

MANAWATŪ 2032

Manawatū's Destination Management Plan 2032 sets the strategic direction for the city's and region's visitor sector, with a view to growing visitor activity and value for the benefit of our communities.

December 2022

CEDA
CENTRAL ECONOMIC
DEVELOPMENT AGENCY

ManawatūNZ.co.nz

This Strategy is a shared vision and framework facilitated and driven by CEDA (with the assistance of Stafford Strategy), and owned and delivered by our stakeholders and partners, locally and across New Zealand.



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ABBREVIATIONS

CAPEX	Capital Expenditure
CBD	Central Business District
COVID-19	Coronavirus disease
CEDA	Central Economic Development Agency
DMP	Destination Management Plan
DOC	Department of Conservation
F&B	Food and Beverage
GDP	Gross Domestic Product
HDC	Horowhenua District Council
HRC	Horizons Regional Council
IVS	International Visitor Survey
LTP	Long Term Plan
MDC	Manawatū District Council
MBIE	Ministry of Business, Innovation & Employment
NPS	Net Promoter Score
NZTA	Waka Kotahi NZ Transport Agency
PNCC	Palmerston North City Council
TLA	Territorial Local Authority
TNZ	Tourism New Zealand
YE	Year End

Part 1: Executive Summary

1.1. A Destination Management Plan for Manawatu

Globally, the visitor economy has significantly changed, driven by COVID-19 and dramatic shifts in the way visitors seek, plan, and consume travel. This Destination Management Plan (DMP) for Manawatu is set within this dynamic and changing environment. It adopts a local view, while also being cognisant of broader regional and national contextual influences. It has been developed to provide strategic direction for Manawatu and Manawatu's tourism stakeholders to plan for the sustainable management, development, and marketing of tourism for the region over the next 10 years.

As the tourism agency for Manawatu region, Central Economic Development Agency (CEDA) is well-positioned to work with stakeholders to drive and coordinate the sustainable management and development of tourism across Manawatu.

Currently, Manawatu is home to some 124,300 people and covers an area of just under 3,000 square kilometres. By 2048, the region is expected to be home to around 136,900 residents. In developing this DMP, careful consideration has been given to adopting a sustainable approach to ensure that the development of tourism also improves the liveability of Manawatu's communities.

Manawatu offers an authentic Kiwi experience with dramatic landscapes that sweep from the rugged Ruahine and Tararua Ranges out to the Tasman Sea. It offers an exciting adventure playground for visitors and locals alike, with a variety of cycling, mountain biking or walking tracks offering stunning scenery and views, along with white water rafting, kayaking, horse trekking and kite surfing. The region is also home to Te Āpiti – Manawatu Gorge: ancient native bush and a land steeped in legend which can be explored by foot, bike, jet boat or horseback.



1.2. Strategic Framework

The following strategic framework has guided the development of this DMP and should be used to direct tourism development for Manawatū going forward. This framework has been developed in close consultation with CEDA, Palmerston North City Council (PNCC), Manawatū District Council (MDC), mana whenua and industry.

It is important to note that activating the key focus areas will require a collaborative approach with many different stakeholders (PNCC, MDC, Horizons Regional Council, CEDA, industry, mana whenua and community).

Figure 1: Strategic Framework


The Vision

“To grow visitor activity and value for the benefit of our community. “

Guiding Principles

Protection & Sustainability	Participation & Community Aspirations	Partnerships, Collaboration & Relationships	Sustainable Progress
Of the cultural identity and values of mana whenua and Manawatū; of our people; kaitiakitanga of our natural environment	Stakeholder participation that ensures the DMP aligns with community aspirations.	Whanaungatanga is at the heart of destination management. Strong, equal partnerships are essential to working together to support one another and achieve greater good.	A focus on higher quality visitor economy outcomes that align with mana whenua and broader stakeholder aspirations for growth.

Key Focus Areas

Infrastructure Growth	Insights & Industry Development	Leadership & Advocacy	Market Development	Product Development	Sustainability & Regenerative Tourism
 <p>Work with all levels of government and partners to identify infrastructure needs that support the growth of a sustainable visitor economy.</p>	 <p>Work closely with the industry to deliver robust and current visitor datasets along with training and upskilling programmes.</p>	 <p>Advocate, lobby and engage to best represent and coordinate the needs of Manawatū’s tourism industry stakeholders.</p>	 <p>Work collaboratively to target markets that align with the region’s values and attributes.</p>	 <p>Support Manawatū’s stakeholders to enhance and develop innovative and contemporary visitor experiences that will strongly appeal to our target visitor markets.</p>	 <p>Positioning Manawatū as a leader in taking pragmatic action on sustainability.</p>

1.3. Measuring Our Success

This DMP is focused on five goals, which aim to deliver on the strategic framework.

- 1. Manawatū is a great place to live, visit, study, and work.**

- 2. Grow tourism's contribution to Manawatū visitor economy to ensure a thriving local economy and improved social wellbeing.**

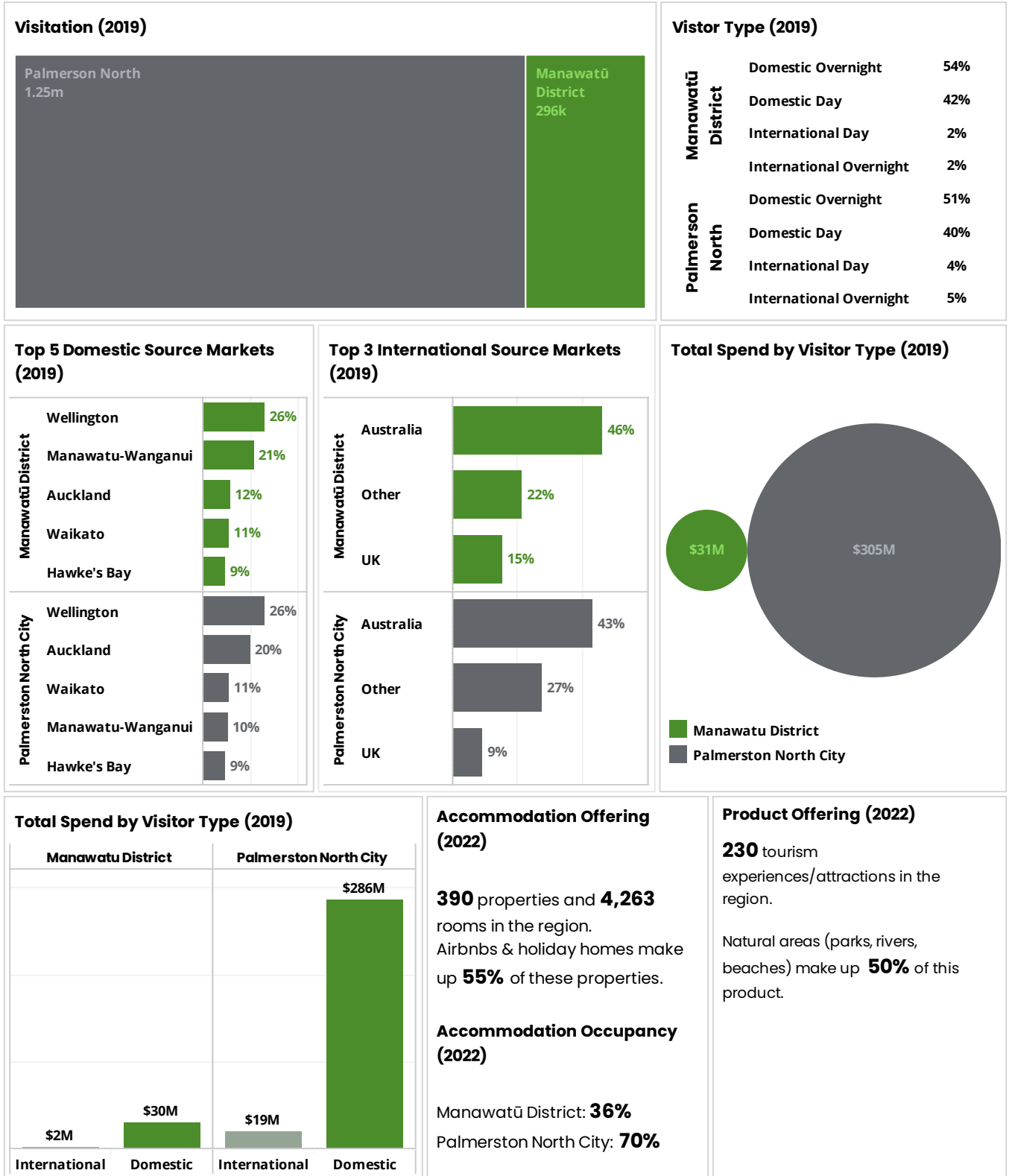
- 3. Develop strong product and promotional links with surrounding regions via greater networking, wider marketing campaigns and extending products and experiences.**

- 4. Ensure tourism development and growth sustains and enhances Manawatū's natural and built environment for the benefit of residents first and foremost and then its visitors.**

- 5. Develop a stronger sectoral collaborative approach with mana whenua for the sustainable development of Manawatū's visitor economy, which ensures engagement with all related sectors (sport, education, arts, history etc).**

1.4. Our Visitor Economy

Figure 2: Manawatū's Visitor Economy – A Summary¹



¹ Based on visitation data (NZ IVS, New Zealand Regional Tourism Estimates and the New Zealand Visitor Activity Forecast - <https://freshinfo.shinyapps.io/NZVAF/>), discussions with CEDA, both Councils, transport providers, and local industry operators.

1.5. Driving Sustainable Tourism for Manawatū

A total of **64** recommendations have been identified for this DMP. These include a range of what have been termed “strategic initiatives” and “development projects”.

Strategic initiatives reflect those recommendations that are the building blocks to support a visitor destination and, while not being major “ribbon-cutting” projects, they are necessary to ensure a successful destination management approach is achieved. **Development projects**, on the other hand, reflect physical projects such as new or enhanced accommodation, tourism attractions or events (for example).

Those indicated with a ♦ are strategic initiatives – all others reflect development project recommendations.

Figure 3: DMP Recommendations

<p style="text-align: center;">Infrastructure Growth</p> <ul style="list-style-type: none"> ▪ Advocacy for improved digital coverage ▪ Arapuke Forest Park road access ▪ Arapuke to Te Āpiti track skyline walk ▪ Ashhurst Loop track (Te Āpiti) ▪ City to Ashhurst/Te Āpiti pathway ▪ Enhanced inter-modal transport services (airport, rail & road transport) ▪ Feilding Civic Centre upgrades ▪ Himatangi Beach break wall remediation ▪ Himatangi Beach car park ▪ Himatangi Beach master plan ♦ ▪ Improved placemaking throughout Manawatū ▪ Manawatū Scenic route upgrades ▪ Public toilet facilities ▪ Ruahine National Park loop trail ▪ Seasonal hop-on, hop-off discovery bus ♦ ▪ Suspension bridge (Te Āpiti) ▪ Te Āpiti amphitheatre 	<p style="text-align: center;">Insights & Industry Development</p> <ul style="list-style-type: none"> ▪ Effective partnerships with tangata whenua ♦ ▪ Improve visitor data, research & insights ♦ ▪ Industry famil program ♦ ▪ Integrated destination calendar ♦ ▪ Tourism industry networking events ♦ ▪ Upskilling operators ♦
<p style="text-align: center;">Product Development</p> <ul style="list-style-type: none"> ▪ Agri showcase & food experience ▪ Āpiti arboretum ▪ Arapuke forest adventure hub ▪ Barneys Point loop track (Te Āpiti) ▪ Beach blokart event ▪ Boutique art hotel in Manawatū District ▪ Palmerston North CBD hotel ▪ CBD rooftop bar ▪ Conference centre & hotel as an anchor for Civic and Cultural Precinct ▪ Destination holiday park along the riverside precinct ▪ Expanded river-based activities (kayak, SUP hire etc.) ▪ Gorge mountain bike trail (Te Āpiti) ▪ Himatangi Beach pop-up trail ▪ Lindauer Trail (Te Āpiti) ▪ Manfeild accommodation & event infrastructure ▪ Mt Lees Reserve homestead boutique accommodation ▪ Old Gorge Road shared path (Te Āpiti) ▪ Outdoor hot tubs & wellness facility with dark sky experience ▪ Outdoor sculpture trail ▪ Rangitāne projects (Te Āpiti) ▪ Rangiwahia Scenic Reserve trail & hub development ▪ Regional garden tours ▪ Ruahine walking trails ▪ Skybridge connecting ranges (Te Āpiti) ▪ Skyline track (Te Āpiti) ▪ Gorge Quarter - H West (Te Āpiti) ▪ UNESCO Geopark (Te Āpiti) 	<p style="text-align: center;">Leadership & Advocacy</p> <ul style="list-style-type: none"> ▪ Integrated event planning ♦ ▪ Manawatū/Palmy proud campaign ♦ ▪ Strengthen relationships with surrounding regions ♦ ▪ Visitor economy awareness campaign ♦
	<p style="text-align: center;">Market Development</p> <ul style="list-style-type: none"> ▪ Continue to promote Manawatū destination brand ♦ ▪ Develop targeted domestic market content ♦ ▪ Market development strategy for overnight visitor growth ♦ ▪ Regional tourism marketing strategy ♦
	<p style="text-align: center;">Sustainability & Regenerative Tourism</p> <ul style="list-style-type: none"> ▪ Collaborate with environmental special interest groups ♦ ▪ Determination of carrying capacity system and monitoring ♦ ▪ Focus on electric vehicles and public transport ♦ ▪ Regenerative tourism support promotional campaign ♦ ▪ Te Āpiti Masterplan project coordination ♦ ▪ Zero Carbon Manawatū ♦

1.6. The Priority Projects

The following provides the suggested priority recommendations to be focused on. They offer a starting point for activation of this DMP as it is impractical to try and activate too many projects at the same time; and a great diversity in their scale, type of development, location, and their timeframe for activation. The methodology for the selection of these priority recommendations is in Section 3.3 of this DMP.

Table 1: The priority strategic initiatives

	Agri showcase & food experience ▲	Arapuke forest adventure hub ▲	Palmerston North CBD hotel ▲	Conference centre & hotel as an anchor for Civic and Cultural Precinct ▲
Rationale	<p>Manawatū is well-regarded as an agricultural and farming centre. However, its positioning as a major agri-tech hub goes largely under the radar as many of the companies in the region developing innovative agri solutions and leading technology do not outwardly display information on what they are doing.</p> <p>The potential exists to showcase this profile and to begin to position Manawatū as an agri-tourism destination with the development of a central agri showcase and food experience centre.</p>	<p>The Arapuke Forest Mountain Bike Park is a significant asset for the region and could be a catalyst to expand not only mountain bikers' interests but also walkers and others.</p> <p>To support its viability, the potential exists to investigate introducing some commissionable (paid) elements into the precinct, possibly including a pay-for-use chair lift to enable leisure visitors generally, mountain bikers and walkers to access a higher point of the site with ease along with possibly offering a café, viewing platform at the summit and potentially hire facilities.</p>	<p>A hotel has recently been announced for the High Flyers site, subject to a full feasibility analysis. This is needed to determine the size of the hotel and supporting facilities.</p> <p>This project should be actively supported along with ensuring that an optimum number of rooms can be supported on the site.</p>	<p>A new or upgraded conference centre in Palmerston North CBD to enable the city to cater to a greater range of conferences and business events, with an attached hotel facility to support conference activities.</p>
Actions	<ul style="list-style-type: none"> Work with Manawatū's agri sector to consider commissioning a feasibility study assessing the viability of developing a major agri showcase centre and food experience. 	<ul style="list-style-type: none"> Complete a feasibility study looking at options to enhance the Arapuke Forest Mountain Bike Park and ways to introduce options to support its viability (including the introduction of commissionable (paid) elements into the precinct such as a pay-for-use chair lift, a café, a viewing platform at the summit and potentially hire facilities). 	<ul style="list-style-type: none"> Support the developer/investor to achieve required planning approvals to enable sufficient rooms to be provided on site Provide market demand data to support evidence-base for the feasibility study 	<ul style="list-style-type: none"> Continue to support PNCC's master planning and cultural precinct work which includes a new or upgraded conference centre in Palmerston North CBD and a supporting adjoining hotel facility.

◆ = strategic initiative | ▲ = development project

	Effective partnerships with tangata whenua ◆	Manawatū/Palmy proud campaign ◆	Gorge Quarter – Tourism Hub West (Te Āpiti) ▲	Tourism industry networking events ◆
Rationale	Effective partnerships with Manawatū iwi and mana whenua are essential for sustainable tourism growth. Manawatū has the opportunity to be a leading provider of authentic, immersive Māori experiences and to weave its unique Māori culture and history into the visitor sector more generally.	Development of a campaign targeted at locals to be proud of the region and what it offers. This could include profiling all the various things to do in the region (particularly new things that have come on streams in the last few years) that locals may not be aware of.	Development of a hub for visitor activities with overnight accommodation within a strategic western gateway location of Te Āpiti.	The consultation undertaken for this DMP highlighted that, currently, there is a limited collaboration amongst industry operators within the tourism sector but there is a strong desire to increase this. The opportunity exists to set up quarterly industry networking events
Actions	<ul style="list-style-type: none"> ▪ Continue to work with the Rangitāne Māori Tourism Working Group to facilitate, and foster authentic and unique cultural experiences and share Manawatū's cultural story with visitors ▪ Continue to build relationships and partnerships with tangata whenua ▪ Support and enable the development of tangata whenua's tourism aspirations 	<ul style="list-style-type: none"> ▪ Create an advocacy program that encourages locals to become ambassadors for their city and region 	<ul style="list-style-type: none"> ▪ Undertake a feasibility study assessing the creation of a hub for visitor activities with overnight accommodation within Te Āpiti 	<ul style="list-style-type: none"> ▪ Run quarterly tourism industry networking events. ▪ Profile the events via industry communication.

◆ = strategic initiative | ▲ = development project

1.7. Where To From Here?

Manawatū is a diverse region and it offers a unique and authentic tourism experience. The region has real strengths in its strong domestic business market, as an outdoor recreational playground for short-break visitors, as a sporting event destination (particularly for secondary school events) and within the agri-tech sector. These should continue to be leveraged going forward.

Achieving the recommendations identified as part of this DMP will require the active participation of a range of stakeholders, including government (at all levels), industry, tangata whenua and community. There is a need for far greater stakeholder collaboration and participation to support sustainable growth for Manawatū's visitor economy and to grow leisure-based visitor markets (which are underrepresented currently).

Although this DMP has identified over 50 recommendations to pursue, these have been prioritised to ensure outcomes are generated and to prevent the DMP from merely being a "wish list".

Creating a sustainable level of activity is, therefore, seen as the key. Often the temptation is to try and take on too much, too quickly and as a result, resources are often spread far too thinly to achieve desired results.

To successfully activate and deliver this DMP, the following is suggested.

- Opportunities for expanding tourism marketing campaigns for the region (led by CEDA in partnership with key stakeholders) are activated so a well-integrated approach is followed
- Core stakeholders (representing all areas of the visitor economy) are actively encouraged to remain involved in driving the agreed outcomes and the resourcing of this DMP

- There is an acknowledgement that although this DMP is for Manawatū District and Palmerston North City, there are surrounding regions that offer products of a complementary nature and who are keen to work with CEDA to offer a stronger and more compelling visitor proposition (particularly concerning investigating packaging various trails including drive, cycle, walking, equestrian, kayaking, rafting etc.).
- This DMP should assist the shareholder councils in setting their respective LTPs when updates are undertaken.
- Although this DMP has deliberately identified several priority recommendations to support the sustainable growth of the visitor economy, CEDA and the various visitor economy stakeholders should select 3-5 recommendations only, to drive the DMP as the top priorities for the short-medium term (acknowledging that other initiatives can be added to over time once the priority short term projects are already activated). There is a need to avoid trying to take on too much too quickly without sufficient resources. Importantly, the role of CEDA is as a facilitator, coordinator, and advocator. To achieve this role, sufficient capacity and resourcing are required.
- The delivery of new tourism projects identified within this DMP will likely require funding for feasibility study analyses and business cases. Funding should be identified and set aside for allowing at least the top 3 priority recommendations to move to the next stage of development, whether the funding is coming from public or private sector sources.

In summary, this DMP outlines the priority recommendations to grow Manawatū's visitor economy going forward. It does this by offering a combination of targeted and tactical short-term recommendations, as well as long-term actions to work towards, to help the sector recover and thrive moving forward.



Image credit: Rangiwahia Hut Lookout, ManawatūNZ.co.nz

Part 2: Where Are We Now?

2.1. CEDA's Role

Although this DMP refresh has been developed as an initiative of CEDA, CEDA's role will be one of ongoing coordination, advocacy, and support. Implementation of this DMP will be undertaken by a mix of stakeholders including PNCC, MDC, CEDA, and DOC, in partnership with tourism industry stakeholders and mana whenua. CEDA will, however, need to play a key role in overseeing the implementation of the DMP and supporting partners in their roles and responsibilities.

There are also several marketing opportunities for which CEDA is best placed to develop and coordinate for Manawatū and Palmerston North separately.

The role of CEDA, as Manawatū's regional tourism organisation, is to coordinate tourism-related strategies and projects that will promote and achieve growth and prominence of the visitor economy across Manawatū. This is done in line with the objectives,

strategies, and commitments of the New Zealand Government and MBIE, and will be achieved in partnership and with the support of other government agencies; PNCC and MDC; industry and business associations; and tourism and allied business operators throughout Manawatū.

In addition, feedback from operators in neighbouring regions (Horowhenua and Rangitikei who both do not have an RTO), indicates their interest in working with CEDA to help build wider opportunities for tourism collaboration in both marketing campaigns and product development.

With the proposed Te Āpiti Manawatū Gorge various tourism and recreational projects in Te Āpiti Masterplan, there is also a benefit and need for the Tararua region to also collaborate with CEDA on both marketing and product development opportunities which Te Āpiti Masterplan has already identified.



2.2. The Process Followed



To help frame the preparation of the DMP, the following principles were established to help guide the planning process and industry consultations:

- Ensure tourism growth is productive, sustainable, and inclusive.
- Improve residents' quality of life.
- Promote the development of sustainable and commissionable visitor experiences.
- Ensure infrastructure is catering to the needs of residents and visitors.
- Maintain local resources (e.g., people, open spaces etc.).
- Create experiences for specific market segments.
- Ensure the quality of the visitor experience.
- Gain/maintain competitiveness in the market.
- Value and celebrate local cultures and identities.
- Improve industry cohesion and collaboration.

2.2.1. Methodology

The following investigations and inputs were undertaken or reviewed to inform this DMP.

- Desktop research and literature review.
- Situation analysis.
- Workshops with industry and other relevant stakeholders.
- Visitor economy assessment (including historic visitation data).
- Tourism product audit, gap analysis and consumer sentiment assessment.
- Community and industry visitor economy survey.
- Analysis of macro factors relevant to the visitor economy.
- Identification of preliminary recommendations.
- Workshop with industry to discuss findings and preliminary recommendations.
- Prioritisation of recommendations.
- Development of draft DMP document.
- The socialisation of draft DMP and integration of any feedback.
- Finalisation of the DMP.

2.2.2. Industry and Community Consultation

The input received from the community and industry was invaluable and provided a key resource for the DMP's preparation.

Industry and other relevant stakeholder consultations (on-on-one sessions) along with a large number of workshops and focus group sessions with a variety of stakeholders were undertaken during site visits to the region as well as via teleconference throughout the DMP's process.

2.3. About Destination Management Planning

2.3.1. What is a DMP?

A Destination Management Plan (DMP) is a strategic plan that sets out a shared vision between stakeholders regarding what their visitor sector should look like and what it will take to get there. Destination management reflects a shift away from a sole focus on destination marketing to a more holistic and collaborative approach to managing visitor growth.

“Destination Management and planning is the mechanism by which New Zealanders can ensure that tourism in their region reflects their wishes and they have an agreed way to maximise the benefits that tourism brings whilst managing any negative impacts. It helps give greater certainty to the private sector that enables long term investment as well as confidence to the public sector about the facilities and services they need to provide.”²

A DMP sets the high-level strategy and direction for the visitor sector over a multiple-year time horizon, with separate tactical and operational plans sitting underneath the Plan to guide execution.

Destination Management involves the management of all aspects of a destination that contribute to a visitor’s experience, including the perspectives, needs and expectations of visitors, Māori, mana whenua, the tourism industry, wider businesses, community, central and local government.

A DMP collectively sets the direction for where we want and need the visitor sector to go, and what we do and don’t want as a region, ensuring we can improve and not detract from the brilliant lifestyle we have here in a way that makes our region not only better off economically, but also socially, culturally, and environmentally.

If not well-managed, visitation also has the potential to bring about negative impacts such as over-crowding or harm to the environment. Destination Management ensures a holistic and integrated approach to the visitor economy, with three interdependent components:

- **Visitor Experience:** the destination’s experience offering, including activities, attractions, supporting infrastructure, services and
- **Marketing and Promotion:** the destination’s marketing and promotional activity, creating demand and enabling the destination to be competitive, productive and
- **Resource Management:** the destination’s strategy, policy, and regulatory frameworks, Te Tiriti o Waitangi, organisational structures and the investments that support the destination.

This DMP envisages visitation being managed in a way that not only produces economic benefits but also improves social, cultural, and environmental outcomes. The Plan provides a collective roadmap for how we can work together to grow the value we

receive from visitors to our region, improve the quality of life for residents and ultimately create a better Manawatū for everyone.

2.3.2. Why do we need a destination management plan for Manawatū?

Destination management enables communities and destinations to respond to changing conditions and determine the type of tourism they would like to have and the benefits they would like to receive, taking an active role in managing these. It focuses on destination management which is a holistic approach to planning for and sustainably growing the visitor economy. Unlike traditional tourism strategies which tend to be focused on marketing, destination management is much broader and focuses on product development, investment attraction, planning requirements, industry development, visitor management, infrastructure development as well as destination marketing.

A DMP provides a platform for future-proofing Manawatū as a place people want to live, work and visit. It also assesses ways to increase economic, environmental, and social benefits. The DMP sets out a clear collaborative alignment across all sectors (public and private) that engage with and talk to; visitors, locals and potential residents, and businesses.

² Iain Cossar. GM Tourism, MBIE (Destination Management Guidelines 2020)

Image credit: Feilding Saleyards, ManawatūNZ.co.nz



2.4. Definitions to Assist

2.4.1. What is our region?

Our region comprises Palmerston North City and Manawatū District (see Figure 4). However, we know that visitors to our region are unconstrained by local government boundaries and will in some instances choose to engage in experiences beyond our region's borders to satisfy their needs.

We understand that a strong visitor proposition in neighbouring regions will help us to collectively compete more effectively with other parts of New Zealand, most of which are also trying to grow visitation.

2.4.2. Who are our tangata whenua?

In Palmerston North District our tangata whenua are Rangitāne o Manawatū. In Manawatū District our tangata whenua are Rangitāne o Manawatū, Ngāti Raukawa and Ngāti Kauwhata. These are the region's treaty partners.

2.4.3. What is a visitor?

A visitor is any non-resident who spends time in our region. This includes holidaymakers, people visiting friends and relatives, short-term students, international students, business travellers, event attendees, shoppers, people with medical needs seeking specialist care and more. We don't see these visitors as 'tourists' but as temporary residents, friends we haven't met yet.

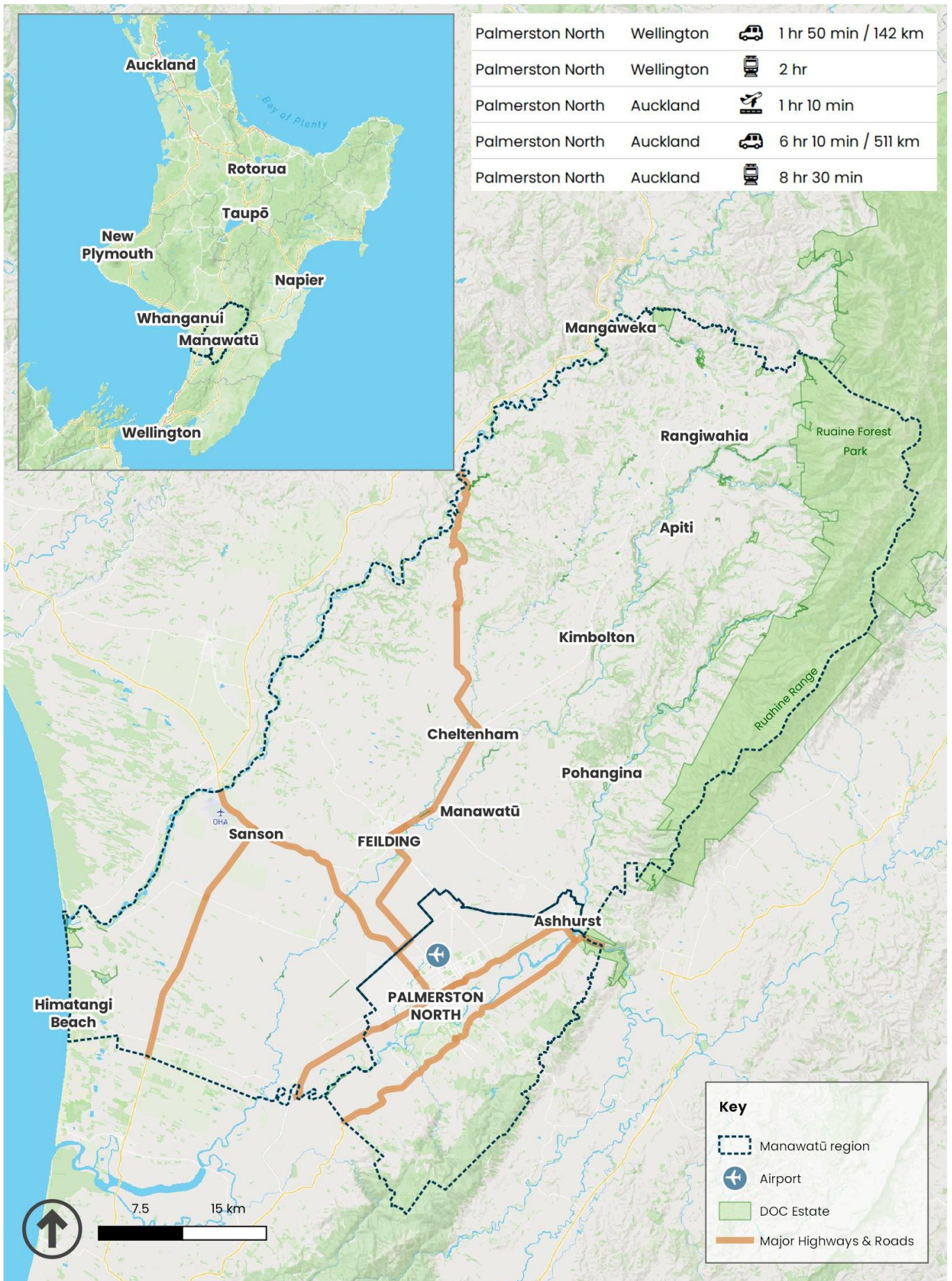
2.4.4. What guidance have we used to prepare this plan?

