



SOUTHLAND MURIHIKU
DESTINATION STRATEGY 2019 - 2029
12 month review

To February 2021





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Executive summary

When the Southland Murihiku Destination Strategy 2019- 2029 was launched in December 2019, it was anticipated the recommendations within it would be implemented over the following 10 years. However, only one year later, already two thirds of the 68 recommendations meant to guide the sustainable growth of tourism in the region are either complete, in progress or under investigation, all despite the interruption of COVID-19.

This significant progress can be attributed to the combined commitment made both in principle and in resourcing by key stakeholder organisations to achieve the outcomes of the Strategy. The ability to continue this pace of activity and to grow the visitor economy will be determined by the level of ongoing support offered by key stakeholders - particularly from councils, central government, and the private

sector – as well as the ability of the region to work collaboratively. The degree to which communities buy in to sustainable tourism, will also have an effect on the ability to achieve the recommendations.

Great South, as the guardian and driver of the Strategy, has integrated recommendations and priorities within its business and operations. This will ensure its approach to destination management incorporates all aspects of destination development and promotion as reflected in the New Zealand-Aotearoa Government Tourism Strategy.

COVID-19 PANDEMIC

With the global pandemic of COVID-19 closing New Zealand's borders to international visitors in early 2020, the region's tourism sector has had a challenging year. Great South remains committed to supporting the Southland community and business sector during this challenging time and with support of central and local government, is delivering a range of services to support the region's restart and overall recovery.

One such action has been to review the Strategy to ensure it is fit for purpose in a COVID-19 environment. The review has ensured there is a clear and prioritised focus on the domestic market and supporting businesses to 'pivot' or 'repackage'

their experiences where possible. The review has also reinforced the need for Southland to focus on projects that represent its unique selling points which will help differentiate it in an extremely competitive domestic tourism sector.

This has resulted in Great South's prioritised focus on development of key projects as below:

- ▶ Bluff Motupōhue 2020 Tourism Master Plan
- ▶ Food Tourism
- ▶ Agritourism
- ▶ Inter-regional Touring Routes
- ▶ Invercargill - The Gateway to Southland
- ▶ Low Emission Tourism (Sustainable Catlins, Cycling, Walking, and Dark Skies)

The Strategy had a clear focus to increase visitor spend and extend length of stay. Unfortunately, COVID-19 meant this was not achieved in 2020. These goals will continue to be re-evaluated as the situation changes. Great South will continue to provide tourism business support, particularly through the Regional Business Partner programme. It will also provide data and visitor insights to support destination management and to allow measurement of tourism activity, including spend and visitor flows.



Refreshing your memory

SOUTHLAND MURIHIKU DESTINATION STRATEGY

The development of a strategy was a key recommendation of the Southland Regional Development Strategy (SoRDS) Action Plan, in recognition of significant tourism growth in Southland. From May 2012 to May 2019, Southland achieved 50.5% growth in tourism spend and 57.1% growth in guest nights.

The Strategy was developed through a process of extensive consultation, including a large number of interviews, workshops and discussions, surveys completed by more than 390 people with an interest in Southland's future, as well as detailed research and analysis.

The Strategy provides a blueprint for how the

Southland destination is managed, establishes a framework to ensure the economic and social benefits of tourism are shared across the entire Southland region moving forward, and represents a shift in the approach to tourism planning.

Instead of looking only at destination marketing, the Strategy embraces a destination management focus which involves taking a holistic approach to planning for, and sustainably growing the visitor destination.

The Strategy aligns with the New Zealand-Aotearoa Government Tourism Strategy and has been developed incorporating the best practice principles of destination management.

THE VISION

“ For Southland to be recognised as a distinct visitor destination (and a place to live, work and invest) guided by strong sustainability principles and values.

THE GOALS

1 Reach \$1billion in visitor spend by 2025 and \$1.4billion by 2029

2 Grow overnight visitation to 1.3million visitors by 2029

Southland tourism sector highlights

FOR THE 2020 YEAR

REGIONAL PERFORMANCE AGAINST TARGETS

Prior to COVID-19, the region was tracking well to reach the spend goals outlined in the Strategy (\$1 billion visitor spend by 2025). For the calendar year 2019, the total Southland region achieved 3% growth in visitor spend which equated to \$692 million, with Southland RTO (Regional Tourism Organisation) up by 2% to \$442m and Fiordland RTO up by 5% on the previous year to \$250m. However, in 2020 the region faced an emergency flooding event in the first week of February, closely followed by border closures, national lockdown and a lack of international visitors as a result of COVID-19. At the same time the government changed its approach to data, meaning 2020 activity needed to be measured using a different methodology.

CHANGE IN DATA COLLECTION

Since COVID-19 the Government's key measurement tool for visitor spend, the Monthly Regional Tourism Estimates (MRTEs), has become unfit for purpose. This is due to increased use of international cards by New Zealanders returning home, a reliance on international surveys, and characteristic changes to the visitor market (length of stay, type and source of visitors). Great South now monitors and reports visitor spend using Marketview data, which captures actual visitor spend through electronic card transactions. It does not include visitor spend with cash, online purchases, bookings through agents or prebooked activities and as such represents a portion of the previously estimated MRTEs, which attempted to account for the value of these activities.

THE IMPACT OF COVID-19

COVID-19 has severely impacted visitor spend and hampered progress to achieve the \$1b visitor spend goal detailed in the Strategy. During this time, and while international borders remain closed, Great South's focus has been on stimulating domestic visitation and monitoring the situation based on prior spend levels. Key indicators monitored have shown the number of visitors and spend through the Southland region were significantly impacted from March 2020 onwards. As the country moved out of

lockdown and with domestic travel possible again some parts of the region have, and are faring, more positively than others. When split by RTO, Southland RTO has shown a strong rebound in visitor numbers and spend, while Fiordland RTO has not, largely due to its heavy reliance on large volumes of international visitors.

INSIGHTS AND OBSERVATIONS

Marketview card spend data shows that in January 2020 both RTOs were tracking strongly compared to the same month in 2019. However, with the impacts of COVID-19, both RTOs fell strongly and Fiordland recorded a 94% reduction in spend in April 2020 relative to April 2019. Southland RTO also had significant decline due to COVID-19 but has subsequently recovered quickly, and at times outperformed previously recorded spend, while Fiordland RTO has not.

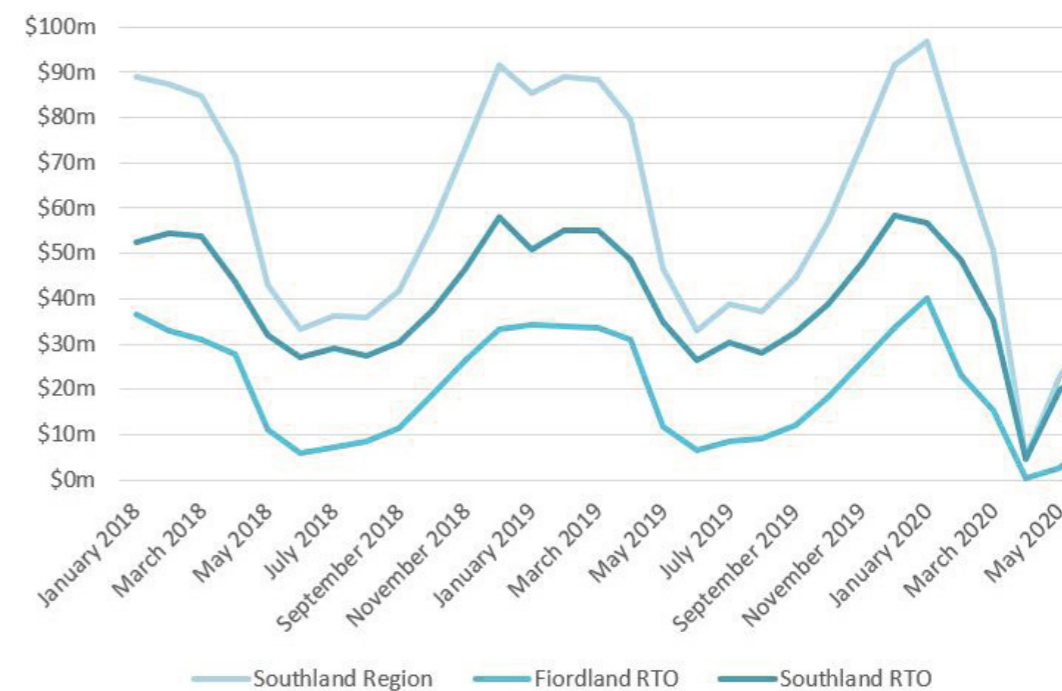
After moving closer to the prior year's spend in July, Fiordland RTO has continued to face steady decline making it the worst affected RTO in the country. The reasons for this are linked to the fact that Fiordland is a significantly isolated region; it does not see the through-traffic other areas benefit from and international visitors usually account for a high percentage of visitor spend (approx. 65%).

Other destinations within Southland have seen a different trend in visitation activity. Stewart Island Rakiura had 26% more visitors between June and November than the previous year while Milford Sound Piopiotahi saw a decrease of 82% on the 2019 calendar year.

With a largely domestic visitor market, data and operator experience shows strong visitation over weekends and holiday periods with quieter periods mid-week. Key travel routes through Southland remain consistent with the Southern Scenic Route and State Highway 6 from Invercargill to Queenstown showing good traffic volume. Many domestic visitors appear to be focused on self-drive touring, utilising the lack of international travel as an opportunity to experience more of New Zealand and regions they may not have been to before, such as Southland.

