

TARARUA DISTRICT VISITOR AND WALK-CYCLE STRATEGY AND ACTION PLAN

July 2019





EXECUTIVE SUMMARY

Tararua District has the potential to play a much stronger role in providing visitor services and experiences than at present.

Currently, some visitors stay overnight, but most visitors briefly stop in the district as they transit to other destinations. There is an opportunity to have more of this type of visitor stay longer in the district.

The objective of this report is to help Tararua District Council identify and guide the development of new or enhanced visitor experiences that encourage visitors to spend more money and gain more enjoyment from the district's attractions. Delivery of new or enhanced visitor experiences will have the benefit of contributing to the attractiveness of the district for existing residents and growing the resilience of the Tararua economy, alongside the benefits provided to visitors.

The biggest opportunity for Tararua is to optimise the attractiveness of current and new experiences in the Te Āpiti / Manawatu Gorge area. Walking and cycling tracks, Māori heritage / cultural and biodiversity appreciation, sharing the awe of the unique Gorge landscape and enjoying the power of the windfarms is the 'number one' potential growth experience awaiting further development. Delivery of this opportunity will require dedicated resources, careful planning, secure funding and strong collaboration with neighbouring local authorities.

The second biggest opportunity is to focus on providing better-known and better-quality walk and cycle experiences at each of the five towns that form the core of the fabric of Tararua District's attractiveness to visitors. On-going effort should also be directed toward town-centre revitalisation.

Of special interest is the need to develop the walk / ride from Pahiatua to Mangatainoka. There is also a need to make far more of the Lindauer heritage experience at Woodville by exercising strong leadership, committing funding and delivering a well-led plan for a Lindauer appreciation trail.

The third biggest opportunity for focused attention is to have the Waihi Falls better known and made more pleasant, possibly in combination with other scenic drive and rural environment experiences.

It is all too easy to focus destination development on growing new experiences. Of equal importance is the need to grow awareness and participation in those experiences that are already successful. The district's three biggest current attractions are Pūkaha National Wildlife Centre, the Tui Brewery and the range of attractions on offer at Norsewood. Each of these experiences has development potential. With concerted effort, we can see their value continuing to grow. We can also see events such as Woodville / New Zealand International MotoX, other unique events and special railcar excursions growing in popularity. The railcar offers the opportunity to link Tararua scenic and other attractions together as part of a leisurely experience.

Quality visitor experiences do not happen on their own. There is a need for more focus on collaboration and partnerships with iwi, DOC, MBIE and people from the surrounding three districts / regions at your boundary. This is for the purposes of creating joined-up experience itineraries and developing market awareness of what you jointly have to offer.


We also see a need to build visitor-sector capability and to identify opportunities for visitor-sector family-owned SMEs and entrepreneurs to grow their enterprise (e.g. agritourism) by you convening regular meetings and focused workshops. This, among other tasks, will require that Tararua District Council allocates skilled staff to planning for visitor experience development, the exercise of sector leadership and the provision of other 'enablers' of visitor development and management.

Tararua District offers a slice of the genuine 'people-centred' experiences sought by visitors. Visitors want stories to take home – Tararua can provide these. Further market development initiatives will be required to ensure that more potential visitors more actively consider Tararua District as a place to visit.

This report first describes the international, national and district visitor markets. It then defines the objectives that may be achieved through careful visitor growth. It then identifies the constraints and opportunities that must be overcome and capitalised upon through carefully prioritised effort, to unlock the potential of your district.


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Particular attention should also be directed toward other 'enablers' of visitor sector growth such as good roads, digital connectivity and market development based on a clear, unique and agreed statement describing what Tararua District has to offer to the visitor.

In addition, attractive and well-functioning towns create pride and community cohesion and act as an 'incentive to stop' for the passing motorist. The Council's recent investment in the upgrade of town centres in Eketahuna, Pahiatua, Woodville and Dannevirke is a valuable manifestation of this incentive.

The report concludes by providing details about the experiences and services that differentiate Tararua District from other parts of New Zealand and describes how these, and new experiences can be developed for the benefit of the district.

The community benefits of improved destination development and management for your district are waiting to be grasped. We urge that you commit to the actions listed in the conclusion to this report by allocating appropriate budget and staff time toward their implementation.

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INTRODUCTION

Purpose of Strategy and Action Plan

This report identifies how Tararua's destination development and management opportunities may be enhanced.

The sought-after outcome is visitor sector growth that further contributes to the economic resilience, attractiveness, environmental sustainability and economic diversity of the Tararua District.

Achievement of this outcome requires exploration of how further investment in current or new experiences should be prioritised, coordinated and funded, how the public and private visitor sectors may be better integrated, what needs to be done to enhance market awareness and who should be accountable for putting necessary action initiatives into effect.

The primary audience for this report is the Tararua District Council. It is also designed to be read and acted upon by Tararua visitor sector leaders and others from the sector with an interest in Tararua visitor sector management and development.

Background

The 'Manawatū-Whanganui Economic Action Plan'¹ identified nine opportunities for growth across the region. Tourism and visitor services were viewed as one of the highest priority opportunities for development.

¹ Manawatū Whanganui Economic Action Plan, Accelerate 25, Horizons Regional Council, August 2016

With this opportunity in mind, the Tararua District Council applied for and received funding from the Government's Provincial Growth Fund (PGF) to prepare an action plan identifying and integrating general visitor sector development opportunities and specific cycle-walk development and management opportunities. This report is the product of the expenditure of Tararua District Council and MBIE dual-purpose funding.

Tararua District

Tararua District is located on the south-east coast of the North Island of New Zealand, bound to the west by the Tararua Ranges and to the east by the Pacific Ocean. It covers an area of 4,360km² and has an estimated 2018 resident population of 17,850².

The four main Tararua towns of Dannevirke, Woodville, Pahiatua and Eketahuna are primarily service centres for the agricultural sector. They also service industry and domestic and passing traffic. With Norsewood and Pongaroa added to the mix, each of Tararua's six towns has a unique character, with a wide range of experiences on offer, all capable of further development, for the enjoyment of both residents and visitors. These towns sit in an extensive and highly productive rural landscape.