To ensure a holistic destination management approach for Manawatū, it was essential that the views, aspirations, and concerns of our wider community were taken into consideration through an extensive consultative process. This approach recognises that Destination Management does not happen in isolation: it involves a wide range of sectors, stakeholder groups, communities and delivery partners including local and central government, businesses, sector groups and communities.

The development of this Destination Management Plan has been guided by:

- The new best practice Destination Management Guidelines 2020 developed as a priority in the New Zealand-Aotearoa Government Tourism Strategy.
- The Long-Term Plans of Palmerston North City Council and Manawatū District Council.
- Consultation with, and input from tangata whenua and iwi and Māori.
- Consultation with, and input from our local communities and business sector
- Research and workshops conducted to understand the region's positioning and potential with iwi, visitors, and conference sector stakeholders.
- Input from our key stakeholders including Massey University, Te Pūkenga - UCOL, Palmerston North Airport, Sport Manawatū, Manawatū Chamber of Commerce, Feilding and District Promotion, Air New Zealand, MBIE, and Department of Conservation.

Figure 4: Manawātū Region



2.5. Our Visitor Profile



Understanding the profile of Manawatū’s visitors is important when planning for our visitor economy. This includes insights into:

- the size of our visitor market, in terms of how many visitors are travelling our region, and how this has changed over time;
- where visitors are coming from, including from domestic and international origins;
- the split between day trippers and overnight visitors; and
- total spending by visitors.

2.5.1. How data has been derived

There are significant data gaps in New Zealand’s tourism/visitation data. Before 2012, a comprehensive dataset that covered regional tourism was issued³, however, this full dataset is no longer

available. As a result, data is currently collected from several different sources⁴, each of which uses a different methodology and often has different boundaries applied. This makes it extremely challenging to determine a complete picture of visitation to a region and perform trend analysis.

To determine a comprehensive picture of visitation to Manawatū, a variety of datasets have been leveraged. These are summarised in Table 2.

To eliminate the risk of double counting, and to provide an understanding of where visitors are travelling within the region, data has been shown by TA, rather than providing a combined regional dataset.

Table 2: Data Used

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

³ Including total visitation by market (overnight and day trips by international and domestic visitors), spend, average length of stay etc.

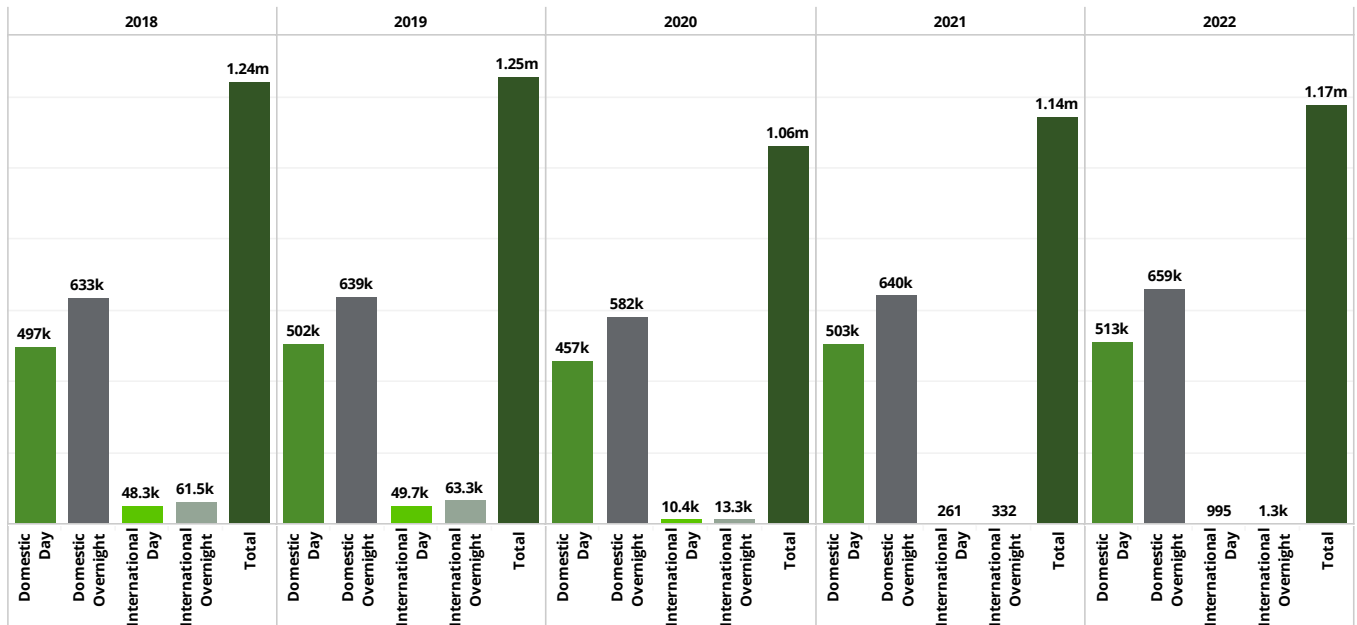
⁴ Including the IVS, MBIE’s visitor spend data, the Accommodation Monitor, Qrious data etc.

2.5.2. Historic Visitation

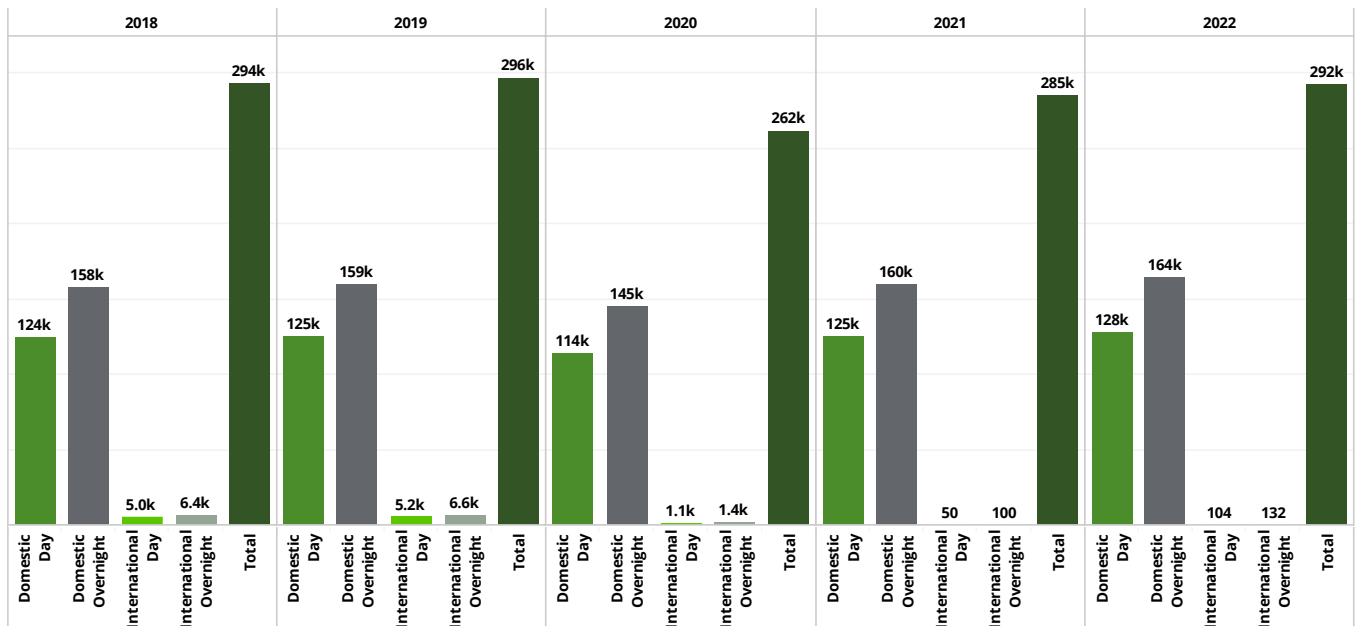
Figure 5 provides a summary of visitation to both Palmerston North and Manawātū District from 2018 to 2022. It demonstrates that both areas did not experience as dramatic a decline due to COVID-19 as many other regions because of its strong domestic market focus and that Palmerston North, as the major city and population centre, generates the most visitation, recording 1.17m visitors in 2022.

Figure 5: Historic Visitation to Palmerston North City & Manawātū District 2018 – 2022⁵

Visitation to Palmerston North



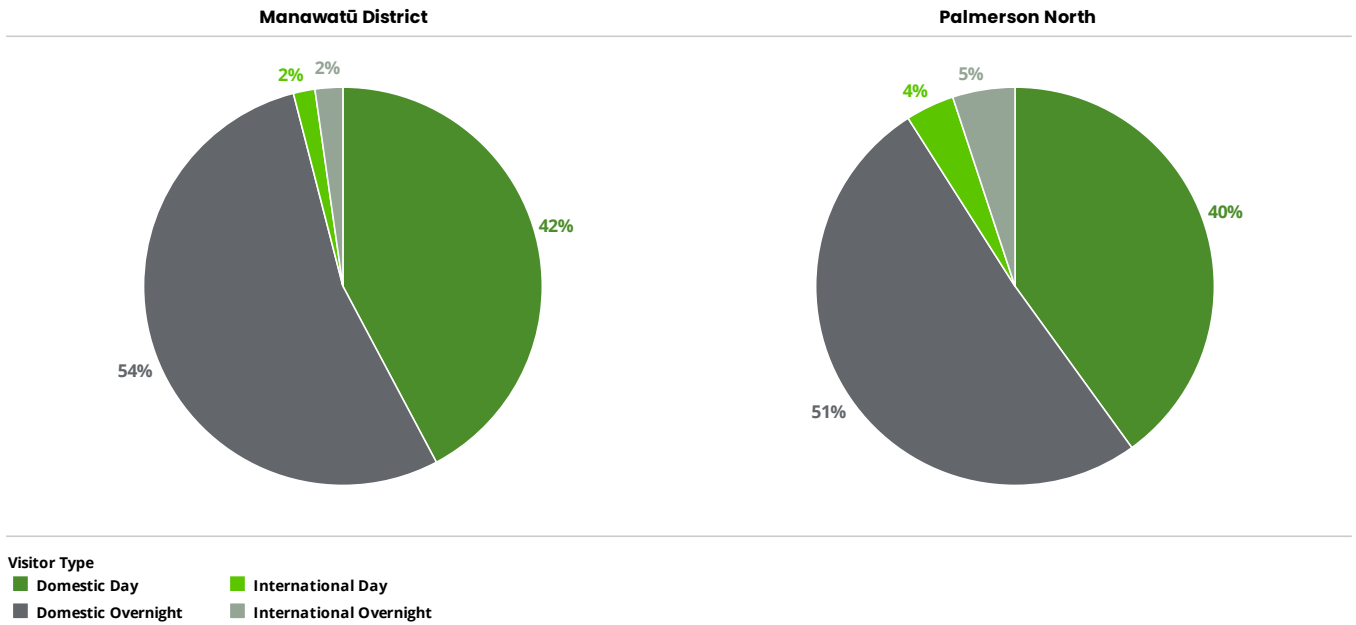
Visitation to Manawātū District



⁵ Based on visitation data (NZ IVS, New Zealand Regional Tourism Estimates and the New Zealand Visitor Activity Forecast - <https://freshinfo.shinyapps.io/NZVAF/>), discussions with CEDA, both Councils, transport providers, and local industry operators.

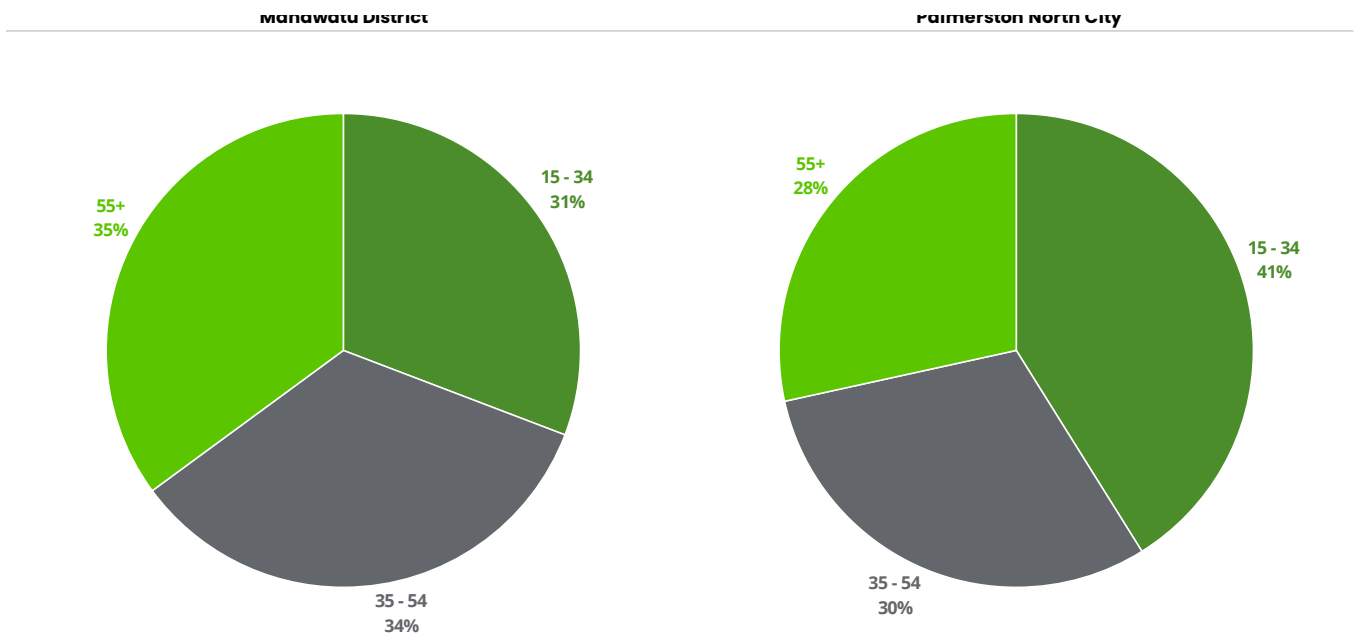
Manawatū is very much a domestic market: for both TLAs, domestic visitation (day and overnight) comprised over 90% of all travel (see Figure 6). Interestingly, the region has a stronger proportion of domestic overnight than domestic day trip visitation. This is a strength that needs to continue to be built on. Overnight markets tend to be far higher yielding because of the additional spend they generate on accommodation, food and beverage, transportation, attractions, retail etc.

Figure 6: Historic Visitation to Palmerston North City & Manawatū District by Visitor Type 2019⁶



The age of travellers to the region (Figure 7) is fairly evenly split for the district, with a slightly stronger 15-34 age group for Palmerston North, reflecting potentially a strong sports attendance for events and the number of Massey University students.

Figure 7: Historic Visitation to Palmerston North City & Manawatū District by Age of Travellers 2019⁷

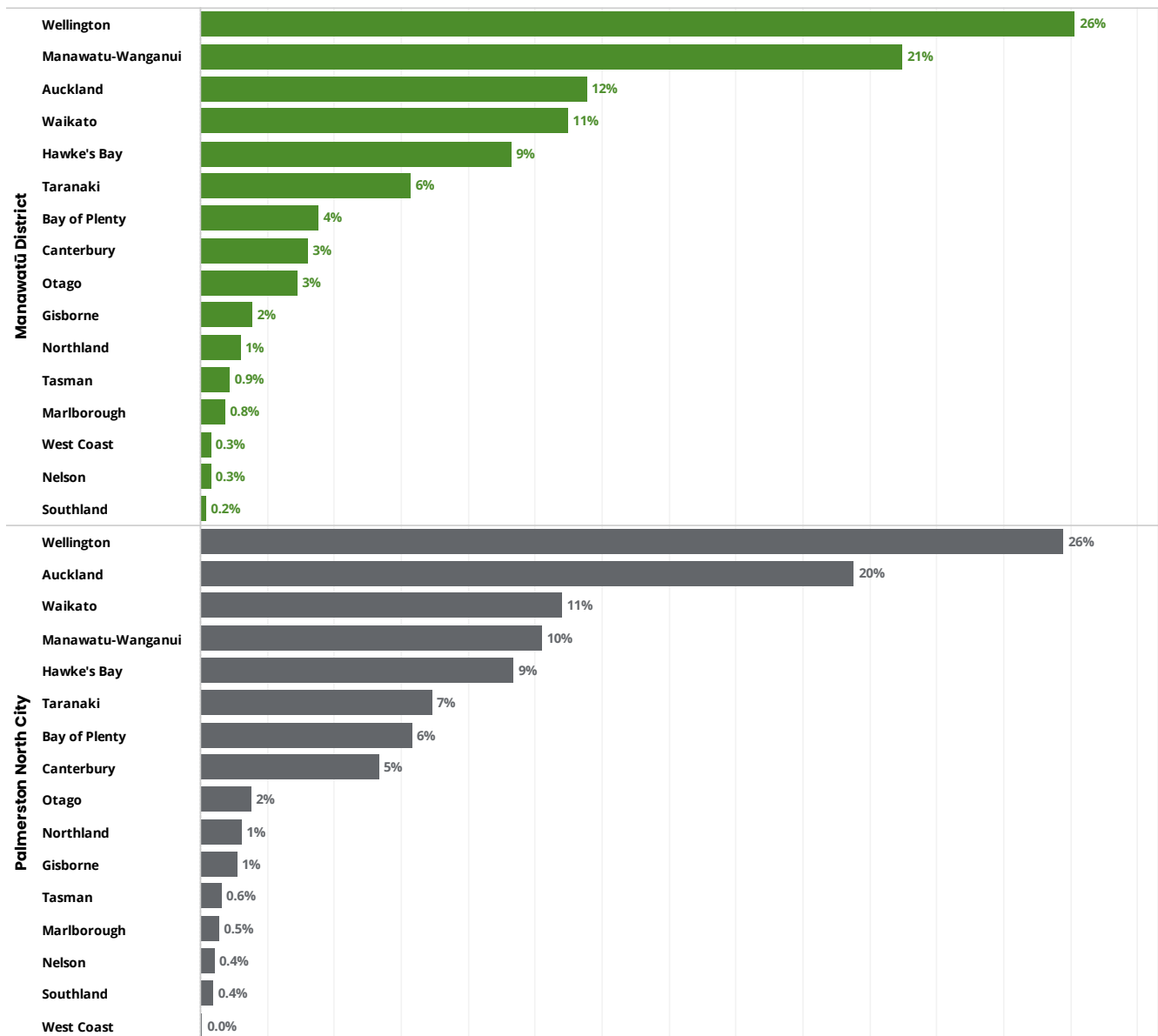


⁶ Ibid
⁷ Ibid

Figure 8 summarises the origin of domestic visitors to Palmerston North and Manawatū District. It demonstrates that:

- Wellington is a major generating market for the region, with more than one-quarter of all domestic visitors originating from the Wellington region. Transmission Gully has greatly reduced the drive time ex Wellington making the region even more accessible.
- Auckland is the second largest domestic market for Palmerston North highlighting its strength as a business hub and VFR (visiting friends and relatives) destination.
- The business hub that Palmerston North offers for a much wider catchment than Manawatū, reflects the opportunity to keep on strengthening this with many visitors coming for business, shopping, and events, especially from Wanganui, the towns within the Rangitīkei and Horowhenua regions which are all fairly close.

Figure 8: Historic Visitation to Palmerston North City & Manawatū District by Origin of Domestic Visitors 2019⁸

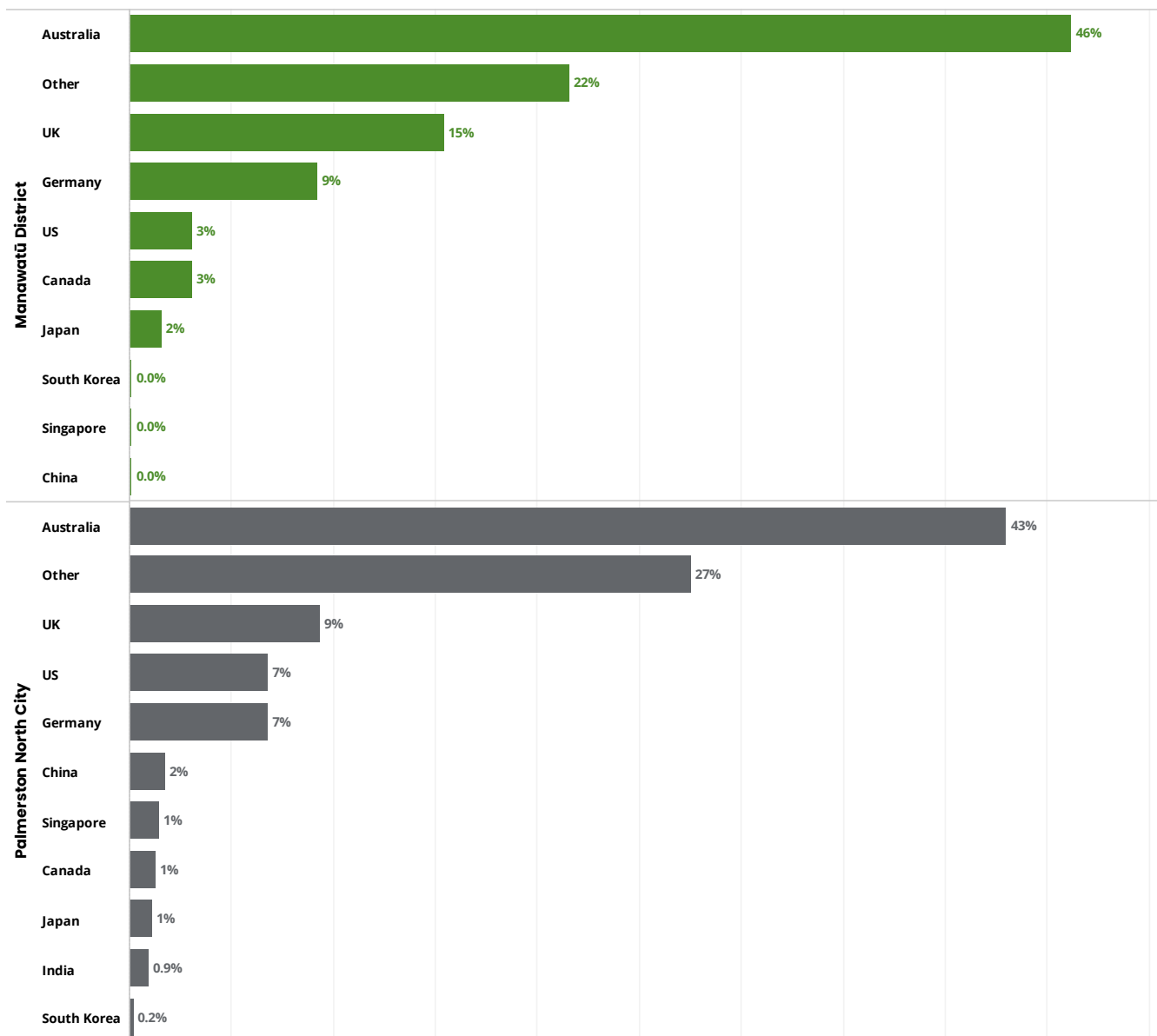


⁸ Ibid

Australia is the major international visitor market for the region – comprising almost half of all visitors to both TLAs (see Figure 9). Other major markets comprise the UK, USA, and Germany which are thought to reflect strong business and technology connections (representing 73% of all international visitors to Manawatū and 66% for Palmerston North). The other category primarily reflects other European generating niche markets (that are not large enough to represent their own individual country), also with strong business and tech connections.

With the COVID-19 recovery likely to extend into the medium-term, Australia is expected to continue to be the major international market for New Zealand for the foreseeable future. There are already strong business and VFR links between Manawatū and eastern seaboard Australian cities especially (Adelaide, Melbourne, Canberra, Sydney, Gold Coast and Brisbane) with the potential to start to grow a leisure market as well. Direct flights ex these cities into Auckland and to a lesser extent Wellington, provide good and relatively fast travel connections to Manawatū which can help grow a future new leisure destination for Australians wanting to visit for short breaks (3-5 days) as well as longer touring journeys.

Figure 9: Historic Visitation to Palmerston North City & Manawatū District by Origin of International Visitors 2019⁹

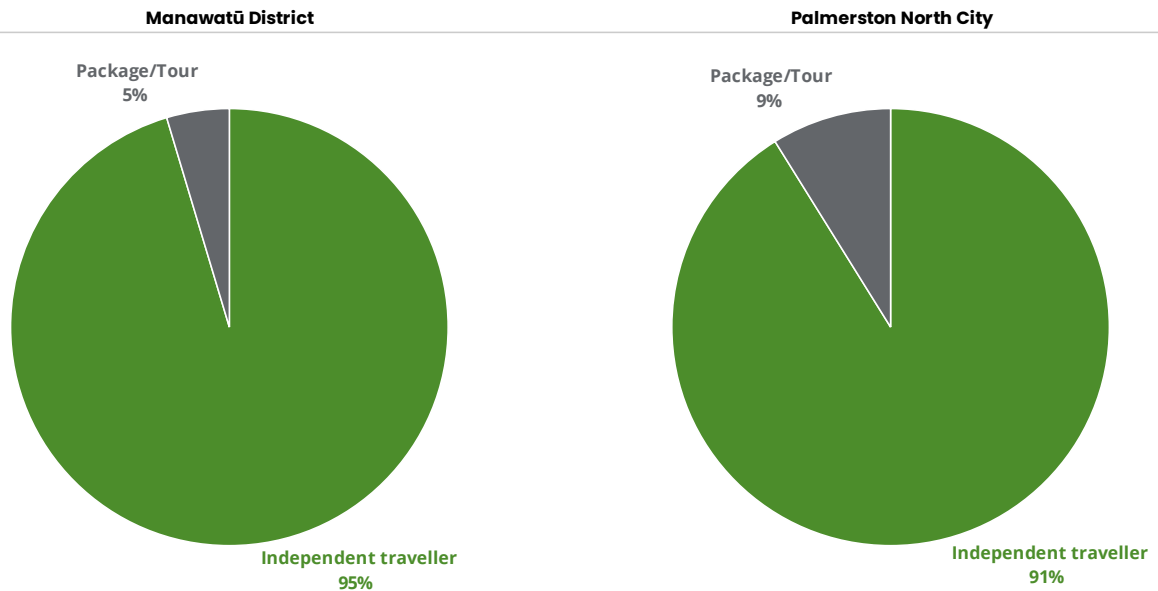


⁹ Ibid

There is a strong dominance of Free Independent Travellers (averaging over 90% across both TLAs) with only a small proportion being on a packaged tour. This reflects the strong business sector and VFR sector categories who visit Manawatū and the very limited numbers of those travelling for holiday and leisure purposes.

Feedback from the vast majority of operators indicated a desire to continue to focus on the VFR market, free independent travellers and the boutique tour market as the mass/larger coach tour market was not seen as a good fit with the region's product offering and is expected to take a longer timeframe to recover.

Figure 10: Historic Visitation to Palmerston North City & Manawatū District by International Visitors (Packaged vs FIT) 2019¹⁰



¹⁰ Ibid

2.5.3. Historic Spending in Manawatū

2.5.3.1. Why the data differs?

MBIE has changed the provision of tourism spending data, moving away from the *Monthly Regional Tourism Estimates (MRTEs)*. These have been replaced by *Tourism Electronic Card Transactions (TECTs)*. The TECTs have been established by MBIE as an interim replacement for the MRTEs.