MONTHLY VISITOR SPEND BY RTO AND REGION (MRTEs)

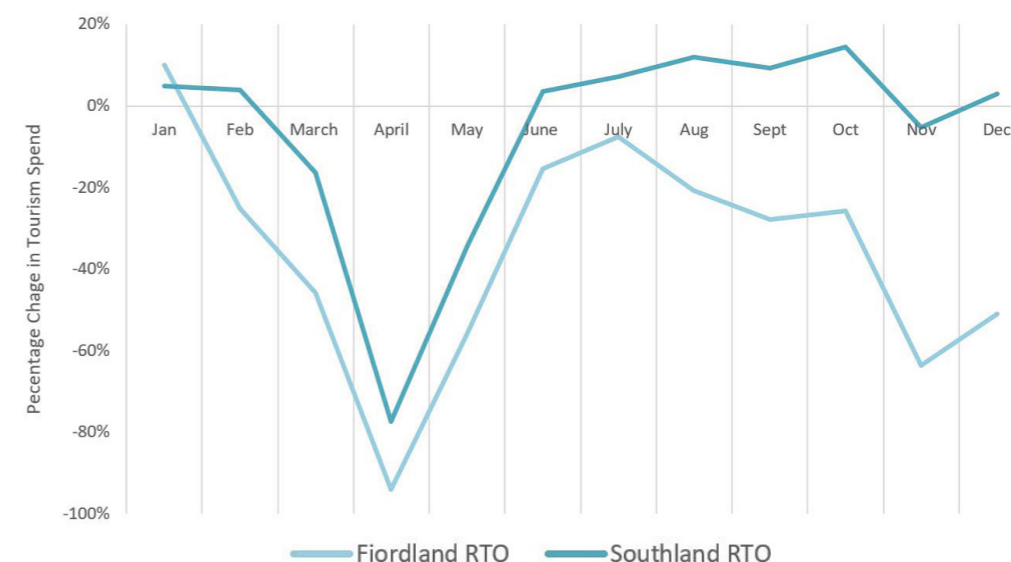
Source: MBIE Monthly Regional Tourism Estimates (MRTEs)



Note: The two RTOs combine to form the Southland Region

PERCENTAGE CHANGE IN MONTHLY VISITOR SPEND BETWEEN 2019 AND 2020

Source: Marketview



Implementation approach

To achieve the goals in the Strategy, a comprehensive range of recommendations were developed and structured as follows:

- ▶ **Eight 'building block' priority recommendations**
- ▶ **Five high priority investment recommendations**
- ▶ **55 recommendations as identified within the five groupings of: product development, infrastructure, governance, sustainability, marketing and promotion**

ROLE OF GREAT SOUTH

Great South is the guardian and driver of the Strategy, in partnership with the region's councils and other major stakeholders.

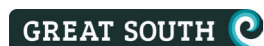
While Great South will oversee the overall implementation of the Strategy, there are a variety of agencies and groups that are already playing key roles in its effective implementation.

It was a recommendation of the Strategy that a tourism leadership group be formed, however this has been delayed due to COVID-19. That group would work alongside Great South to help drive the overall implementation of the Strategy.

Great South elected to prioritise four of the eight building block projects in the Strategy, because they either had a regional focus, enabled other projects to happen, or were an extension of its current business.

Great South is also supporting the five high priority investment recommendations including the Milford Opportunities project, Maruwai precinct in Gore and development of the Bluff Motupōhue 2020 Tourism Master Plan, which includes two of the high investment projects within it.

Of the other 55 recommendations in the Strategy, Great South is actively driving 22, while also supporting other project leaders to implement their respective projects.



IMPLEMENTATION APPROACH 1: 'Building block' priority recommendations

The Strategy identified eight 'building block' recommendations to sustainably manage and grow Southland as a visitor destination. While not being 'ribbon-cutting' projects, they are necessary to ensure a successful destination management approach is achieved. The 'building block' projects are as follows:



Undeterred by COVID-19, Great South progressed four of these eight 'building block' projects as detailed in the following pages. These four projects reflected key priority areas for the region including the development of a strategic approach to events, implementation of key marketing campaigns in a highly competitive domestic sector and an assessment of the overall branding and positioning of the region. The fourth project related to the alignment of the region's two RTOs to support an integrated and sustainable regional tourism approach.

The other four building block projects will be progressed as the region returns to a 'business as usual' environment.

BUILDING BLOCK PROJECT 1: BRANDING (DESTINATION FOCUSED)

The consultation undertaken to develop the Strategy identified a lack of understanding (locally, domestically and internationally) regarding “what” Southland is as a visitor destination and the lack of a clear destination brand. The recommendation was that to elevate Southland’s profile, consideration should be given to developing a destination brand for Southland. This would leverage off the recently completed Southland Story project and should:

- ▶ Determine the region’s destination attributes and its unique points of difference
- ▶ Develop a series of sub-regional/local brands which demonstrate the unique flavour of these areas, but which align with the overarching Southland destination brand
- ▶ Link to local community identity and manaakitanga principles so that locals can clearly identify with a regional brand
- ▶ Ensure that the regional destination brand is a key success factor in delivering a quality meaningful and welcoming experience for visitors
- ▶ Define the brand and the region’s position based on the unique geographic position between Southland and surrounding high profile destinations such as Queenstown and Dunedin

PROGRESS TO DATE

The development of a destination brand has been divided into three stages, two of which are almost complete. This work has provided valuable insight into how both Southlanders perceive their region and how it is perceived by those outside of Southland. This information will be essential in developing any destination branding.

1. Southland Story - COMPLETED

Research undertaken by Principles Consulting defined how Southlanders see themselves and the region, in terms of it as a unique place to live, work, learn and visit.

2. Consumer & Industry Insights - COMPLETED

Testing the pillars identified in the Southland Story, Angus & Associates has undertaken research to understand perceptions of the region by consumers (visitors and possible visitors) as well as industry (trade channels and key stakeholders).

3. Destination Brand Evaluation, Development & Implementation - UNDERWAY

Utilising insights from the Angus & Associates research, current destination brands for both Southland and Fiordland will be evaluated, and new options considered, before being integrated into all regional promotional activity. This will include an upgrade of the southlandnz.com website and development of new content and marketing collateral and assets.

FUTURE FOCUS

The next area of focus is stage 3 (as above).

BUILDING BLOCK PROJECT 2: DESTINATION TOURISM ORGANISATION

The Strategy recommended that the region could benefit from having one well-structured and well-resourced Regional Tourism Organisation (RTO) in the interests of growing the overall visitor economy on a sustainable basis.

This would enable integrated tourism leadership (a SoRDs recommendation) and support a wider focus of not just marketing and promoting the region, but also developing new product, attracting investment and supporting the provision of fit-for-purpose infrastructure.

PROGRESS TO DATE

From April 2021, Destination Fiordland’s RTO responsibilities and services will be delivered by Great South. While Southland will continue to have two RTOs, it presents an opportunity to strengthen the regional Southland visitor proposition with the improved alignment of both RTOs.

With its reliance on international visitors, Fiordland has been one of the RTOs most significantly

impacted by COVID-19 and the lack of international visitors. The aim is to ensure that all aspects of developing a sustainable destination are addressed with a key focus on marketing to local and domestic visitors and supporting businesses to adapt and package their products and experiences accordingly.

FUTURE FOCUS

The priority is to implement the transition of Destination Fiordland into Great South and maximise opportunities to develop, manage and market a unique, highly competitive and sustainable Southland visitor destination, which includes Fiordland.

Support for tourism operators will continue to be provided, building on the \$292,281 that was allocated to Fiordland operators in 2020 through Great South as the government’s Regional Business Partner. This will also include the continued provision of workshops and training to support and build capability.

Another key focus will be realising the potential of positioning Te Anau as the gateway to Milford and Fiordland National Park and other parts of Fiordland in line with the Milford Opportunities Project.

BUILDING BLOCK PROJECT 3: DESTINATION EVENTS STRATEGY

Although Southland has a vibrant calendar of events, only a small portion of these yield high economic value and attract visitors from outside of the region. Most are seen as important community events, rather than visitor-focused destination events.

It was identified that a strategic framework was required to find gaps and opportunities within the existing events calendar, to build capability and capacity within the events sector and to utilise events to enhance visitation to the region. Using events to drive domestic visitation has become more important with international borders closed.

PROGRESS TO DATE

The Southland Murihiku Events Strategy(see page 30), developed by Great South in consultation with key stakeholders, was adopted by all Councils in

late 2020. The five-year Events Strategy reflects a regional commitment and desire to maximise the benefit of events for the region, its community and its people. The vision is ‘a supported dynamic and sustainable event sector that encourages community participation and drives visitation to the region by building on unique points of difference’.

It is focused on achieving four key goals:

- ▶ Attract, retain, grow and enhance sustainable events
- ▶ Maximise community wellbeing: economic, social, cultural and environmental
- ▶ Encourage excellence in event management
- ▶ Provide a balanced events calendar

FUTURE FOCUS

Implementation of the vision and goals identified in the Events Strategy is the key future focus. This will involve multi-stakeholder collaboration and close alignment with regional promotion and marketing in the short term, while events are used as a key driver of domestic visitation.

Ensuring events and tourism align within Fiordland and Southland will be a particular focus, as well as ensuring the dispersal and timing of events throughout the calendar year.

Implementation will be supported with financial support from the government’s Regional Events Fund.

BUILDING BLOCK PROJECT 4: REGIONAL DESTINATION MARKETING PLAN

The Strategy recommended an update of the regional marketing plan to reflect new tourism products proposed in the Strategy, as well as a new destination brand and associated collateral, including the new southlandnz.com website. The marketing plan would identify the most appropriate channels (including social media) to target identified domestic and international markets, as well as strategies targeting locals to encourage greater ownership of the Southland destination brand.

The marketing plan would also seek to ensure that sub-regional marketing initiatives strengthened their respective points of difference to reach niche markets, while at the same time leveraging the destination brand to its full potential.