The primary industry in Tararua is agriculture. Over a third of the district's workers are employed in this sector. A small number of larger industries are present in the district, including meat processing, dairy processing and steel fabrication. There are also smaller scale industries with the well-known manufacturer of natural fibre clothing at Norsewood and Woodville amongst them.

² StatsNZ

Agriculture, retail trade, manufacturing, farm servicing, health and education services make up the bulk of employment. Cottage industries and home occupations are common.

Under current StatsNZ projections, future growth in the Tararua population will be almost entirely from people aged 65+. This group will increase from 17% of the population in 2013 to 26% in 2028. This increase is likely to have a negative impact economically as older people tend to spend less as they proceed through their retirement years. By offering access to urban cycle routes, cycling can save people money to spend in their local communities and thereby bypass fuel, registration, WoF and parking costs^{3,4}.

Who is a visitor?

We prefer to refer to the 'out-of-towners' coming to Tararua as 'visitors' rather than 'tourists.' This enables us to address the full range of persons experiencing Tararua's offerings – whether they be domestic or international persons or whether they be persons visiting Tararua in transit to other locations.

A 'visitor' is 'a person who is a guest who comes to spend time with or stay in a place that is not their home...for pleasure, for business, for sight-seeing, for experiences.'⁵

For statistical purposes, a visitor is often only counted when and if they go more than 40kms from their home, for reasons other than those related to their home. This means officially, visitors are defined more broadly than perhaps is the usual case in common understanding. They are certainly more than just 'tourists'.

The challenge faced by the community is, therefore, to attract, bring home and retain young people and to improve the dynamism and resilience of the economy by increasing its depth and breadth. Growth in the visitor sector can help to meet that challenge.

³ We note StatsNZ projections do not consider the potential population growth that may occur as a result of more people locating to the district because of the cheaper housing and yet ease of access provided to Palmerston North and other locations by the new Te Ahu a Turanga: Manawatū Tararua Highway.

⁴ NZTA, Benefits of Investing in Cycling, page 10, 2018

⁵ Google definition

Scope

Both 'destination development' and 'destination management' are addressed in this report. This enables us to consider current and emergent experiences that attract visitors, as well as the management interventions required to improve the capability, capacity and infrastructure 'enablers' like roads plus accommodation and cafes that provide efficient services to your visitors.

Although frequently referring to visitor growth, our preference and hope is that growth in visitor numbers is not considered in isolation from a consideration of the quality of the visitors and the quality of the experiences enjoyed by these visitors. This wider definition of desirable growth provides a foundation to achieve longer-term destination development that is more suited to both the visitors and to Tararua residents than consideration of growth for its own sake.

Market development and the 'brand' that best encompasses Tararua's attractions are additional important 'enablers' of destination development. We address these matters further later in the report.

Both 'strategy' and 'action' are important concepts addressed in this report. They have both received focus as part of our work. 'Strategy' defines the framework to deliver agreed objectives, often in times of uncertainty and change, such as those currently being experienced in Tararua. 'Action' defines the tasks, tactics, resources and timelines for delivery of agreed objectives and actions.

⁶ The reports accessed as part of our enquiry are a closed resource for use by the project team stored in a cloud-based research folder. This may be used by the project owners to support this strategy when actioning future works.

Approach to this project

THE PEOPLE BEHIND THIS REPORT

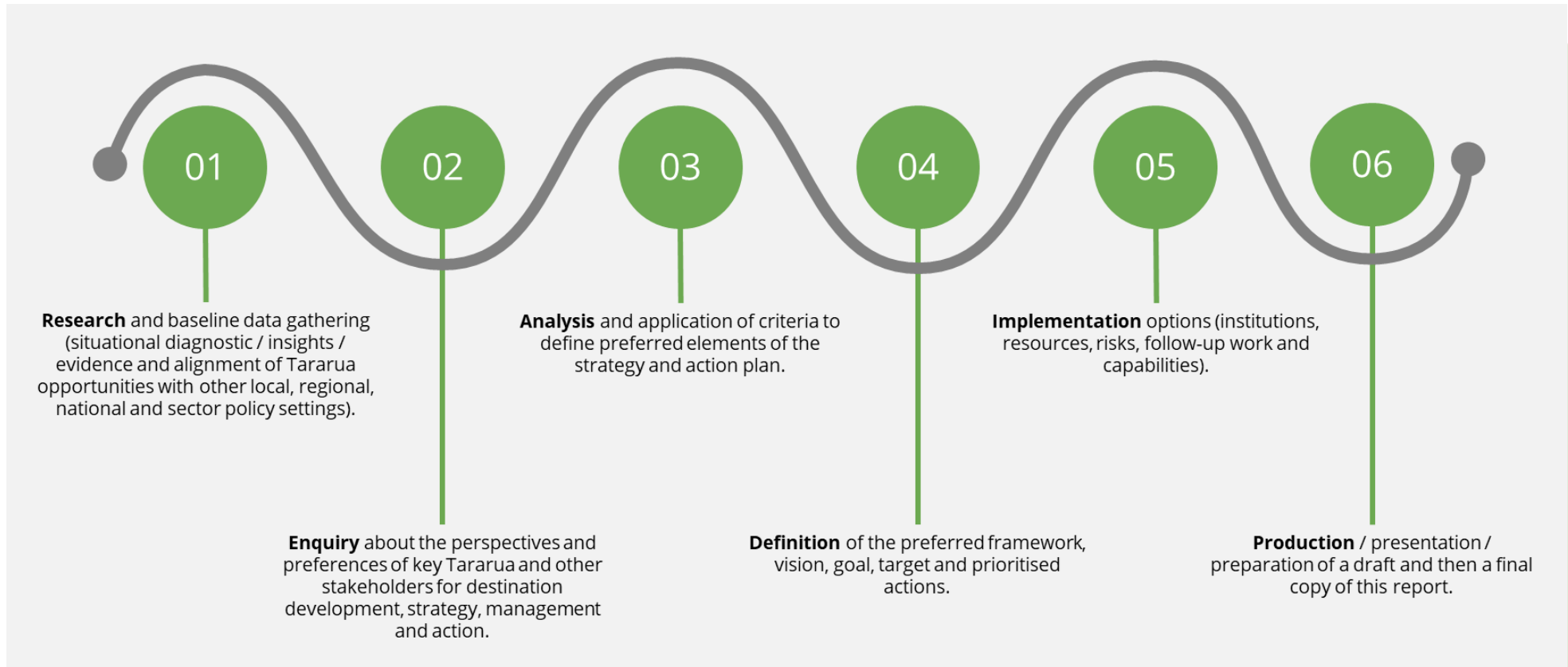
John Hutchings from consultancy firm HenleyHutchings, together with visitor sector consultant Dave Bamford, were engaged by Project Sponsor Mark Maxwell (Economic Development and Communications Manager from Tararua District Council) to develop this strategy and action plan. The consultants have been assisted by Dannevirke-based project manager Colin Yonge and Tararua District Council's business support officer Angela Rule.