The MRTEs were “discontinued due to issues that have arisen from COVID-19 ... the methodology for weighting the measured electronic card transaction spend, up to the whole of industry spend, became unusable. The TECTs instead aim to present the measured electronic card transactions (ECT) attributable to tourism, but without any attempt to represent the total spend. This method is considered to be the best way to provide spend data to the industry while travel is severely affected by COVID-19 border restrictions.”¹¹

As a result, the two datasets are different and are not comparable.

There are, however, some challenges with the TECTs.

- They represent card spending only (do not include any other form of spending such as cash, pre-purchases or online spend). This results in the figures in the TECTs being substantially smaller than those in the MRTEs so the two series should not be directly compared (this is why Manawatū TECT spend data is much smaller than Manawatū MRTE spend data).
- The TECT data is provided by Marketview, who uses a base of ECT spending from the Paymark network (approximately 70% of total ECT spending) to estimate total ECT spending.

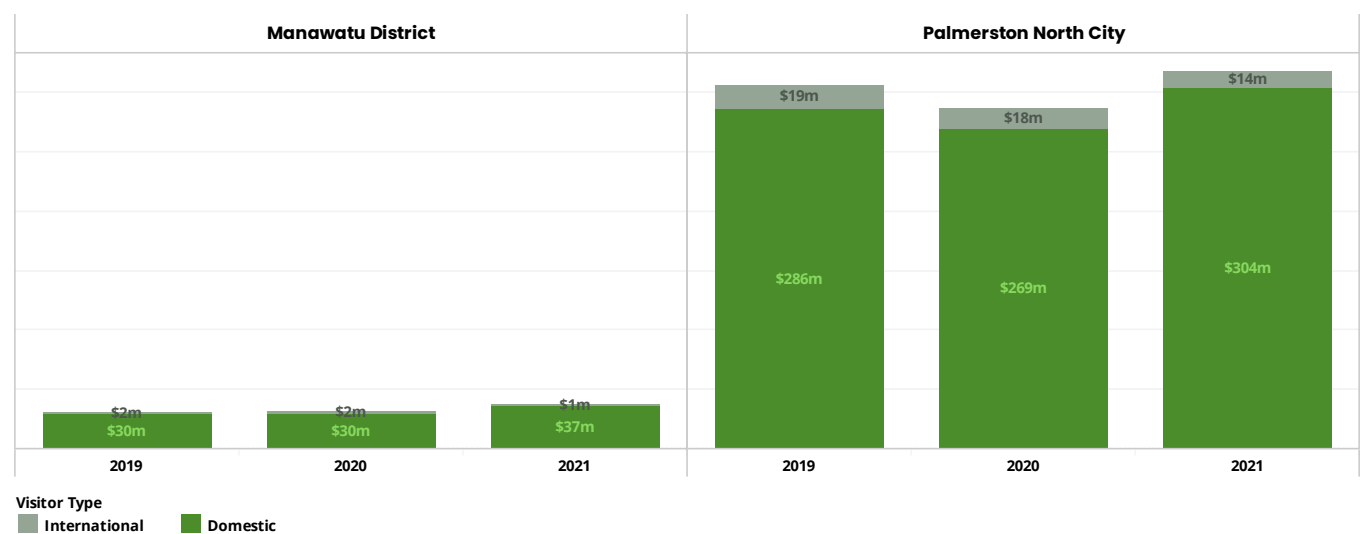
- The TECT dataset is better used for proportions and trends of spending, rather than dollar values.

2.5.3.2. Historic Spend

Figure 11 provides a snapshot of historic spend in Palmerston North and Manawatū District based on the TECT data. It is important to note that this data is conservative given it is based on TECT data (provided by MBIE) which is not able to pick up on all visitor spending. It demonstrates the following trends and patterns, however.

- Visitor spend very much domestic market dominated for both TLAs. While domestic visitors represented 91% of total visitation in 2019, their spend represented 94% of all spend, showing the strength of this market not only from a visitation perspective but also from an expenditure viewpoint.
- Although COVID-19 did have an impact on visitor spending, this was not as significant as what some other destinations around the country experienced.
- The region is likely going to require more commissionable tourism products to generate a solid uplift in visitor spending for both TLA areas.
- Supply-side capacity constraints (especially accommodation capacity) will continue to have a major impact on visitor spending and visitation growth generally. More major events (cultural, sports-based etc) are also likely to be required along with refreshed and new visitor attractions and experiences.

Figure 11: Historic Visitor Spending in Palmerston North City & Manawatū District 2019 – 2021¹²



¹¹ <https://www.mbie.govt.nz/immigration-and-tourism/tourism-research-and-data/tourism-data-releases/tourism-electronic-card-transactions/>

¹² Ibid.

Figure 12 provides a summary of spending by product type and illustrates the following.

- Retail spend leads, followed by food and beverage. These two product types collectively represent 81% of total visitor spend for Palmerston North and 84% for Manawatū. FoodHQ and hospitality and producer industries should look to grow collective use of local and wider regional product and as a feature of event/conferencing catering. Branding quality Manawatū produce and services needs to be strengthened to support the regional proposition as a foodie hub.
- Accommodation spending is relatively small (averaging 7-8%), reflecting the limited supply of products.
- Cultural and recreation spending is also low (averaging only 1%) which reflects the free entry of many experiences and the need for attraction refreshers/upgrades to help improve their marketability since they were developed. Comparative to many other destinations nation-wide, this is a small share of total overall spend.

Figure 12: Historic Visitor Spending in Palmerston North & Manawatū District by Product Type 2019¹³



¹³ Ibid

2.6. Our Product Offering

Manawatū has a growing array of attractions, experiences, and accommodation products. The following section provides a stocktake of this mix to provide an overview of the region's current strengths and possible gaps that exist.

2.6.1. Accommodation Stocktake

Figure 13 provides a summary of the accommodation audit undertaken and demonstrates the following.

- There are just over 4,200 accommodation rooms in the region but some of these (an estimated 5 motel properties) are currently utilised as emergency housing so are not part of the regional room stock. This is further constraining the region's accommodation supply. Having sufficient, year-round, bookable unit stock is important for securing events and attracting a larger, more diverse overnight visitor market.
- The region's accommodation typology is dominated by Airbnbs/holiday homes (55% of all properties and 14% of all rooms). This accommodation type has anecdotally been growing as commercial accommodation supply has been increasingly constrained.
- The majority of room stock, however, is provided through student apartments and long-term accommodation properties (36% of all rooms throughout the region).
- In terms of short-term commercial accommodation, however, motels provide the most room stock, representing 23% of all stock and 14% of all properties. Hotels, on the other hand, appear to be underrepresented, comprising just 2% of all properties in the region.

With respect to product gaps, Manawatū's accommodation mix would appear to be missing the following.

- Manawatū currently does not have a larger, higher-quality hotel and has limited branded accommodation products. Feedback indicates the region often struggles to attract larger events (due to the constrained size of the accommodation mix) and higher-end corporate events because of this. There are often challenges in securing accommodation mid-week due to

a lack of supply and rates being charged do not necessarily reflect the quality offered because of this.

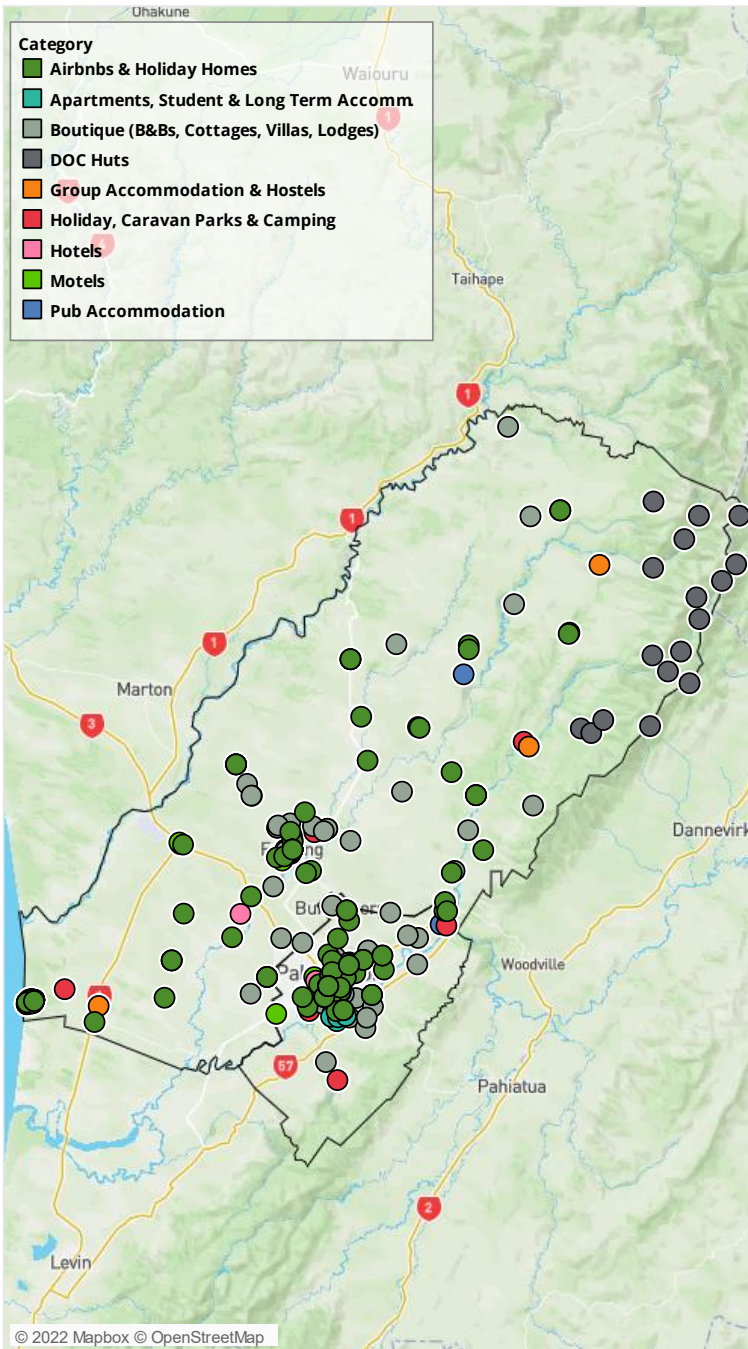
- Higher quality, family-friendly destination holiday parks (rather than traditional caravan-style parks).
- Boutique and higher-end lodge-style accommodation.
- Glamping pods and eco chalets able to support cycle trails and walking tracks throughout the region as well as offering overnight river-based experiences for rafting and kayaking and fishing trips (guided and unguided) for trout etc.

2.6.2. Accommodation Sentiment

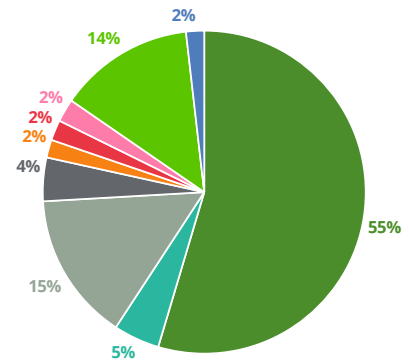
A consumer sentiment assessment was also undertaken on the region's accommodation mix (see Appendix 1) for an understanding of how this is calculated). It is important to note that the Net Promoter Score (NPS) assessment was only undertaken on products with five or more reviews. A score of more than 50 is very good, while a score of less than 30 is below average.

- Overall, Manawatū's accommodation mix achieves an NPS of +47 which is a good overall score (based on over 10,500 reviews). However, this score is effectively boosted by the region's boutique accommodation offering which generates a strong average NPS of +80.
- Four categories received below-average scores, including:
 - Apartments, student, and long-term accommodation: -3
 - Group accommodation & hostels: +1
 - Hotels: +16
 - Pub accommodation: +30
- Motels – which dominate Manawatū's short-term commercial accommodation offering (in terms of bookable room stock) - achieved an average rating of +37 which is about average.
- On a comparative basis, the following NPS scores were achieved (as averages) in similar exercises in other destinations in NZ:
 - Dunedin received a +48 NPS
 - The Waitaki received a +51 NPS
 - The Mackenzie received a +44 NPS

Figure 13: Manawatū's accommodation product (a summary)



Type of Accommodation



Category	#	% of Total	Rooms	Rooms % of Total
Airbnbs & Holiday Homes	213	55%	578	14%
Boutique (B&Bs, Cottages, Villas, Lo	58	15%	258	6%
Motels	53	14%	984	23%
Apartments, Student & Long Term ..	18	5%	1,525	36%
DOC Huts	17	4%	111	3%
Hotels	9	2%	379	9%
Holiday, Caravan Parks & Camping	8	2%	90	2%
Pub Accommodation	7	2%	56	1%
Group Accommodation & Hostels	7	2%	282	7%
Total	390	100%	4,263	100%

Category	Total Reviews	Avg. NPS
Boutique (B&Bs, Cottages, Villas, Lo	559	+80
DOC Huts	70	+78
Holiday, Caravan Parks & Camping	1,167	+57
Motels	4,809	+37
Pub Accommodation	1,439	+30
Hotels	2,201	+16
Group Accommodation & Hostels	180	+1
Apartments, Student & Long Term ..	114	-3
Total	10,539	+47

2.6.3. Attractions/Experiences Stocktake

Figure 14 provides the results of the stocktake of Manawatū's attractions and experiences. It demonstrates the following.

- Based on the audit, there are 230 different tourism attractions/experiences across the region.
- Natural areas, rivers, beaches, parks, and lookouts comprise the largest share of the product identified (50%). While much of this product service a local market, it also forms an important part of the region's tourism offering.
- The product is very much clustered within Palmerston North – plus small clusters in Feilding and Ashhurst.
- There is an abundance of free products (an estimated 73% of all attractions and experiences are free¹⁴). Although free product forms an important part of a destination's product mix and is important for community amenity, it is important to ensure there is a balance: paid product generates far greater economic benefit which can assist in growing social licence for tourism.
- Many attractions (built and natural) appear to require reinvestment and upgrading.
- While there was anecdotal commentary that Manawatū has limited indoor, family-friendly attractions, it appears to rate better than many others in this area.
- Manawatū has the only motor sport circuit south of Hamilton (this makes it unique in a very large area).
- Manawatū has well-developed drive circuits and cycling circuits throughout the district.
- The hospitality offering in the region is good quality with a range of restaurants and bars etc. The region's F&B offer received a good NPS of +40 demonstrating that customers are generally very satisfied with the F&B experience on offer. This score is even higher when takeaway and pub establishments are excluded, with an overall NPS of +43 being achieved.
- Event capacity is restricted due to the size of venues (and accommodation capacity).
- Te Āpiti Masterplan development projects for Manawatū Gorge are noted as a priority for Councils and many stakeholders.
- Manawatū is recognised as having no major natural 'hero' icons but having very attractive vistas and rural landscapes.
- Manawatū has some good niche sectors with the potential to grow such as garden tours and events, river activations

(rafting, kayaking, jet boating etc), night-time economy activities (markets etc), Himatangi Beach blokarting, agri tourism, food innovation and tech experiences.

- With respect to product gaps, there appear to be the following.
 - Limited art, mana whenua and cultural products when compared with the size of other product typologies. The opportunity exists to develop this form of product; however, it needs to be cutting-edge technology, interactive and unique. A traditional museum-style experience is unlikely to deliver a distinctive or exciting visitor experience.
 - Limited destination-style "hallmark" events.
 - Limited health and wellness products.
 - Limited tour product to offer guided, boutique experiences of the region.
 - Limited product that leverages the region's growing "foodie" scene, its strong agricultural economy, and its night-time economy. This is a significant opportunity for Manawatū given the growing F&B offering and the propensity for visitors to spend on F&B.

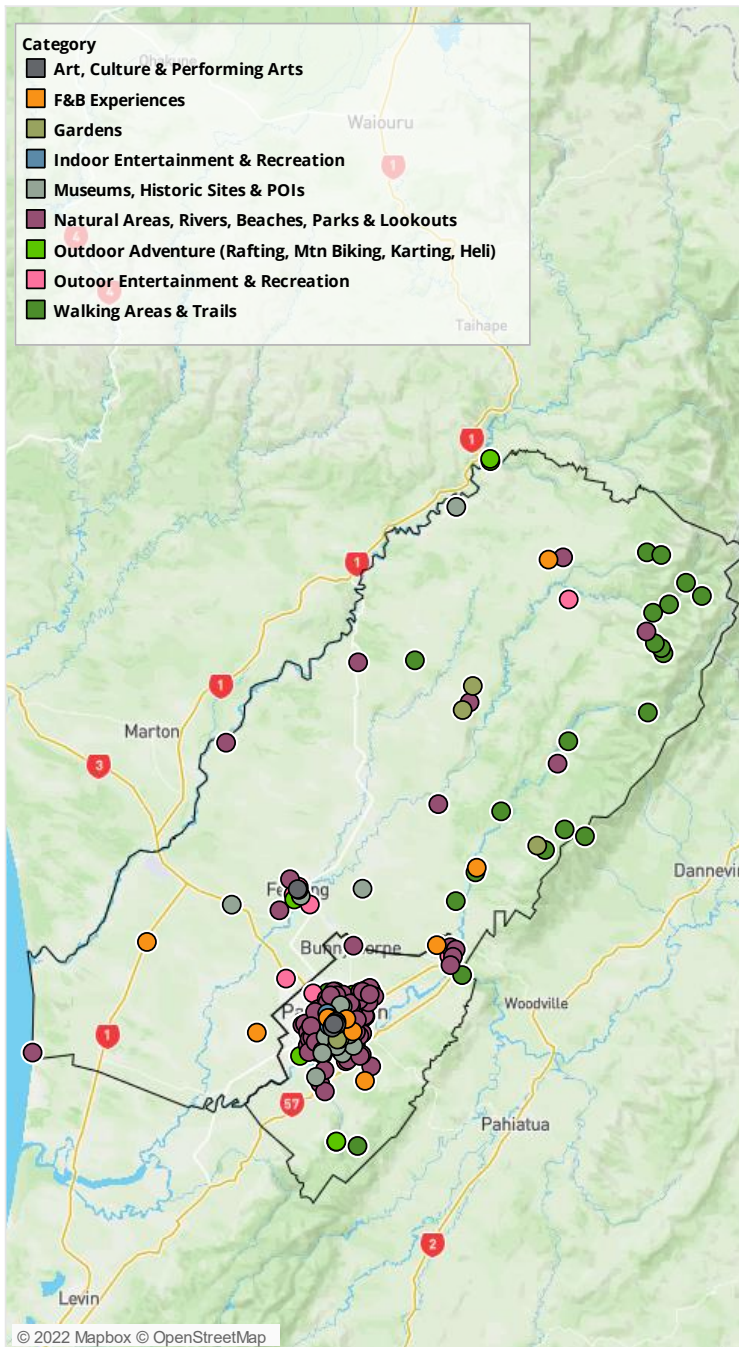
2.6.4. Attractions/Experiences Sentiment

The sentiment assessment of Manawatū's attractions/experience mix demonstrates the following. It is important to note that the Net Promoter Score (NPS) assessment was only undertaken on products with five or more reviews. A score of more than 50 is very good, while a score of less than 30 is below average.

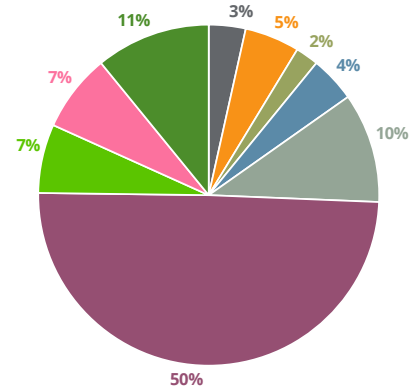
- The region's product mix achieves a positive NPS score of +51, based on just under 22,000 reviews. This is a strong rating that should continue to be built on.
- The highest NPS score (+71) was achieved by walking areas & trails, followed by gardens (+70) and F&B experiences (+68).
- Paid attractions and experiences, on average, rated higher (+58) than free experiences (+45). Indicating that the visitor markets see better value adds that tour guides and activity experiences are offering as paid experiences.
- On a comparative basis, the following NPS scores were achieved in similar exercises in other destinations in NZ:
 - Dunedin received a +63 NPS
 - The Mackenzie received a +61 NPS
 - The Waitaki received a +58 NPS

¹⁴ Based on a top line analysis

Figure 14: Manawatū’s attractions/experiences offering (a summary)



Type of Attractions



Category	#	% of Total
Natural Areas, Rivers, Beaches, Parks & Lo..	114	50%
Walking Areas & Trails	25	11%
Museums, Historic Sites & POIs	24	10%
Outdoor Entertainment & Recreation	17	7%
Outdoor Adventure (Rafting, Mtn Biking, Ka..	15	7%
Indoor Entertainment & Recreation	10	4%
Art, Culture & Performing Arts	8	3%
F&B Experiences	12	5%
Gardens	5	2%
Total	230	100%

Category	Total Reviews	Avg. NPS
Walking Areas & Trails	480	71
Gardens	592	70
F&B Experiences	2,288	68
Outdoor Adventure (Rafting, Mtn Biking, K..	2,378	67
Art, Culture & Performing Arts	832	65
Museums, Historic Sites & POIs	5,267	56
Outdoor Entertainment & Recreation	2,492	53
Natural Areas, Rivers, Beaches, Parks & Lo..	4,399	41
Indoor Entertainment & Recreation	3,131	37
Total	21,859	51

Free vs Paid Attractions



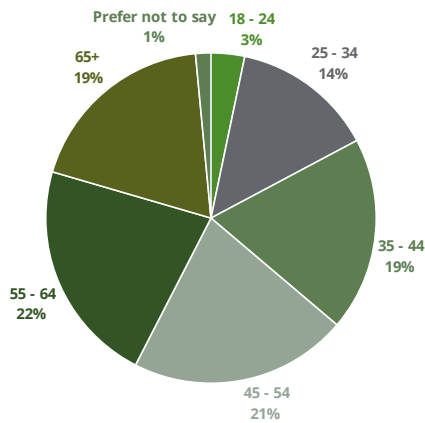
2.7. Community Sentiment Survey

In 2021 and 2022 CEDA conducted surveys to gauge community sentiment regarding tourism within Manawātū. The full questions from the 2022 survey are included in Appendix 2. The survey was open for over 30 days and received 337 responses. The findings are summarised below.

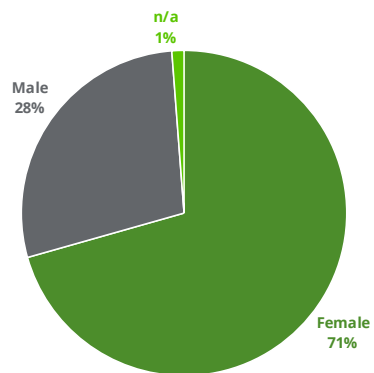
Figure 15 illustrates a good age range of respondents but a strong skew of more women than men responding. The regional spread is wide with 62% being from Palmerston North and 27% from Feilding and the wider Manawātū region (excluding Palmerston North City).

Figure 15: Respondent Profile

Please indicate your age



What gender do you identify as?



What region do you live in?

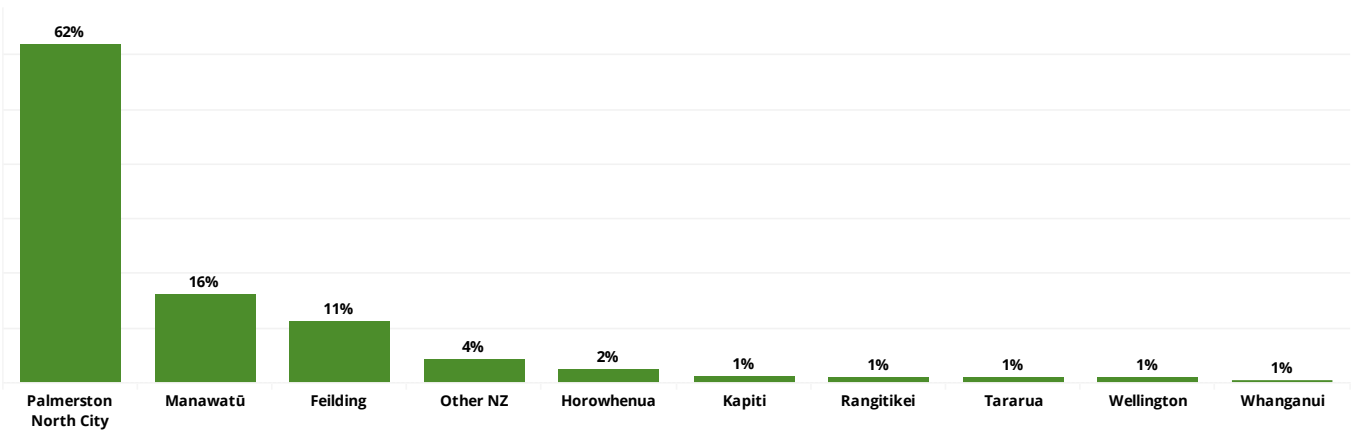
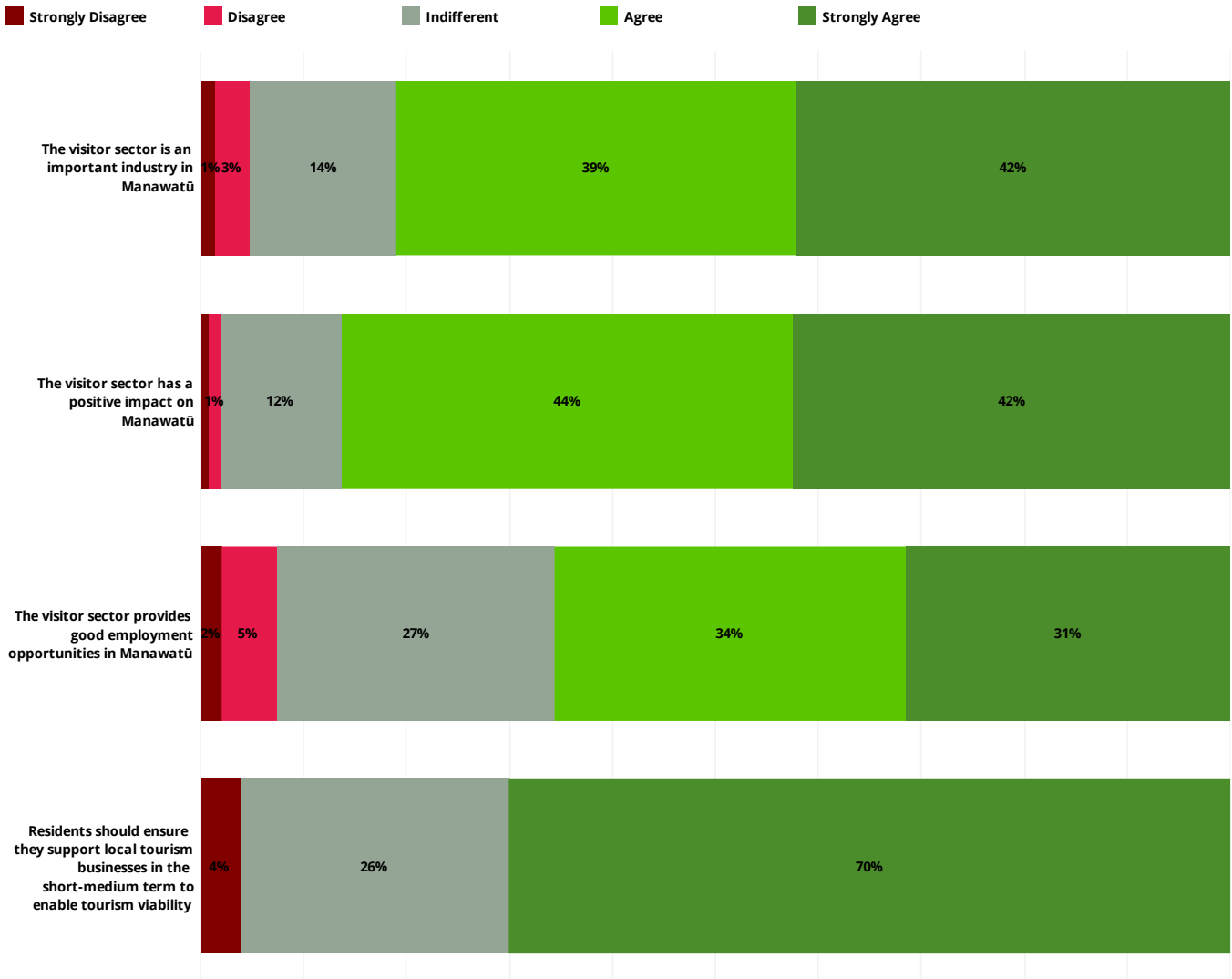


Figure 16 provides perceptions of community towards the visitor economy. it demonstrates that generally there is strong positive sentiment towards the visitor economy in Manawatū. Over 80% of respondents agreed or strongly agreed that the visitor sector is important to Manawatū and has a positive impact on the region.

Figure 16: Perceptions towards the visitor economy



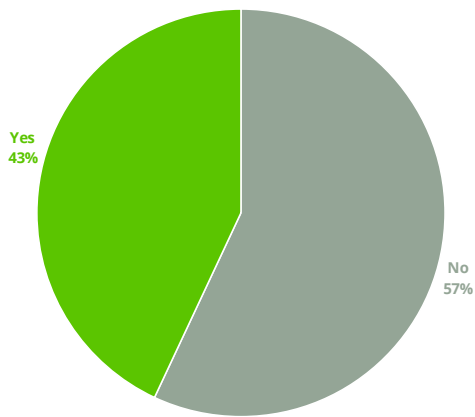
Despite significant efforts, awareness of the region’s tourism promotional initiatives is not strong yet with more than half of respondents indicating they:

- had not heard of any promotional initiatives within Manawatū; and
- they did not know about Manawatū’s destination website: ManawatūNZ.co.nz

This is likely to be due to promotional campaigns being focussed on target markets located outside of Manawatū, so locals aren’t likely to see them. The Palmy/ Manawatū Pride campaign is therefore important to help build local awareness.