PROGRESS TO DATE

A marketing plan was developed for the 2019-2020 season, however COVID-19 made this plan irrelevant, both with the limited ability for travel, and with all regions targeting the domestic leisure market. As a result, Great South amended the marketing plan and the following campaigns were developed and delivered post lockdown:

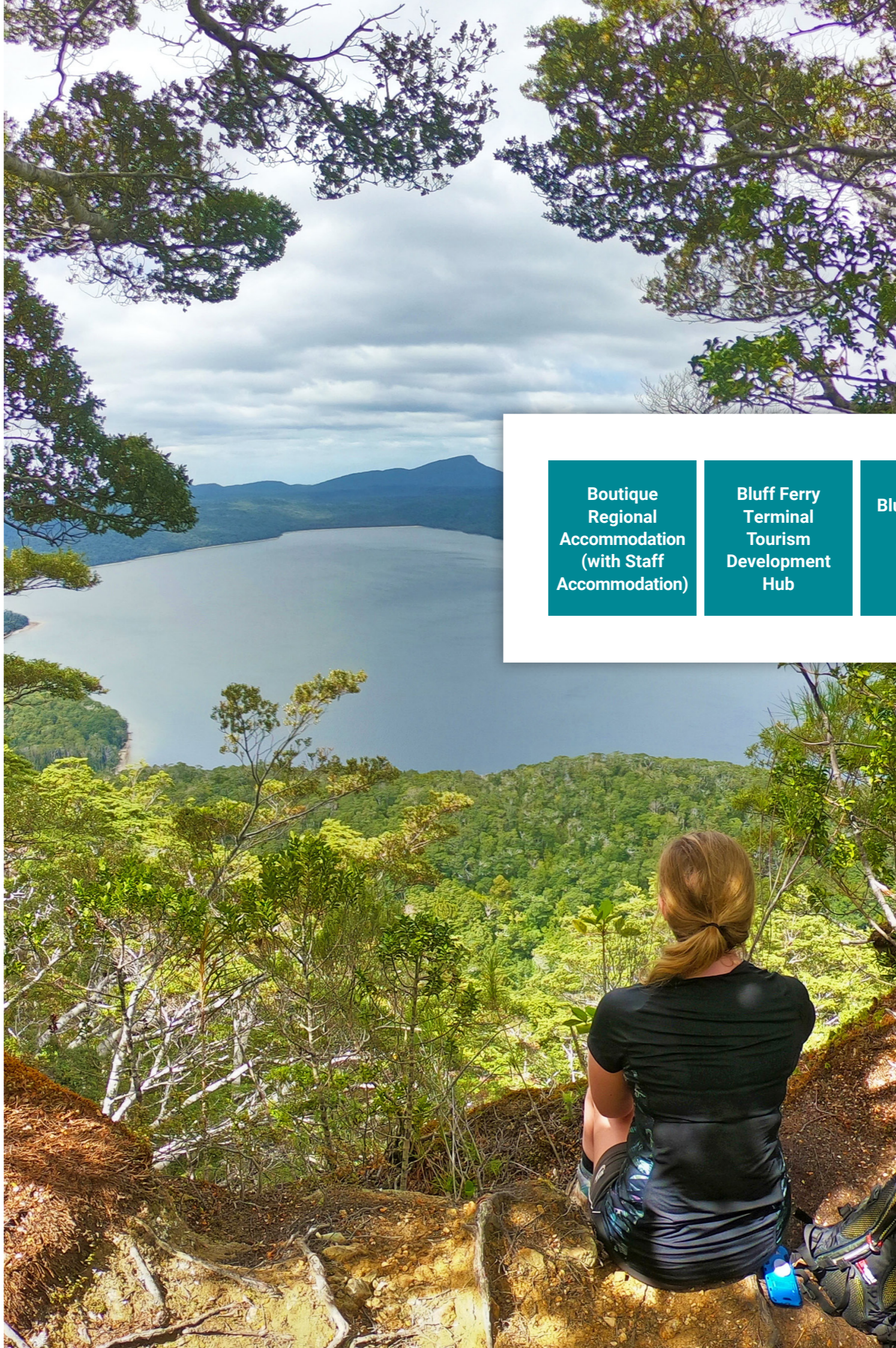
- ▶ Together Southland - Buy local, Stay local, Be local (encouraging Southlanders to support local)
- ▶ Rediscover #MySouthland (social media campaign targeting Southlanders to share their favourite spot/hidden gem and to explore their own region)
- ▶ Rediscover Southland (targeting self-drive markets to visit Southland, from Christchurch south including neighbouring regions)
- ▶ Discover Southland (targeting Aucklanders to visit Stewart Island in particular, utilising the jet connectivity and sustaining Great South's partnership with Air New Zealand)

As well as specific campaigns, Great South has achieved over 90 media articles creating awareness of the region, promoting travel opportunities and has hosted a number of famils and influencers.

Social media continues to be a successful tool with Southland placed as the fifth most popular region out of 31 in New Zealand based on followers (SouthlandNZ has approximately 150,000 followers across its social media channels).

FUTURE FOCUS

A new marketing plan is currently being developed based on the insights from Angus & Associates, and with the Fiordland RTO included in overall destination branding. Work with the region's sub-regional promotions groups, to support alignment of sub-regional and regional marketing and product development, will also continue.



IMPLEMENTATION APPROACH 2:

High priority investment recommendations

The Strategy identified five tier-1 game changer projects to stimulate investment in Southland. These high priority recommendations are as follows:

Boutique Regional Accommodation (with Staff Accommodation)

Bluff Ferry Terminal Tourism Development Hub

Bluff Southern Marine Discovery Centre

Maruawai Precinct Development including Distillery

Options for Milford Sound/ Te Anau

These projects presented a significant opportunity to position Southland as a strong destination in its own right, generating significant public and private investment into the region. They would also encourage the introduction of new commissionable (paid) product into the region, helping to attract a higher-yield visitor market. These projects will also assist with the generation of new and ongoing employment opportunities.

While Great South has supported the Maruawai and Milford Opportunities projects, its main focus has been on developing accommodation and on Bluff. The investigation into developing accommodation for the region was halted by COVID-19 but is a future focus, intrinsically linked to the current provision of housing. It is pleasing to see the development and continued progress of the Invercargill Licensing Trust's central Invercargill hotel, The Langlands.

The two priority projects for Bluff, the Ferry Terminal Tourism Development Hub and the Bluff Southern Marine Discovery Centre, needed to be looked at in a wider context, hence the development of the Bluff Motupohue 2020 Tourism Master Plan (see page 20).

MARUAWAI PRECINCT DEVELOPMENT

This project is being developed and led by Gore District Council

The Maruawai project is a three-stage development, which will culminate in a suite of facilities within the eventual Maruawai Cultural Precinct.

STAGE ONE

This involves the redevelopment of the Hokonui Moonshine Museum and the \$1.9m project will deliver an operating distillery, refreshed displays, and facilities for functions and tours – with a strong emphasis on themed merchandise. The visitor will be taken through the chronology of illicit spirit production in wider Southland, the rise and decline of localised Prohibition, and development of 21st century ‘Hokonui’ production.

This initiative has attracted significant funding from the Provincial Growth Fund, Gore District Council, Community Trust South, Mataura Licencing Trust, and a range of other project participants and donors. To complement and build on the success

of the neighbouring Eastern Southland Gallery, this museum redevelopment has adopted a strong art focus with nationally significant artists and designers lending weight to still manufacture, display content and merchandise production.

PROGRESS TO DATE

Contractors have begun structural work on the museum building and many aspects of the displays and fit-out are being fabricated off-site. The still and the distillery equipment are due to be commissioned off site (New Plymouth) in late January, then prepared for being shipped south once building work is complete later in 2021.

FUTURE FOCUS

A strong emphasis will be on the indigenous nature of the eventual ‘Hokonui’ product lines, and the engagement of local suppliers and hospitality providers. Community partnerships with Mataura Licencing Trust, Hokonui Runanga Incorporated, Eastern Southland Gallery and artist networks will infuse a unique ‘flavour’ to the museum.

STAGE TWO

This involves the development of the Maruawai

Centre – a museum facility that will tell the wider story of the Mataura River valley. A long-standing research partnership with Hokonui Rūnanga and Gore District Historical Society will ensure that the early history of ‘Maruawai’ will be told in an engaging way, and with strong artist input. In the broadest sense this district story will be a ‘paddock to the plate’ one with not only our traditional mahinga kai sites explored, but also significant cameos from Flemings Mill (and the nationally iconic Sgt Dan brand), and a variety of other producers. The merging of indigenous flora and fauna with introduced species will give rise to story scenarios incorporating known (brown trout) and other lesser known district stalwarts. Again, a range of artist/designer sub-projects will abound.

With a total project cost of \$2.9m, this museum development has attracted significant funding from the Provincial Growth Fund, Gore District Council, Community Trust South, Mataura Licencing Trust and a range of other project participants and donors.

PROGRESS TO DATE

The host building has been secured and workspaces developed (\$1m) and detailed design is beginning (now that stage one construction is underway).

FUTURE FOCUS

The Maruawai Centre will embrace a number of different functions. It will be a critical link between mana whenua and the wider community, and to this end education will be a key component. With Gore Visitor Centre acting as front-of-house there will be a strong visitor connection and a critical link between our broader Maruawai story and those told in adjacent, specialised precinct facilities.

STAGE THREE

This will see themed and fully developed street scape which is visitor, pedestrian, and event friendly. Public art will be a prominent component. This project is in its conceptual phase with the future focus to engage with wider national and international contemporary art networks and practitioners, private philanthropists and national funders.



