partnerships to enable them to tell their story of Dunedin food and drink // Recognise the Treaty principles of partnerships, reciprocity, and mutual benefit // Food and drink sector delivering deeper and more meaningful returns to the Dunedin Visitor Economy // Unified and collaborative sector 		

RECOMMENDATION: Regional Partnerships			
LEAD PARTNER: Enterprise Dunedin		OBJECTIVE/S: Benchmarking/Enhancement	PRIORITY: 2
SUPPORT PARTNER/S:			
// Tourism Central Otago	// Tourism Waitaki	// Great South	// Invercargill Airport
// Destination Queenstown	// Lake Wānaka Tourism	// Dunedin Airport	// Car and motorhome rental companies
		// Queenstown Airport	
ACTIONS / OUTCOMES			
Much of the food and drink product range championed in Dunedin is sourced or grown in the hinterland. Building strong partnerships with the greater region of the lower South Island strengthens the whole food and drink proposition and widens the product offering.		// Create ability to leverage connecting tourism product such as cycle trails (and proposed extensions)	
		// Build one-way touring itineraries that connect the greater region with key food stops incorporated	
		// Foodie passport with 'must-try's' around the region	

ACTION 3: EVENTS

RECOMMENDATION: Dine Dunedin			
LEAD PARTNER: Brand Amp Marketing		OBJECTIVE/S: Differentiation/Benchmarking/Enhancement	PRIORITY: 1
SUPPORT PARTNER/S:			
// Enterprise Dunedin	// Food and Drink Tourism Sector Group		
ACTIONS / OUTCOMES			
Dine Dunedin has two primary challenges in enabling it to grow and flourish:		// Be better supported with marketing, PR and digital to drive awareness and preference by Enterprise Dunedin based on the fact that Enterprise Dunedin have stated that:	
// Sector buy-in: there are quite low levels of participation and many are not prepared to financially contribute at a level needed to build success.		<ul style="list-style-type: none"> • They believe that there is potential for this event to be more significant • Keen to support • Not weather dependant • Winter – good for locals too • Showcases diversity of offerings 	
// Identification of the unique point of difference of Dine Dunedin as compared to other food and drink festivals in New Zealand.		// Build stronger commercial partnerships to enable:	
To address these challenges, Dine Dunedin should:		<ul style="list-style-type: none"> • Long term financial sustainability • Ability to grow out-of-town marketing • Employ a dedicated full time staff resource to drive up participation numbers and manage event delivery 	
// Identify what makes Dine Dunedin “distinctly Dunedin” – how does it differentiate itself from other food events around the country? Why would a visitor choose Dine Dunedin over another food event? Consider the role of seafood, Dunedin heritage, nature and geography. Lean into the 'darkness' (like Dark Mofo)		// Consider shifting the timing of the event to a different time of year	
		<ul style="list-style-type: none"> • Consider the target market – if students aren't the target market, don't worry if they aren't in Dunedin • Don't clash with major competitor events from key visitor source markets (Auckland and Wellington both have large food events in August) 	