Figure 17: Tourism promotion awareness

In the past 12 months, have you heard about any tourism promotional initiatives in Manawatū?



Did you know that our regions website ManawatūNZ.co.nz showcases and celebrates all the activities in Palmerston North city

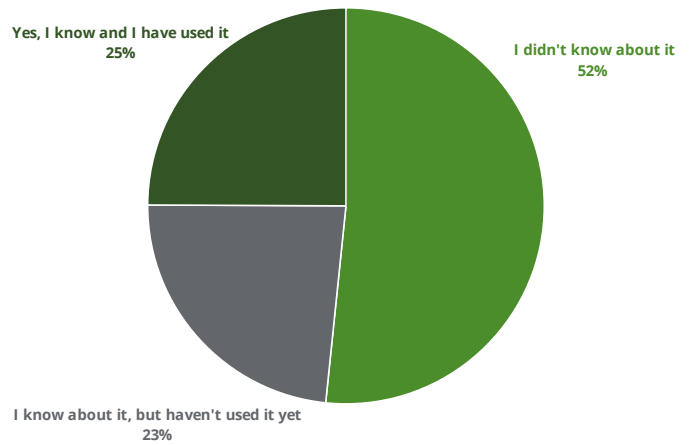
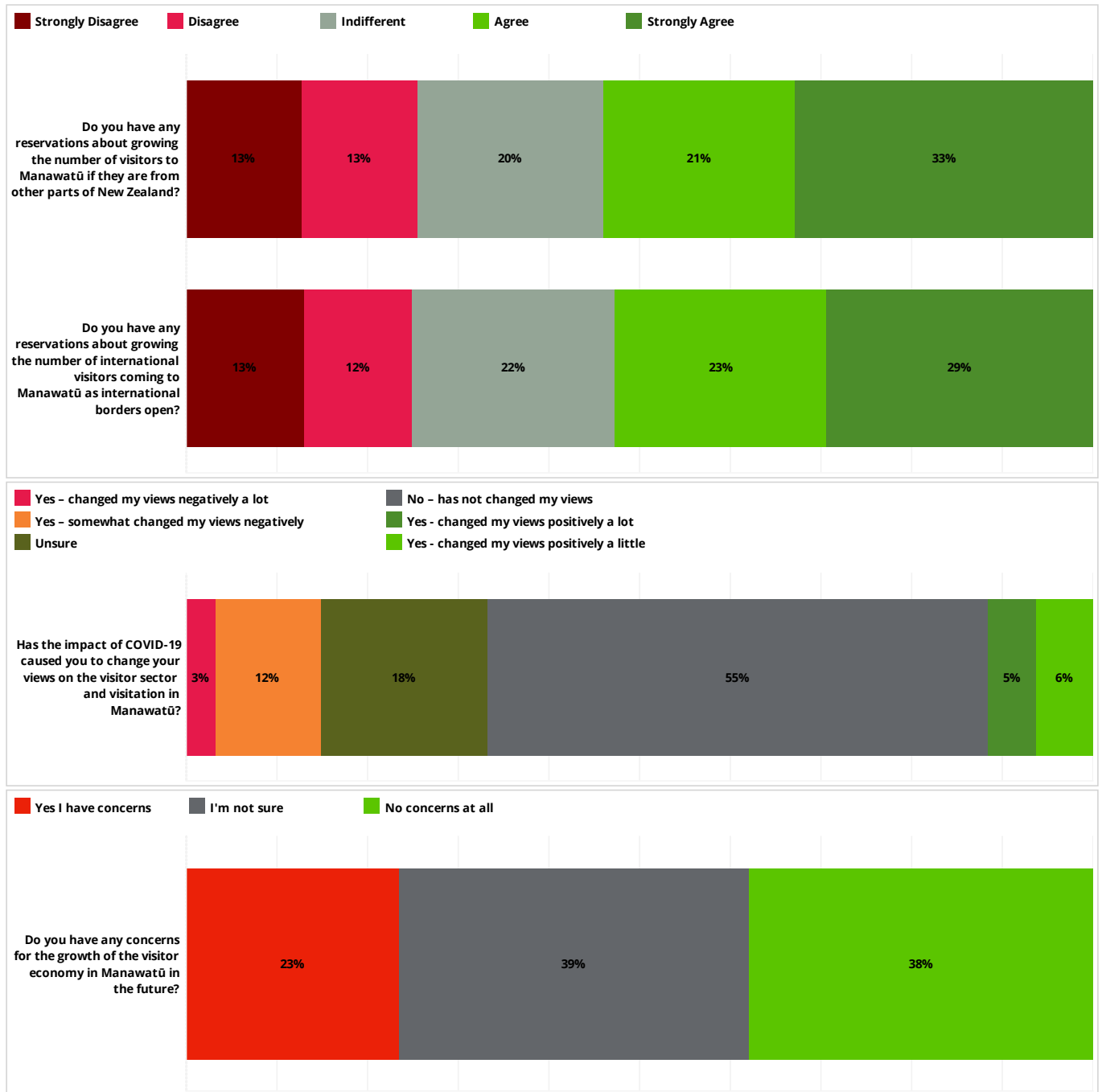


Figure 18 provides a snapshot on community perceptions about visitor growth. It shows that:

- the community are equally concerned about the impact that strong, unsustainable growth that visitation from both an international and domestic market could have on Manawatū;
- COVID-19 did little to change the mind of most about the visitor sector in Manawatū with more than half indicating their views did not change; and
- while some in the community are concerned about the growth of the visitor economy in Manawatū (23%) most were either not concerned at all (38%) or were not sure (39%).

Figure 18: Perceptions of growth

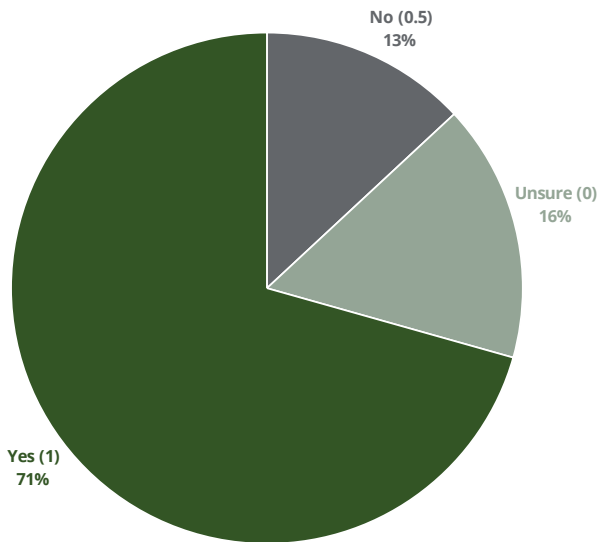


Whilst locals are keen to encourage family and friends to visit, they are concerned that the region is perceived as boring with limited activities to do.

Figure 23: Encouraging friends and family to visit

Would you actively encourage your friends and family living outside of Manawatū to come and visit?

If no or unsure, what are your reasons?



2.8. Global & National Trends in Tourism

The tourism sector globally has transformed significantly over the past ten years. This transformation has, in part, been driven by technology development, major health and financial events as well as changing consumer preferences (in both the way they book and travel). Figure 24 summarises some global and national trends impacting the tourism sector, followed by a more detailed description of each and their implications for Manawatū.

Figure 24: Tourism Trends



2.8.1. Recovering from the COVID-19 pandemic

COVID-19 has disrupted tourism globally. In the short term, the opportunity exists to leverage New Zealand’s domestic visitor market by encouraging them to explore more of their own country and engage in local experiences. This potentially could be converted into a longer-term opportunity because by building greater awareness of regional New Zealand’s unique offerings, this could change how New Zealanders travel domestically over the longer term.

As international borders re-open and travel is far easier, New Zealand’s core markets will be rebuilt (Australia, Southeast Asia, USA, the UK, and Europe) while also exploring opportunities to diversify into emerging markets, such as in Asia (India, for example), where growing wealth is anticipated to drive demand for international travel. Our natural assets and unique culture provide

the opportunity to offer unique experiences that these markets are likely keen to undertake.

Diversification opportunities not only exist in visitor markets but also through the diversifying into new products and experiences, for example in luxury travel and encouraging higher-yielding travel. This could potentially be driven by uncertainties regarding inbound international aviation capacity which will both challenge New Zealand’s visitor economy and encourage a focus on higher-yield travellers.

Implication for Manawatū: The shift by many destinations to focus far more on the domestic market means that competition amongst New Zealand’s destinations has significantly increased. Manawatū needs to ensure it is offering new and enhanced unique visitor experiences.

2.8.2. The digitalisation of visitor information & tourism marketing

Tourism operators and providers need to be prepared to meet the needs of the smartphone generation, with online booking capabilities, mobile-friendly websites, and social media-driven marketing. Having a strong destination brand presence is crucial. Operators need to be online and bookable.

For public and commercial operators, digitalisation provides opportunities to use more detailed data on human behaviour, particularly throughout the booking cycle.

However, a careful balance of online information and marketing is required. There is often too much consumer choice and the proliferation of online information at times makes decisions difficult for consumers. The planning process needs to be made simpler to navigate. Package deals have strong appeal (especially to a time-poor consumer) and are motivating as they create a call to action and offer a sense of urgency to book.

Another aspect of technology that has disrupted the visitor economy is the global explosion of the sharing economy. These business models, and others yet unimagined, are anticipated to continue to grow and innovate as they gain increasing levels of acceptance. Real-time access, artificial intelligence, augmented reality, and data personalisation strategies are becoming necessities and will require continuous development to enhance the visitor experience.

Implication for Manawatū: While a small proportion of operators are digital-ready and have a strong online presence, a large number still rely on traditional methods of advertising and booking. CEDA and the industry need to be proactive in ensuring that all tourism operators are present in the digital space with a solid social media presence.

From a domestic tourism perspective, while New Zealanders are prolific users of technology, there is also a desire, at times, to take a step back from technology. There is a yearning to reconnect through disconnecting; going back to basics and taking a holiday away from the online world.

Strong interpersonal visitor services and bespoke product is therefore seen as important to help New Zealanders re-engage with nature, history, and the essence at times of what makes Manawatū special and appealing.

Manawatū destination website has a strong digital presence and would benefit from linking to all operator sites to book online packages.

2.8.3. Climate change

Climate change is a serious, global threat, and actively preventing it needs to be a part of a sustainable tourism strategy. The warming of different parts of the world and extreme weather phenomena, as well as the related social consequences, may increase tourism to parts of New Zealand where the weather conditions are still relatively cool, but it may also result in many of the nation's key tourism attractions changing, particularly those based on natural experiences such as glaciers, gorges, ski fields, geothermal sites etc.

There is also a shift towards short-haul travel as society is increasingly aware of the carbon footprint long-haul travel generates.

Implication for Manawatū: For nearly all international markets, New Zealand is considered a long-haul destination. Ways of offsetting their carbon footprint while travelling to and within Manawatū need to be considered.

2.8.4. Changing traveller expectations

Visitor expectations have changed rapidly. Visitor economies must be proactive and adapt to address the changing needs of different traveller cohorts. While younger visitors are seeking authentic and sustainable experiences (and want their interactions digitally enabled throughout the journey) there is an increasing number of older travellers, multi-generational families, and people with disabilities travelling, requiring a focus by destinations on accessible infrastructure, quality experiences, and a safe environment. New Zealand's quality infrastructure and reputation for safe and secure travel, position us well to adapt to and attract these growing markets.

New Zealand's top five largest international source markets (in order of demand) in 2019 included Australia, China, the USA, the UK, and Japan. These international markets were looking for security & safety, world-class natural beauty and wildlife, value for money, friendly locals, family-friendly destinations, a clean city and good food, local cuisine and produce.

As international leisure travel resumes, these markets will also be looking for safe and hygienic destinations and new interesting experiences.

Implications for Manawatū: Manawatū needs to be positioning itself as a destination that has embraced COVID-19 safety precautions and offers a safe and hygienic destination for travellers with various enhancements to existing products along with new products. This includes open spaces and outdoor, uncrowded environments.

2.8.5. Engaging the community

Before COVID-19, many destinations globally were suffering from over-tourism, where communities were turning against the visitor economy due to perceived and real impacts on the environment, their quality of life etc. There is a need for operators to adopt more sustainable practices and engage with the community by acknowledging their needs and educating them about the benefits delivered by the visitor economy. A fully engaged and supportive community will be more welcoming and will appreciate the amenity brought by the visitor economy, thereby adding to a destination's reputation for a positive visitor experience.

Implications for Manawatū: There is a need to ensure the community understand the benefits of growing Manawatū visitor economy. This includes the number of jobs generated and supported, along with how tourism helps support greater community amenities (including longer retail and F&B trading hours, a more diverse range of attractions, accommodation, transport services and supporting the viability of public and private amenities and services etc.)

2.8.6. The economic centre of gravity is shifting eastward

Economic growth has been very strong in various parts of Asia, and it is predicted to keep growing. As these economies continue to advance, and as ongoing recovery from COVID-19 progresses, there will be a growing number of travellers from these countries. Their expectations and desires differ market-to-market and there is a growing shift from packaged travel to free independent travel as these markets mature.

Implication for Manawatū: With international leisure-based travel resuming, Manawatū needs to ensure that promotion and product offerings align with the market expectations of travellers from these growing economies. Delivering to meet specific market needs is going to be important. However, the primary focus for Manawatū should be on the domestic visitor market which represents a very high percentage of visitation.

2.8.7. The time-poor traveller

Travellers are increasingly time-poor. In long-haul travel markets, such as the USA and Europe, New Zealand is seen as a destination that requires a large commitment of both time and money. There is much greater pressure on first-time visitors to see as much as possible or to see the key 'icons' at least.

Implications for Manawatū: In many instances, long-haul travellers believe New Zealand is the 'trip of a lifetime' and see it as a single-visit destination. However, constrained itineraries often mean these visitors "tick off" the bucket list items which are often promoted in New Zealand destination marketing (such as Milford

Sound, Mount Cook, Rotorua, the West Coast Glaciers, the Bay of Islands and the higher profile great walks in the national parks).

Destinations such as Manawatū, therefore, risk being missed by many of these visitors. Whilst the need to offer an icon isn't necessarily essential, there is much competition amongst regions throughout New Zealand and a far higher need to deliver exemplary service standards and more unique and interesting experiences to compensate for the lack of an icon.

From a domestic tourism perspective, New Zealanders are increasingly time-poor. Holiday time is precious, and reconnection remains central to travel. Taking time out to be with family and friends allows one to connect, recharge, escape and enjoy the small things in life.

2.8.8. Diversity of cultures

Visitors are increasingly international. Through globalisation and international mobility, both multiculturalism and the importance of the diversity related to it, have increased rapidly in the last few years.

There is an increased expectation concerning authenticity and engagement. The quest for a deeper connection to a place and its people continues to be a strengthening travel goal. More visitors are looking for ways to have a local and connected experience.

A growing tourism segment and often a way to experience a destination's culture is via food-based experiences that can showcase local products and cultural cuisine. However, they need to be authentic experiences. The food tourism sector is highly competitive in a domestic marketplace that is now crowded with food festivals, art festivals and major sporting events etc.

Implication for Manawatū: There needs to be a greater focus on fostering the development of export-ready products and experiences as well as those that enable visitors to truly experience and interact with different cultures.

2.8.9. Rebuilding the visitor economy workforce

A major impact of COVID-19, particularly on the tourism sector, was that a large number of experienced staff exited the visitor economy which has resulted in lost expertise. Many businesses are facing workforce shortages that have been exacerbated by the continuing short-term absence of permanent and temporary migrant workers who have traditionally been an important supplementation to the visitor economy workforce. Better employment engagement strategies with people who may be underutilised in this workforce, including people living with disabilities, women returning to the workforce after children, older New Zealanders, and engaging with more mana whenua should be explored.

At a central government level, this could require reforming visa settings to expand the pool of people able to be recruited from overseas, especially with such high employment levels nationally.

The opportunity exists over the longer term, however, to enhance the reputation of the visitor economy as a career of choice to encourage more New Zealanders to choose it as their career path. This will include industry ensuring that employers are offering good conditions and career opportunities.

Implication for Manawatū: Even before COVID-19, Manawatū struggled to attract and retain tourism and hospitality staff. Several factors have influenced this including the fact that the sector is not always seen as offering sufficient career pathways. A broader regional tourism and hospitality retention strategy may be required to address labour force shortages.

2.8.10. Expectations of improved customer service standards

Customer service remains an issue for most destinations yet can be the point of difference that visitors often have positive lasting memories of. This is often a challenge for the tourism industry, which tends to have a higher staff turnover, and which often attracts those who are seeking more transitory employment. Competitive destinations are strategically building their competitive offer around a well-skilled and trained workforce delivering exemplary service standards.

Implication for Manawatū: There is a need for Manawatū to constantly upgrade its customer service standards to meet and exceed visitor expectations. This will be particularly important in a post-COVID-19 market where the tourism sector has seen major changes in employment levels and is finding it far harder to secure sufficient staff.

2.8.11. A stronger domestic tourism focus

COVID-19 has turned tourism on its head in New Zealand. Throughout the country, destinations are grappling with the slow recovery of international visitation and spending. To counter this decline, operators and destinations are increasingly focusing on the domestic visitor market. While there are some common threads between domestic and international visitor expectations, there are also significant differences.

Implication for Manawatū: Understanding domestic tourism trends is important as it can help ensure that Manawatū is proactively researching what visitors are needing. Product development and marketing activity need to be carefully aligned with this.

The domestic visitor market comprises the vast majority of visitors to Manawatū. This market offers the low-hanging fruit opportunity and should continue to be focused on. It is important that product development aligns with domestic visitor market desires as competition for domestic visitors will continue to grow and international leisure visitation will be slower to fully recover.

Part 3: Where Do We Want To Be?



3.1. The Strategic Framework

The following strategic framework has guided the development of this DMP and should be used to direct tourism development in Manawatū region going forward.

3.1.1. Vision

The vision for Manawatū’s visitor economy is as follows.

“To grow visitor activity and value for the benefit of our community.”

3.1.2. Guiding Principles

The guiding principles of this DMP are based on the three ‘P’s of Te Tiriti o Waitangi; Participation, Protection, and Partnerships, to ensure that this DMP acts in the best interests of the people of the land, as well as those with mana whenua status throughout various locations within Manawatū region and seeks to be inclusive of all Māori in our community.

The Rangitāne Māori Tourism Working Group, which was established in early 2020 in partnership with CEDA, identified the following core values and it was agreed that of utmost importance was protecting the natural and cultural taonga of tangata whenua:

- Tino Rangatiratanga - self-determination
- Community-based aspirations

- The spiritual and cultural dimension is powerful
- Slow growth: quality over quantity
- Sustainability (environmental)
- Collaboration, connections, and relationships

These values set the platform and guiding principles for the DMP and have been factored into all actions and outcomes.

A key pillar for mana whenua involvement in the visitor economy going forward is the protection of their intellectual property and opportunities to leverage this uniqueness via storytelling, cultural and mainstream tourism products and experiences. These reflect opportunities for mana whenua as both passive and active operators and investors across the spectrum of tourism development opportunities identified in this DMP refresh.

Mana whenua will advise when they are ready to activate their opportunities for tourism development and investment. Because of commercial sensitivities, all potential mana whenua-driven tourism development projects are not able to be listed yet in the recommendations section.

Figure 25: DMP Guiding Principles

Protection & Sustainability	Of the cultural identity and values of mana whenua and Manawatū; of our people; kaitiakitanga of our natural environment
Participation & Community Aspirations	Stakeholder participation that ensures the DMP aligns with community aspirations.
Partnerships, Collaboration & Relationships	Whanaungatanga is at the heart of destination management. Strong, equal partnerships are essential to working together to support one another and achieve greater good.
Sustainable Progress	A focus on higher quality visitor economy outcomes that align with mana whenua and broader stakeholder aspirations for growth.

3.1.3. Key Focus Areas

The following key focus areas (Figure 26) were developed by CEDA in early 2020 and were tested as part of the consultation process. Stakeholders felt they still have strong relevancy and they have, therefore, been applied to this DMP which is a refresh from the earlier DMP developed by CEDA.

Figure 26: Key focus areas



3.2. The Recommendations

3.2.1. Strategic Initiatives vs Development Project Recommendations

64 recommendations have been identified for this DMP. These include a range of what have been termed “strategic initiatives” and “development projects”.

- **Strategic initiatives** reflect those recommendations that are the building blocks to support a visitor destination and, while not being major “ribbon-cutting” projects, they are necessary to ensure a successful destination management approach is achieved.
- **Development projects**, on the other hand, reflect physical projects such as new or enhanced accommodation, tourism attractions or events (for example).

These strategic initiatives and development project recommendations and the rationale for them, are the key to helping to understand why the region is a wonderful place to live, work, play and visit, and why so many do. The many projects and initiatives identified for this DMP are there to support the needs of the local community, and the various visitor markets to be attracted; so, the connection and value of these to the overall visitor experience, therefore, is critically important.

There is a rich vein of stories, places and experiences in Manawatū, which illustrate the regions identity and which offer the building blocks, to strengthen visitor market interest, and the need for new and enhanced tourism development projects and supporting strategic initiatives.

3.2.2. The full list of recommendations

Those indicated with a ♦ are strategic initiatives – all others reflect development projects.

3.2.2.1. Infrastructure Growth

Work with all levels of government and partners to identify infrastructure needs that support the growth of a sustainable visitor economy.



- **Advocate for improved digital coverage:** There are parts of Manawatū that do not have strong digital coverage. Improved coverage should be advocated for, not only to benefit visitors but also for locals. This will assist in providing visitor information as well as safety information. An audit may need to be undertaken to identify major dead spots where advocacy efforts should be focused on first and foremost.
- **Arapuke Forest Park road access:** To future-proof visitor access to Arapuke Forest Mountain Bike Park to support the development of a potential chair lift on site and a café at the summit.
- **Arapuke to Te Āpiti Track skyline walk:** Creation of a skyline walk connecting the two destinations and providing loop trails to the city.
- **Ashhurst Loop Track (Te Āpiti):** A 9km long loop walking track connecting Ashhurst township to Manawatū Gorge and showcasing great views of two rivers and the ranges. The track passes over Manawatū and Pohangina Rivers and will utilise the shared path to be constructed from the new Gateway Park at the western end of the gorge to the Ashhurst Domain. The

eastern section of the loop track (between the new road and the Pohangina Bridge) is being provided by Waka Kotahi as part of Te Ahu a Turanga Manawatū-Tararua Highway project as they will allow public use of a maintenance track in this location.

- **City to Ashhurst/Te Āpiti Pathway:** Connecting Palmerston North CBD to Ashhurst/Te Āpiti via a shared pathway for use by walkers and cyclists.
- **Feilding Civic Centre upgrades:** Upgrades to the Civic Centre to cater to Increased demand and to enable it to be fit-for-purpose.
- **Himatangi Beach break wall remediation:** Constant issues with erosion and spring tides have resulted in the need for far greater remedial action to prevent the risk of flooding occurring and the loss of the access road down to the beach.
- **Himatangi Beach master plan ♦:** Development of a master plan to cater to the growth in demand Himatangi is experiencing (and likely to continue to experience). This could investigate beach parking solutions, café and F&B options, infrastructure requirements etc.

Figure 27: Himatangi Beach access challenges



- **Himatangi Beach car park:** Investigate restoring the old Himatangi Beach car park that is covered under sand and similar in size to the Foxton Beach car park.
- **Improved placemaking throughout Manawatū:** Enhanced placemaking throughout the region will assist in maximising the value of the local community's assets and assists in promoting healthy lifestyles and wellbeing. Although placemaking extends far beyond the remit of a DMP, places which are great to live in and which are well-visited by locals often become popular visitor destinations. Community and visitor destinations are intrinsically related. An example where improved placemaking outcomes could be beneficial is The Square in Palmerston North.
- **Manawatū Scenic route upgrades:** Upgrades to Manawatū Scenic route including wayfinding, interpretive signage, and additional marketing spending to grow its profile.
- **Public toilet facilities:** Each Council should undertake a public toilet review to assess capacity and determine if a need exists for additional public toilets around the region. Public toilets should be easy to find, accessible and well-maintained.
- **Ruahine National Park loop trail:** While the Ruahine National Park currently offers several major tramping tracks linking to back country huts etc, a new loop trail to offer a 2–3-day, 1-2-night tramp linking to existing huts is being considered by DOC.
- **Seasonal hop-on, hop-off discovery bus** ♦: To encourage visitors arriving on public transport (and even those with their own vehicles) to explore beyond walking distance of the city centre, the opportunity exists to investigate the introduction of a hop-on, hop-off shuttle service (see Figure 28). A variety of cities operate similar services via a variety of different models, including:
 - an operator running the shuttle service on a fully commercial basis whereby visitors pay a ticket and utilise the shuttle service on a paid basis; or
 - government running the shuttle service as a loss leader and enabling visitors to access the service for free or at a significantly reduced rate to encourage visitor dispersal throughout the region.

In many locations, these hop-on, hop-off services operate during peak visitation periods only to cater for periods of maximum visitor demand.

Figure 28: Hop-on, Hop-off shuttle precedents¹⁵



- **Suspension bridge (Te Āpiti):** A suspension bridge (around 180m long) crossing over Manawatū River to provide safe walking access to and from the Ferry Reserve as part of the Lindauer Trail (noting that the Lindauer Trail falls within Tararua District Council boundary but has been included here because of the broader regional opportunity that Te Āpiti Masterplan presents). The bridge means users can avoid a particularly narrow stretch of Napier Road which has very little shoulder width. The intention is the bridge would be a destination feature, easily accessed from the nearby scenic reserve.
- **Te Āpiti Amphitheatre in Gorge Quarter:** Development of a natural amphitheatre within Te Āpiti precinct to support events, concerts and shows.

¹⁵ St Johns City Explorer, Canada; Marlborough Bus Tours Hop On Hop Off Explorer, NZ.

Image credit: Cloud 9, ManawatūNZ.co.nz



3.2.2.2. Insights & Industry Development

Work closely with the industry to deliver robust and current visitor datasets along with training and upskilling programmes.



- **Effective partnerships with tangata whenua** ♦: Effective partnerships with Manawatū iwi and mana whenua are essential for sustainable tourism growth. Manawatū has the opportunity to be a leading provider of authentic, immersive Māori experiences and to weave its unique Māori culture and history into the visitor sector more generally. To ensure this is done well, iwi needs to be a partner in tourism sector planning and strategy- setting as well as leaders in developing tourism experiences that involve Māori culture and heritage. Through the consultation process, it was identified as a region our Māori culture needs to be better acknowledged, integrated, and celebrated in the region’s tourism sector and for Māori creativity, history, and stories to be reflected in the regional landscape and through specific events.
- **Improve visitor data, research & insights** ♦: As outlined previously here is a dearth of tourism-related data not only for Manawatū but country-wide. This is especially obvious currently because domestic tourism is being heavily focused on in place of international visitation, but with reduced investment in this critical data sector over the last 15 years. To guide the sustainable growth of tourism in Manawatū, an up-to-date and robust data set is needed. MBIE’s Tourism Data Leadership Group is looking to develop a “co-governed data system ... for tourism data and insights”¹⁶. To avoid duplication

of work, this dataset, once created, should be leveraged to produce visitor data for Manawatū region as well as Manawatū and Palmerston North TLAs. However, stakeholders within Manawatū should be looking to collect more localised data including community sentiment towards tourism along with visitor sentiment.

- **Industry famil program** ♦: Work with operators to run bi-annual famils in the region so that operators within the visitor economy sector understand what product is available (including what product has recently come on board and what has been refreshed).
- **Integrated destination calendar** ♦: Feedback received indicated that often events clash because there is a lack of communication and awareness as to when events are being held. It is understood that PNDC is currently developing a coordinated events calendar. There is a need to investigate whether Manawatū District events can be incorporated into this and that all operators buy into this solution.
- **Tourism industry networking events** ♦: The consultation undertaken for this DMP highlighted that, currently, there is a limited collaboration amongst industry operators within the tourism sector but there is a strong desire to increase this. The opportunity exists to set up quarterly industry networking events where:
 - CEDA can provide the industry with an update on the state of the sector;
 - the industry can discuss with CEDA any issues they are facing collectively as an industry (rather than focusing on issues individual operators are experiencing);
 - the industry can network and get to know other operators in the sector; and

¹⁶ <https://www.mbie.govt.nz/immigration-and-tourism/tourism-research-and-data/tourism-data-overview/tourism-data-leadership-group/>

- CEDA and the industry can discuss updates and the progress of implementing the opportunities identified in this DMP.

The sessions could potentially be hosted at different businesses throughout the region to increase awareness of the product range available.

- **Upskilling operators** ♦: Almost all operators in the tourism sector in the region are micro-to-small operators. Capability development should be a significant focus to work towards growing the leisure market into the international visitor market. An area of focus is digital capabilities to ensure we can collectively lift the region's profile online and enable our visitor sector businesses – including hospitality and retail – to effectively market themselves and leverage the tools available including Google Business, TripAdvisor, NewZealand.com and other platforms and effectively utilise user-generated content and feedback.