MILFORD OPPORTUNITIES PROJECT

This project is being developed and led by the Milford Opportunities Governance Group

The Milford Opportunities Project was established in 2017 to create an ambitious and innovative masterplan for Milford Sound Piopiotahi, the Milford corridor and the region surrounding it.

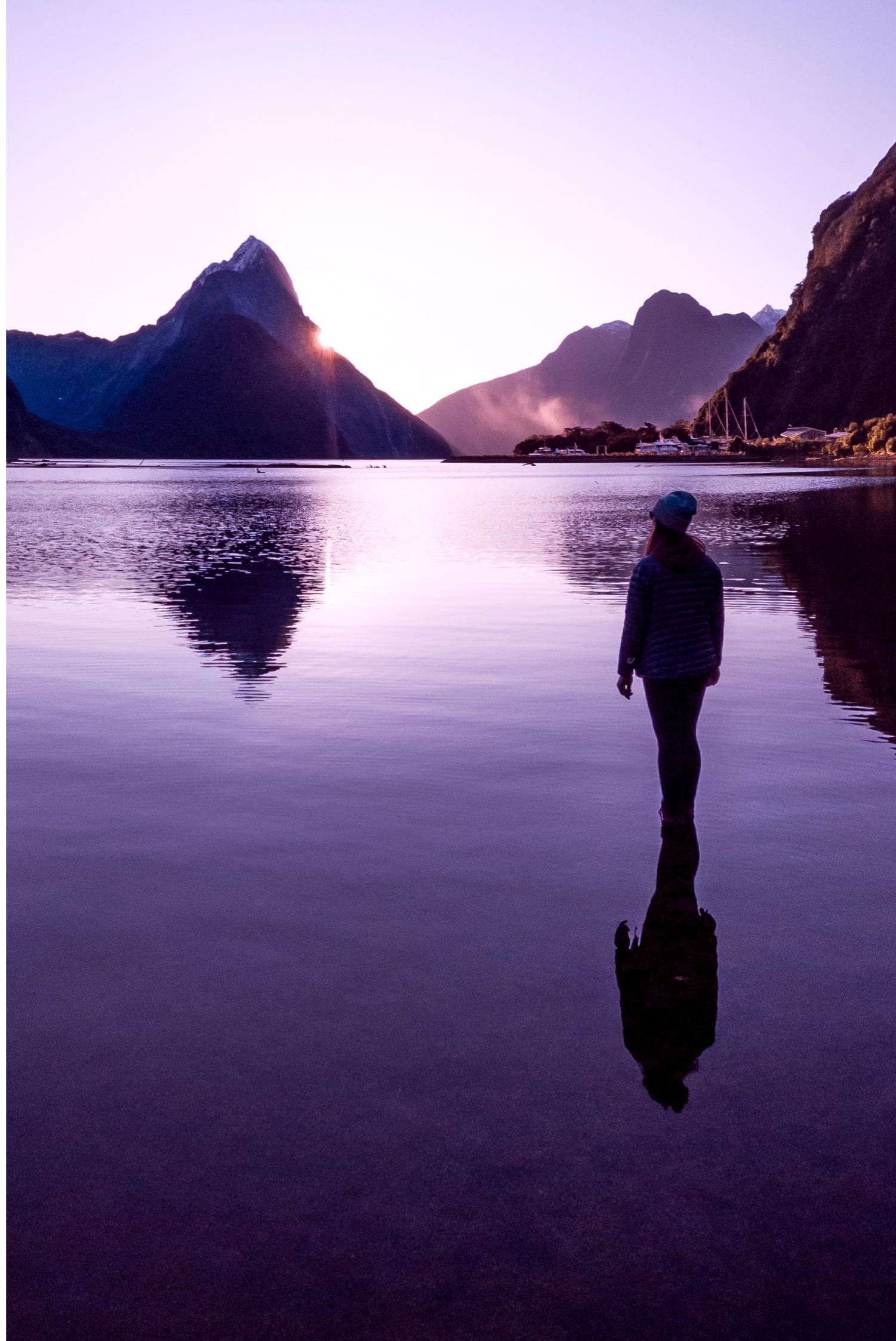
The masterplan will make recommendations to ensure Milford Sound Piopiotahi maintains its status as a key visitor icon and provides a world-class visitor experience. It must be accessible, uphold mana whenua, national park and conservation values, and maintain its World Heritage status. It must also add value to Southland and New Zealand.

The Project was created as a result of the growing congestion in Milford Sound Piopiotahi and the Milford corridor, which if not addressed, is expected to become an issue again when borders reopen. It is led by a governance group made up of local government, central government, iwi and business representatives. It will be delivered through a three-stage process, with stage one, which established context, vision and objectives, completed in September 2018.

Stage two was about creating ideas, public and stakeholder engagement, and workstream research on key areas in order to define and choose options to be included in the masterplan. The work done in the past 14 months has been focused on validating ideas with data, information and public feedback.

This stage will be completed in mid 2021 when the masterplan is made public. Adoption and possible implementation of the masterplan by Government will be stage three of the process.

To date, the background reports have been completed by the project team and sent to the governance group for final consideration. The draft masterplan is being completed and will also be approved by the governance group. The aim is for the masterplan to go to government ministers in April, before it is publicly released in May/June.



IMPLEMENTATION APPROACH 3:

Priority projects undertaken by Great South

In the past year Great South identified the following priority projects for immediate progression and/or further investigation. These will build upon or complement the 'building block' or high priority investment projects.

- ▶ Bluff Motupōhue 2020 Tourism Master Plan
- ▶ Food Tourism
- ▶ Agritourism
- ▶ Dark Skies Interpretation and Experiences
- ▶ Lower South Collaboration - 45 South NZ
- ▶ Visitor Services (i-SITE) Assessment
- ▶ Tourism Data and Visitor Insights
- ▶ New Flights into Southland (Rakiura, Te Anau and Invercargill)
- ▶ Industry Workshops (Social Media & Digital Literacy Up-Skilling)
- ▶ Sub-Regional Action Plans
- ▶ Product Packaging
- ▶ Low Emission Tourism

BLUFF MOTUPŌHUE 2020 TOURISM MASTER PLAN

Bluff is a popular visitor destination attracting visitors for a variety of reasons. Its rich history and culture is represented by various attractions, and its links with Stewart Island Rakiura go beyond providing the terminus for the twice-daily ferry service which runs across Foveaux Strait. While a significant number of visitors are welcomed each year, their length of stay in Bluff tends to be short.

The Strategy identified significant potential for Bluff to benefit more from the opportunities presented by tourism, which in turn became the focus of the Tourism Master Plan. Similar to the rest of Southland, this was linked to encouraging visitors to stay longer and spend more, by developing products and experiences that fit with the people and place. These would also showcase the unique and compelling aspects of Bluff as a destination.

PROGRESS TO DATE

Great South has facilitated the development of the Bluff Motupōhue 2020 Tourism Master Plan alongside the Invercargill City Council and Awarua Rūnanga. It provides concepts for the future development of Bluff as a jewel in the crown of the Southland region. The ultimate aim of the Master Plan is to transform and revitalise Bluff to make it a more attractive place to live, work, play, visit and invest in, over the coming 20 years.

The **Ferry Terminal Tourism Development Hub** and **Bluff Southern Marine Discovery Centre** were two of the five high priority projects in the Strategy

recommended for investment, and feature in the Master Plan. The Master Plan received extensive local media coverage and the feedback from the close to 50 submissions received during the public consultation phase was positive. The community is delighted to see both recognition of the potential of and investment in Bluff.

FUTURE FOCUS

The feedback received following public consultation on the draft Master Plan is being collated and will be used to amend the Plan. Projects such as the Bluff Hill Motupōhue Lookout Pouwhenua and development of mountain bike tracks as part of the proposed Active Recreation Hub were of high interest to locals. The process forward is currently being defined, but will continue to be a multi-stakeholder approach.



FOOD TOURISM

Southland is well known for its unique food, and food production is a core part of the region's identity, providing a strong foundation to position the region as a food tourism destination. However, there is currently limited ready-to-market food tourism product on offer such as farm gate trails, cooking schools, fruit and vegetable picking experiences, food events and 'paddock to plate' dining experiences.

The opportunity was therefore identified to assess how the Southland food story can be

developed to target visitors and build Southland's position as a 'foodie destination'.

PROGRESS TO DATE

Great South has led the development of a regional food tourism strategy with support from Eat New Zealand. The market assessment and research phase of this project, involving a series of workshops around the region, was completed in late 2020 and resulted in the development of a food industry database, an operator map and an assessment of Southland's iconic food stories from a visitor perspective.

FUTURE FOCUS

The final strategy development is set to be complete in early 2021 and the pathway forward, from a Great South perspective, will be shared soon after its completion. The Strategy is complementary to many key projects already underway, including the development of the Southern Pioneers Food Hub which has received Provincial Growth Fund support.



AGRITOURISM

Due to Southland's strong farming background and agricultural story, the region has the potential to become known as the 'Agritourism Capital of New Zealand'. Many farmers are increasingly looking to diversify their farm-based income and numerous visitor experiences and farm stays have been

developed with high interest in this area. Visitors are increasingly seeking ways to gain a more connected, authentic experience and agritourism offers a unique view into our rural communities.

PROGRESS TO DATE

Great South has identified agritourism as a key pillar for the region. In 2020, it engaged the support of Strategies Marketing Consultancy Ltd to assess the current market within Southland, creating an audit of operators and identifying opportunities.

FUTURE FOCUS

Throughout 2021 an accreditation system will be investigated and implemented, along with the development of an online platform to market agritourism to visitors. The development of agritourism based itineraries and opportunities to support operator development will also be progressed within the coming year.