RECOMMENDATION: Dunedin Craft Beer & Food Festival		
LEAD PARTNER: OUSA	OBJECTIVE/S: Differentiation/ Benchmarking/Enhancement	PRIORITY: 1
SUPPORT PARTNER/S: // Enterprise Dunedin // Food and Drink Tourism Sector Group		
<p>ACTIONS / OUTCOMES</p> <p>Dunedin Craft Beer & Food Festival is a successful event in that it sells out every year. That said, the challenge for the event is that there is no room for it to grow under its current operating model, so little impetus for it to evolve its offering. Furthermore, its organisers admit that the event lacks “Dunedin-ness” and that little sets it apart from other beer events around New Zealand.</p> <p>To address these challenges, the Dunedin Craft Beer & Food Festival should:</p> <ul style="list-style-type: none"> // Consider marketing to an out-of-town audience to drive up the proportion of out-of-town attendees and improve the economic impact of the event on Dunedin. Shift focus from ticket sales to elevating the overall experience // Revisit expanding the event offering (such as a Dunedin Beer Week) to drive differentiation from other beer events in New Zealand. Success comes down to getting the programming right and this can be a great extra revenue driver for the event // Be better supported with branding and marketing help reinforce the Dunedin Story by Enterprise Dunedin // Be provided with support and access to Enterprise Dunedin / Tourism New Zealand research to help inform decisions about marketing the event // Consider reinvestment opportunities and ways to support vendors to deliver better results for the participants in the event and encourage them to continue to invest in improving the event visitor experience. 		
RECOMMENDATION: Port Chalmers Seafood Festival		
LEAD PARTNER: Organising Committee	OBJECTIVE/S: Differentiation/ Benchmarking/Enhancement	PRIORITY: 1
SUPPORT PARTNER/S: // Enterprise Dunedin // Food and Drink Tourism Sector Group		
<p>ACTIONS / OUTCOMES</p> <p>The Port Chalmers Seafood Festival is in the enviable position that it has a strong Dunedin and Otago provenance story as well as having very little competition around New Zealand. Arguably, of the three events assessed for this report, this event is the most ‘distinctly Dunedin’. The challenges for the Port Chalmers Seafood Festival fundamentally lie in its operations. To grow sustainably, this event will need to move away from a volunteer management structure to a dedicated event team with specialised skills and experience.</p> <p>To address these challenges, the Port Chalmers Seafood Festival should:</p> <ul style="list-style-type: none"> // Seek assistance to build a commercial model for the event // Seek funding to appoint a dedicated part-time paid Event Manager to lead the growth of the event and put in place key systems and processes to streamline event communications and operations // Build strong commercial partnerships to enable the event to undertake significantly upweighted marketing and PR to build the event brand and drive awareness and preference // Work with Enterprise Dunedin on a Baseline Events Support Marketing Package specifically for assistance with PR, marketing and digital activities // Collaborate with key tour operators from around New Zealand to create “Dunedin Seafood Weekend” packages – Port Chalmers Seafood Festival, Nature Tours, Heritage experiences etc 		

RECOMMENDATION: New Events and Festivals		
LEAD PARTNER: Food and Drink Tourism Sector Group	OBJECTIVE/S: Differentiation/ Benchmarking/Enhancement	PRIORITY: 2
SUPPORT PARTNER/S: Enterprise Dunedin		
<p>ACTIONS / OUTCOMES</p> <p>There is a ground swell of support from the wider food and drink sector for the growth of events and festivals that celebrate people, products and experiences that reflect Dunedin. Consideration and feasibility should be undertaken for:</p> <ul style="list-style-type: none"> // Matariki Night Market - Local iwi and marae collaboration and leadership, Matariki clams, seafood harvest, sustainable seasonal celebration (to leverage the national Eat New Zealand Feast Matariki platform) // Saint Andrew's Day Celebrations (February) <ul style="list-style-type: none"> • Distinctly Dunedin • Celebrates ties to Scotland • Haggis, Harraway's, pasties, distillers • Octagon • Link to heritage story // Wild Dunedin / Organic Food Festival <ul style="list-style-type: none"> • Create link between nature and food in Otago geography • Focus on growers and producers • Work already done in this space that can be built on // Seasonal Produce Celebrations – work in partnership with wider Otago and Central Otago regions to celebrate stone fruit, for example // Claim back The Cheese Roll – Dunedin Cheese Roll Challenge. Win it back from Southland! // Lean into the 'darkness' and Dunedin's Gothic heritage 		

ACTION 4: PRODUCT DEVELOPMENT

RECOMMENDATION: Elevate the Otago Farmers' Market		
LEAD PARTNER: Otago Farmers' Marketing	OBJECTIVE/S: Differentiation/ Enhancement	PRIORITY: 1
SUPPORT PARTNER/S: Enterprise Dunedin		
<p>ACTIONS / OUTCOMES</p> <p>Farmers' markets are a strong driver for domestic food and drink visitors and research shows that international visitors desire direct engagement with the makers of their food. 43% of all food and drink visitors to Dunedin are interested in shopping at Farmers' or Local Food Markets (DGIT, 2021).</p> <p>Establish a formal partnership with the Otago Farmers' Market and develop a calendar of activities to actively help drive visitation to the market. The market should be a must-do for any foodie visitor to Dunedin. There are currently just shy of 10,000 followers on Facebook and 3,500 followers on Instagram.</p> <p>Working with the Otago Farmers' Market will work to:</p> <ul style="list-style-type: none"> // Increase intra-regional and domestic visitation // Drive visitors into the wider region to engage with the makers and producers // Build sustainability of the farmers' markets as an incubator for new food and drink products // Connects producers and suppliers directly with consumers to tell the Dunedin Food Story // Build the reputation and pride in Dunedin-made food and beverage products 		