The types of support required are likely to include (but not be limited to):

- programs focused on social media and how to correctly utilise the various social media tools available (including what tool is best for specific types of marketing);
- assistance in storytelling and experience development;
- help in clustering and bundling experiences to make itineraries interesting and appealing;

- assistance in carbon mitigation strategies and climate change adaption;
- workforce development approaches;
- business capability building and sustainable business practices advice;
- visibility and assistance in helping to stand out;
- networking with other businesses to understand what is in the area;
- help in participating in additional programs to develop product offerings;
- understanding how to value-add to existing products;
- providing the opportunity to network along the value chain to develop relationships with other suppliers.
- training on getting listed on the NZ Tourism Business Database to ensure their product is listed on the appropriate state government tourism websites;
- customer service upskilling; and
- programs on understanding the difference between start-up, market-ready, accredited and export-ready tourism products (Figure 29).

For the rangatahi of Manawatū, tourism offers valuable opportunities to follow a career in their rohe and share their stories authentically through the development of compelling experiences for visitors and residents delivered in authentic ways.

Figure 29: Market readiness stages



3.2.2.3. Leadership & Advocacy

Advocate, lobby and engage to best represent and coordinate the needs of Manawatū's tourism industry stakeholders.



- **Integrated event planning** ♦: Councils, CEDA and event organiser stakeholders to work collaboratively to support a shared and comprehensive events calendar to mitigate event clashes and maximise the benefits able to be derived from hosting events in the region.
- **Manawatū/Palmy proud campaign** ♦: Development of a campaign targeted at locals to be proud of the region and what it offers. This could include profiling all the various things to do in the region (particularly new things that have come on streams in the last few years) that locals may not be aware of.
- **Strengthen relationships with surrounding regions** ♦: There appears to be a strong desire by surrounding regions to work collaboratively to grow the broader region's visitor economy. This is an acknowledgment that visitors do not recognise local government boundaries but travel to destinations and for products/experiences.
- **Visitor economy awareness campaign** ♦: There is a need to educate some operators in Manawatū that even though they may not be in traditional tourism sectors (for example, accommodation), they do derive significant benefits from visitors. This includes petrol stations, café and restaurant operators, retailers etc. Demonstrating to these operators the value derived to their businesses from visitors can often significantly shift how they value and treat visitors.

3.2.2.4. Market Development

Work collaboratively to target markets that align with the region's values and attributes.



- **Continue to build and leverage Manawatū's brand and identity** ♦: Significant effort and resources have gone into developing Manawatū identity to date. This should continue to be leveraged and promoted across all destination marketing for Manawatū. Ensuring and maintaining regional buy-in of the destination brand is key. Importantly, there is a need for all stakeholders (councils, CEDA, mana whenua, industry, and community) to work from a single, consistent destination brand message.
- **Develop targeted domestic market content** ♦: Manawatū is very much a domestic market destination and this focus is likely to continue for the foreseeable future. This market

represents a low-hanging fruit opportunity. This should look at markets including the amateur and secondary school sports events market, conferences and business events market and the domestic visiting friends and relatives and leisure market.

- **Market development strategy for overnight visitor growth** ♦: A separate market development strategy is suggested to identify products that can be packaged up to encourage overnight visitor growth especially and noting which markets this may best appeal to.
- **Regional tourism marketing strategy** ♦: Creation of a new regional tourism marketing strategy to determine promotional campaigns aimed at specific visitor markets. These are needed to link products throughout Manawatū District so the benefits of tourism can be more widely distributed. Potential also exists to link products in surrounding regions from the Horowhenua, Tararua and Rangitikei Districts as most are not aligned to an RTO but indicate they are keen to work in collaboration with Manawatū via CEDA.

3.2.2.5. Product Development

Support Manawatū's stakeholders to enhance and develop innovative and contemporary visitor experiences that will strongly appeal to our target visitor markets.



- **Agri showcase & food experience:** Manawatū is well-regarded as an agricultural and farming centre. However, its positioning as a major agri-tech hub goes largely under the radar as many of the companies in the region developing innovative agri solutions and leading technology do not outwardly display information on what they are doing. The potential exists to showcase this profile and to begin to position Manawatū as an agri-tourism destination with the development of a central agri showcase and food experience centre.
- **Ian McKian Pinetum and Arboretum:** The development of an arboretum experience north of Āpiti to showcase conifers and other species should be investigated. This recognises the extensive work already at the site, to enable visitors to see a range of established trees as part of major forestry activity.
- **Arapuke Forest Park Adventure Hub:** The Arapuke Forest Mountain Bike Park is a significant asset for the region and could be a catalyst to expand not only mountain bikers' interest but also walkers and others. To support its viability, the potential exists to investigate introducing some commissionable (paid) elements into the precinct, possibly including a pay-for-use chair lift to enable leisure visitors generally, mountain bikers and walkers to access a higher point of the site with ease along with possibly offering a café,

viewing platform at the summit and potentially hire facilities. Although we understand there is an existing shuttle service to take mountain bikers back up to the trails from the bottom (but this doesn't operate from the existing car park), this is highly seasonal only and we understand at times there can be a queue to get a place to head back up. What is suggested here is not so much a chair lift for the mountain biking sector, but a facility to enable those with younger kids or the elderly and general visitors who just want to reach a viewing platform to look over parts of Manawatū, to be able to access this area. The opportunity is to grow its significance for supporting a number of visitor markets so it can become a true adventure hub for a far wider audience, rather than just for mountain bikers and more fit and capable walkers.

Figure 30: Trails hub precedents¹⁷



- **Himatangi Beach blokarting event:** Creation of a major annual Himatangi Beach blokarting event that could potentially extend down to Foxton Beach (in collaboration with Horowhenua District).
- **Boutique hotel in Manawatū District:** Undertake a feasibility study looking at the development of a boutique hotel within the Manawatū district. There may be potential sites in a variety of towns throughout the district where existing buildings could be retrofitted to offer this. Options might potentially include properties which have retail outlets on ground floor level and which could offer say apartments 1-2 floors above which could be retrofitted for that purpose. There may also be some country pubs that could be refurbished to encourage the development of accommodation above the bar and restaurants.
- **Palmerston North CBD hotel:** A hotel has recently been announced for the High Flyers site, subject to a full feasibility analysis. This is needed to determine the size of the hotel and supporting facilities. This project should be actively supported along with ensuring that an optimum number of rooms can be supported on the site.
- **CBD rooftop bar:** A rooftop bar within the Palmerston North CBD to create a unique bar experience similar to what is offered in Auckland, Wellington, and Melbourne. This could be partially sheltered and offer heating during winter (similar to what is done in other locations).
- **Destination holiday park along riverside precinct:** Development of a true, destination-style holiday park along the riverside precinct in Palmerston North to cater to a growing family market undertaking RV/caravan trips and looking for destination-style parks. This could potentially comprise approximately 40 powered sites, 40 unpowered sites, 10 cabins as well as a water play park and F&B facilities. Figure 31 provides some examples of best-practice destination holiday park precedents.
- **Expanded river-based activities:** Identify potential river-based tourism infrastructure and products that could be introduced to further activate Manawatū River (and other rivers) and further promote those that already exist.
- **Gorge mountain bike trail (Te Āpiti):** An iconic new 11km long dedicated mountain bike (MTB) trail traversing east-west across the southern side of Manawatū Gorge Scenic Reserve. Offering fantastic close-up views of native bush and windfarms as well as long views of the wider region. Purpose-built for MTB use, it will also form part of 'Te Āpiti Loop Track'. This will extend 35km around both sides of Manawatū Gorge when combined with the north side Te Ahu a Turanga Manawatū-Tararua Highway project shared path that is scheduled to be completed by late 2024. The grade 3/4 MTB track is to be developed in partnership with Manawatū
- **Barneys Point Loop Track (Te Āpiti):** This is an 8km walking track providing access near the eastern end of the old Gorge Road. The missing link in the proposal is to create, with the Department of Conservation, a new section of walking track leading down from Windy Point Look Out to Barney's Point. The track will showcase views of the gorge both from high above and at road level.
- **Conference Centre & Hotel as an anchor for Civic and Cultural Precinct:** A new or upgraded conference centre in Palmerston North CBD to enable the city to cater to a greater range of conferences and business events, with an attached hotel facility to support conference activities.

¹⁷ Dwellingup Trails and Visitor Centre, WA; Swinley Forest Bike Hub, UK

Mountain Bike Club. The track is largely contained within the reserve (8km) with two private properties involved at the western end (3km). It will diversify the mountain bike offering in the region as investment to date has occurred at Arapuke further south along the Tararua Ranges.

- **Himatangi Beach pop-up trial:** There is currently limited access to F&B or water sports gear or amenities hire at Himatangi Beach during peak periods. The potential exists to encourage an operator to trial a pop-up operation near the beach to offer simple F&B (ice creams, coffees, hot chips etc.) during peak periods and potentially to incorporate some gear hire.

Figure 31: Destination holiday park precedents¹⁸



- **Lindauer Trail (Te Āpiti):** A 4km long shared path connecting Woodville to the Ferry Reserve on the eastern side of Manawātū Gorge. Although the the Lindauer Trail falls within the Tararua District Council boundary it has been included here because of the broader regional opportunity that Te Āpiti presents. The trail would also provide for a full 35km walking loop around both sides of the gorge by connecting the eastern end up. The trail is named in honour of the famous artist Gottfried Lindauer who was buried in 1926 in the Old Gorge Cemetery which is along the route. The trail would include interpretive signage celebrating the life of Lindauer. A portion of the trail has already been constructed to Hampson Street on the western outskirts of Woodville.
- **Manfeild accommodation & event infra:** Manfeild is an underutilised and underpromoted asset for the region. To grow the utilisation of this asset, there is a need to investigate introducing supporting accommodation (approximately 20 apartments) as well as enhanced event infrastructure.
- **Mt Lees Reserve homestead boutique accommodation:** A bed and breakfast had previously occupied the homestead until early 2020 when it closed. Council has invested significantly to ensure the electrics are up to code and installing adequate fire exits and prevention equipment etc. The potential may exist to transform the homestead into a higher-quality accommodation offering. This could be ideal given its strategic location only 2 hours from Wellington.

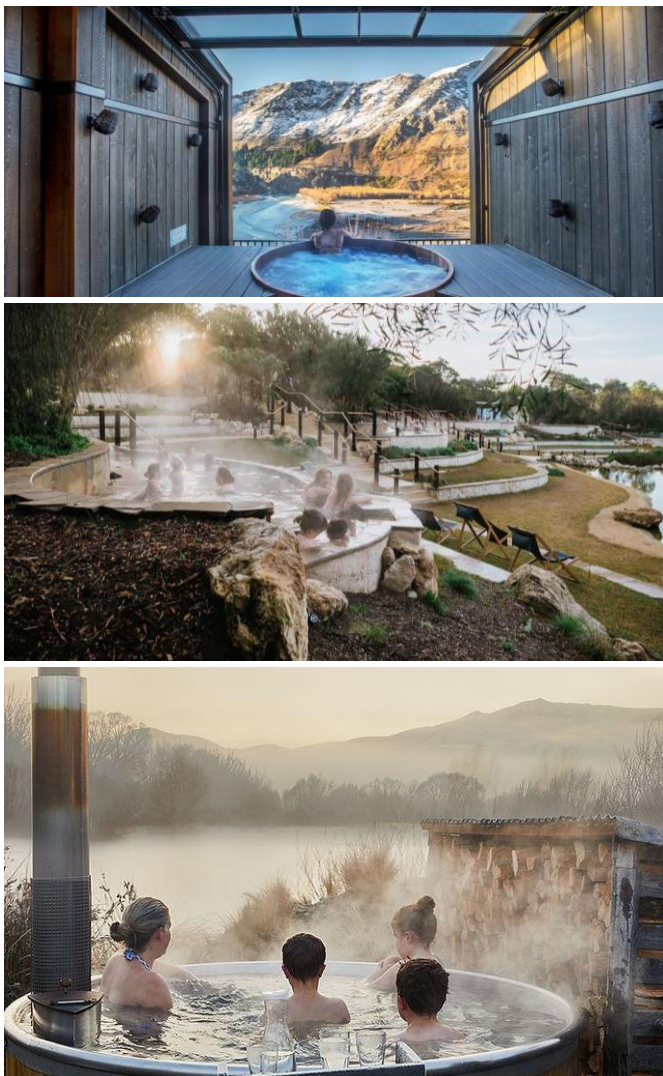
Figure 32: Mt Lees Reserve homestead and grounds



¹⁸ Reflections Holiday Parks Seal Rocks, NSW, Australia; Reflections Holiday Parks Seal Rocks, NSW, Australia; BIG4 Traralgon Park, VIC, Australia; Lake Taupo Holiday Resort, NZ

- **Old Gorge Road shared path (Te Āpiti):** The dedicated use of the 9km former road as a shared path linking both sides of the ranges. The project would provide flat access in an elevated position for all abilities with easy connections from the Gateway Park in the west, to the Ferry Reserve in the east. A suite of interpretive signage to showcase the unique cultural heritage – both Māori and European – would be developed and installed along the way.
- **Outdoor hot tubs & wellness facility with dark sky experience:** The outdoor recreational focus of much of Manawatū’s tourism product, along with its rural environment and cool climate in winter, makes it ideally placed to introduce an outdoor hot tub experience that could potentially incorporate a night sky viewing experience.

Figure 33: Outdoor hot tub precedents¹⁹



¹⁹ Onsen Hot Pools and Day Spa, Queenstown; Peninsula Hot Springs, Mornington Peninsula, Victoria; Hot Tubs Ōmarama, Ōmarama

- **Outdoor sculpture trail:** Continue to expand the existing Kimbolton outdoor sculpture trail along The Country Road and potentially into other parts of the region.
- **Rangitāne o Manawatū projects (Te Āpiti):** Rangitāne o Manawatū has a deep relationship with Te Āpiti extending many hundreds of years with the awa travelling through the area providing the mauri that sustains Iwi and the abundant biodiversity. They wish to develop a series of cultural projects to showcase their unique history and connection to the awa and whenua in a way that is mana-enhancing and inclusive for all visitors where appropriate to do so. The projects will provide a platform for Iwi to both lead and participate in mahi, acting on opportunities that exist now, and those that arise through the delivery of the masterplan and the Waka Kotahi Te Ahu a Turanga Manawatū-Tararua Highway project.
- **Regional garden tours:** Manawatū is fortunate to have a climate that supports high-quality gardens. As a niche tourism sector, it is a large motivator of travel – with studies finding that one-third of visitors around the world visit gardens during their travels (and that there are more than 300 million garden visitors worldwide).²⁰ The potential exists to package Manawatū’s garden experiences and offer self-guided and guided garden tour experiences of Cross Hills Garden, Heritage Park, Caccia Birch Gardens and Caroline’s Gardens and Store (amongst others).

Figure 34: Manawatū Gardens²¹



²⁰ Visiting gardens in Portugal - Profiling the historic gardens visit and visitors, Susana Silva, Paulo Carvalho, 2019.

²¹ Cross Hills Garden; Caccia Birch Gardens

- **Rangiwahia Scenic Reserve trail & hub development:** Continue to develop and promote the Rangiwahia Scenic Reserve trail experience including the 2-hour bush walk and eco experience. This includes creating stronger links to Āpiti village via signage, short walks, and picnic sites (the Āpiti Tavern & Eatery is noted as a small-scale and appealing destination). Partnership with DOC is crucial.

Figure 35: Rangiwahia Scenic Reserve²²



- **Ruahine walking trails:** Demand is seen by DOC to encourage half and 1-day walking trails in the Ruahine National Park to encourage walkers to access and enjoy loop and lineal trails of shorter duration and to visit points of interest etc.
- **Skybridge connecting ranges (Te Āpiti):** A suspension bridge (around 200m long) located in an elevated position above Manawatū River providing walking access between the Ruahine and Tararua Ranges. Sited near Barney's Point toward the eastern end of the gorge, the bridge provides a destination feature in and of itself but also provides a more direct access option through the area.
- **Skyline track (Te Āpiti):** A 45km walking track extending along the Ruahine Ranges, from Wharite Peak north of Ashhurst through the Tararua Ranges to Arapuke Park south of Palmerston North. Showcasing iconic views of the region, the track will traverse a variety of landforms along the way. The track will connect into the Coppermine Creek track in the north and notably, Burttons Track in the south which is part of the Te Araroa trail leading all the way to Paraparaumu. It will use predominately existing publicly owned tracks or road reserve.
- **Gorge Quarter - Tourism Hub West (Te Āpiti):** In this strategic western gateway location, Gorge Quarter will be a hub for visitor activities with overnight accommodation is proposed to be developed in an environmentally sensitive and responsive way. On the lower terrace, planned facilities will range in size with large-scale event opportunities such as concerts and weddings at a purpose-built facility. On a smaller scale, there is an opportunity to establish recreation businesses or coffee cart/containers adjacent to the new carpark. On the upper slopes, there could be intimate eco-cabins nestled in the native bush alongside an opportunity to establish a café or restaurant on an elevated north-facing plateau with extensive views of the region.
- **UNESCO Geopark (Te Āpiti):** A project raised by Manawatū River Source to Sea group to promote and obtain UNESCO 'Geopark' status for Te Āpiti. If awarded the status would provide an additional layer of protection along with recognition on the international stage. This would have benefits for regional pride as well as increasing visitor numbers to the region.

²² <https://www.facebook.com/RangiwahiaScenicReserve/photos>

3.2.2.6. Sustainability & Regenerative Tourism



Positioning Manawatū as a leader in taking pragmatic action on sustainability.

- **Collaborate with environmental special interest groups** ♦: Manawatū has a unique environment. There are a variety of special interest groups focused on the protection and enhancement of the region’s natural environment, all striving to make the region a better place to live and visit. Stronger promotion of the outcomes these groups are achieving needs to be undertaken. The potential may also exist to investigate with these groups opportunities for visitors to assist with regenerative tourism opportunities (for example, trapping and compliance monitoring).

Determination of carrying capacity system and monitoring ♦: pre-COVID-19 particularly, there were significant concerns amongst the host community throughout the country regarding overtourism. While Manawatū may not have suffered from overtourism, there is a need to ensure this does not become an issue in the future. Consideration should be given to completing a carrying capacity study including the determination of environmental metrics, social impact metrics and visitor satisfaction metrics. Carrying capacity systems are often difficult to encourage because they can be made overly complicated. However, creating a system of simple performance measurement metrics offers a starting point for monitoring and setting an initial daily limit. Te Āpiti could potentially be a pilot study for a carrying capacity assessment for the region (as it is noted that on peak days the Tawa Loop, for example, is heavily used by locals especially and anecdotally, can experience challenges).
- **Focus on electric vehicles and public transport** ♦: If feasible, Manawatū should look to investigate the potential to introduce electric buses and passenger vehicles. This would

likely require the introduction of additional electric vehicle charging stations across the region to support this.

- **Regenerative tourism promotional campaign** ♦: A carefully targeted campaign to encourage like-minded thinking visitors for helping to restore and maintain the environment should be considered. Evidence suggests that the vast majority of successful regenerative tourism projects result in higher spending visitors financially contributing to environmental and social programs rather than actively undertaking hands-on participation.

The success of regenerative tourism and related programs tends to rely heavily on international visitor involvement, with domestic visitors often not tending to actively participate. The success of regenerative tourism and regenerative farming also requires local communities and domestic visitors to be far more environmentally conscious themselves. After all, why should international visitors be expected to contribute to improving and supporting the environment and social needs of host communities if locals do not show the same values and respect.
- **Te Āpiti Masterplan project coordination** ♦: Continue to support Te Āpiti Masterplan Governance Group to activate the opportunities identified within the Masterplan and to investigate regenerative tourism initiatives that could assist towards the ecological restoration and protection of Te Āpiti.
- **Zero Carbon Manawatū** ♦: Support PNCC’s goal to be an eco-city and its target to achieve a 30% reduction in greenhouse gas emissions by 2031.²³ While achieving this extends far beyond the visitor economy, tourism can contribute to and support resource recovery, increase its sustainable practices as well as seek to decrease wastewater and stormwater production. As the vast majority of operators in the visitor economy are micro-to-small operators, many may require assistance on how they can adopt more sustainable and environmentally friendly business practices.

²³ <https://www.pncc.govt.nz/Council/What-were-doing/Ongoing-projects-and-programmes/Tackling-climate-change>

3.3. Prioritising the Recommendations

3.3.1. Priority Strategic Initiatives

While all the strategic initiatives are considered important, there are a number that have been identified during the consultation phase that appear to require more immediate attention. These are indicated in Figure 36.

Figure 36: Priority strategic initiatives



3.3.2. Priority Development Recommendations

3.3.2.1. Methodology for prioritising the development recommendations

To determine the priority development project recommendations, each has been assessed against the weighted criteria outlined in Table 3. A weighted score has been used to reflect that some of the criteria have a stronger positive impact or a higher level of importance to each stakeholder than others.

Where possible, the assessment has utilised quantitative data (particularly for those projects where feasibilities or business cases have been developed). In the absence of such assessments, however, a qualitative assessment has been undertaken based on local knowledge, stakeholder consultation, professional experience, and a general assessment of the perceived benefits. All projects will need to have feasibility studies and business cases to ensure they are viable and able to deliver desired outcomes.

Table 3: Recommendation ranking criteria

Criteria	Score	Weighting	Description
Attract a higher spending visitor market	None = 0 Low = 1 Medium = 2 High = 3	3	Those which are likely to be drivers for encouraging visitation by those markets which typically spend more are ranked higher
A catalyst to stimulate other investment	None = 0 Low = 1 Medium = 2 High = 3	3	Projects that are more likely to encourage additional or complementary investment into other projects are rated higher.
Employment (Op.) Potential	None = 0 Low = 1 Medium = 2 High = 3	1	Projects which are likely to generate greater employment opportunities once operational are ranked higher.
Encourage mana whenua in the visitor economy	Yes = 1 No = 0	3	Projects that actively encourage mana whenua involvement in the visitor economy and/or which grow mana whenua ventures are ranked higher.
Estimated visitation	None = 0 Low = 1 Medium = 2 High = 3	2	The projects which are likely to generate higher visitation are ranked higher.
Improve the environment	None = 0 Low = 1 Medium = 2 High = 3	2	Projects that comprise environmental initiatives are ranked higher.

Criteria	Score	Weighting	Description
Landowner	DOC = 0 Unknown = 1 Council = 2 Other Govt. Agency = 2 Private = 3	1	Projects which are situated on private land are ranked higher because there are likely to be fewer constraints.
Likelihood to be profiled by TNZ	None = 0 Low = 1 Medium = 2 High = 3	1	The ability of the project to grow the region's destination profile. Projects which may have Higher marketing budgets (particularly those run by larger tourism players), as well as highly unique products, are ranked higher.
Likely to be supported by the community	None = 0 Low = 1 Medium = 2 High = 3	2.5	Those projects that may be supported (either through visitation or general support) by the local community are ranked higher.
Likely visitor appeal	None = 0 Low = 1 Medium = 2 High = 3	2.5	The projects which are likely to have a Higher appeal to the visitor market are ranked higher than those which may generate lower visitor interest.
Need for ongoing operational government funding	None = 3 Low = 2 Medium = 1 High = 0	1.5	If the project is likely to require ongoing government contributions to fund operating costs, it is ranked lower. If the project is likely to be commercially viable/sustainable, it is ranked higher.
Regional dispersal of visitors	None = 0 Low = 1 Medium = 2 High = 3	1.5	If a project is able to encourage higher visitor dispersal throughout the region, it is ranked higher.
The ability of the project to secure government funding	None = 0 Low = 1 Medium = 2 High = 3	3	Those projects which may be more likely to be able to secure government funding (capex or opex) are ranked higher.
Short term project commencement	Yes = 1 No = 0	2	If the project is likely to be able to be activated in a shorter period, it is ranked higher.
Size of private investment	= 0 = 0 <\$100,000 = 1 <\$500,000 = 2 <\$1,000,000 = 3 >\$1,000,000 = 4	2	Projects which are more likely to attract private sector investment (regardless of the value of this investment) are ranked higher.
Size of public investment	<\$100,000 = 4 <\$500,000 = 3 <\$1,000,000 = 2 >\$1,000,000 = 1 = 0 = 0	1.5	Projects which have a higher public sector investment requirement are ranked lower.
Higher domestic visitation	None = 0 Low = 1 Medium = 2 High = 3	2.5	Those which are likely to encourage Higher domestic (rather than local) visitation are ranked higher.
Higher international visitation	None = 0 Low = 1 Medium = 2 High = 3	2.5	Those which are likely to encourage Higher international visitation and profile are ranked higher.
The uniqueness of the product	None = 0 Low = 1 Medium = 2 High = 3	1.5	The uniqueness of the product is ranked according to whether it is unique across NZ (ranked higher), across the region, or whether the product is likely to be unique only to the specific area it is situated in (ranked lower).



Image credit: He Ara Kotahi Pathway, ManawatūNZ.co.nz

3.3.2.2. The Top Five Development Recommendations

Figure 37 summarises the projects identified that achieved a top-five score based on the ranking matrix. These projects, by virtue of their higher ranking, offer a starting point for activation of this DMP as it is impractical to try and activate too many projects at the same time. The top five projects offer great diversity in their scale, type of development, location, and their timeframe for activation.

Table 4 that follows provides the full ranking of the projects based on the total weighted score. The full-ranking matrices are included in Appendix 3 and Appendix 4.

The top five development recommendations are “game changers” for Manawatū’s visitor economy. They are considered game changers because their size, scale and investment requirements mean they are likely to act as a catalyst to stimulate many other projects to be activated. Additionally, they support the need for public infrastructure funding. While the focus should be on these top five projects, the action plan (see Section 4.1) demonstrates the full list of recommendations and highlights many other smaller projects that may present lower-hanging fruit opportunities that may be able to be activated more easily because of their smaller scale.