METHOD

Our approach to this project has reflected the following phases of work (Figure 1 – over page):

1. **Research** and baseline data gathering (situational diagnostic / insights evidence and alignment of Tararua opportunities with other local, regional, national and sector policy settings).⁶
2. **Enquiry** about the perspectives and preferences of key Tararua and other stakeholders for destination development, strategy, management and action.
3. **Analysis** and application of criteria to define preferred elements of the strategy and action plan.
4. **Definition** of the preferred framework, vision, goal, target and prioritised actions.
5. **Actions** and implementation options (projects, institutions, resources, risks, follow-up work and capabilities).
6. **Production** / presentation / preparation of a draft and then a final copy of this report.

Figure 1: Process applied to the development of this document



Workshops and expert informants

The 'enquiry' phase of our work was perhaps the most important. As part of this phase, we interviewed over 25 stakeholders with 'leadership' views about how to grow the visitor sector in Tararua. In addition, we convened four half-day workshops to discuss general visitor sector aspirations and constraints. The first three workshops were with 38 participants. A later workshop was held with 22 participants and was focused on walking and cycling opportunities.

Contextual matters that have influenced our approach

The issues we explored during the workshops and interviews with expert informants included:

- Vision and objectives for the visitor sector.
- Key strengths and weakness of Tararua as a destination.
- Comparative rating of importance of current Tararua visitor experiences.
- Recommendations about the priority to be accorded to the development of new or expanded visitor experiences.
- Identification of the priority infrastructure e.g. roads, required to support growth in the sector
- Recommendations about sector people capacity / capability constraints and opportunities affecting the sector

In general terms, our approach to developing this report was centred on our desire to solicit information that would help the Tararua

District Council and visitor sector leaders in Tararua to:

- Move away from the 'make do and mend' short-term approach often characterising destination development in other parts of New Zealand.
- Create a 'destination by design' approach that delivers what the visitor is seeking and optimises contributions to the Tararua economy (quality vs quantity and market-led rather than product-led).
- Be conscious that indiscriminate development of tourism is losing confidence with the public, i.e. the 'social licence' offered by 'locals' to visitors and the visitor sector has limits that need to be respected by developers and visitors alike.
- Shape future market demand / market development initiatives in collaboration with the directly affected community and regional neighbours.
- Identify risks and formulate recommendations that give due recognition to the potential for unanticipated national and international shocks.

We were also very conscious that having visitor sector development aspirations or dreams is a waste of time unless these can be realised through careful investment and funding. We have therefore assessed the scale and alignment of potential investment and experience development propositions with the principles and general availability of central government funds, the Tourism Infrastructure Fund, NZTA transport funding, funding from Tararua District Council and most importantly, the actions and general attitude of the private sector toward investment in expanded visitor sector experiences and services.

INTERNATIONAL AND DOMESTIC VISITOR CONTEXT

Before getting into details about what actions may be taken to enhance the visitor sector in Tararua, we felt it important to present a reminder about what's happening within the visitor sector internationally and nationally.

Visitor sector in New Zealand

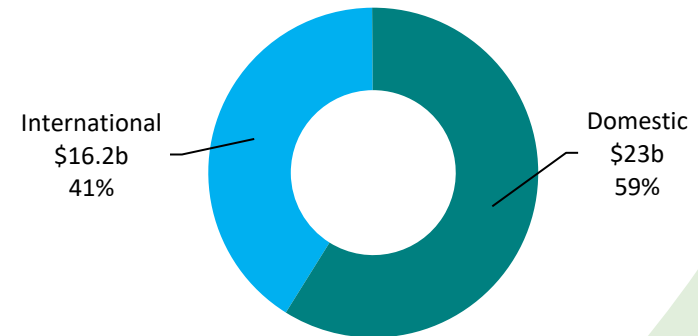
International tourism is booming within almost all countries in the world. According to the latest UNWTO tourism barometer prepared for the World Tourism Organisation, worldwide international tourist arrivals to all destinations (overnight visitors) increased 6% to 1.4 billion in 2018. The recent ease of access to comparatively cheap air travel is the key to this enormous growth in interest in travel.

Tourism in New Zealand is booming as well. It is New Zealand's biggest export industry, earning \$16.2 billion or 20.6% of New Zealand's foreign exchange earnings (year ended March 2018).⁷

MBIE estimate total tourism expenditure in year-end March 2018 was \$38 billion. Domestic tourism is the primary contributor to this expenditure with \$23 billion of expenditure, whereas expenditure by international visitors was \$16 billion (Figure 2 - right).

The 'Domestic Growth Insight Tool'⁸ shows us there are 45 million potential domestic trips, consisting of 27.5 million potential day trips and 17.5 million potential overnight trips throughout New Zealand.