RECOMMENDATION: Seafood		
LEAD PARTNER: Enterprise Dunedin	OBJECTIVE/S: Differentiation	PRIORITY: 2
SUPPORT PARTNER/S: Food and Drink Tourism Sector Group		
ACTIONS / OUTCOMES <p>Developing Dunedin's seafood story as a key pillar of the city's food and drink narrative is an opportunity that should be explored further. As noted in the Dunedin Visit Observations (Page 17), one of the most surprising observations of Dunedin is the lack of inclusion of seafood (particularly the locally sourced Littleneck Clams and Blue Cod) on local restaurant menus. These seafood varieties are sourced from in and around Otago Harbour and surrounds and very much speak of Dunedin's "Taste of Place."</p>		
<p>Explore the opportunity to harnessing the seafood narrative by:</p> <ul style="list-style-type: none"> // Invest in and elevate the Port Chalmers Seafood Festival - Dunedin is home to one of very few consistently delivered seafood events in New Zealand // Build a content library that tells the story of Harbour Fish, Southern Clams, Plato Restaurant, Best Café and other products and experiences that showcase the seafood of the area // Work with Dine Dunedin to develop a more seafood-focused offering in the event programme to drive stronger differentiation for the event // Research the establishment of a permanent fish market (reference, sydneyfishmarket.com.au/) <ul style="list-style-type: none"> • Retail sales • Seafood school • Restaurants • Link to Otago University (Marine Science School) and Otago Polytechnic (Food Design and Culinary Arts School) 		

RECOMMENDATION: Food Trail Development			
LEAD PARTNER: Food and Drink Tourism Sector Group		OBJECTIVE/S: Enhancement	PRIORITY: 2
SUPPORT PARTNER/S:			
// Enterprise Dunedin	// Suppliers	// Tourism Experiences	// Tour operators
// Producers	// Restaurants and hospitality operators	// Cycle Trails	
ACTIONS / OUTCOMES <p>Development of a series of food and drink-themed focused self-drive / cycle trails and itineraries focused on the key themes of the Dunedin (and Otago) food and drink landscape – seafood, organics and sustainability, craft beer, distilleries, Vogel Street, street art and street food, laneways, regional growers and producers – take the Otago Farmers' Market back to the farm, Food Harvest Trail, incorporate Otago Harbour (ferry, cycling etc).</p>			
<p>Development of itineraries to drive:</p> <ul style="list-style-type: none"> // Increase length of stay in the city/region // Regional diversity (get people off the beaten track) // Seasonality (what are the opportunities for the shoulder seasons) // Links to the development of a digital food and drink directory // Support development of links to the cycle trail network – Otago Central Rail Trail, Alps2Ocean // Drive collaboration between restaurants and producers and suppliers, i.e., where does my dish come from; go and visit the place 			

RECOMMENDATION: Enhance Existing Visitor Attraction Food Experience			
LEAD PARTNER: Existing Visitor Attractions		OBJECTIVE/S: Enhancement/ Differentiation	PRIORITY: 2
SUPPORT PARTNER/S: // Producers // Suppliers			
ACTIONS / OUTCOMES			
<p>Whilst the primary objective of many visitor attractions is not their food and drink offering, in-house restaurants, coffee shops and gift shops with food offerings can be a good revenue generator if delivered well. Most of Dunedin's visitor attractions are culture, heritage and nature attractions including, but not limited to, Larnach Castle, Otago Museum, Lan Yuan Dunedin Chinese Garden, Toitu Otago Settlers Museum, The Royal Albatross Centre, Olveston Historic Home and Dunedin Public Art Gallery. Food and drink are a feature of all these attractions, to a varying degree – of quality and experience.</p> <p>Based on observations of brief visits to a number of these attractions, menu offerings are limited (Covid-19 is noted here), but arguably none of the menus tell a particularly strong Dunedin Food Story – paninis, filled rolls, many cakes and slices (so much lolly cake), scones and muffins and hot chips and pies abound. There's the odd cheese roll.</p>		<p>Some thought should be given to menus and offerings that have a clear connection to:</p> <ul style="list-style-type: none">// Local producers and suppliers (call these out), such as Fish & Chips with local fish// The theme of the attraction, such as Bannocks and Soup or Settlers Shortbread at the Settlers Museum, for example <p>Also noted earlier in this Report there appears to be additional untapped opportunities:</p> <ul style="list-style-type: none">// Create a much stronger food and drink experience at venues such as the Chinese Garden to capture a longer stay (and higher spend) from visitors, for a Chinese lunch for example.// Both Larnach Castle and Olveston noted their food and drink events as key offerings, but little information is available about these on their website making it very hard for visitors to include this as part of an itinerary. Again, appreciating the Covid-19 limitations here.	
RECOMMENDATION: Provenance Mark			
LEAD PARTNER: Enterprise Dunedin		OBJECTIVE/S: Benchmarking/ Differentiation/Enhancement	PRIORITY: 3
SUPPORT PARTNER/S: // Food and Drink Tourism Sector Group // Producers // Suppliers // Otago Farmers' Market			
ACTIONS / OUTCOMES			
<p>The establishment of a food labelling system to actively encourage purchase of local made products, such as “Crafted in Dunedin” (reference: madenorthcanterbury.co.nz/)</p> <p>A provenance mark enhances and the food and drink narrative and brings producers together under one banner. It acts as a signpost and differentiates those products as only being from Dunedin. Essentially the mark represents the values of what it means to be a Dunedin producer or supplier.</p>		<p>Design a small set of criteria that defines a Dunedin producer/ supplier such as:</p> <ul style="list-style-type: none">// Geographical presence (must be made, produced, adapted etc within Dunedin)// Must be a Dunedin-based business// Labelling could include a window decal, product stickers, posters, merch etc// Flexible to apply ('tight at the top; loose at the bottom')// Simple administration by Enterprise Dunedin – keeps food and drink audit updated and website content up to date <p>Key outcomes are:</p> <ul style="list-style-type: none">// Recognisable symbol that is associated with quality// Builds pride in food and drink community// Unified food and drink brand for Dunedin	