Figure 37: The Top Five Development Recommendations

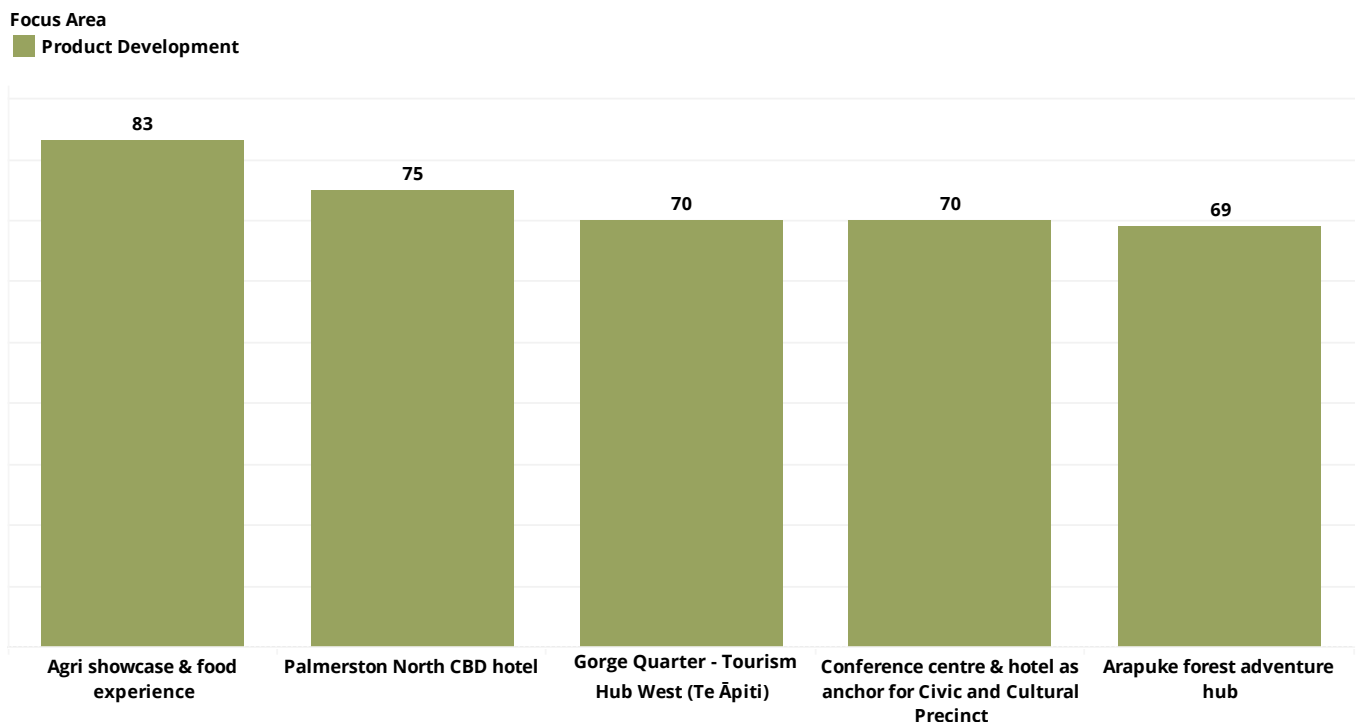


Table 4: All development recommendations ranked

Project Name	Focus Area	Type	Rank	Weighted Score
Agri showcase & food experience	Product Development	Attraction/Experience	1	83
Palmerston North CBD hotel	Product Development	Accommodation	2	75
Gorge Quarter - Tourism Hub West (Te Āpiti)	Product Development	Accommodation	3	70
Conference centre & hotel as anchor for Civic and Cultural Precinct	Product Development	Infrastructure	3	70
Arapuke forest adventure hub	Product Development	Attraction/Experience	5	69
Outdoor hot tubs & wellness facility with dark sky experience	Product Development	Attraction/Experience	6	65
Destination holiday park along riverside precinct	Product Development	Accommodation	6	65
Boutique art hotel in Manawatū District	Product Development	Accommodation	8	64
Manfeild accommodation & event infrastructure	Product Development	Infrastructure	9	62
Gorge mountain bike trail (Te Āpiti)	Product Development	Infrastructure	10	59
Regional garden tours	Product Development	Attraction/Experience	11	58
Skybridge connecting ranges (Te Āpiti)	Product Development	Attraction/Experience	12	57
Expanded river-based activities (kayak, SUP hire etc.)	Product Development	Attraction/Experience	12	57
Rangitāne projects (Te Āpiti)	Product Development	Mana whenua	14	55
Outdoor sculpture trail	Product Development	Attraction/Experience	15	54
CBD rooftop bar	Product Development	Attraction/Experience	15	54
Himatangi Beach pop-up trial	Product Development	Attraction/Experience	17	52
Mt Lees Reserve homestead boutique accommodation	Product Development	Accommodation	18	48
Himatangi Beach car park	Infrastructure Growth	Infrastructure	19	44
UNESCO Geopark (Te Āpiti)	Product Development	Attraction/Experience	20	42
Old Gorge Road shared path (Te Āpiti)	Product Development	Infrastructure	20	42
Suspension bridge (Te Āpiti)	Infrastructure Growth	Attraction/Experience	22	40
Skyline track (Te Āpiti)	Product Development	Infrastructure	22	40
Lindauer Trail (Te Āpiti)	Product Development	Infrastructure	22	40
Barneys Point loop track (Te Āpiti)	Product Development	Infrastructure	22	40
Ashhurst Loop track (Te Āpiti)	Infrastructure Growth	Infrastructure	22	40
Feilding Civic Centre upgrades	Infrastructure Growth	Infrastructure	27	38
City to Ashhurst/Te Āpiti pathway	Infrastructure Growth	Infrastructure	28	37
Arapuke to Te Āpiti track skyline walk	Infrastructure Growth	Attraction/Experience	29	36
Manawatū Scenic route upgrades	Infrastructure Growth	Infrastructure	30	35
Enhanced inter-modal transport services (airport, rail and road tran..	Infrastructure Growth	Infrastructure	30	35
Ian McKean Pinetum and arboretum	Product Development	Attraction/Experience	30	35
Gorge Quarter - Te Āpiti amphitheatre	Infrastructure Growth	Infrastructure	33	34
Arapuke Forest Park road access	Infrastructure Growth	Infrastructure	34	33
Rangiwahia Bush Reserve trail & hub development	Product Development	Infrastructure	35	32
Improved place making throughout the Manawatū	Infrastructure Growth	Infrastructure	36	31
Himatangi Beach break wall remediation	Infrastructure Growth	Infrastructure	37	28
Beach blokart event	Product Development	Event	38	27
Ruahine walking trails	Product Development	Infrastructure	39	24
Advocacy for improved digital coverage	Infrastructure Growth	Infrastructure	39	24
Public toilet facilities	Infrastructure Growth	Null	41	23
Ruahine National Park loop trail	Infrastructure Growth	Infrastructure	42	17

3.4. Measuring Our Success

This DMP is focused on five goals, which aim to deliver on the strategic framework.

 Goal	 Indicator	 Targets
<p>1. Manawatū is a great place to live, visit, study and work.</p>	<ul style="list-style-type: none"> ▪ Visitor and resident satisfaction grow ▪ Increased attendance across events and festivals (where benchmark measurement is possible) 	<ul style="list-style-type: none"> ▪ Surveys undertaken illustrate satisfaction levels of 85%+ are achieved. ▪ Event attendance for annual events grows by 5%+ p/a.
<p>2. Grow tourism's contribution to Manawatū visitor economy to ensure a thriving local economy and improved social wellbeing.</p>	<ul style="list-style-type: none"> ▪ Tourism GDP increases and tourism job opportunities grow. ▪ Visitor yield, measured via average spend, increases. ▪ The number of tourism-based products and experiences grows. ▪ New tourism products are featured in lifestyle media. ▪ Reinvestment into existing products occurs (with the aim of refreshing current experiences and enhancing/expanding the offering). ▪ The value of tourism to Manawatū's community is expressed in positive local attitudes toward supporting the visitor economy. 	<ul style="list-style-type: none"> ▪ Tourism GDP increases by >2% p/a and employment growth by 2% p/a (measured via Infometrics). ▪ Visitor spending increases by > 2% p/a (measured via Infometrics). ▪ A new tourism product is developed every 24 months. ▪ At least 2 lifestyle media articles p/a featuring new or enhanced Manawatū tourism products p/a. ▪ At least 8% of existing tourism product receives reinvestment every 4 years. ▪ At least 85% of Manawatū residents surveyed annually have a positive attitude to the visitor economy and tourists.
<p>3. Develop strong product and promotional links with surrounding regions via greater networking, wider marketing campaigns and extending products and experiences.</p>	<ul style="list-style-type: none"> ▪ Cross-regional collaboration occurs with the Rangitikei and/or Horowhenua regularly via promotional campaigns and joint events. ▪ Joint marketing campaigns are developed. 	<ul style="list-style-type: none"> ▪ No less than one cross-regional collaborative promotional campaign p/a. ▪ At least one cross-regional event undertaken p/a. ▪ No less than one joint marketing campaign with a different surrounding region p/a.
<p>4. Ensure tourism development and growth sustains and enhances Manawatū's natural and built environment for the benefit of residents first and foremost and then its visitors.</p>	<ul style="list-style-type: none"> ▪ New and/or improved amenities and infrastructure are introduced to enhance placemaking (cycleways, walking tracks, public toilets, rubbish facilities and interpretive and directional signage). ▪ Participation in regenerative tourism opportunities occurs (tree planting by visitors etc.) 	<ul style="list-style-type: none"> ▪ At least one existing cycleway or walking track is extended once every 2-3 years and/or a new one is commenced every 3-4 years ▪ The cleanliness and quality of public toilets are rated over 90% in visitor and community surveys p/a. ▪ Residents and visitors rate the quality of signage at over 85% p/a. ▪ A new regenerative tourism program is introduced every two years and receives strong media coverage and support.
<p>5. Develop a stronger sectoral collaborative approach with mana whenua for the sustainable development of Manawatū's visitor economy, and which ensures engages with all related sectors (sport, education, arts, history etc).</p>	<ul style="list-style-type: none"> ▪ Manawatū is held up as a best practice example across New Zealand of broader successful tourism industry collaboration with mana whenua. ▪ New marketing initiatives are developed with mana whenua to encourage cultural tourism, education tourism, heritage tourism etc. ▪ The range of product development opportunities for mana whenua is grown to incorporate and capitalize on the broader sectors of the visitor economy in Manawatū. 	<ul style="list-style-type: none"> ▪ Mana whenua and local tourism industry operators rate industry collaboration at over 85% p/a. ▪ One new marketing collaboration p/a with mana whenua and the tourism industry. ▪ Education tourism visitation grows by >2% p.a. over 10 years (measured via national-level data). ▪ Sports tourism visitation grows by >10% over 10 years (measured via national-level data). ▪ Cultural and heritage visitation grow by >7% over 10 years (measured via national-level data).

3.5. Visitor forecasts



Figure 38 and Figure 39 provide forecasts for visitation to Palmerston North City and Manawatū District over the period 2023 to 2032. The forecasts are based on three different scenarios including low, medium, and high growth scenarios. It is important to note that the unstable environment that has resulted from COVID-19 and fluctuating conditions (including snap border closures and new variants of the virus strain) means that forecasting with a higher degree of accuracy (and through using historic trends) is problematic.

Traditionally, international visitation has comprised a relatively small proportion of total visitation to the region, so the closure of borders has had less of an impact than for many other destinations throughout the country (such as Queenstown). The projections, therefore, reflect the success of Manawatū in continuing to grow its domestic markets out to 2032.

The data reflects the following.

- The low growth scenario reflects a much more conservative recovery from COVID-19, with visitation anticipated to reach pre-COVID-19 levels by 2024-2025 in both council areas.
- The medium growth scenario reflects a more likely recovery scenario. This scenario assumes the region benefits from several new tourism-related developments over the period out to 2032. Under this scenario, visitation is forecast to reach pre-COVID-19 levels by approximately 2023-2024. By 2032, visitation is forecast to reach 1.8 million visitors to Palmerston North City and 421,000 to Manawatū District.
- The high growth scenario sees a much stronger COVID-19 recovery and related uplift from tourism development initiatives. This scenario assumes most of the recommendations in this DMP are adopted and implemented with far faster development timeframes. Under this scenario, visitation is forecast to reach 2.2 million visitors by 2032 to Palmerston North City and 532,000 to Manawatū District.

Figure 38: Visitor Forecasts – Palmerston North City (2023 – 2032)²⁴

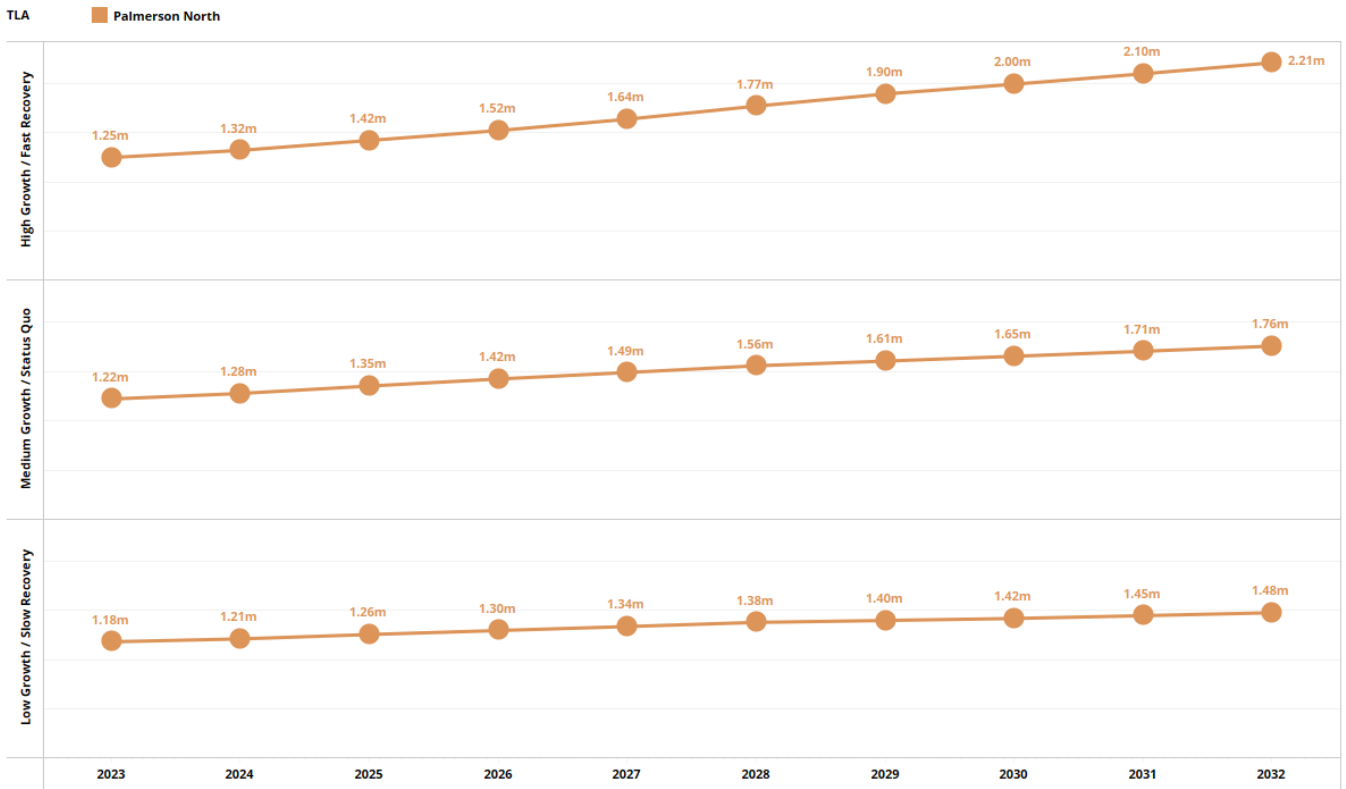
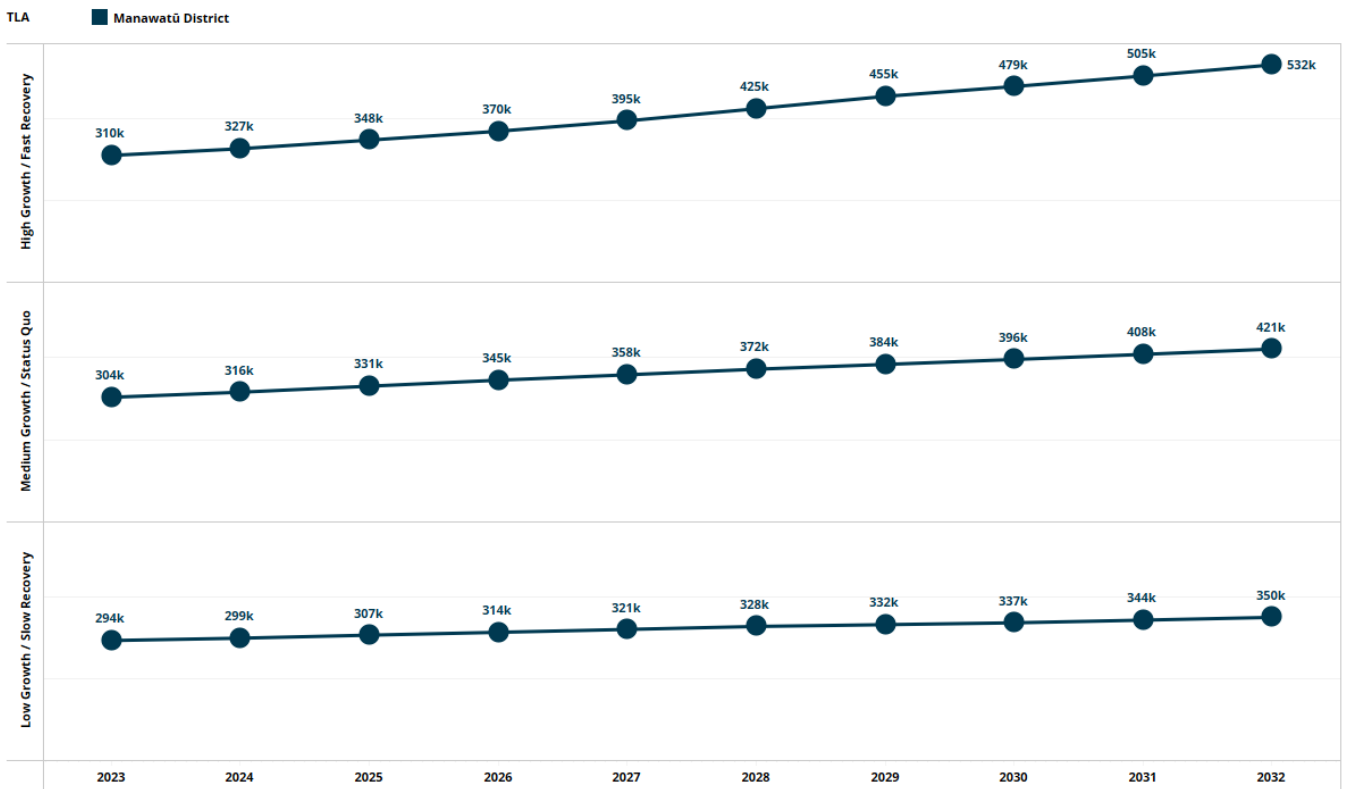


Figure 39: Visitor Forecasts – Manawatū District (2023 – 2032)²⁵



²⁴ Based on visitation data (NZ IVS, New Zealand Regional Tourism Estimates and the New Zealand Visitor Activity Forecast - <https://freshinfo.shinyapps.io/NZVAF/>), discussions with CEDA, both Councils, transport providers, and local industry operators.

²⁵ Ibid

3.6. Markets to focus on

Manawatū should continue to target consumers in markets that present the best potential for sustainable growth and that leverage the existing strengths of the region. Figure 40 provides a summary of the markets that should be focused on (as a starting point). Several of these represent 'low hanging fruit' markets that fit well with the region's existing product base, while others correspond to growth opportunities that have been identified for Manawatū. Many of these markets also represent those visitors that have values that align with local community aspirations. This includes a focus on higher-value visitors (economic, social, cultural, community and environmental value).

Table 5 on the following page provides a link between the markets and the recommendations identified in this DMP. CEDA.nz/data-insights also provides additional data and information about key target segments for Manawatū.

Figure 40: Markets to focus on

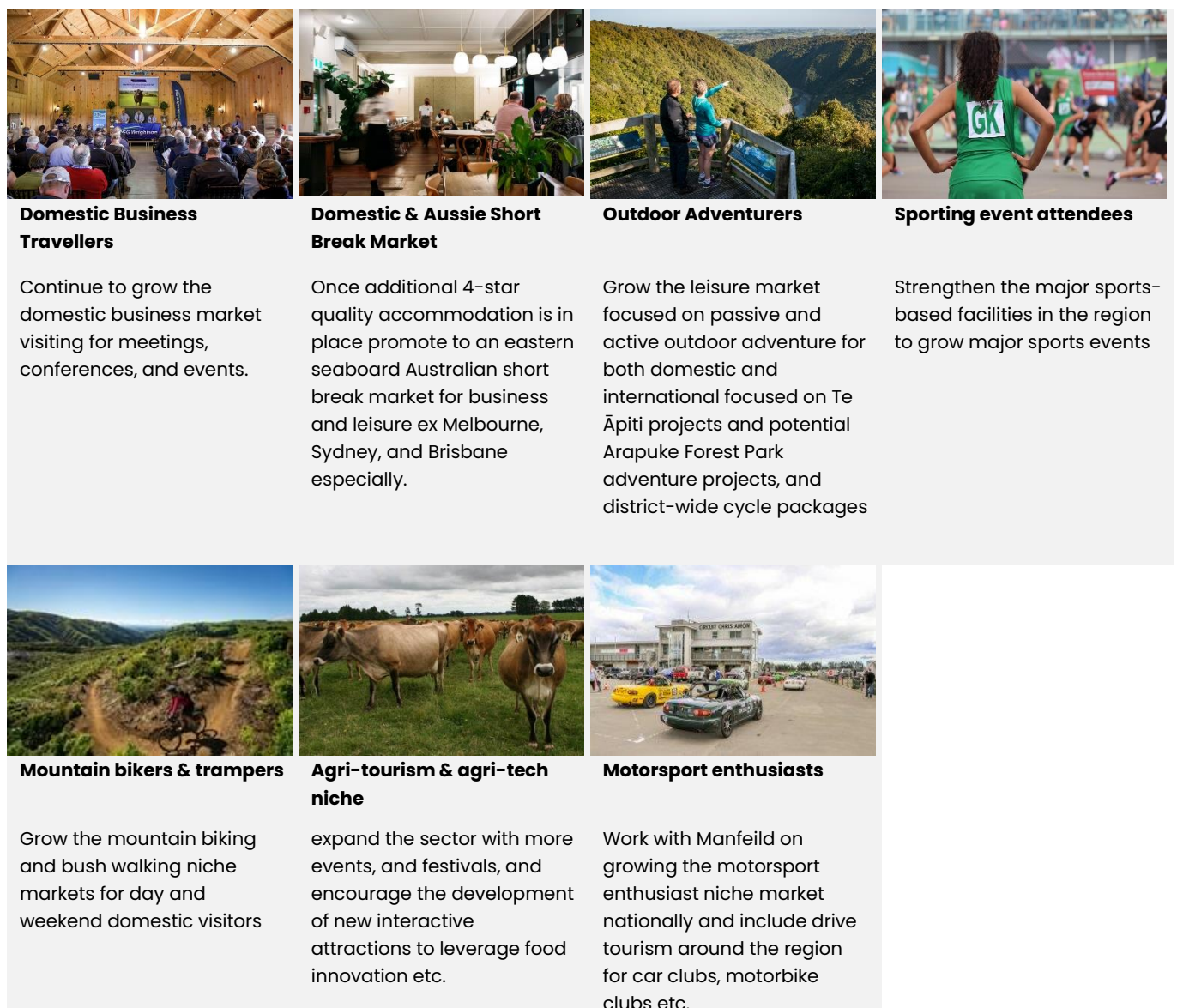


Table 5: The recommendations linked to the markets to focus on

	Domestic Business Travellers	Domestic & Aussie Short Break Market	Outdoor Adventurers	Sporting event attendees	Mountain bikers & trampers	Agri-tourism & agri-tech niche	Motorsport enthusiasts
Advocate for improved digital coverage	-	-	-	-	-	-	-
Agri showcase & food experience	✓	✓	✓		✓	✓	
Ian McKean Pinetum		✓	✓		✓	✓	
Arapuke forest adventure hub		✓	✓		✓		
Arapuke Forest Park road access		✓	✓		✓		
Arapuke to Te Āpiti track skyline walk		✓	✓		✓		
Ashhurst Loop track (Te Āpiti)		✓	✓		✓		
Barneys Point loop track (Te Āpiti)		✓	✓		✓		
Beach blokart event		✓	✓	✓	✓		✓
Boutique art hotel in Manawatū District	✓	✓	✓		✓	✓	✓
Palmerston North CBD hotel	✓	✓	✓		✓	✓	✓
CBD rooftop bar	✓	✓	✓	✓	✓	✓	
City to Ashhurst pathway		✓					
Conference centre & hotel as an anchor for Civic and Cultural Precinct	✓	✓	✓	✓	✓	✓	✓
Destination holiday park along the riverside precinct			✓	✓	✓		
Enhanced inter-modal transport services (airport, rail and road transport)	✓	✓	✓	✓	✓	✓	✓
Expanded river-based activities		✓	✓		✓		
Feilding Civic Centre upgrades	✓						
Gorge mountain bike trail (Te Āpiti)		✓			✓		
Himatangi Beach break wall remediation	-	-	-	-	-	-	-
Himatangi Beach car park	-	-	-	-	-	-	-

	Domestic Business Travellers	Domestic & Aussie Short Break Market	Outdoor Adventurers	Sporting event attendees	Mountain bikers & trampers	Agri-tourism & agri-tech niche	Motorsport enthusiasts
Himatangi Beach master plan	-	-	-	-	-	-	-
Himatangi Beach pop-up trial		✓	✓				
Improved placemaking throughout Manawatū	✓	✓		✓			
Lindauer Trail (Te Āpiti)		✓	✓		✓		
Manawatū Scenic route upgrades		✓	✓		✓		
Manfeild accommodation & event infrastructure	✓			✓		✓	✓
Mt Lees Homestead boutique accommodation		✓	✓		✓		
Old Gorge Road shared path (Te Āpiti)		✓	✓		✓		
Outdoor hot tubs & wellness facility with dark sky experience		✓	✓		✓		
Outdoor sculpture trail		✓	✓		✓		
Rangitāne o Manawatū projects (Te Āpiti)		✓			✓		
Regional garden tours		✓				✓	
Rangiwahia Scenic Reserve trail & hub development		✓	✓		✓		
Ruahine National Park loop trail		✓	✓		✓		
Ruahine walking trails		✓	✓		✓		
Seasonal hop-on, hop-off discovery bus		✓		✓	✓	✓	
Skybridge connecting ranges (Te Āpiti)		✓	✓		✓		
Skyline track (Te Āpiti)		✓	✓		✓		
Suspension bridge (Te Āpiti)		✓	✓		✓		
Gorge Quarter - amphitheatre		✓	✓		✓		
Gorge Quarter - Tourism Hub West (Te Āpiti)		✓	✓		✓		
UNESCO Geopark (Te Āpiti)		✓	✓		✓	✓	

Part 4: How Will We Get There?



4.1. Action Plan

Manawatū needs to work closely together to achieve the desired outcomes of this DMP. Table 6 and Table 7 provide the plan for actioning the various recommendations in this DMP, along with an indication of who will be involved. The ‘Who’ have been ordered alphabetically and is not an illustration of who will be the primary owner. As the coordinator and driver of the DMP (on behalf of all stakeholders), CEDA will need to convene a working group to meet regularly to oversee the implementation of the DMP. The actions are non-exhaustive and will continually need to be updated and refreshed over time.

Table 6: Action Plan – Development Recommendations

Key Focus Area	Recommendation	Action	Who	When
Product Development	Palmerston North CBD hotel ★	<ul style="list-style-type: none"> Support the developer/investor to achieve required planning approvals to enable sufficient rooms to be provided on site. 	PNCC, CEDA	Short term
		<ul style="list-style-type: none"> Provide data to support evidence-base for the feasibility study. 	PNCC, CEDA	Short term
Product Development	CBD rooftop bar	<ul style="list-style-type: none"> Work with existing F&B operators to identify potential demand for CBD rooftop bar. 	CEDA, F&B operators	Short-medium term
		<ul style="list-style-type: none"> Undertake comparative research assessing best practice examples elsewhere. 	CEDA	Short-medium term
		<ul style="list-style-type: none"> Work with PNCC and local real estate agents to identify potential sites that could be suitable, and which could be presented to potential operators. 	CEDA, PNCC	Short-medium term
Product Development	Expanded river-based activities (kayak, SUP hire etc.)	<ul style="list-style-type: none"> Identify potential river-based tourism infrastructure and products that could be introduced to further activate Manawatū River (and other rivers) and further promote those that already exist. 	CEDA and water sports operators	Short-medium term
Product Development	Gorge mountain bike trail (Te Āpiti)	<ul style="list-style-type: none"> Complete a feasibility study looking at the viability of developing an 11km long MTB trail traversing eastwest across the southern side of Manawatū Gorge Scenic Reserve. 	Manawatū Bike Club, Iwi, DOC and Councils	Short-medium term
Product Development	Himatangi Beach pop-up trial	<ul style="list-style-type: none"> Identify potential operators to run a pop-up trial for F&B and/or water sports gear hire at Himatangi Beach potentially on a seasonal basis. 	CEDA	Short-medium term
Product Development	Old Gorge Road shared path (Te Āpiti)	<ul style="list-style-type: none"> Complete a feasibility study looking at the use of the 9km section of the old Gorge Road as a shared path linking both sides of the ranges. 	Waka Kotahi, PNCC, TDC, Iwi, DOC	Short-medium term
Product Development	Regional garden tours	<ul style="list-style-type: none"> Working with the region's gardens and potentially transport operators, provide a series of packaged garden tours. 	CEDA, gardens and transport operators	Short-medium term
Product Development	Outdoor hot tubs & wellness facility with dark sky experience	<ul style="list-style-type: none"> Undertake a study to quantify demand for a hot tub and wellness experience within Manawatū. 	CEDA	Short term
		<ul style="list-style-type: none"> If demand exists, undertake a site audit to identify potential sites that may be suitable. 	CEDA	Short term - Medium term
		<ul style="list-style-type: none"> Produce investment opportunity prospectus highlighting opportunity and provide to the market to promote the opportunity. 	CEDA	Short term - Medium term

Key Focus Area	Recommendation	Action	Who	When
Product Development	Agri showcase & food experience ★	<ul style="list-style-type: none"> Work with Manawatū's agri sector to consider commissioning a feasibility study assessing the viability of developing a major agri showcase centre and food experience. 	CEDA, agri sector	Medium term
Product Development	Ian MCKean Pinetum & arboretum	<ul style="list-style-type: none"> Assess the viability of developing an arboretum experience near Āpiti to showcase conifers and other species. This should build off the extensive work already at the site. 	Private landholder	Medium term
Product Development	Arapuke forest adventure hub ★	<ul style="list-style-type: none"> Complete a feasibility study looking at options to enhance the Arapuke Forest Mountain Bike Park and ways to introduce options to support its viability (including the introduction of commissionable (paid) elements into the precinct such as a pay-for-use chair lift, a café, a viewing platform at the summit and potentially hire facilities). 	Manawatū Bike Club, CEDA	Medium term
Infrastructure Growth	Arapuke Forest Park road access	<ul style="list-style-type: none"> Complete assessment of the costs to future-proof the road access to Arapuke Forest Mountain Bike Park. 	PNCC	Medium term
Infrastructure Growth	Arapuke to Te Āpiti track skyline walk	<ul style="list-style-type: none"> Creation of a skyline walk connecting the two destinations and providing loop trails to the city. 	Te Āpiti Masterplan Governance Group	Medium term
Product Development	Barneys Point loop track (Te Āpiti)	<ul style="list-style-type: none"> Undertake a feasibility study assessing the provision of an 8km walking track providing access near the eastern end of the Old Gorge Road. 	TDC and Te Āpiti Masterplan Governance Group	Medium term
Product Development	Beach blokart event	<ul style="list-style-type: none"> Work with Manawatū Blokart Club to investigate the potential to develop a destination event focused on blokarting between Himatangi and Foxton beach. 	MDC, HDC, Manawatū Blokart Club	Medium term
Product Development	Boutique art hotel in Manawatū District	<ul style="list-style-type: none"> Undertake a feasibility study looking at the development of a boutique art-style hotel within the Fielding CBD. 	CEDA, MDC	Medium term
Infrastructure Growth	City to Ashhurst/Te Āpiti Pathway	<ul style="list-style-type: none"> Assess the cost and potential pathway to connect Palmerston North CBD to Ashhurst/Te Āpiti via a shared pathway for use by walkers and cyclists. This is an important activator of Te Āpiti Master Plan. 	PNCC	Medium term
Infrastructure Growth	Conference centre & hotel as an anchor for Civic and Cultural Precinct ★	<ul style="list-style-type: none"> Continue to support PNCC's master planning and cultural precinct work which includes a new or upgraded conference centre in Palmerston North CBD and a supporting hotel facility. 	PNCC, CEDA	Medium term
Product Development	Destination holiday park along the riverside precinct	<ul style="list-style-type: none"> Complete pre-feasibility assessing the viability of and potential sites for a destination holiday park along the riverfront. 	CEDA, PNCC	Medium term
		<ul style="list-style-type: none"> If shown to be viable, take pre-feasibility to potential major destination holiday park operators to gauge interest. 	CEDA	Medium term
Infrastructure Growth	Himatangi Beach break wall remediation	<ul style="list-style-type: none"> Undertake remedial action to prevent the risk of flooding occurring and the loss of the access road down to the beach. 	MDC	Medium term