Figure 2: International vs Domestic visitor spending



Source: MBIE Monthly Visitor Tourism Estimates

⁷ <http://tia.org.nz/tourism-2025/tourism-today/>

⁸ <https://digit.nz/>

Noting that the things that attract domestic visitors to Tararua will also attract international visitors, the key question we address in this report is: what will it take for more New Zealanders to consider visiting Tararua?

Over the period 2014-2018, tourism expenditure grew by 53.8%, and international arrivals increased by 38.8% (TIA estimates)⁹. Most tourism expenditure occurs in the main gateway cities of Auckland, Wellington, Christchurch and Queenstown.

In 2018, the visitor sector, directly and indirectly, supported 13.5% of the total number of people employed in New Zealand. That means 365,316 people are working in the visitor economy nation-wide.

Common activities undertaken by international visitors to New Zealand

If Tararua is to attract more international visitors it will either need to tell them more about the opportunities available in Tararua – both in terms of good quality service and quality experiences or, if these experiences are not present already, Tararua leaders will need to create what they want and then tell them about it.

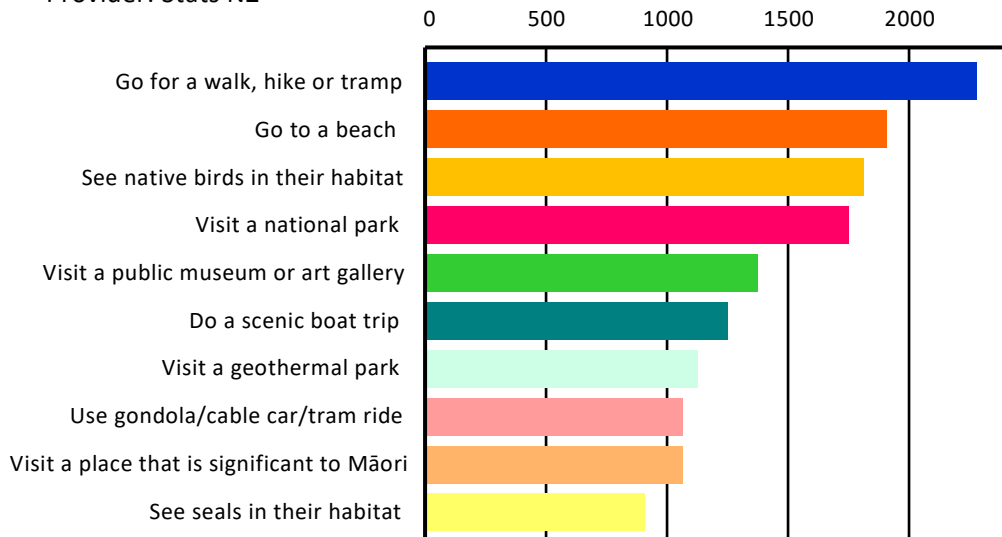
Walking and experiencing natural environments rate highly amongst the top ten activities sought by international visitors (Figure 3). Items of significance to iwi also rate highly, as do visits to museums and art galleries. Tararua can provide at least half of the experiences sought by international visitors.

⁹ Tourism Industry Aotearoa, *Tourism 2025 Scorecard 2018*, November 2018, as sourced on - <https://tia.org.nz/assets/Uploads/Tourism-2025-scorecard-Nov-2018-v2.1.pdf>

Figure 3: Common activities undertaken by international visitors to all locations in New Zealand

By type, year ended June 2018, thousands of people

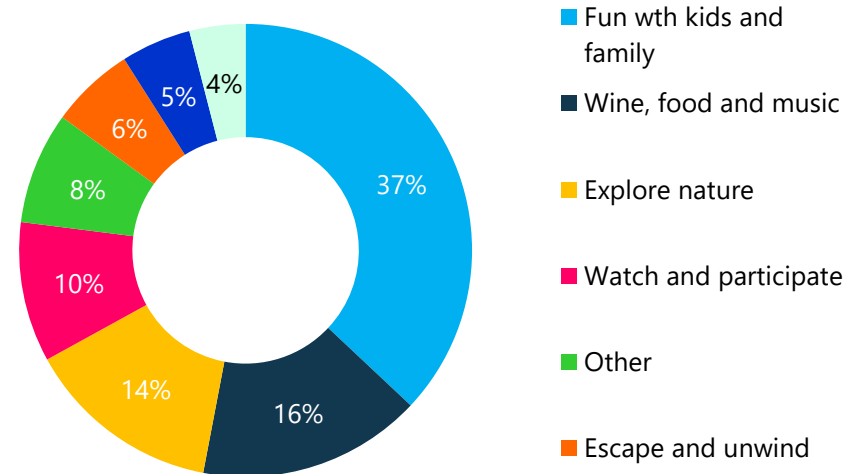
Provider: Stats NZ



Common activities undertaken by domestic visitors within New Zealand

Domestic visitors have similar interests to those expressed by international visitors, although food and wine and ‘having fun with the kids and family’ tend to be more highly represented domestically than internationally. (Figure 4)

Figure 4: Common activities undertaken by a domestic visitor to all locations in New Zealand



As was the case with international visitors, Tararua is well positioned to serve the interests of domestic visitors. The easily accessible Pūkaha National Wildlife Centre is perhaps the highlight for those seeking to explore nature. Fun with the kids, particularly when they need a break from car travel, is well served by such experiences as Fantasy Cave in Dannevirke and Middleton Model Railway in Eketahuna. The music experiences facilitated by the Selfe’s in Norsewood equally fit with established domestic visitor aspirations / desire to watch and participate.

Policy and funding context

The scope of expanded Tararua visitor sector opportunities and ambitions will be influenced by the legislation, policies and funding priorities established by the Tararua District Council as well as those developed by various government departments and agencies. Visitor sector opportunities and ambitions will also be strongly influenced by the

investment decisions and support provided to and by the private sector. We make a brief reference to these influences below. The message to be taken home from this section of the report is that change will be achieved as a result of many influences and adoption of a well-planned and incremental approach rather than something ‘transformational’ in nature.