RECOMMENDATION: Permanent Food Market			
LEAD PARTNER: Independent Commercial Operator		OBJECTIVE/S: Differentiation	PRIORITY: 3
SUPPORT PARTNER/S:			
// Otago Farmers' Market	// Enterprise Dunedin	// Producers	// Supplier
ENTERPRISE DUNEDIN An assessment should be undertaken as to the feasibility of developing a permanent food market in Dunedin (reference: granvilleisland.com/public-market) that could become a permanent home for the Otago Farmers' Market as well as an incubator space to nurture and encourage new product start-ups. Potentially link to the Regional Business Network, MPI, Tertiary Institutions etc.			

ACTION 5: LONG-TERM MARKETING

RECOMMENDATION: Visitor and Marketing Capability			
LEAD PARTNER: Enterprise Dunedin		OBJECTIVE/S: Differentiation/ Enhancement	PRIORITY: 3
SUPPORT PARTNER/S: Food and Drink Tourism Sector Group			
Cross sector representation:			
// Restaurants/Chefs	// Breweries	// Food and Drink Events	// Farmers' Market
// Accommodation	// Distilleries	// Producers	// Attractions
// Hospitality Outlets	// Food Retail	// Suppliers	// Food and Drink Tour Operators
ACTIONS / OUTCOMES Ensuring that the food and drink in Dunedin reflects the city's brand and quality visitors expect. Helping businesses to attract visitors by building their visitor market through developed channels. A project focused on 'raising the bar' of food and drink experiences in Dunedin. Provide pathway to training / funding. Early wins: <ul style="list-style-type: none"> // Photographer coordinated to shoot for multiple venues in style suited to promotion // Google My Business Webinar Training // Social Media and PR Training Seminars // Restaurant's knowledge sharing and acting as menu consultants // More opportunities for the sector to attend workshops to upskill and share thinking 			
Key outcomes: <ul style="list-style-type: none"> // Higher levels of visitor satisfaction // Higher levels of visitor spend at attractions // Unified and collaborative industry driving to achieve a single goal // Helping operators to attract visitors 			

RECOMMENDATION: Destination Food and Drink Marketing Campaign			
LEAD PARTNER: Enterprise Dunedin		OBJECTIVE/S: Benchmarking/ Differentiation/Enhancement	PRIORITY: 3
SUPPORT PARTNER/S:			
// Producers	// Media	// Restaurants	// Attractions
// Suppliers	// Events	// Hospitality	
ACTIONS / OUTCOMES			
Inform Enterprise Dunedin's paid and owned marketing. Positions Dunedin as a desirable food and drink destination offering unique experiences. Connects people to place, producers and makers, food, the environment, heritage and culture.		Angles to include:	
Content Development:		// Destination Dining	
// Work with magazines for special takeover / insert for out of region advertising		// Elemental / in nature	
// Social media campaign		// People: faces of Dunedin, strong link to heritage and culture	
// Digital and paid media		// Family / people / identity / lifestyle	
// Images		// Images placing the food and drink experience as the key reason to visit these destinations	
		// PEOPLE + PLACE + PRODUCT - Imagery should include evocative landscapes, focus on the natural environment and people interacting with the land, connecting in with images of food - literally farm to plate. Making that connection between the people (producers) and the place.	
		Key Outcomes:	
		// Increase in visitation	
		// Increase in positive brand association	
		// Established clear link between people, product and place	