Key Focus Area	Recommendation	Action	Who	When
Infrastructure Growth	Himatangi Beach master plan	<ul style="list-style-type: none"> Undertake the development of a master plan to cater to the growth in demand Himatangi is experiencing (and likely to continue to experience). This could investigate beach parking solutions, café and F&B options, infrastructure requirements etc. 	MDC	Medium term
Product Development	Lindauer Trail (Te Āpiti)	<ul style="list-style-type: none"> Complete a feasibility study for a 4km long shared path connecting Woodville to the Ferry Reserve. 	TDC	Medium term
Product Development	Manfeild accommodation & event infrastructure	<ul style="list-style-type: none"> Work with Manfeild to grow utilisation supporting accommodation (approximately 20 apartments) as well as enhanced event infrastructure. 	Manfeild	Medium term
Product Development	Mt Lees Homestead boutique accommodation	<ul style="list-style-type: none"> Work with MDC to determine market interest in converting the homestead into a high-quality commercial B&B operation. 	CEDA, MDC	Medium term
Product Development	Outdoor sculpture trail	<ul style="list-style-type: none"> Continue to expand the existing Kimbolton outdoor sculpture trail along The Country Road and potentially into other parts of the region. 	CEDA, MDC, Kimbolton community	Medium term
Product Development	Rangitāne o Manawatū projects (Te Āpiti)	<ul style="list-style-type: none"> Work with iwi to develop the concept and feasibility for a project, or series of projects, within Te Āpiti led by Rangitāne to showcase aspects of their culture. 	Rangitāne o Manawatū	Medium term
Product Development	Rangiwahia Scenic Reserve trail & hub development	<ul style="list-style-type: none"> Continue to develop and promote the Ruahine Dress Circle experience including the 2-hour bush walk and eco experience. 	DOC	Medium term
Infrastructure Growth	Seasonal hop-on, hop-off discovery bus	<ul style="list-style-type: none"> Undertake initial study looking at the feasibility and potential operating model for the hop-on, hop-off service. 	CEDA, PNCC, MDC and industry	Medium term
Product Development	Skybridge connecting ranges (Te Āpiti)	<ul style="list-style-type: none"> Complete feasibility study assessing the creation of a suspension bridge located above the awa near Barneys Point. 	Te Āpiti Masterplan Governance Group	Medium term
Product Development	Skyline track (Te Āpiti)	<ul style="list-style-type: none"> Develop a feasibility study looking at the creation of a 45km walking track extending along the Ruahine and Tararua Ranges. 	Te Āpiti Masterplan Governance Group	Medium term
Infrastructure Growth	Suspension bridge (Te Āpiti)	<ul style="list-style-type: none"> Undertake a feasibility study looking at the development of a suspension bridge crossing over the awa east of Ferry Reserve. 	Te Āpiti Masterplan Governance Group and TDC	Medium term
Infrastructure Growth	Gorge Quarter amphitheatre	<ul style="list-style-type: none"> Complete a feasibility study assessing the viability of developing a natural amphitheatre within Te Āpiti precinct to support events, concerts and shows. 	Shannon Family, PNCC, CEDA and Te Āpiti Masterplan Governance Group	Medium term
Product Development	Gorge Quarter - Tourism Hub West (Te Āpiti) ★	<ul style="list-style-type: none"> Undertake a feasibility study assessing the creation of a hub for visitor activities with overnight accommodation within Te Āpiti. 	Shannon Family	Medium term

Key Focus Area	Recommendation	Action	Who	When
Product Development	UNESCO Geopark (Te Āpiti)	<ul style="list-style-type: none"> Carry out feasibility study looking at the cost and benefit of obtaining UNESCO 'Geopark' status for Te Āpiti. 	HRC, Manawatū River Source to Sea	Medium term
Infrastructure Growth	Advocate for improved digital coverage	<ul style="list-style-type: none"> Undertake an audit of digital coverage dead spots. 	PNCC, MDC, HRC	Short term
		<ul style="list-style-type: none"> Use audit findings to advocate for improved digital coverage for improved safety for locals and visitors. 	PNCC, MDC, HRC	Long term
Infrastructure Growth	Ashhurst Loop track (Te Āpiti)	<ul style="list-style-type: none"> Complete feasibility study assessing the development of a 9km long loop walking track connecting Ashhurst township to Manawatū Gorge. 	PNCC	Long term
Infrastructure Growth	Enhanced inter-modal transport services (airport, rail, and road transport)	<ul style="list-style-type: none"> Complete a public transport study to ascertain possible improvements that could be made to enhance local and visitor movement throughout Manawatū. 	PNCC, MDC, HRC	Long term
Infrastructure Growth	Feilding Civic Centre upgrades	<ul style="list-style-type: none"> Undertake upgrades to the Civic Centre to cater to increased demand and to enable it to be fit for purpose. 	MDC	Long term
Infrastructure Growth	Himatangi Beach car park	<ul style="list-style-type: none"> Undertake a study to determine the costs of restoring the old Himatangi Beach car park that is covered under the sand. 	MDC	Long term
Infrastructure Growth	Improved placemaking throughout Manawatū	<ul style="list-style-type: none"> Encourage the region's local councils to integrate stronger placemaking principles in precinct planning. 	CEDA, PNCC, MDC	Long term
Infrastructure Growth	Manawatū Scenic route upgrades	<ul style="list-style-type: none"> Complete upgrades to Manawatū Scenic route including wayfinding, interpretive signage, and additional marketing spending to grow its profile. 	MDC, CEDA	Long term
Infrastructure Growth	Public toilet facilities	<ul style="list-style-type: none"> Introduce greater public toilet capacity in key locations. 	PNCC, MDC, HRC	Long term
Infrastructure Growth	Ruahine National Park loop trail	<ul style="list-style-type: none"> Support DOC in assessing the potential to develop a new loop trail to offer a 2-3-day, 1-2-night tramp linking to existing huts. 	DOC, CEDA	Long term
Product Development	Ruahine walking trails	<ul style="list-style-type: none"> Support DOC to introduce and promote half- and full-day walking trails in the Ruahine National Park to encourage walkers to access and enjoy loop and lineal trails of shorter duration and to visit points of interest etc. 	DOC, CEDA	Long term

★ = priority recommendation

Table 7: Action Plan – Strategic Initiatives

Key Focus Area	Recommendation	Action	Who	When
Sustainability & Regenerative Tourism	Collaborate with environmental special interest groups	<ul style="list-style-type: none"> Create a close working arrangement between environmental groups and CEDA to identify regenerative tourism opportunities. 	CEDA and various environmental groups	Short term
Market Development	Continue to promote Manawatū destination brand	<ul style="list-style-type: none"> Continue to promote Manawatū destination brand and associated collateral to all stakeholders involved in the visitor economy. 	CEDA	Short term
Sustainability & Regenerative Tourism	Determination of carrying capacity system and monitoring	<ul style="list-style-type: none"> Investigate the introduction of a future carrying capacity pilot program for Te Āpiti and with a capacity limit to avoid overcrowding during peak periods. 	Te Āpiti Masterplan Governance Group	Short term
Market Development	Develop targeted domestic market content	<ul style="list-style-type: none"> Continue to gather domestic market insights, so we can better understand who our new domestic visitor is in a new-normal COVID-19 world. 	CEDA	Short term
		<ul style="list-style-type: none"> Continue to develop targeted content to attract the right visitors and stimulate interest and engagement across New Zealand, while raising local awareness and engagement 	CEDA	Short term
		<ul style="list-style-type: none"> Roll out marketing and promotional programs that target these specific markets and audiences. 	CEDA	Short term
Insights & Industry Development	Improve visitor data, research & insights	<ul style="list-style-type: none"> Continue to improve visitor data and insights that underpin business improvement, industry growth and investor confidence. 	CEDA	Short term
		<ul style="list-style-type: none"> Once developed, leverage the dataset created by the Tourism Data Leadership Group to present visitation data for the region and individual TLAs. 	CEDA	Short – Medium term
		<ul style="list-style-type: none"> Encourage the appropriate stakeholders to undertake regular sentiment surveys of visitors and the community regarding tourism 	CEDA, PNCC, MDC	Short – Medium term
Insights & Industry Development	Industry famil program	<ul style="list-style-type: none"> Develop a famil programme for key local and domestic tourism distribution channels and media. 	CEDA, TECNZ, RTNZ, TNZ, local operators	Short term
Leadership & Advocacy	Integrated event planning	<ul style="list-style-type: none"> Provide ongoing support for integrated event planning by event organisers (CEDA, councils, private event organisers etc.) including a shared, holistic events calendar. 	PNCC, MDC, event organisers	Short term
Leadership & Advocacy	Manawatū/Palmy proud campaign ★	<ul style="list-style-type: none"> Create an advocacy program that encourages locals to become ambassadors for their city and region. 	PNCC, MDC, CEDA, Feilding & District	Short term
Sustainability & Regenerative Tourism	Regenerative tourism promotional campaign	<ul style="list-style-type: none"> Develop a promotional campaign to target like-minded thinking visitors for helping to restore and maintain the environment. 	CEDA	Short term
		<ul style="list-style-type: none"> Actively promote the importance of and need for regenerative tourism in the local community 	CEDA	Short term

Key Focus Area	Recommendation	Action	Who	When
Sustainability & Regenerative Tourism	Te Āpiti Masterplan project coordination	<ul style="list-style-type: none"> Continue to support the implementation of Te Āpiti Masterplan and the opportunities identified. 	Te Āpiti Masterplan Governance Group	Short term
Insights & Industry Development	Tourism industry networking events ★	<ul style="list-style-type: none"> Run twice annual tourism industry networking events. Profile the events via industry communication. 	CEDA, industry	Short term
Insights & Industry Development	Upskilling operators	<ul style="list-style-type: none"> Provide targeted training and support for operators to upskill and prepare for offshore marketing and trade opportunities. 	CEDA, TNZ, local operators, Maverick Digital, Qualmark,	Short term
		<ul style="list-style-type: none"> Capability development for key visitor sector businesses, including Qualmark endorsement. CEDA to perform a lead role to coordinate, identify and facilitate. 	CEDA, RTNZ, TECNZ, Qualmark, Maverick Digital, TNZ	Short term
		<ul style="list-style-type: none"> Advocate for tourism sector engagement in national programmes including Tiaki Promise 6, NZ Tourism Sustainability Commitment Framework, and Qualmark Enviro Standards 	Qualmark, TIA, Tourism New Zealand, MBIE	Short term
Insights & Industry Development	Effective partnerships with tangata whenua ★	<ul style="list-style-type: none"> Continue to work with the Rangitāne Māori Tourism Working Group to facilitate, and foster authentic and unique cultural experiences and share Manawatū's cultural story with visitors 	CEDA, Rangitāne o Manawatū	Short - Medium term
		<ul style="list-style-type: none"> Continue to build relationships and partnerships with tangata whenua 	Tangata whenua, PNCC, MDC, CEDA	Medium term
		<ul style="list-style-type: none"> Support and enable the development of tangata whenua's tourism aspirations 	Tangata whenua, CEDA, Māori Tourism New Zealand	Medium term
Insights & Industry Development	Integrated destination calendar	<ul style="list-style-type: none"> Continue to develop an integrated Events Calendar and ensure this links in with MDC events 	PNCC and MDC	Medium term
Market Development	Market development strategy for overnight visitor growth	<ul style="list-style-type: none"> Creation of a market development strategy to identify products that can be packaged up to encourage overnight visitor growth especially and noting which markets this may best appeal to. 	CEDA	Medium term
Market Development	Regional tourism marketing strategy	<ul style="list-style-type: none"> Creation of a new regional tourism marketing strategy to determine promotional campaigns aimed at specific visitor markets. 	CEDA, PNCC, MDC	Medium term
		<ul style="list-style-type: none"> Potential also exists to link products in surrounding regions from the Horowhenua, Tararua and Rangitikei districts as most are not aligned to an RTO but indicate they are keen to work in collaboration with Manawatū via CEDA. 	PNCC, MDC, surrounding councils and CEDA	Medium term
Leadership & Advocacy	Strengthen relationships with surrounding regions	<ul style="list-style-type: none"> Leverage relationships with neighbouring, and 'feeder' regions to provide compelling, multi-day visitor offerings. 	CEDA, neighbouring LTOs, RTOs and Councils	Medium term

Key Focus Area	Recommendation	Action	Who	When
		<ul style="list-style-type: none"> Develop/reset working relationships with key partners including Iwi, DOC, event organisers, community groups and tertiary education institutions. 	CEDA	Medium term
Leadership & Advocacy	Visitor economy awareness campaign	<ul style="list-style-type: none"> Develop and roll out a tourism benefits community awareness campaign. 	CEDA, PNCC, MDC	Medium term
Sustainability & Regenerative Tourism	Focus on electric vehicles and public transport	<ul style="list-style-type: none"> Investigate the viability of introducing electric busses in the region 	PNCC, MDC, HRC	Long term
		<ul style="list-style-type: none"> Continue to advocate for the greater provision of electric vehicle charging stations across the region 	PNCC, MDC, HRC, CEDA	Long term
Sustainability & Regenerative Tourism	Zero Carbon Manawatū	<ul style="list-style-type: none"> Inform and educate visitor sector operators on how they can integrate environmentally sustainable operations into their business. 	CEDA	Short term
		<ul style="list-style-type: none"> Continue to support PNCC in its desire to be an eco city and reduce the City's greenhouse gas emissions by 30% by 2031. 	PNCC, CEDA	Long term

★ = priority recommendation

4.2. The Capital Expenditure to Activate the Recommendations

Figure 41 provides a top-line estimate of potential capital development costs separated by investment type and level of capex estimated as well.

These estimates are indicative only and provided to help illustrate the likely level of capital development required for the projects identified. They also illustrate that in order to activate interest in many of the privately funded suggested projects, publicly funded infrastructure is needed, as, without a commitment from both public and private sector funding sources, too little product development may be able to be activated from this DMP and over the next 10-year period.

As shown, there is a good mix of both public and private investment opportunities, with:

- 51% of projects being funded via private sources; and
- 49% coming via public sources.

This should be viewed positively as far too often the capital cost burden primarily falls heavily on the government to fund with too little private sector investment able to be leveraged from it. A review of projects and their indicative capital requirements in the table below indicates that whilst there are fewer private sector-funded projects than publicly funded ones, the quantum of private sector investment requirements is often higher.

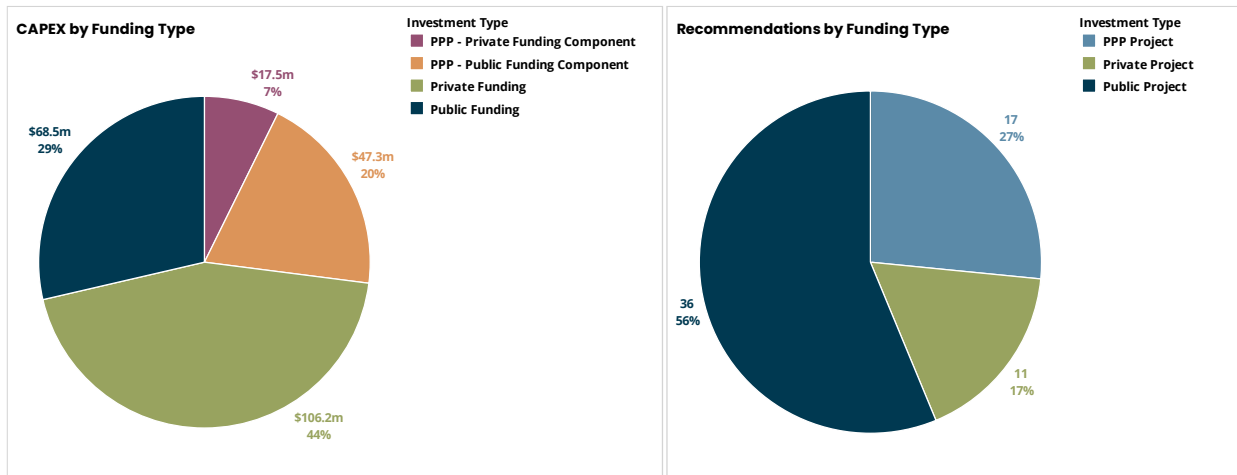
Importantly, a commitment by the government to fund many projects which cannot generate a commercial return is needed to help leverage private sector investment.

In discussions with potential operators and investors who may wish to consider establishing in the region, key decision-making criteria include the following.

- The attitude of the council to support new investment and speed to get planning approvals.
- Are sites available for tourism development and are they zoned fit for purpose or can this occur on a timely basis?
- Funding support by the government to provide infrastructure funding requirements to the site (potable water, electricity, sewer connections).
- Level of sophistication of the existing tourism industry in the region and ability to work with them and leverage off existing successful operations.
- Level of market awareness of the region already and perceptions.
- The attitude of the community to be supportive of new tourism investment and facilities to support local employment.
- The likely return on investment and commercial payback period
- Ability to access debt capital on favourable terms and conditions.

However, sitting above all these points is the desire to ensure that what they are considering developing and investing in will also find favour with tangata whenua in the region. This is important as well for tangata whenua, as it potentially opens up opportunities for passive or active involvement in projects (direct investment or partnerships) where site use and/or leasing of land may be possible and also provides the chance to link with well-experienced operators to help de-risk opportunities.

Figure 41: Estimated CAPEX



Project Name	PPP - Private Funding Component	PPP - Public Funding Component	Private Funding	Public Funding	Total
Advocacy for improved digital coverage	\$0	\$0	\$0	\$30,000	\$30,000
Agri showcase & food experience	\$6,000,000	\$14,000,000	\$0	\$0	\$20,000,000
IanMcKean Pinetum & Arboretum	\$0	\$0	\$150,000	\$0	\$150,000
Arapuke forest adventure hub	\$4,000,000	\$6,000,000	\$0	\$0	\$10,000,000
Arapuke Forest Park road access	\$0	\$0	\$0	\$2,400,000	\$2,400,000
Arapuke to Te Āpiti track skyline walk	\$0	\$0	\$0	\$4,500,000	\$4,500,000
Ashhurst Loop track (Te Āpiti)	\$0	\$0	\$0	\$2,000,000	\$2,000,000
Barneys Point loop track (Te Āpiti)	\$0	\$0	\$0	\$2,000,000	\$2,000,000
Beach blokart event	\$0	\$0	\$0	\$450,000	\$450,000
Boutique art hotel in Manawātū District	\$0	\$0	\$17,000,000	\$0	\$17,000,000
CBD rooftop bar	\$0	\$0	\$900,000	\$0	\$900,000
City to Ashhurst/Te Āpiti pathway	\$0	\$0	\$0	\$4,000,000	\$4,000,000
Collaborate with environmental special interest groups	\$0	\$0	\$0	\$30,000	\$30,000
Conference centre & hotel as anchor for Civic and Cultural Precinct	\$6,400,000	\$25,600,000	\$0	\$0	\$32,000,000
Continue to promote the Manawātū destination brand	\$0	\$0	\$0	\$35,000	\$35,000
Destination holiday park along riverside precinct	\$0	\$0	\$20,000,000	\$0	\$20,000,000
Determination of carrying capacity system and monitoring	\$0	\$0	\$0	\$45,000	\$45,000
Develop targeted domestic market content	\$8,750	\$26,250	\$0	\$0	\$35,000
Effective partnerships with tangata whenua	\$11,250	\$33,750	\$0	\$0	\$45,000
Enhanced inter-modal transport services (airport, rail and road transpo..	\$62,500	\$187,500	\$0	\$0	\$250,000
Expanded river-based activities (kayak, SUP hire etc.)	\$0	\$0	\$200,000	\$0	\$200,000
Feilding Civic Centre upgrades	\$0	\$0	\$0	\$18,000,000	\$18,000,000
Focus on electric vehicles and public transport	\$0	\$0	\$0	\$35,000	\$35,000
Gorge mountain bike trail (Te Āpiti)	\$0	\$0	\$0	\$4,500,000	\$4,500,000
Himatangi Beach break wall remediation	\$0	\$0	\$0	\$4,000,000	\$4,000,000
Himatangi Beach car park	\$0	\$0	\$0	\$500,000	\$500,000
Himatangi Beach master plan	\$0	\$0	\$0	\$65,000	\$65,000
Himatangi Beach pop-up trial	\$42,250	\$22,750	\$0	\$0	\$65,000
Improve visitor data, research & insights	\$0	\$0	\$0	\$55,000	\$55,000
Improved place making throughout the Manawātū	\$0	\$0	\$0	\$200,000	\$200,000
Industry famil program	\$21,000	\$14,000	\$0	\$0	\$35,000
Integrated destination calendar	\$0	\$0	\$0	\$20,000	\$20,000
Integrated event planning	\$3,750	\$11,250	\$0	\$0	\$15,000
Lindauer Trail (Te Āpiti)	\$0	\$0	\$0	\$2,000,000	\$2,000,000
Manawātū Scenic route upgrades	\$0	\$0	\$0	\$3,615,000	\$3,615,000
Manawātū/Palmy proud campaign	\$13,750	\$41,250	\$0	\$0	\$55,000
Manfeild accommodation & event infrastructure	\$0	\$0	\$12,000,000	\$0	\$12,000,000
Market development strategy for overnight visitor growth	\$0	\$0	\$0	\$65,000	\$65,000
Mt Lees Reserve homestead boutique accommodation	\$0	\$0	\$5,000,000	\$0	\$5,000,000
Old Gorge Road shared path (Te Āpiti)	\$0	\$0	\$0	\$1,000,000	\$1,000,000
Outdoor hot tubs & wellness facility with dark sky experience	\$0	\$0	\$2,500,000	\$0	\$2,500,000
Outdoor sculpture trail	\$30,000	\$20,000	\$0	\$0	\$50,000
Palmerston North CBD hotel	\$0	\$0	\$43,600,000	\$0	\$43,600,000
Public toilet facilities	\$0	\$0	\$0	\$155,000	\$155,000
Rangitāne projects (Te Āpiti)	\$800,000	\$1,200,000	\$0	\$0	\$2,000,000
Rangiwahia Bush Reserve trail & hub development	\$0	\$0	\$0	\$1,800,000	\$1,800,000
Regenerative tourism support promotional campaign	\$0	\$0	\$0	\$50,000	\$50,000
Regional garden tours	\$0	\$0	\$20,000	\$0	\$20,000
Regional tourism marketing strategy	\$0	\$0	\$0	\$50,000	\$50,000
Ruahine National Park loop trail	\$0	\$0	\$0	\$1,600,000	\$1,600,000
Ruahine walking trails	\$0	\$0	\$0	\$6,300,000	\$6,300,000
Seasonal hop-on, hop-off discovery bus	\$57,000	\$38,000	\$0	\$0	\$95,000
Skybridge connecting ranges (Te Āpiti)	\$0	\$0	\$0	\$3,500,000	\$3,500,000
Skyline track (Te Āpiti)	\$0	\$0	\$0	\$1,200,000	\$1,200,000
Strengthen relationships with surrounding regions	\$5,000	\$15,000	\$0	\$0	\$20,000
Suspension bridge (Te Āpiti)	\$0	\$0	\$0	\$1,500,000	\$1,500,000
Gorge Quarter - amphitheatre	\$0	\$0	\$0	\$1,200,000	\$1,200,000
Te Āpiti Masterplan project coordination	\$8,750	\$26,250	\$0	\$0	\$35,000
Gorge Quarter - Tourism Hub West (Te Āpiti)	\$0	\$0	\$4,800,000	\$0	\$4,800,000
Tourism industry networking events	\$8,750	\$26,250	\$0	\$0	\$35,000
UNESCO Geopark (Te Āpiti)	\$0	\$0	\$0	\$1,500,000	\$1,500,000
Upskilling operators	\$3,750	\$11,250	\$0	\$0	\$15,000
Visitor economy awareness campaign	\$0	\$0	\$0	\$45,000	\$45,000
Zero Carbon Manawātū	\$0	\$0	\$0	\$80,000	\$80,000
Total	\$17,476,500	\$47,273,500	\$106,170,000	\$68,525,000	\$239,445,000

4.3. Facilitating Investment

The following reflect options applied by successful destinations to find ways to achieve the desired mix of new commercial accommodation and built visitor attractions for sustainable economic growth and to strengthen the accommodation mix. Without different forms of government intervention, most accommodation investments will struggle to be realised in the region, in the current economic environment.

<p>1. Positive government intervention to support destination aspirations</p>	<p>2. Effective dialogue between the commercial accommodation sector, RTOs, councils, and central government agencies</p>	<p>3. More effective government agency and council inter-departmental decision-making to support new tourism development</p>	<p>4. Finding suitable land in areas appropriate for new tourism investment and zoning it fit for purpose</p>
<p>5. Tilting the playing field by offering upfront concessions and support to stimulate investment</p>	<p>6. Clustering tourism development into nodes, hubs, and precincts along with other forms of tourism development</p>	<p>7. Ensuring alternative forms of transport (airlines, coach, rail, and private vehicle use) to access the destination</p>	<p>8. Developing effective visitor management strategies</p>

4.3.1. Tourism Investment Opportunities

There are a number of commercial accommodation investment and development opportunities identified which correlate to local government desires to stimulate economic uplift in a mix of areas throughout Manawatū. These include:

- hinterland eco chalets and/or cottages;
- glamping style development;
- medium-to-larger hotels serviced apartment complexes or resorts;
- destination holiday parks;
- boutique hotels/resorts; and
- uniquely themed forms of commercial accommodation which could be in the form of an art hotel (to support an arts and cultural precinct), a nature-focused commercial accommodation facility to support a national park/eco attraction and a mana whenua-themed commercial accommodation facility to help support the viability of a new Māori visitor cultural experience.

4.3.2. Investment Challenges

New forms of commercial accommodation have not been determined (other than identifying whether they would ideally be in broad terms - CBD, farming, bush-based, or coastal-based near say Himatangi). This is partly because, for the most part, councils in the region are not owners of land which they can easily designate for commercial accommodation.

The onus, therefore, falls to the investor/developer to identify suitable sites for new accommodation facilities which may be on private land, potentially Crown land, on conservation land or other land owned by Government agencies or other parties.

However, as identified in this DMP Refresh for Manawatū, there can be significant challenges in getting government land activated for tourism purposes. Without a paradigm shift within government to act as the catalyst/facilitator for tourism investment and development, the ability to activate commercial tourism development opportunities on a timely basis risks being often viewed as too challenging by the development community, especially when compared to residential development, mixed-use commercial development, industrial estates and/or special interest sites for public amenities.

This problem is seen across the country and has often acted as a major handbrake in activating timely new or redeveloped tourism development opportunities.

4.3.3. Investment Needs

What is clear from the research and analysis for this Manawatū DMP, however, is the need to introduce various forms of new and mostly higher quality commercial accommodation than currently exists, to help fill a product gap in the supply of facilities in Manawatū region. Industry and developer feedback, especially from the tourism accommodation sector and the investors and owners of facilities, noted through workshops and interviews, the need to:

- improve the level of visitor yield generated to improve the profitability of commercial tourism accommodation investment to make it a more desirable sector for investment;
- grow the range of commercial accommodation facilities available (to appeal to a broader visitor market);
- increase the overall quality of commercial accommodation facilities to help attract a higher spending visitor market and to broaden the region's appeal to various niche markets with a higher propensity to spend and wanting a higher quality of accommodation;
- facilitating greater visitor dispersal throughout Manawatū region so that the economic benefits of the visitor economy can be shared more widely, with emphasis on stimulating visitation to more hinterland areas to support and benefit rural communities;
- cater to the demand for new and better-quality food and beverage outlets in many locations which require a higher spending visitor market, staying overnight, to help make them more commercially viable; and
- increase local employment opportunities along with broader investment, particularly as local economies leverage new tourism facilities to pick up more strongly and to encourage visitation by international visitor markets especially, noting that their average spend is noticeably higher than for domestic visitor markets.