DARK SKIES INTERPRETATION AND EXPERIENCES

Stewart Island Rakiura is one of 14 certified International Dark Sky Sanctuaries and is one of only two in New Zealand (the other is Great Barrier Island). This, coupled with the vast number of places in Southland unaffected by light pollution, provides the opportunity to create new product leveraging off this, focusing on dark sky interpretation and experiences.



PROGRESS TO DATE

In 2020 Great South continued to support the work required to maintain the Sanctuary and to promote it to visitors. A sky quality measurement meter was installed on the island, Sanctuary branding and signage was created and Rakiura's night sky was marketed through media and via the SouthlandNZ website. In October, Great South also ran a Dark Sky Ambassador training course on the island to provide technical knowledge on the night sky and support the development of dark sky tourism product.

FUTURE FOCUS

Beyond Stewart Island Rakiura, opportunities for dark sky designation in Fiordland will be investigated in consultation with Southland District Council, the Department of Conservation, the Fiordland Community Board, local iwi and the local community.

LOWER SOUTH COLLABORATION - 45 SOUTH NZ

Increased collaboration between the RTOs of the lower South Island has been recognised as key to improving visitor management, as visitors don't recognise traditional RTO or regional boundaries. The identification of meaningful partnerships will provide increased ability to consider the uniqueness of each region as well as visitor travel patterns and future market demand.

PROGRESS TO DATE

The 45 South NZ Touring Route is a collaborative

project between the eight RTOs of the lower South Island: Destination Queenstown, Great South, Tourism Waitaki, Clutha Development, Destination Fiordland, Tourism Central Otago, Enterprise Dunedin and Lake Wanaka Tourism. The project seeks to develop a network of touring routes throughout Otago and Southland which showcase unique, diverse and sustainable visitor offerings and experiences targeted at both locals and visitors.

A role dedicated to the touring route has been established and, while it sits within the Great South team, the role works alongside all RTOs involved in the project. To date, an MOU for the project has been established and the roading network for the route has been determined.

FUTURE FOCUS

Continue progress with the business case for this concept throughout 2021, including wider stakeholder engagement.

This project will also include the development of a wayfinding strategy, analysis of existing product on offer and identification of gaps and opportunities to encourage greater visitor dispersal around the region and a consistent approach to information.



VISITOR SERVICES (I-SITE) ASSESSMENT

Work is underway by i-SITE New Zealand to investigate the role i-SITES will play in the future, in recognition of the change in way visitors plan and book their trips. For financial viability, i-SITES need to adapt. The Destination Strategy recommended that Southland review its visitor information services, including i-SITES, to gain an understanding of their role in the tourism system.

PROGRESS TO DATE

The outcome from the national review of the i-SITE network is expected mid-2021 and Great South has been contributing to this process at a national level.

Great South has facilitated an independent review of local i-SITE services, which have been significantly impacted by COVID-19. For the Invercargill i-SITE, it meant a drop in international visitors and a major decline in revenue, which resulted in the Invercargill i-SITE visitor information and booking centre being closed indefinitely from December 2020.

FUTURE FOCUS

Great South will continue to work closely with i-SITE New Zealand, Tourism New Zealand and the Department of Conservation on future opportunities as there becomes more clarity on a new future national network. The Invercargill i-SITE situation will continue to be reviewed as borders reopen and international travel resumes.

TOURISM DATA AND VISITOR INSIGHTS

Data and visitor insights are key to the tourism industry as they highlight trends, guide where investment should be made and provide key information on the sector. During the last year Statistics NZ and MBIE began an overhaul of the data platforms they have traditionally collected and shared with industry. This signalled a period of change for some of our key data sources, with COVID-19 also affecting the assumptions that many of these have been based on. As a result, Great South has investigated new sources of insights and will continue to work on accessing data that gives the most accurate picture of activity in the region possible.

PROGRESS TO DATE

Recognising the importance of data for the region's development and to support businesses with their decision making at this crucial time, Great South has created a Data Analyst position within the organisation. This position is ensuring a coordinated approach to the sourcing and communication of data and insights alongside national happenings.

Throughout 2020, Marketview data based on card transactions has been utilised which has provided some very important insights regarding spend from financial transactions within the region. This has helped to guide Great South's approach in a COVID-19 environment.

Understanding accommodation occupancy is also essential and Great South uses two key tools.



Air DNA provides information on the non-commercial accommodation sector and MBIE has recently released a revised commercial accommodation tool, the Accommodation Data Programme which uses voluntary data provided by individual properties.

FUTURE FOCUS

Great South continues to wait on outcomes of the national review of visitor data and insights and, in the meantime, will identify priority needs for data, to determine which data sources are most useful. A focus on understanding visitor flows is a priority which will support investigation into touring routes as well as ensure the provision of fit for purpose infrastructure in the region. This can be achieved with data tools that investigate population density.

Great South will also continue to work on interpreting and communicating key trends and insights obtained from data and making this information more accessible to the wider community.

NEW FLIGHTS INTO SOUTHLAND (RAKIURA, TE ANAU AND INVERCARGILL)

The Strategy identified that domestically, the region is perceived as remote ('deep south', 'lands end' etc) and therefore harder and more expensive to access.

Airfares from Wellington, Auckland and even Christchurch have often been prohibitively expensive, deterring impulse visits to Southland. Improved and more affordable connectivity would have benefits

beyond simply servicing the tourism leisure sector.

The opportunity to maximise infrastructure and capability of the Invercargill Airport was also recommended for exploration. This would support Invercargill Airport acting as the southern gateway to the region and increase connectivity to the lower south, complementing the existing Queenstown northern gateway and the Dunedin north-eastern gateway.

PROGRESS TO DATE

Great South played a key role alongside other stakeholders in lobbying for and obtaining a direct jet service between Auckland and Invercargill. The service began in August 2019, four days a week and it allowed travel to Auckland and back in a day, benefiting business travellers in particular.

With its introduction, Great South partnered with Air New Zealand to deliver a nationwide marketing campaign called 'Speechless in Southland', which achieved some of the best results for any campaign Air New Zealand had delivered. This campaign was supported by Invercargill Airport, Southern Institute of Technology, ILT, SBS Bank, NZAS and South Port.

The jet service was suspended as a result of COVID-19, however a revised service was reintroduced in July 2020 focussing on enabling domestic leisure travel. Subsequently, Stewart Island Flights amended their flight times to Stewart Island Rakiura and this has resulted in record numbers of Auckland visitors to the region.

FUTURE FOCUS

Great South will continue to advocate for additional

schedules and services on behalf of the region, enhancing ease of travel both into and out of Southland. This will also complement efforts to promote Invercargill as a gateway to Southland. Marketing collateral and wall maps have recently been installed at Invercargill Airport supporting this.

Great South will continue to work collaboratively with the 'lower south' and other ports to actively encourage regional dispersal, by way of joint marketing campaigns and product and itinerary development opportunities. Initially these will be focused on the domestic leisure market but would show preparedness for the return of international visitor markets.

INDUSTRY WORKSHOPS

The Strategy identified a need for the industry to upskill in the areas of social media and digital programming, for more cost-effective ways to reach a wider range of visitor markets.

PROGRESS TO DATE

Building capability within the tourism sector has been a priority and post COVID-19, Great South, (who administer the Regional Business Partner programme and COVID-19 specific funding), were able to provide support and advice to the tourism sector across a range of areas.

This support totalled \$474,000 and included help with human resources, health and wellbeing, business continuity and planning, finance and resource management, marketing strategy and

planning, and digital enablement.

Great South has partnered with an external digital media specialist to deliver five digital marketing workshops (two of which took place towards the end of 2020 and three in mid-February 2021).

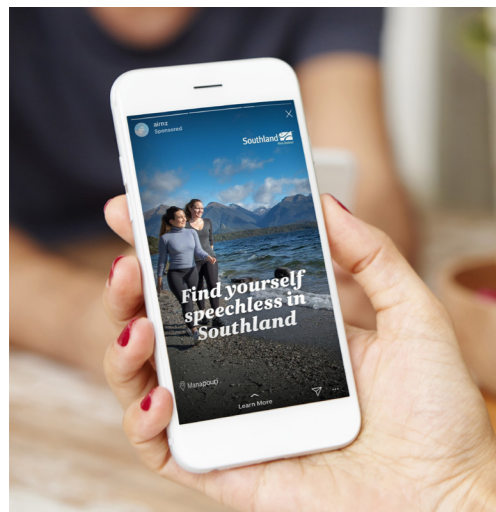
These workshops were a deep dive into the digital marketing world, showing the possibilities for businesses to promote themselves online through social media, google ads, SEO, email marketing and the importance of a good website.

FUTURE FOCUS

Great South will partner with an external specialist to undergo the Google DMO programme which helps make sure Southland is best represented online. Part of this programme will be two workshops across the region for businesses to claim and/or improve their google my business listing as well as some general digital marketing skills.

Great South will continue to assess operator needs and will facilitate workshop opportunities throughout the year targeting specific areas of need as they are identified by the tourism sector.

This may include, but is not limited to, working with trade, storytelling, or repackaging experiences to appeal to domestic visitors. These workshops will be delivered with support from the Government's Strategic Tourism Asset Protection Programme, which Great South is managing on behalf of the region.



SUB-REGIONAL ACTION PLANS

To encourage greater dispersal of visitors and economic benefit throughout the region, the further development of sub-regions will be critical. The goal is to support the celebration of the uniqueness of each sub-region, which contribute to an overall compelling regional proposition.

Partnerships with local sub-regions was one of the suggestions in the Strategy, to help support an alignment of community values and tourism, providing opportunities for gateways and regional hubs, as well as product packaging and itinerary development.