RECOMMENDATION: Destination Restaurant		
LEAD PARTNER: Independent Restaurant Operator	OBJECTIVE/S: Benchmarking/ Differentiation/Enhancement	PRIORITY: 3
SUPPORT PARTNER/S: Enterprise Dunedin		
ACTIONS / OUTCOMES		
There is little doubt that ‘destination restaurants’ play a key role in building the credibility of strong food and drink destinations, take Noma (Copenhagen), Blue Hills at Stone Barns (upstate New York), Hiakai (Wellington) or closer to home, Fleur’s Place (Moeraki). These restaurants tell the story of the place they are from, and the experience reflects the people and the products that have made them famous.		Continuing to nurture these restaurants, supporting them through content development and ensuring that they are included as part of the Dunedin Tourism Story, will inevitably work towards the development of building the reputation of Dunedin destination dining experiences.
Destination restaurants don’t just happen. They are an enormous investment by the chef, the team, the growers, suppliers and supported by the destination. There are some restaurants in Dunedin that have pedigree (Plato, Best Café) or have established themselves more recently, but are building a strong reputation and gaining national recognition (Moiety, Titi).		

REFERENCES

GRAPHS AND DATA:

- // New Zealand Food & Agri Tourism Industry Insights Report, ANZ / Ministry of Primary Industries, 2018: comms.anz.co.nz/tp/download/659275/186fc75b36a66233505a44172f62812e/NZ-tourism-report.pdf
- // Domestic Growth Insights Tool (DGiT): dgit.nz/
- // Domestic Traveller Segments: dgit.nz/domestic-traveller-segments/
- // Domestic Travel View Report: insights.tourismnewzealand.com/assets/Tourism-New-Zealand/Consumer-research/Domestic-research/Domestic-Travel-View-Report-December-2021.pdf
- // Tourism New Zealand Mindsets: insights.tourismnewzealand.com/int/mindsets/#/
- // Made with Care: nzte.govt.nz/page/made-with-care

DUNEDIN CITY COUNCIL / ENTERPRISE DUNEDIN DOCUMENTS:

- // Ara Toi Ōtepoti – Our Creative Future: dunedin.govt.nz/__data/assets/pdf_file/0015/522060/Ara-Toi-Viewable.pdf
- // Brand Dunedin Guidelines - 2020
- // Dunedin Destination Plan: dunedin.govt.nz/__data/assets/pdf_file/0010/652852/Dunedin-Destination-Plan-web.pdf
- // Dunedin's Economic Development Strategy (2013-2023) dunedin.govt.nz/__data/assets/pdf_file/0008/262997/Dunedins-Economic-Development-Strategy-2013-2023.pdf
- // Festivals and Events Plan 2018-2023: dunedin.govt.nz/__data/assets/pdf_file/0004/132754/Dunedin-Festival-and-Events-Plan-2018-2023.pdf

GENERAL REFERENCES:

- // Angus & Associates, Market Perceptions: Dunedin, Year End September 2021
- // Dunedin Visitor Profile, 2018-2021
- // Enterprise Dunedin, *Identifying Visitor Microsegments for Dunedin*, June 2021
- // Spatial Product Map – Dunedin City Boundaries
- // en.wikipedia.org/wiki/History_of_the_Otago_Region
- // teara.govt.nz/en/whaling/page-2
- // infoshare.stats.govt.nz/ViewTable.aspx?pxID=e72c8643-5589-4853-b9a6-d740ce22b7b1
- // freshinfo.co.nz/expertise/events

EVENT CONSULTATION:

Thanks go to the Event Managers who generously gave up their time to assist with this report:

- // Dine Dunedin: Nicola McConnell, BrandAMP
- // Dunedin Craft Beer & Food Festival: Jason Schroeder, OUSA
- // Port Chalmers Seafood Festival: AJ Johnston, Marketing and Communications Volunteer

**FOOD + DRINK NEW ZEALAND ARE FOOD
TOURISM CONSULTANTS AND EXPERTS IN
DELIVERING WORLD-CLASS CULINARY
EXPERIENCES AND EVENTS.**

*We provide advice and guidance to destinations,
events, food operators and the wider food sector
on how to leverage food tourism opportunities.*

foodanddrinknewzealand.com



Photo: Sarah Meikle

**FOOD + DRINK
NEW ZEALAND**