4.3.4. Need for Government Intervention

As most of the new accommodation being suggested is 4-star quality or higher, it is particularly important that councils especially are able to offer the accommodation sector:

- support for securing potential development sites for locating new commercial accommodation whether this be long-term leases or freehold land;
- working closely with developers and investors to assist in getting council planning approvals through in realistic timeframes where these offer desirable new forms of accommodation or expansion to existing accommodation properties where this is possible, and
- work in tandem with project proponents where central government agency approvals are also required so projects do not get unduly held up at a central government level.

A clear message from the development community is the desire for greater certainty from the government at all levels, to help mitigate project risk. This ranges across all forms of commercial accommodation from more remote and at times small-scale commercial development such as glamping tents through to eco chalets and cabins, and a range of boutique hotels and larger-scale development where these may also be part of mixed-use development projects (sometimes with a co-located visitor attraction, a function or conference venue, retail etc.).

The consistent message received from operators, developers and investors is that the planning approval process at both a local and regional government level is far more difficult to navigate and far less supportive of tourism development opportunities than other forms of property investment experienced.

4.3.5. When to Tilt the Playing Field

Current occupancy levels, room rates and yield being achieved in the Manawatū should be sufficient for many existing commercial accommodation operators to consider major refurbishment and/or expanding existing properties to better meet changing market demand. The fact that this is not occurring is due to a lack of competition necessitating the need for this. As a result, the region has an ageing accommodation supply, leading to challenges of how to competitively market and position the region for the immediate future. Unlike most regions nation-wide, Manawatū benefits from strong year-round occupancy rates, mostly due to business demand.

Mechanisms need to be introduced to tilt the playing field so that new investment can be actively encouraged and a more competitive environment stimulated. Forms of government intervention could include (but may not be limited to) the following.

Stakeholders who can effect change:				
◆ Central Government ■ Local Government ▲ Other				
Non-financial Incentives	Floor space bonuses & height incentives ■	Release of Crown land for tourism development ◆	Mixed-use development schemes ■	Exclusive zoning for tourism developments ◆ ■
	Support for accessible room requirements for facilities with less than 25 rooms ◆ ▲ ■	Planning & Process Support to speed up the approval process ◆ ▲ ■		
Financial Incentives	Tax exemptions/concessions ◆	Accelerated depreciation allowance for hotels etc. ◆	Better access to utility supply ▲ ■	Government-subsidised loans ■ ◆
	Income guarantee by operators to encourage more off-the-plan buyers of units ◆ ▲	Purchase of land and concessions on long-term ground leases ◆ ▲ ■	Incentives for heritage conversion to tourism use ◆ ▲ ■	Direct Government Investment (short and/or longer term) ■ ◆

4.3.6. Non-Financial Inducements and Incentives

The following outlines the various non-financial inducements - incentives that could be considered by various levels of government and stakeholders to help de-risk short-term accommodation development.

4.3.6.1. Floor space bonuses and height bonuses for hotel development

This involves providing floor space and/or height bonuses to those looking to develop short-term accommodation to enable a higher density of development on the site. This mechanism is primarily used to encourage the development of additional new hotels and serviced apartment rooms where a greater density can support project economics.

4.3.6.2. Release of crown land for tourism development

This allows for exclusive use over a specified parcel of Crown-owned land for a defined term and purpose. This can provide the developer with confidence where longer-term security is important and where land can be leased long term, rather than sold.

4.3.6.3. Mixed-Use Development Schemes (which include short-term accommodation as a component)

This includes (but is not limited to) allowing a proportion of the development to comprise longer-term residential apartments or similar. This allows for various development elements to be combined as part of the total development, to assist with facilitating project funding through the sale (often off the plan) of residential and commercial units to help fund project development.

Councils and project financiers are also proving to be more attracted to mixed-use developments than conventional apartment

development projects given the reduced level of risk offered by the diversified nature of these investments.

Because these properties combine an assortment of uses and residents, investors and developers can better safeguard themselves against major vacancies when compared to single-use apartments or hotels.

‘Such developments can solve floor layout issues which have traditionally hindered residential sales. Instead of locating apartments on lower floors that have a less desirable view and ultimately a lower price tag, developers can use this space for hotel rooms or student accommodation, office space, parking or other amenities.’

4.3.6.4. Exclusive zoning for tourism developments

Including zoning specific sites within a special purpose zone which aims to encourage tourism-related uses. This is often used to streamline the planning approval framework to ensure the standardisation of tourism development opportunities. The current lack of sufficient fit-for-purpose-zoned land within Manawātū is seen as a significant limitation in encouraging new tourism project investment.

4.3.6.5. Planning & Process Support

Providing support to project applicants through the development process (particularly in the planning and approvals phase) is important. While economic development and tourism personnel in councils are often seen to offer strong support, other departments in councils (notably town planning, social planners and engineering) are more often not seen as so supportive of tourism development project applications.

4.3.6.6. Support for accessible room requirements for hotels etc. under 25 rooms

Accessible room requirements are often detailed in the Disability (Access to Premises – Buildings) Standards and require a minimum number of accessible rooms must be provided by short-term accommodation providers. Accessible room requirements add significant construction costs and reduce operating margins for hotels. Government financial support for investors to provide more accessible rooms is required to better deliver to the needs of the accessible market niche.

4.3.7. Financial Inducements and Incentives

There are a variety of financial incentives which can encourage short-term accommodation development. These are noted below.

4.3.7.1. Tax exemptions/concessions

This includes providing tax exemptions to hotel developments including capital works deduction incentives.

4.3.7.2. Government-subsidised loans

From time to time and to help support project financing, government support including offering more favourable terms and repayment conditions than traditional private financial institutions may be considered. From time to time this approach has occurred where the government, more often through their established development corporations, have assisted with project financing to help de-risk projects, especially during initial establishment periods where project viability can be more tenuous (first 5 years of project operations). This can also include the government underwriting the commercial loan for a period of time to help achieve more favourable terms from commercial financing sources to support a project.

4.3.7.3. Accelerated depreciation allowance for hotels

This can often stimulate reinvestment into an existing product or the development of new accommodation properties. This offers greater deductions in the earlier years of the life of an asset. This is useful for accommodation operators because, with short-term accommodation, it can often take 5+ years to see a positive return on investment.

Case Study: Grant in Lieu of Depreciation, NZ



A Grant in lieu of depreciation scheme was introduced in 1988 due to a lack of new hotels and the refurbishment of existing hotels occurring. For a set 12-month period, the NZ Government adjusted depreciation schedules to support upfront depreciation for new hotels and major refurbishment to existing properties which resulted in several new properties being commenced and older properties being refurbished. Without Government intervention, it was seen that the supply of commercial accommodation room stock would continue to be below market demand levels, and the overall quality of commercial accommodation stock was noted as an issue by inbound tour operators and wholesalers trying to sell the destination.

4.3.7.4. Income guarantee by developers/operators

This may occur where private investors are being requested to purchase units (residential and commercial) off the plan and the project proponent/developer guarantees a level of return on investment for a set period (often being the first 2-3 years).

The financing costs for such an arrangement are often built into the investment asking price.

4.3.7.5. Purchase of Land and Concessions on long-term ground leases

Including offering peppercorn rental rates in the first few years of development and/or operation, and/or where ground lease payments are not introduced until a development is operational.

4.3.7.6. Incentives for heritage conversion to tourism use

This includes earmarking publicly owned heritage buildings and sites for accommodation development While guaranteeing access for the public (because of heritage value) but which provides development opportunities for tourism operators. At times this offers a solution to tourism’s often limited ability to compete to access suitable sites including high-value land.

4.3.7.7. Assisting with access to utility supply

Councils, in particular, have supported strategic projects where site locations are further from sewer connections, waste management, potable water, electricity etc. and where utility services are brought to the boundary of sites. In addition, and in more remote locations, this may extend to supporting road access to sites.

4.3.7.8. Direct Government Investment

From time to time government, at various levels has had to provide the capital to build and develop commercial accommodation and/or to support investment by a third party where a level of government support is seen as important to offer confidence to primary investors.

Case Study: Tourist Hotel Corporation, NZ



Tourist Hotel Corporation in NZ: Government-built hotels in Milford, Te Anau, Mt Cook, Franz Josef and Fox Glaciers in the 1960s as these were locations where major visitor attractions were located but without overnight accommodation, visitation was expected to be very limited. The Government built hotels, ran them and eventually privatised them. It was not possible at the time to secure private investor interest as these sites were regional and remote, so private investors had little to leverage off and were deemed to be higher-risk ventures. These locations also suffered from very high seasonality, typically offering a distinct 4-5-month tourism season with minimal visitation for the rest of the year. These locations, are now some of the most visited in New Zealand and have grown to include a range of additional commercial accommodation options (camping grounds, lodges etc.) and land, air and water-based tour operators etc. But for the government undertaking the initial investment, however, these iconic locations may have struggled to come to fruition.

Case Study: Hamilton, NZ (major branded hotels)



Waikato Tainui undertook the development of two branded Accor properties within the CBD of Hamilton. To help secure the investment, Council agreed to be a minority equity investor/shareholder for a period of time but with the option of selling out of their investment back to the major shareholder, within an agreed timeframe. Without the Council’s commitment to invest to help support the development, it is uncertain if the development would have been undertaken. And noting that these were the first major branded hotels in Hamilton and eventually well supported by both business and leisure markets.

Part 5: Appendices

Appendix 1 NPS Calculation

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

The NPS is calculated using a scale (see Figure 42), with:

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

TripAdvisor and Google²⁶ use a scale of 1-5 for consumer ratings on accommodation products. Converting this to the NPS scale means that a rating of 1-3 is considered "detractors" for the product, a score of 4 are the product's "passives" and a score of 5 is the product's "promoters".²⁷ Only product with more than 5 reviews was included in the NPS assessment to ensure a robust sample size.

Figure 42: NPS Score Scale



²⁶ Booking.com has not been used to derive a NPS because it does not provide a scale of scores, but rather, only provides an overall score. Therefore, an NPS is unable to be calculated from Booking.com listings.

²⁷ <https://birdeye.com/blog/net-promoter-score-explained/>

Appendix 2 Community Sentiment Survey Questions

- Please indicate your age
- What gender do you identify as?
- What region do you live in?
- The visitor sector is an important industry in Manawatū. (weight)
- The visitor sector has a positive impact on Manawatū. (weight)
- The visitor sector provides good employment opportunities in Manawatū. (weight)
- Residents should ensure they support local tourism businesses in the short-medium term to enable tourism viability. (weight)
- In the past 12 months, have you heard about any tourism promotional initiatives in Manawatū? (weight)
 - Can you tell us more about the tourism initiatives you have heard about in your area?
- Did you know that our regions website ManawatūNZ.co.nz showcases and celebrates all the activities in Palmerston North city and Manawatū for visitors and residents?
- What, in your opinion, are the main reasons people visit Manawatū?
- What kinds of other activities are undertaken?
- What do you think may be the main reasons people don't visit Manawatū?
- How likely are you to take a holiday in New Zealand in the next 12 months? (weight)
 - What kind of holiday have you planned?
- How likely are you to take a holiday overseas in the next 12 months? (weight)
- Do you have any reservations about growing the number of visitors to Manawatū if they are from other parts of New Zealand? (weight)
- Do you have any reservations about growing the number of international visitors coming to Manawatū as international borders open? (weight)
- Has the impact of COVID-19 caused you to change your views on the visitor sector and visitation in Manawatū? (weight)
 - Please describe how your views have changed
- Do you have any concerns for the growth of the visitor economy in Manawatū in the future? (weight)
 - What are your main concerns, if any?
- What are your top three 'must-do' experiences you would recommend to visitors who come to Manawatū?
- What in your opinion would make Manawatū an even better visitor destination?
- Would you actively encourage your friends and family living outside of Manawatū to come and visit? (weight)
 - If no or unsure, what are you reasons?
- Is there any other comment you'd like to share about the visitor industry in Manawatū?
- Enter your email address if you'd like to go in the draw to win a \$300 Prezzy Card.

Appendix 3 Full Matrix with Values

Table 8: Full matrix with values

Project Name	Attract a higher spending visitor market	Catalyst to stimulate other investment	Employment (Op.) Potential	Encourage mana whenua in the visitor economy	Estimated visitation	Improve the environment	Landowner	Likelihood to be profiled by TNZ	Likely to be supported by community	Likely visitor appeal	Need for ongoing operational govt. funding	Regional dispersal of visitors	Secure Govt. Funding	Short term project commencement	Stronger domestic visitation	Stronger international visitation	Uniqueness
Advocacy for improved digital coverage	n/a	None	None	No	None	n/a	Unknown	None	High	n/a	Medium	None	Medium	No	None	None	None
Agri showcase & food experience	High	High	Medium	Yes	High	Medium	Unknown	Medium	High	High	None	High	Medium	No	High	High	High
IanMcKeanPinetum&arboretum	Low	None	n/a	No	Low	Medium	Private	None	Low	Low	None	Low	None	No	Low	Low	Medium
Arapuke forest adventure hub	Medium	High	Medium	Yes	High	None	Council	Medium	High	High	None	Medium	Medium	No	High	High	High
Arapuke Forest Park road access	Low	n/a	None	No	n/a	High	Unknown	None	Low	Medium	Low	Medium	Low	No	n/a	n/a	n/a
Arapuke to Te Āpiti track skyline walk	Low	Low	None	Yes	Low	Low	Unknown	Low	High	Low	Low	Medium	Low	No	Medium	Low	None
Ashhurst Loop track (Te Āpiti)	Low	Low	None	No	Low	Low	Unknown	Low	Medium	Low	Medium	High	Low	Yes	High	High	Low
Barneys Point loop track (Te Āpiti)	Low	Low	None	No	Low	Low	Unknown	Low	Medium	Low	Medium	High	Low	Yes	High	High	Low
Beach blokart event	None	Low	None	No	n/a	None	Council	Low	Medium	Low	Low	Medium	Low	No	Low	n/a	None
Boutique art hotel in Manawātū District	High	Medium	Medium	No	Medium	None	Private	Low	Medium	High	None	Low	None	No	High	High	Low
CBD rooftop bar	Medium	Low	Medium	No	Medium	None	Private	Low	High	Medium	None	None	None	Yes	High	Medium	None
City to Ashhurst/Te Āpiti pathway	Low	Low	None	Yes	Low	Low	Unknown	None	High	Low	Low	Medium	Low	Yes	Medium	Low	None
Conference centre & hotel as anchor for Civic and Cultural P.	High	High	High	Yes	High	None	Council	Medium	High	High	None	Low	Low	No	High	Low	Low
Destination holiday park along riverside precinct	Low	Medium	Low	Yes	High	Medium	Private	Medium	Medium	High	None	Medium	None	No	High	Low	Medium
Enhanced inter-modal transport services (airport, rail and ro.	n/a	High	None	No	None	None	Unknown	None	High	None	High	None	None	No	None	None	None
Expanded river-based activities (kayak, SUP hire etc.)	Medium	Medium	Low	No	Medium	Low	Private	Low	Medium	Medium	None	Medium	None	Yes	High	Medium	Low
Feilding Civic Centre upgrades	Low	Medium	Low	No	High	None	Council	None	High	Low	None	n/a	Low	No	Low	Low	Low
Gorge mountain bike trail (Te Āpiti)	Medium	Medium	None	No	High	Low	Unknown	Medium	Medium	High	Medium	High	Medium	Yes	High	High	Medium
Himatangi Beach break wall remediation	None	None	n/a	No	n/a	High	Council	None	High	n/a	Low	Low	Low	Yes	None	None	n/a
Himatangi Beach car park	Low	Medium	n/a	No	n/a	High	Council	None	High	n/a	None	n/a	Low	No	Medium	n/a	n/a
Himatangi Beach pop-up trial	Low	Medium	Low	Yes	Medium	None	Private	None	High	Medium	None	Medium	Low	Yes	Medium	n/a	Low
Improved place making throughout the Manawātū	n/a	Medium	None	No	None	n/a	Unknown	None	High	High	Low	None	Low	No	None	None	None
Lindauer Trail (Te Āpiti)	Low	Low	None	No	Low	Low	Unknown	Low	Medium	Low	Medium	High	Low	Yes	High	High	Low
Manawātū Scenic route upgrades	None	Low	n/a	Yes	Low	Low	Other Govt. A.	None	Medium	Medium	Medium	High	Low	No	Medium	Low	Low
Manfeld accommodation & event infrastructure	Medium	Medium	High	No	High	None	Private	Low	Medium	High	None	Medium	None	No	High	Low	Medium
Mt Lees Reserve homestead boutique accommodation	High	Low	Low	No	Low	None	Private	None	Low	Medium	None	Low	None	Yes	Medium	Low	None
Old Gorge Road shared path (Te Āpiti)	Low	Low	None	No	Low	Low	Unknown	Medium	Medium	Low	Medium	High	Low	Yes	High	High	Low
Outdoor hot tubs & wellness facility with dark sky experience	High	Low	Low	No	Low	None	Private	Medium	High	High	None	Medium	None	Yes	High	High	Medium
Outdoor sculpture trail	Low	Low	None	Yes	Medium	Low	Council	Low	High	Medium	Low	Medium	Medium	No	High	Medium	Low
Palmerston North CBD hotel	High	High	High	Yes	High	Low	Unknown	Low	Medium	High	None	Unknown	None	No	High	High	Low
Public toilet facilities	n/a	None	None	No	None	High	Unknown	None	High	n/a	High	None	Low	No	None	None	None
Rangitāne projects (Te Āpiti)	Medium	Medium	None	Yes	Medium	Low	Unknown	Low	Medium	Low	Medium	High	Low	No	Medium	High	High
Rangiwahia Bush Reserve trail & hub development	None	None	None	Yes	Low	Medium	Unknown	None	High	Medium	Medium	Medium	Low	No	Medium	Low	None
Regional garden tours	Medium	Low	Low	No	Medium	Medium	Private	Low	High	Medium	None	High	None	Yes	High	Medium	Medium
Ruahine National Park loop trail	None	None	None	No	Low	Low	DOC	None	Low	Low	Medium	Medium	Low	No	Low	None	None
Ruahine walking trails	None	None	None	Yes	Low	Low	DOC	None	Low	Low	Medium	Low	Medium	No	Low	n/a	None
Skybridge connecting ranges (Te Āpiti)	Low	Medium	None	No	High	Low	Unknown	Medium	Medium	High	Medium	High	Medium	Yes	High	High	High
Skyline track (Te Āpiti)	Low	Low	None	No	Low	Low	Unknown	Low	Medium	Low	Medium	High	Low	Yes	High	High	Low
Suspension bridge (Te Āpiti)	Low	Low	None	No	Low	Low	Unknown	Low	Medium	Low	Medium	High	Low	Yes	High	High	Low
TGorgeQuarteramphitheatre	Low	Low	None	No	Medium	None	Unknown	Low	Medium	Medium	None	Low	Low	Yes	Medium	None	Low
Gorge Quarter - Tourism Hub West (Te Āpiti)	High	Medium	Low	No	Medium	Low	Private	Low	Medium	Medium	None	High	Low	Yes	High	High	Low
UNESCO Geopark (Te Āpiti)	Low	Low	None	Yes	Medium	Low	Unknown	Medium	Medium	Low	Medium	High	Low	No	Medium	Medium	High

Appendix 4 Full Matrix with Scores

Table 9: Full matrix with scores (unweighted score/weighted score)

Project Name	Attract a higher spending visitor market	Catalyst to stimulate other investment	Employment (Op.) Potential	Encourage mana whenua in the visitor economy	Estimated visitation	Improve the environment	Landowner	Likelihood to be profiled by TNZ	Likely to be supported by community	Likely visitor appeal	Need for ongoing operational govt. funding	Regional dispersal of visitors	Secure Govt. Funding	Short term project commencement	Size of private \$	Size of public \$	Stronger domestic visitation	Stronger international visitation	Uniqueness	Total
Advocacy for improved digital coverage	1/3	0/0	0/0	0/0	0/0	1/2	1/1	0/0	3/6	1/2	1/1	0/0	2/6	0/0	0/0	3/3	0/0	/	0/0	13/24
Agri showcase & food experience	3/9	3/9	2/2	1/3	3/6	2/4	1/1	2/2	3/6	3/6	3/3	3/3	2/6	0/0	4/8	0/0	3/6	3/6	3/3	44/83
IanMcKeanPinetum&arboretum	1/3	0/0	1/1	0/0	1/2	2/4	3/3	0/0	1/2	1/2	3/3	1/1	0/0	0/0	2/4	4/4	1/2	1/2	2/2	24/35
Arapuke forest adventure hub	2/6	3/9	2/2	1/3	3/6	0/0	2/2	2/2	3/6	3/6	2/2	2/2	2/6	0/0	4/8	0/0	3/6	/	3/3	37/69
Arapuke Forest Park road access	1/3	1/3	0/0	0/0	1/2	3/6	1/1	0/0	1/2	2/4	2/2	2/2	1/3	0/0	0/0	0/0	1/2	1/2	1/1	18/33
Arapuke to Te Āpiti track skyline walk	1/3	1/3	0/0	1/3	1/2	1/2	1/1	1/1	3/6	1/2	2/2	2/2	1/3	0/0	0/0	0/0	2/4	1/2	0/0	19/36
Ashhurst Loop track (Te Āpiti)	1/3	1/3	0/0	0/0	1/2	1/2	1/1	1/1	2/4	1/2	1/1	3/3	1/3	1/2	0/0	0/0	3/6	3/6	1/1	22/40
Barneys Point loop track (Te Āpiti)	1/3	1/3	0/0	0/0	1/2	1/2	1/1	1/1	2/4	1/2	1/1	3/3	1/3	1/2	0/0	0/0	3/6	3/6	1/1	22/40
Beach blokart event	0/0	1/3	0/0	0/0	1/2	0/0	2/2	1/1	2/4	1/2	2/2	2/2	1/3	0/0	0/0	2/2	1/2	1/2	0/0	17/27
Boutique art hotel in Manawatu District	3/9	2/6	2/2	0/0	2/4	0/0	3/3	1/1	2/4	3/6	3/3	1/1	0/0	0/0	4/8	4/4	3/6	3/6	1/1	37/64
CBD rooftop bar	2/6	1/3	2/2	0/0	2/4	0/0	3/3	1/1	3/6	2/4	3/3	0/0	0/0	1/2	3/6	4/4	3/6	2/4	0/0	32/54
City to Ashhurst/Te Apiti pathway	1/3	1/3	0/0	1/3	1/2	1/2	1/1	0/0	3/6	1/2	2/2	2/2	1/3	1/2	0/0	0/0	2/4	1/2	0/0	19/37
Conference centre & hotel as anchor for Civic and Cultura..	3/9	3/9	3/3	1/3	3/6	0/0	2/2	2/2	3/6	3/6	3/3	1/1	1/3	0/0	4/8	0/0	3/6	1/2	1/1	37/70
Destination holiday park along riverside precinct	1/3	2/6	1/1	1/3	3/6	2/4	3/3	2/2	2/4	3/6	3/3	2/2	0/0	0/0	4/8	4/4	3/6	1/2	2/2	39/65
Enhanced inter-modal transport services (airport, rail and..	1/3	3/9	0/0	0/0	0/0	0/0	1/1	0/0	3/6	3/6	0/0	3/3	1/3	0/0	1/2	2/2	0/0	/	0/0	18/35
Expanded river-based activities (kayak, SUP hire etc.)	2/6	2/6	1/1	0/0	2/4	1/2	3/3	1/1	2/4	2/4	3/3	2/2	0/0	1/2	2/4	4/4	3/6	2/4	1/1	34/57
Feilding Civic Centre upgrades	1/3	2/6	1/1	0/0	3/6	0/0	2/2	0/0	3/6	1/2	3/3	1/1	1/3	0/0	0/0	0/0	1/2	1/2	1/1	21/38
Gorge mountain bike trail (Te Āpiti)	2/6	2/6	0/0	0/0	3/6	1/2	1/1	2/2	2/4	3/6	1/1	3/3	2/6	1/2	0/0	0/0	3/6	3/6	2/2	31/59
Himatangi Beach break wall remediation	0/0	0/0	1/1	0/0	1/2	3/6	2/2	0/0	3/6	1/2	2/2	1/1	1/3	1/2	0/0	0/0	0/0	0/0	1/1	17/28
Himatangi Beach car park	1/3	2/6	1/1	0/0	1/2	3/6	2/2	0/0	3/6	1/2	3/3	1/1	1/3	0/0	0/0	2/2	2/4	1/2	1/1	25/44
Himatangi Beach pop-up trial	1/3	2/6	1/1	1/3	2/4	0/0	3/3	0/0	3/6	2/4	3/3	2/2	1/3	1/2	1/2	3/3	2/4	1/2	1/1	30/52
Improved place making throughout the Manawatu	1/3	2/6	0/0	0/0	0/0	1/2	1/1	0/0	3/6	3/6	2/2	0/0	1/3	0/0	0/0	2/2	0/0	/	0/0	16/31
Lindauer Trail (Te Āpiti)	1/3	1/3	0/0	0/0	1/2	1/2	1/1	1/1	2/4	1/2	1/1	3/3	1/3	1/2	0/0	0/0	3/6	3/6	1/1	22/40
Manawatu Scenic route upgrades	0/0	1/3	1/1	1/3	1/2	1/2	2/2	0/0	2/4	2/4	1/1	3/3	1/3	0/0	0/0	0/0	2/4	1/2	1/1	20/35
Manfeld accommodation & event infrastructure	2/6	2/6	3/3	0/0	3/6	0/0	3/3	1/1	2/4	3/6	3/3	2/2	0/0	0/0	4/8	4/4	3/6	1/2	2/2	38/62
Mt Lees Reserve homestead boutique accommodation	3/9	1/3	1/1	0/0	1/2	0/0	3/3	0/0	1/2	2/4	3/3	1/1	0/0	1/2	4/8	4/4	2/4	1/2	0/0	28/48
Old Gorge Road shared path (Te Āpiti)	1/3	1/3	0/0	0/0	1/2	1/2	1/1	2/2	2/4	1/2	1/1	3/3	1/3	1/2	0/0	1/1	3/6	3/6	1/1	24/42
Outdoor hot tubs & wellness facility with dark sky experie..	3/9	1/3	1/1	0/0	1/2	0/0	3/3	2/2	3/6	3/6	3/3	2/2	0/0	1/2	4/8	4/4	3/6	3/6	2/2	39/65
Outdoor sculpture trail	1/3	1/3	0/0	1/3	2/4	1/2	2/2	1/1	3/6	2/4	2/2	2/2	2/6	0/0	1/2	3/3	3/6	2/4	1/1	30/54
Palmerston North CBD hotel	3/9	3/9	3/3	1/3	3/6	1/2	1/1	1/1	2/4	3/6	3/3	3/3	0/0	0/0	4/8	4/4	3/6	3/6	1/1	42/75
Public toilet facilities	1/3	0/0	0/0	0/0	0/0	3/6	1/1	0/0	3/6	1/2	0/0	0/0	1/3	0/0	0/0	2/2	0/0	/	0/0	12/23
Rangitāne projects (Te Āpiti)	2/6	2/6	0/0	1/3	2/4	1/2	1/1	1/1	2/4	1/2	1/1	3/3	1/3	0/0	3/6	0/0	2/4	3/6	3/3	29/55
Rangiwahia Bush Reserve trail & hub development	0/0	0/0	0/0	1/3	1/2	2/4	1/1	0/0	3/6	2/4	1/1	2/2	1/3	0/0	0/0	0/0	2/4	1/2	0/0	17/32
Regional garden tours	2/6	1/3	1/1	0/0	2/4	2/4	3/3	1/1	3/6	2/4	3/3	3/3	0/0	1/2	1/2	4/4	3/6	2/4	2/2	36/58
Ruahine National Park loop trail	0/0	0/0	0/0	0/0	1/2	1/2	1/1	0/0	1/2	1/2	1/1	2/2	1/3	0/0	0/0	0/0	1/2	0/0	0/0	10/17
Ruahine walking trails	0/0	0/0	0/0	1/3	1/2	1/2	1/1	0/0	1/2	1/2	1/1	1/1	2/6	0/0	0/0	0/0	1/2	1/2	0/0	12/24
Skybridge connecting ranges (Te Āpiti)	1/3	2/6	0/0	0/0	3/6	1/2	1/1	2/2	2/4	3/6	1/1	3/3	2/6	1/2	0/0	0/0	3/6	3/6	3/3	31/57
Skyline track (Te Āpiti)	1/3	1/3	0/0	0/0	1/2	1/2	1/1	1/1	2/4	1/2	1/1	3/3	1/3	1/2	0/0	0/0	3/6	3/6	1/1	22/40
Suspension bridge (Te Āpiti)	1/3	1/3	0/0	0/0	1/2	1/2	1/1	1/1	2/4	1/2	1/1	3/3	1/3	1/2	0/0	0/0	3/6	3/6	1/1	22/40
Gorge Quarter - amphitheatre	1/3	1/3	0/0	0/0	2/4	0/0	1/1	1/1	2/4	2/4	3/3	1/1	1/3	1/2	0/0	0/0	2/4	0/0	1/1	19/34
Gorge Quarter - Tourism Hub West (Te Āpiti)	3/9	2/6	1/1	0/0	2/4	1/2	3/3	1/1	2/4	2/4	3/3	3/3	1/3	1/2	4/8	4/4	3/6	3/6	1/1	40/70
UNESCO Geopark (Te Āpiti)	1/3	1/3	0/0	1/3	2/4	1/2	1/1	2/2	2/4	1/2	1/1	3/3	1/3	0/0	0/0	0/0	2/4	2/4	3/3	24/42