PROGRESS TO DATE

Great South has begun engaging with Southland's sub-regional promotional groups. Initially this was to create awareness of the Strategy, the value of it and opportunities for their respective communities. The focus has now switched to identifying joint partnership opportunities, allowing Great South to understand how to support and enable each sub-region to develop their own individual tourism offerings, events and points of interest (as well as infrastructure to meet the needs of visitors). This will be reflected in the development of specific investment plans for some groups.

FUTURE FOCUS

The future focus is to continue to develop and implement the investment plans for specified promotion groups. There will be effort to understand the priorities of local communities, understanding the

challenges experienced through COVID-19 as well as the future opportunities of tourism and events.

PRODUCT PACKAGING

The Strategy identified a need to develop more commissionable products to increase visitor spend. This can be achieved in a number of ways including developing new product, supporting diversification of existing products and looking at how products and experiences are packaged together.

Currently there is limited bookable product packaging available on online booking platforms for Southland. The vast majority of packages (which include product within Southland) appear to be booked in Queenstown which results in a skew in the regional spend figures. Encouraging development of more commissionable product, viable business operations and creating more bookable product packages will encourage stronger regional marketability.

PROGRESS TO DATE

As Southland grows commissionable product, aligning complementary products that form compelling and unique experiences for visitors is a good way to offer a stronger commissionable proposition. The Lower South Collaboration (45 South NZ), along with the wayfinding strategy work, is laying the preliminary work in auditing and packaging the complementary products already on offer.

There has also been a number of marketing and promotion campaigns which have packaged various

products and events together, these included the 'Rediscover Southland', 'BikeFest' and 'Summer Wheels' campaigns.

Great South has also worked one-on-one with individual businesses to investigate how they could package their products to appeal to new or different markets, particularly in light of COVID-19 and switching from an international to domestic focus.

FUTURE FOCUS

Great South will continue to progress key touring route development projects such as the 45 South NZ project. One-on-one support will continue to be provided for tourism operators to support them to look at developing commissionable product offerings and to utilise trade channels. Great South will continue to develop and market compelling packaging of products and experiences appealing to the domestic leisure market in the foreseeable future.



LOW EMISSION TOURISM

The values and underlying principles on which the Strategy was developed express a clear desire for tourism in the region to be developed in a way that achieves economic benefits, but also benefits our natural environment and local communities.

The Strategy recognised the impact of climate change on the tourism industry and the importance of building a low-emissions and climate resilient economy. It also acknowledges an awareness and desire of visitors to experience low emission experiences such as cycling, walking, stargazing etc.

With all this in mind, the Strategy identified the potential for Southland to reposition itself as a low emission tourism region, an approach which would align well with the NZ Aotearoa Government Tourism Strategy and Great South's organisational values.

PROGRESS TO DATE

Great South, in partnership with Ministry for the Environment and The Tindall Foundation, established the first regional Carbon Neutral Advantage programme in 2018. The purpose of this programme is to identify strategies that support the transition to a low emission future for the region. This has been achieved by engaging with regional businesses and community.

In 2020 several workshops have been run with local businesses to provide them with the tools to measure their emissions along with strategies to reduce them. These workshops will continue in 2021.



Another initiative, in partnership with key stakeholders, was to install electric vehicle charging facilities throughout the region and in particular along the Southern Scenic Route. Five new charging locations were added to the region's network in the last two years - at Te Anau, Bluff and Athol in 2019 and at Curio Bay and Tuatapere in 2020.

There are now 23 electric vehicle charging stations throughout Southland, including nine ChargeNet fast chargers. From 2019 to 2020, there was a 45% increase in distinct charging station users.

In 2020, Great South and Clutha Development initiated a partnership to identify how to develop, manage and promote the Catlins as a sustainable destination. It acknowledges the economic opportunities from tourism for the community, which must be achieved alongside environmental, cultural and social considerations. The framework for this project will be developed in 2021, as will the identification of other opportunities for low emission tourism in the wider region.

FUTURE FOCUS

This is a key area of focus for Great South and development of Southland as a low emission destination. Progress to date will continue to be built upon including development of low emission activities such as cycling, walking, stargazing and overall the concept of 'slow' tourism.



Key regional projects showcase

While Great South is the guardian and main driver of the Strategy there are many regional stakeholders and community agencies who are actively delivering recommendations and projects that form part of the Strategy.

The following showcase of key regional projects are being delivered by community agencies and stakeholders. Each project will form an integral part to the regional implementation of the overall Strategy.

The highlighted projects are:

- ▶ **Southland Murihiku Events Strategy**
- ▶ **Invercargill City Centre Master Plan**
- ▶ **Murihiku Marae Redevelopment**
- ▶ **Predator Free Murihiku**

SOUTHLAND MURIHIKU EVENTS STRATEGY

Home to the famous Bluff Oyster & Food Festival, Tussock Country Music Festival, Burt Munro Challenge, Kepler Challenge and many more iconic events, it is clear from the diversity of these events that Southland embraces the vibrancy and social wellbeing that events can deliver.

Events can be looked at from different perspectives:

- ▶ They are important to Southlanders, contributing to the quality of life on offer in the region
- ▶ They play a key role in attracting people to the region to both live and visit
- ▶ They can define what it is to be a Southlander and represent various aspects of the Southland Story

Overall, it is agreed that they can create a sense of place, belonging and resident satisfaction adding to the liveability of a place.

In response to COVID-19, connection for locals to each other and their community will be of even greater importance. More than ever before, events are highly valued because of their role in driving and stimulating domestic tourism and vibrancy, particularly while New Zealand's borders are closed and international visitation is limited. For this to be achieved, there is a need for alignment with overall destination development and attraction activities.

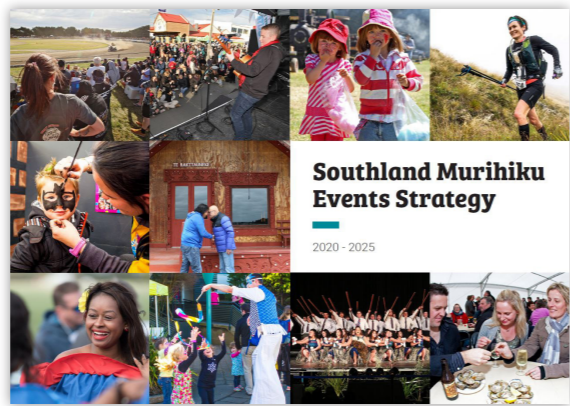
The Southland Murihiku Events Strategy 2025 reflects a regional commitment and desire to maximise the benefit of events for the region, the community and its people. It has been developed by Great South in consultation with key partners and aligns with regional strategic planning including the Southland

Regional Development Strategy 2015 and the Southland Murihiku Destination Strategy.

The Strategy's vision is "a supported, dynamic and sustainable event sector that encourages community participation and drives visitation to the region by building on unique points of difference", and it focuses on achieving four key goals. It outlines a suggested implementation framework and suggests that success will be determined by a multi stakeholder partnership approach considering those who fund, deliver, leverage and attend events.

Implementation will be boosted in 2021-22 with support from the Government's Regional Events Fund. While the Strategy has only recently been formally adopted (after an inclusive process of development), implementation of key projects has been progressing. This progress includes one-on-one support for 34 destination events, supporting them to better promote their events and attract more attendees - especially from outside of the region. A key focus has also been on supporting event organisers with capability- building opportunities and creating support networks.

GREAT SOUTH



INVERCARGILL CITY CENTRE MASTER PLAN

This project is being developed and led by Invercargill City Council

Creating public streets that make people want to visit Invercargill's city centre, connect major developments and encourage people to stay is the aim of this major planning project.

It's an exciting time for Invercargill. Significant investment is being made in city centre development, with the Council working alongside to create more vibrant streets and build connections around the city.

The City Centre Master Plan draws on the input and ideas of community groups, iwi, individuals and businesses from across the region, setting a pathway to a city centre that is enticing to visitors and makes Southlanders proud. The Master Plan itself is just the start of the process. It offers a framework for future projects, along with guidance on how the city centre could work better for people.

The Master Plan was endorsed by Invercargill City Council in February 2021 and work on initial projects (Esk and Don streetscaping) is being fast-tracked to align with target opening dates of other city developments including Invercargill Central Limited and Langlands Hotel. Other aspects of the plan will be carried out over several years, with more time being taken to discuss concepts with the local community and retailers.

The Master Plan is based on a set of Guiding Principles that the community told the Council they want for the future of their city. These are:

- ▶ **Celebrate scale and identity**
Southlanders live in wide open spaces with

abundant natural resources. The city centre will retain the characteristics of a big-scale landscape while creating places for people that celebrate Invercargill's cultural values.

- ▶ **Restore a connection with the environment**
Southlanders live in a stunning area, with strong connections to the estuary and other water sources. The city centre will contribute to a healthy living environment and reflect Invercargill's special position alongside the estuary.
- ▶ **Move for prosperity and wellbeing**
Balancing movement around the city centre is key. Pedestrians, cyclists, drivers, and heavy vehicle operators have different needs that must be considered, including safety, access, and shelter.
- ▶ **Promote a destination gateway**
Invercargill is the launching point to explore Southland – the city centre needs to be a place that people want to spend time in as they prepare to discover the amazing attractions of the region.
- ▶ **Urban play to make you stay**
The Council wants to create a place that everyone can enjoy by making Invercargill more fun and playful for people of all ages and abilities, which will also encourage people to stay for longer.
- ▶ **A city to inhabit and enjoy**
A vibrant city centre is good for business, becomes an attractive place to live, encourages people to stay in the region and reflects the city's heritage. The Council wants to support all of these interests and build on the city's strengths.



MURIHIKU MARAE REDEVELOPMENT

This project is being developed and led by Waihōpai Rūnaka

The region currently has a number of significant Rūnanga-driven projects which not only acknowledge the past but reflect future aspirations including a desire to look after mana whenua and the environment Murihiku sits within. One such project is a state of the art Murihiku Marae redevelopment which the Waihōpai Rūnaka have been investigating for the past seven years. Situated at Tramway Road in Invercargill, this redevelopment expands on the Waihōpai and Murihiku Marae indigenous footprint, providing Murihiku whānau a standing place fit for the future.