TARARUA DISTRICT LONG TERM PLAN 2018-28

The recently adopted Tararua District Council Long Term Plan maintains the focus – as expressed in earlier Plans, on core infrastructure, economic development, and financial prudence. Matters raised in the 2018-28 Plan, with more than passing effect on the visitor sector include:

- The opportunities arising from the construction of the new **State Highway** route between the Manawatū and Tararua Districts – implying a need to actively search for interventions that best capitalise on this new road for the visitor sector.
- The potential impact on farms and communities of the further review of the **Horizons One Plan** and proposed changes to the National Policy Statement on Freshwater Management – implying a need to search for investments (e.g. agritourism) that will add to the resilience of the district’s economy.
- The importance of continuing to build relationships with Rangitāne o Tamaki nui a Rua and Ngāti Kahungunu – implying a need to search for and support initiatives that grow the **Māori economy** and at the same time, respect cultural and heritage values.
- The intention to expand the council’s strategic priorities to include building a resilient and connected community by developing **reserves and recreational facilities** that aid economic development – such as those that may be put in place at the Waihi Falls.

- Generally supporting initiatives that may:
 - Establish a clear **Tararua identity**. (*We discuss this further later in this report*).
 - Attract and retain **skilled people** in the district to ensure core services are maintained. (*We have already noted that actions which attract visitors have the benefit of also helping to attract and retain permanent residents*).
 - Promote the district to provide opportunities to **local businesses** from tourism. (*We can see the merit of developing a prospectus to attract visitor sector investors*).
 - Provide support to local businesses and community organisations. (*We recommend that **dedicated Council staff resource** be directed toward achieving a higher level of visitor sector business collaboration*).
 - Seek opportunities to attract **external funding** for district projects. (*We identify opportunities later in this report which may be secured with the help of funding from the Tourism Infrastructure Fund or third-party funding*).

TOURISM STRATEGY, MBIE

The Aotearoa New Zealand Government Tourism Strategy¹⁰ proposes a more deliberate and active role for government in tourism than in the past. The Strategy’s objective is to make sure that future sector growth is productive, sustainable and inclusive. The Strategy suggests the pace and scale of visitor growth have effectively outstripped the capacity of visitor systems to respond in some areas and consequently, opportunities are not being fully realised, and pressures are not always well managed.

¹⁰ Aotearoa New Zealand Government Tourism Strategy, MBIE May 2019

We draw attention to the matters raised within the Strategy, together with comment about what Tararua could do to take advantage of these policies identified *in italics*, as follows:

- **Not all regions are benefiting:** Seasonal and regional travel patterns exacerbate visitor pressures (such as on the environmental impacts and congestion) and mean that the gains from tourism are not spread evenly across regional New Zealand. *(Tararua could play a role in helping to spread visitors more evenly across New Zealand).*
- **Not enough collaboration:** A fragmented regional picture is apparent, with some regions and cities competing rather than cooperating with each other or being more focused on attracting visitors rather than meeting expectations of communities and visitors. *(Tararua District Council leadership could enhance collaboration while, at the same time, having an open ear to the needs and wishes of residents).*
- **Funding arrangements not sufficiently responsive:** Funding arrangements are slow to respond to significant and rapid shifts in visitor volumes, impacting on investments in maintaining and building necessary infrastructure, amenities and attractions. *(Tararua District Council should be better armed, courtesy of this report, to consider how it may respond to the infrastructure implications arising from growth in the visitor sector).*
- **Policy arrangements not sufficiently fleet-of-foot:** Some of the policy settings and institutional arrangements which were established when government was principally focused on increasing visitor numbers are no longer fit-for-purpose in the current high growth environment. *(We note that government has now established a substantial tourism policy unit within MBIE. In addition, DOC has increased the size of its visitor policy unit).*

In addition to the specific actions referenced above, the Strategy's policies envisage several significant new areas of cross-agency work to help overcome the above challenges. The objective of this cross-agency work is to deliver the desired visitor sector 'sustainable, productive and inclusive growth' goals. Some of the priority actions listed in the Strategy to achieve these goals include:

- **Funding:** Ensuring that funding models cater to tourism growth and enable those who benefit from infrastructure to contribute to its costs.
- **Leadership:** Taking a stronger leadership role in the sector.
- **Planning:** Improving destination plans at a regional level.
- **Value over volume:** Continuing Tourism New Zealand's strategy of targeting for 'value' over 'volume' and encouraging off-peak season growth.
- **Productivity:** Focusing on tourism sector productivity, including addressing skills.
- **Sustainability:** Looking at the likely impacts on the tourism sector of climate change and moving to a low emissions economy.
- **Māori economy:** Supporting iwi to develop authentic visitor experiences and to raise awareness of these.

REVIEW OF TOURISM NEW ZEALAND

As an example of the intent to exercise more central government leadership, MBIE has announced (April 2019) an intent to carry out a further review of Tourism New Zealand¹¹. This review will consider, among other things, what role Tourism New Zealand should play in supporting New Zealand's future tourism needs and how it should position its capabilities to deliver on this role.

¹¹ An initial review was carried out by Tourism NZ itself early in 2018. The current review will be carried out by an externally appointed group of well-experienced persons.

A second example of recent stronger government visitor-sector leadership relates to funding arrangements. From 1 July 2019, the Government is introducing an International Visitor Conservation and Tourism Levy (IVL) of \$35 per visitor to enable international visitors to contribute directly to the infrastructure they use and to help protect the natural environment they enjoy.

TOURISM INFRASTRUCTURE FUND OR TIF (MBIE)

The Tourism Infrastructure Fund (TIF) was established to support communities under pressure to meet the demands placed on infrastructure by growth in the visitor sector. The fund amounts to \$25 million per annum with applications invited from local government six monthly. Each round of TIF applications is influenced by a 'priority statement' issued by the Minister for Tourism. The current statement is reasonably generic – with an emphasis toward projects where visitor impacts on infrastructure have given rise to capacity constraints and or opportunities. A set of criteria are applied to judge the merit of competing applications. These include the availability of co-funding, the scale of benefits to tourists and the mechanism to fund the proposed upkeep of the infrastructure in the long term. It is noted that to date Tararua District Council has been successful in securing funding for toilets and showers at Mangatainoka Reserve and four solar compacting bins. (NB Our preliminary appraisal suggests the plan for the upgrade of facilities and tracks at Waihi Falls is a good candidate for a TIF application. We discuss this proposition more fully later in this report).