Waihōpai Rūnaka Chair Cyril Gilroy says the project will ensure Murihiku Marae is fit for purpose and able to carry the rūnaka into the future.

“This will be all the things a pā was, but in a modern context – fluid and adaptive to meet the needs of our community in this post-Covid-19 world. The new mix of facilities will be suitable for a range of hui, social services, community and business activities, and will provide improved functionality of the marae as a civil defence community hub.”

“It is about incorporating the past while our sights are set on the future, and we are realising our aspirations in the present. We are privileged to be a part of making our whānau moemoea a reality alongside our partners.”

The Rūnaka is also looking to explore tourism opportunities as part of an overall business approach.

The Wharenui Te Raitauneke would remain but nearly all other buildings will be replaced by purpose-built, future-proofed, and environmentally sustainable structures in a unique design that reflect the history of Waihōpai. Included in the scope of the design is a new wharekai, the replacement of a substandard administration and services hub, internal roading, parking and other infrastructure and landscaping, plus the phased completion of onsite accommodation for kaumātua.

Planning for the project has been underway for seven years. The total project cost is approximately \$13 million with the government funding making up the majority of the funding, with a further \$2.5 million from the Rūnaka and from Te Rūnanga o Ngāi Tahu (from the Ngāi Tahu Marae Development Fund). A final \$1.5 million is required, which will be sourced through other funding.

The Rūnaka aims to let the main construction contract in August 2021, and for the new facilities to be open by the end of 2022. The construction phase will create 33 temporary jobs and there will be eight permanent jobs once the marae is complete.



PREDATOR FREE MURIHIKU

These projects are being developed and led by Bluff Hill Motupōhue Environment Trust and Predator Free Rakiura

Predator free aspirations are important for tourism in Southland Murihiku as a lot of the region's visitor experiences and offerings are based within the natural environment and alongside native species. Essentially the goal is to help people and nature to thrive together by removing predators.

Predator Free 2050 is an ambitious goal to rid New Zealand of its most damaging introduced predators that threaten the nation's indigenous biodiversity, taonga species, economy and primary sector. It is one of many work programmes that aims to contribute to reversing the rapid loss of New Zealand's biodiversity, by eradicating possums, mustelids and rats, so the country's unique wildlife can thrive and ecosystems can grow strong again.

There are a number of predator free initiatives throughout the region being delivered by community groups or stakeholder collaborations in collaboration with the Department of Conservation, local councils, iwi and Predator Free 2050. Some of these are situated within key visitor destinations of Stewart Island Rakiura, Bluff Motupōhue and Fiordland. There are efforts to further support and link these initiatives together through the Predator Free Southland partnership initiative which is aligned with Predator Free 2050.

One of these is the Bluff Hill Motupōhue Environment Trust who have been conducting predator control

on Bluff Hill Motupōhue for more than 10 years. Predator Free Bluff now builds on this 10-year commitment from the Bluff Hill Motupōhue Environment Trust and aims to eliminate introduced predators to provide a safe habitat for native species on the hill. This is a key initiative as identified in the Bluff Motupōhue 2020 Tourism Master Plan and is also an essential component of providing biosecurity for other predator free initiatives on Stewart Island Rakiura and the Sub Antarctic Islands.

Predator Free Rakiura is based on a belief that there is so much to protect, this is an investment in the future. Rakiura is a nature hotspot and home to many species either threatened or found nowhere else. Community, visitors and wildlife are intertwined on Rakiura and objectives of the project are to have a healthy Rakiura for both visitors and families forever, sustained meaningful employment for the community and to maintain the relaxed lifestyle of the Island within stunning natural landscapes.

An incredible amount of work towards a predator-free Rakiura has already been achieved by iwi, the community and various organisations. With much of Rakiura undeveloped, and with many predators already absent, protection of this unique habitat and wildlife is possible and at a scale that can not happen elsewhere.

This also links to aspirations to continue to bring home the endangered kākāpō.



“ This is for our mokopuna and their mokopuna. ”



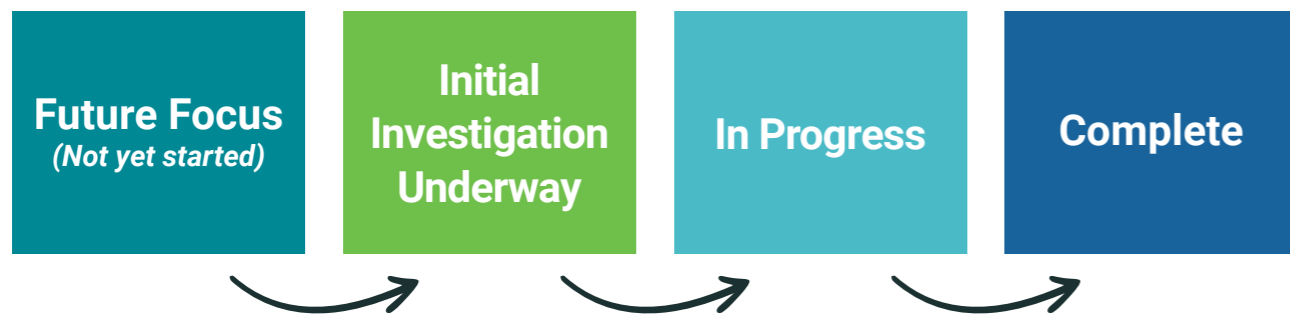
“ Let's protect our forests and wildlife, helping restore the mauri of the island. ”



Summary of implementation progress

It is important to acknowledge that the Strategy is a 10-year plan. It consists of 68 recommendations and the continued ability to activate these recommendations is predicated on the level of support from key stakeholder organisations, especially councils and central government; the level of resourcing able to be applied by both government and the private sector; the acceptance of sustainable tourism growth outcomes by local communities; and the ability of the region to work collaboratively to grow the visitor economy.

Information below provides a status update on all 68 recommendations (more information on specific projects can be found in the main text of this document). Status has been categorised in four ways, as follows:



KEY OF ABBREVIATIONS

- SDC** Southland District Council
- ICC** Invercargill City Council
- GDC** Gore District Council
- ES** Environment Southland
- ILT** Invercargill Licensing Trust
- DOC** Department of Conservation
- NZTA** New Zealand Transport Authority
- SRHC** Southland Regional Heritage Committee
- RTO** Regional Tourism Organisation

THE BUILDING BLOCKS (8 Projects)

RECOMMENDATION	LEAD ORGANISATION	STATUS UPDATE
Destination Events Strategy	Great South	Complete (see page 30)
Regional Destination Marketing Plan	Great South	Complete & Will be repeated (see page 13)
Branding (Destination Focused)	Great South	In Progress (see page 12)
Destination Tourism Organisation	Great South	In Progress (see page 12)
Southland Tourism Investment Prospectus	Great South	Initial Investigation Underway
Tourism Leadership Group	Great South	Initial Investigation Underway
Regional Infrastructure Investment Plan	Great South, ICC, SDC, GDC	Future Focus
Visitor Economy Awareness Campaign	Great South	Future Focus

TIER 1 HIGH INVESTMENT PRIORITY RECOMMENDATIONS (5 Projects)

RECOMMENDATION	LEAD ORGANISATION	STATUS UPDATE
Maruawai Precinct Development & Distillery	GDC	In Progress (see page 16)
Options for Milford Sound/Te Anau	Milford Opportunities Project Steering Group	In Progress (see page 18)
Boutique Regional Accommodation (with Staff Accommodation) x4	Great South	Initial Investigation Underway
Bluff Ferry Terminal Tourism Development Hub	South Port, Real Journeys, Awarua Rūnanga	Future Focus
Bluff Southern Marine Discovery Centre	Bluff Community Board, Awarua Rūnanga	Future Focus

PRODUCT DEVELOPMENT RECOMMENDATIONS

(23 Projects)

RECOMMENDATION	LEAD ORGANISATION	STATUS UPDATE
Major Hotel in Invercargill (The Langlands)	ILT	In Progress
Agri-Tourism Development including Farm Experiences & Farmstays	Great South	In Progress (see page 21)
Conservation Dark Sky Interpretation & Experiences	Great South, DOC	In Progress (see page 21)
Hub & Spokes/Sub Regional Action Plans	Great South	In Progress (see page 26)
Gore Activation Opportunities	GDC	In Progress
Iwi-Based Visitor Experiences & Narrative	The four Rūnanga in Southland	In Progress
Kiwi Guardians Initiative	DOC	In Progress
Catlins Experience Cluster/Sustainable Catlins Project	Great South, Clutha Development	In Progress
Invercargill Water Tower Attraction	ICC	Initial Investigation Underway
Development of Accredited Farmstays x10	Great South	Initial Investigation Underway
Queens Park (Invercargill), Anderson Park (Invercargill) & Dolamore Park (Gore) Enhancement	ICC, SDC, GDC	Initial Investigation Underway
All-Weather Visitor Experience(s) for Invercargill x2	Great South, ICC	Initial Investigation Underway
Aviation Events at Te Anau Airport Manapouri	Great South, SDC	Initial Investigation Underway
Eco-Lodges in Remote Locations (with Staff Accommodation) x2	Great South, SDC, DOC	Initial Investigation Underway
Heritage, Art, Architecture & Food Self-Guided Walking Tours in Invercargill	Great South, ICC, Arts Murihiku	Initial Investigation Underway
Western Southland Tourism Attractions Circuit Development	Great South	Initial Investigation Underway
Regional Museums & Heritage Centres Trail/Circuit	ICC, SDC, GDC	Initial Investigation Underway