PROVINCIAL GROWTH FUND

The Provincial Growth Fund (PGF) was established to fund projects that support job creation, including in key sectors such as tourism – in a way that 'powers-up' regional prosperity and productivity.

'Surge' regions including the Manawatū-Whanganui region, have a slight advantage over non-surge regions when applying for PGF funds. Surge regions are regions falling toward the lower end of GDP and employment performance.

Successful PGF projects will help achieve the PGF's objectives¹² by:

- Creating jobs, leading to sustainable economic growth.
- Increasing social inclusion and participation.
- Enabling Māori to realise aspirations in all aspects of the economy.
- Encouraging environmental sustainability and helping New Zealand meet climate change challenge commitments (alongside their support of productive use of land, water and other resources).
- Improving resilience, particularly of critical infrastructure.
- Diversifying the region's economy.

Tourism projects appear to have received extensive Government PGF support over the last year although we have been informed by officials that this sector may not be so favoured moving forward. Expansion of Pūkaha National Wildlife Centre and the recreational opportunities at Te Āpiti /The Manawatū Gorge, as well as many of the other opportunities identified later in this report, will contribute to provincial growth. Government co-investment in these projects would help to achieve this objective.

¹² These objectives are more fully described in the investment prospectus and application templates available from MBIE's Provincial Development Unit website.

NZTA

The most impactful recent change in the transport operating environment is that arising from the Government's adoption of the 2018 Government Policy Statement (GPS) on transport. This gave emphasis toward:

- Balanced investment across social, economic, environmental, resilience and economic outcomes and away from funding capacity improvements based on constructing new State Highways.
- Mode neutrality, safety and the integration of land use planning and transport investment - to create more liveable communities, with better use of technology.

While many local authorities are still attempting to search out how to best adjust to this new transport investment priority setting framework, smart councils have taken the opportunity to advance walking and cycling opportunities and are rapidly developing other means to improve urban design and reduce transport-related greenhouse gas emissions through careful referencing of the GPS requirements in their transport funding requests.

For Tararua, this could mean focusing on the development of tracks and trails within and between the district's towns, including the proposed trail between Pahiatua and Mangatainoka and potential improvements to make Route 52 more cycle-tour friendly.

¹³ 1000 businesses signed up to this promise by the end of March 2019.

TIA STRATEGY AND POLICIES

Tourism Industry Aotearoa (TIA) is an advocate agency operating on behalf of the visitor sector. Their recent initiatives have included the following:

- Launching '**Tourism 2025 & Beyond**' (May 2019) with its top ten actions to work on – many of which are highly relevant to sector growth in Tararua:
 - embedding sustainability;
 - managing destinations by the development of quality destination management plans;
 - growing and shaping demand with an emphasis toward high-value visitors;
 - embracing tikanga Māori;
 - engaging communities to prevent loss of social licence;
 - investing in the right infrastructure at the right time; fostering the 60% of visitors who come from the 'domestic' / New Zealand market;
 - investing to deliver quality sector data and research.
- Calling for a 20 percent share of the GST collected from international visitors to be made available to local government to help councils fund the development of essential infrastructure and services to support regional tourism.
- Championing sustainable tourism by developing the sustainability charter and inviting sector participants (now over 1000 signed-up) to commit to the Tiaki Promise¹³.

DOC'S VISITOR AND HERITAGE STRATEGY

DOC's draft Visitor and Heritage Strategy (November 2018) provides good content to guide consideration of the net benefit of providing visitor services and facilities within public conservation lands, including within

National Parks and local reserves. The following points are particularly salient:

- **Benefits of accessing nature:** Across the globe, there is increasing recognition of the benefits of time visitors spent in nature for people's health and wellbeing. These benefits tend to be non-quantifiable - in a traditional accounting sense. They are 'intrinsic' in nature.
- **Contributes to DOC's stretch goal:** Providing opportunities to enjoy public conservation land contributes to DOC's stretch goal of '90% of New Zealanders' lives being enriched through connection to our nature.'
- **Distributes visitor benefits into the regions:** As a large percentage of public conservation land and water are outside of the main metropolitan centres; recreation and tourism opportunities in these areas generate jobs and opportunities for inclusive growth.
- **Business generation:** Protecting, restoring and providing sustainable access to public conservation lands and waters can increase regional wellbeing as well as conservation outcomes. Visitors contribute by using recreation-based operators and by spending on fuel, food, accommodation, hospitality and other businesses in nearby communities. (NB About 1,100 businesses operated recreation and tourism-based activities on public conservation lands and waters in 2017).
- **Iwi opportunities:** Use and enjoyment of public conservation lands provides an opportunity for Māori to showcase their cultural heritage and realise their aspirations as a key part of the visitor sector.
- **Priority toward protection:** The natural, cultural and historic heritage of places managed by DOC are viewed by them as needing to be given 'protection' as a priority ahead of providing for their use and development. Once necessary protection measures are in place, visitors can then experience and connect with this unique heritage. This protection and the enhanced

visitor connection will contribute to improved wellbeing of communities.