Conservation HQ at Te Anau	Great South, SDC, DOC	Future Focus
Lake Manapouri & Lake Te Anau Water-Based Tourism Product	Great South, SDC, Fiordland Community Board	Future Focus
Positioning Lumsden as Southland's Cycling Hub	Great South, SDC	Future Focus
Stirling Point Visitor Experience Enhancements	ICC, Bluff Community Board, Awarua Rūnanga	Future Focus
Destination Holiday Park(s) (with Staff Accommodation) x2	Great South	Future Focus
Upmarket Lodges in Prime Locations (with Staff Accommodation)	Great South	Future Focus

SUSTAINABILITY RECOMMENDATIONS

(6 Projects)

RECOMMENDATION	LEAD ORGANISATION	STATUS UPDATE
Low Emission Itineraries & Tourism Experiences	Great South	In Progress (see page 27)
Freedom Camping Policy	DOC, ICC, SDC, GDC, Central Government	Initial Investigation Underway
Wildlife Management	DOC	Initial Investigation Underway
Carrying Capacity Assessments at Select Locations	DOC	Future Focus
P2P Accommodation Policy	Great South, ICC, SDC, GDC	Future Focus
Fiordland National Park Management Plan Completion	DOC	Future Focus

INFRASTRUCTURE RECOMMENDATIONS

(10 Projects)

RECOMMENDATION	LEAD ORGANISATION	STATUS UPDATE
Bluff Motupōhue 2020 Tourism Master Plan	Great South	Complete (see page 20)
New Flights into Southland (Rakiura, Te Anau & Invercargill)	Great South, Invercargill Airport	In Progress (see page 24)
Maintaining Road Network Quality	ICC, SDC, GDC, NZTA	In Progress
Expansion of Cruise Vessel Facilities at South Port (Bluff)	ICC, South Port	Initial Investigation Underway
Jetty & Wharf Audit, Upgrades & Expansion	SDC, ES, South Port	Initial Investigation Underway
Catering for Multi-Modal Road Users	ICC, SDC, GDC, NZTA	Initial Investigation Underway
Extended Operating Hours for Invercargill & Te Anau Airports	SDC, Invercargill Airport	Initial Investigation Underway
Heritage Tourism Strategy for Southland	Great South, SRHC	Initial Investigation Underway
Introduction of Passing Lanes to Enhance Road Safety	SDC, NZTA	Initial Investigation Underway
Te Anau Airport as Additional Aviation Access to Fiordland	SDC, Milford Opportunities Steering Group, Aviation Operators	Initial Investigation Underway

GOVERNANCE RECOMMENDATIONS

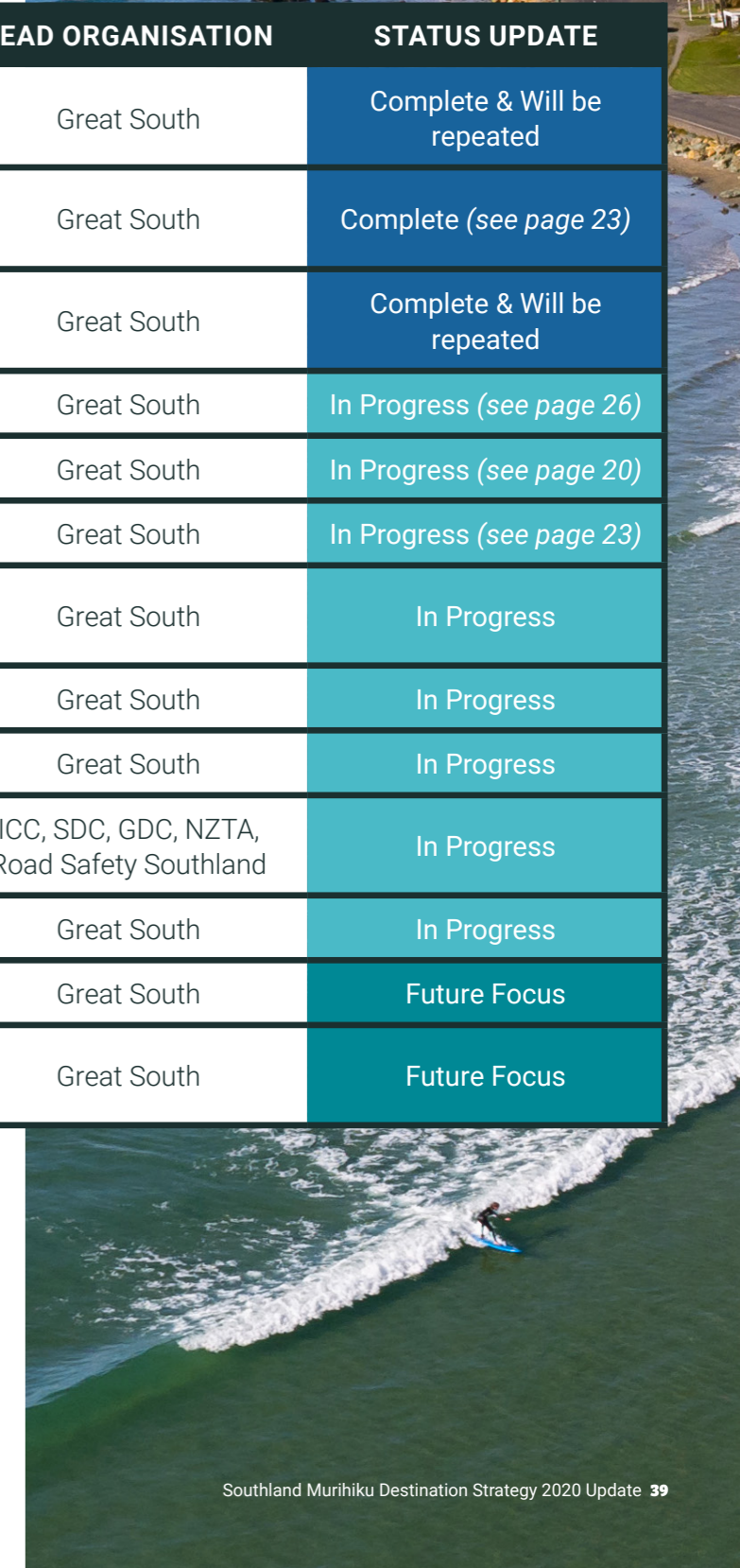
(3 Projects)

RECOMMENDATION	LEAD ORGANISATION	STATUS UPDATE
Lower South Collaboration (Wayfinding Strategy & Touring Route Development '45 South NZ')	Great South, 7 Neighbouring RTOs	In Progress (see page 22)
Industry Workshops	Great South	In Progress (see page 25)
Tourism Training Facility	Southern Institute Of Technology	Future Focus

MARKETING AND PROMOTION RECOMMENDATIONS

(13 Projects)

RECOMMENDATION	LEAD ORGANISATION	STATUS UPDATE
Destination Promotion to Locals: 'Things to do in your own backyard'	Great South	Complete & Will be repeated
Visitor Services (i-SITEs) Assessment	Great South	Complete (see page 23)
Winter Marketing Campaign	Great South	Complete & Will be repeated
Product Packaging	Great South	In Progress (see page 26)
Food Tourism Coordination & Strategy	Great South	In Progress (see page 20)
Ongoing Collation & Distribution of Tourism Data	Great South	In Progress (see page 23)
Culinary Marketing Campaign: 'Foveaux Strait to Fork!'	Great South	In Progress
Destination Content Creation	Great South	In Progress
Destination Events Calendar for Major Events	Great South	In Progress
Driver Safety Promotion	ICC, SDC, GDC, NZTA, Road Safety Southland	In Progress
Enhancement of the Regional Events Toolkit	Great South	In Progress
Digital Media for Southland Trails	Great South	Future Focus
Fishing & Hunting Marketing & Development Strategy	Great South	Future Focus



Looking forward

This document provides an update on progress to implement the 10-year Strategy after its first year of operation. Great South, as the champion of the Strategy and lead driver of a number of projects, has adapted its approach and subsequently re-prioritised key areas of focus due to the impact COVID-19. Despite COVID-19, there has still been considerable and pleasing progress to achieve the overall vision of the Strategy which is for Southland to be recognised as a distinct visitor destination (and a place to live, work and invest) guided by strong sustainability principles and values.

A number of key projects have been completed including key building blocks. Of these, a highlight is the alignment of both RTOs which will ensure a stronger regional proposition which is essential to 'stand out' and attract domestic visitors (in the short term) in an extremely competitive visitor sector. Two of the five high investment 'game changer' projects are in progress to be completed including tourism master planning in Bluff, which signifies exciting change and opportunity for the region.

The Strategy had key goals relating to increasing visitor spend and length of stay in the region. These are currently being reviewed in line with new data sets and visitor insights being developed by central government. However, the uncertainty surrounding COVID-19 remains, meaning it is difficult to create accurate goals with a number of unknown factors, including when borders will reopen and international visitors will return to New Zealand.

COVID-19 has impacted various parts of the Southland region differently. Stewart Island Rakiura has experienced its busiest season on record while Fiordland has been one of the most affected areas due to its isolation and high dependence on international visitation (predominantly from Queenstown). This has meant that looking forward, the approach will need to acknowledge the different needs of various communities and sub regions but how they affect the overall regional proposition.

Great South will continue to build on the momentum built on this first year of implementation and acknowledges the willingness of key stakeholders and partners to work alongside us to achieve progress to date.



THE TEAM

The team at Great South remain passionately committed to developing Southland as a destination. Great South welcomes opportunities to work with the tourism sector in this challenging time and looks forward to 2021. Below are some of the key tourism and events staff members who have been working on many of the projects detailed within this document:



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