IMPLICATIONS OF COUNCIL, DEPARTMENT AND AGENCY POLICY

We referenced some of the links between the above policy instruments and Tararua visitor opportunities in our previous description of each of these policy instruments. Other salient 'linkages' or implications for Tararua include the following:

- **Tararua District Council:** The Council's Long-Term Plan clearly recognises the opportunities for the district from growth in the visitor sector. The Plan's support for strategic roading, town centre redevelopment, reserve development and 'identity' investments will provide a solid foundation for this growth.
- **Tourism New Zealand:** The possible outcomes of the review of Tourism New Zealand may include a requirement for them to be more active in linking their international market development with domestic destination development. As a minimum, we can see a need for a much stronger link between the experiences and services sold to both the domestic and international market and the location, quantity and quality of these experiences and services, including essential visitor-related infrastructure in the regions. Tararua visitor sector leaders should monitor emerging decisions and be ready to capitalise on any opportunity that may emerge.
- **International Visitor Levy:** The International Visitor Conservation and Tourism Levy (IVL) is expected to raise over \$450 million over 5 years. Emerging policy about how this fund will be spent suggests projects to be funded by the IVL will be those that contribute to the long-term sustainability of tourism in New Zealand, by protecting and enhancing biodiversity, upholding New Zealand's reputation as a world-class experience, and addressing the way critical tourism infrastructure is funded. Tararua visitor

sector leaders should monitor the policy affecting how the IVL is spent and be ready to seek funding for eligible Tararua-based projects.

- **Public conservation land:** Tararua District has extensive areas of public conservation land including that located in the Tararua and Ruahine Forest Parks. There are also many walking and general recreation opportunities offered at the Manawatū Gorge, Makuri Gorge, the Waihi Falls and elsewhere. Although budget and policy constrained, DOC's draft Visitor and Heritage Strategy indicates an active interest in providing additional recreation and leisure opportunities and insights.
- **Funding assistance:** Tararua District may have several projects suited to co-investment from either third-party funding or the Tourism Infrastructure Fund¹⁴.

¹⁴ We make further comment about which projects may be suited to this funding toward the end of this report.

VISITORS TO TARARUA

State of the Tararua economy

The gross domestic product (GDP) of Tararua District is \$727m. Growth in GDP for the year ending March 2019 was 3.0% compared to the national growth of 2.5%.

Annual 2019 (year ending 31st March) average percentage changes to several indicators of economic well-being¹⁵ demonstrate the general Tararua economy is operating well, but there are some underpinning long-term resilience challenges requiring attention – challenges we believe could be lessened by encouraging growth in the visitor sector. On the positive side of the ledger:

- Consumer spending was up 7.9% (New Zealand average 4.1%).
- Commercial vehicle registrations were up by 14.6% (New Zealand average -0.07%).
- Job seekers were up 2.1% compared to an average increase of 7.6% in the remainder of New Zealand.
- Unemployment was the same as the New Zealand average at 4.3%.
- House sales were up 8.8% (compared to the negative 1.6% experienced elsewhere in New Zealand).

The Infometrics provisional GDP growth estimate for the district was 3.0% for the March 2019 year, easily outpacing the 2.5% national average. The population grew 2.6% in the March 2019 year. Population increases remain above the national average, as people continue to be drawn to the region's affordable housing and quality lifestyle.

¹⁵ Data for the Tararua District was compiled from Infometrics.

Electronic card spending on retail purchases grew 8.1% in the March 2019 year compared to a national average of 4.1%. Spending by tourists in the district increased 9.0% in the April 2019 year, while guest nights in the district grew 8.1% in the March 2019 year.

Population growth is driving house sales in the district, which grew 8.8% in the March 2019 year next to a national average of just 1.4%. Sales activity is flowing through into house price inflation.

The net conclusion to be drawn from the above data is that the Tararua District is currently enjoying a favourable economic tail wind.

Tararua visitor spending

The annual spend by both domestic and international visitors to Tararua District for the last three years has gone up from \$47m in 2017, to \$48m in 2018, to \$52m for the 2019 (YE March 2019 - Figure 5). If a multiplier of 1.7% is applied to this January 2019 expenditure, then the visitor sector could be said to contribute to 11% of the Tararua economy. This of course leads to the challenge of attempting to define what may be achievable with more concerted effort, i.e. adoption and implementation of a Tararua visitor sector strategy and action plan. We return to this question later in the report.

The flow-on value of the visitor sector throughout the Tararua economy is large – with the biggest spend being on fuel (\$14m). This underpins the role played by Tararua as an area ‘transited’ by many visitors – many of whom do not regard it as a destination but do fill-up with fuel as they transit through the district. In addition, around \$9 - \$10m is spent on each of: retail food / beverage; served food / beverage; and other retail expenditure (Figure 6).

Figure 5. Tourism annual expenditure in Tararua District

Tourism expenditure

Annual total, Tararua District (\$m)

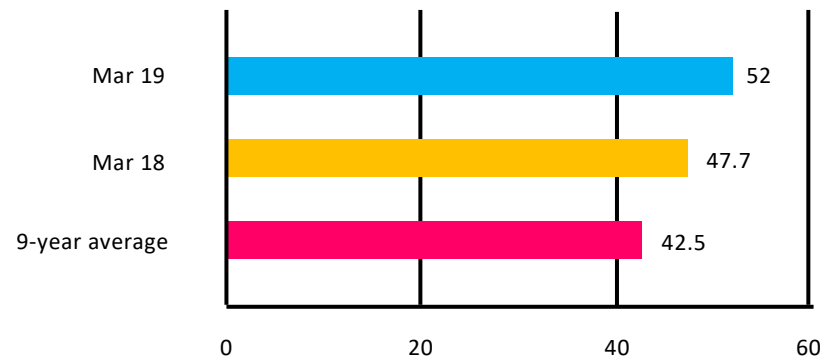
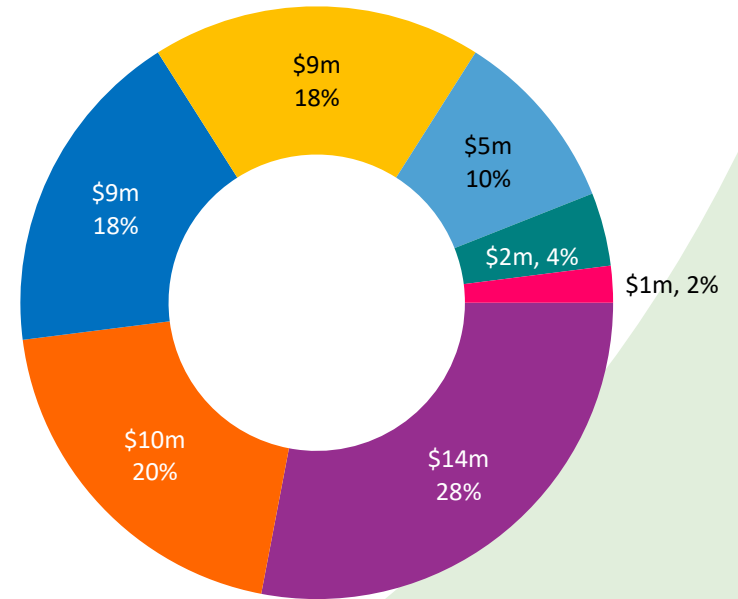


Figure 6: Expenditure of visitors to Tararua

Total visitor spend (YE Jan 2019)



- Retail sales - fuel and other automotive products
- Retail sales - other
- Food and beverage services
- Retail sales - alcohol, food, and beverages
- Other tourism products
- Accommodation services
- Cultural, recreation and gambling
- Other passenger transport (0%)

Source: MBIE Monthly Tourism Estimates, Feb 2019

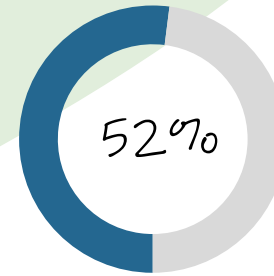
Tararua visitor accommodation

Expenditure on commercial accommodation by visitors is \$2m or only 4% of total visitor expenditure. The comparatively low level of expenditure on commercial accommodation reflects the high number of visitors who do not require accommodation because they are in transit or because they are day trippers. We estimate this type of visitor to be 52% of all Tararua visitors¹⁶. It also reflects the thirty percent of visitors who choose to stay with friends and family rather than in commercial accommodation.

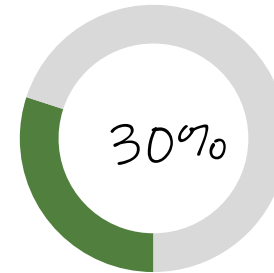
Occupancy of commercial accommodation is comparatively low at 22%¹⁷. This implies the district's accommodation facilities have the capacity for more visitors.

Information provided by the Tararua i-SITE at Woodville suggests there are 19 commercial accommodation listings in Tararua. These are relatively evenly spread between each of the district's five towns with an additional sprinkling in rural parts of the district. There is a mix of hotels, motels and lodges and they are all pitched at very moderate prices. When calculated on the base of all bedrooms within available accommodation, the full cost divided by the potential number of guests falls to \$36 per person per night, indicating that the region's private sector is generally offering low cost / well-priced accommodation for large groups of people.

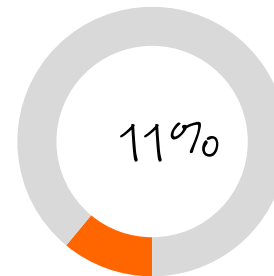
The ex-Pahiatua hospital, now renamed as Masters Hall, is an additional comparatively cheap and somewhat unique 100 max accommodation option suited to larger groups and events. Putting aside Masters Hall, there are 400 commercial beds available in Tararua.



52% of visitors to Tararua are in transit to somewhere else



30% of Tararua visitors stay with friends or family



11% of the district's GDP currently comes from the visitor sector



the district has an estimated 120,000 visitors per year who stay overnight and 5,700 visitors of international origin.

¹⁶ Source: Domestic Growth Insight Tool 2018

¹⁷ The low occupancy may be distorted by inclusion of the multi-bed Masters Hall facility which is more focused on smaller groups than full occupancy.

In addition, use is made of AirB&B and there are 37 listings within the district on bookabach.co.nz. Of these 37 listings, 64% were entire houses available to let.

Of interest is the good number of farm-stay accommodation options available in Tararua. Pongaroa and Wimbledon also offer visitors the opportunity to experience rural hospitality within local pubs and lodges.

We can see the value of Airbnb accommodation within the district continuing to grow. An experimental study commissioned by StatsNZ¹⁸ suggests that use of peer-to-peer accommodation¹⁹ has tripled nationwide since 2013. It now accommodates more than 8.8m people and is worth \$556m national wide (March 2018). Peer-to-peer accommodation constitutes 18% of all guest nights.

Every indication is that 'peer to peer' accommodation is giving a valuable boost to the economy of places like Tararua.

We also note that the absence of three-star plus accommodation in Tararua District means that some visitors to Tararua, particularly those travelling on pre-prepared itineraries, will enjoy the experiences the district offers and then stay overnight in accommodation in Masterton or Palmerston North.

Number of international visitors to Tararua

Tararua had 5,700 international tourists in 2018 (NB this does not necessarily imply they stayed overnight in Tararua). This number of international visitors reflects a year-on-year increase in international

¹⁸ Accommodation and the Sharing Economy in New Zealand, StatsNZ, June 2019.

¹⁹ 'Peer-to-peer accommodation' is the generic title for accommodation of this type, with AirB&B and Bookabach being two of the more significant providers.

visitors but in real terms and on an annual basis, the increased numbers are not large.

Number of domestic visitors to Tararua

Calculating the number of New Zealanders who visited Tararua is not easy. Data compiled by Infometrics suggests 45,611 visitors stayed in commercial accommodation, but the data referenced earlier in this report suggests that 52% of visitors transited through Tararua without staying overnight. In addition, of those visitors who did stay overnight, 30% stayed with friends and relatives. If all of this data is conflated, it implies the district may have had a total of between 120,000 and 130,000 domestic visitors during 2018²⁰.

Origin of domestic visitors to Tararua

Most Tararua domestic visitors come from Tararua's neighbouring regions (see Figure 7). There are upwards of 500,000 people within two hours travel of Tararua and closing on one million persons within three hours' drive. The 'origin-location' of most visitors to Tararua²¹ is as follows:

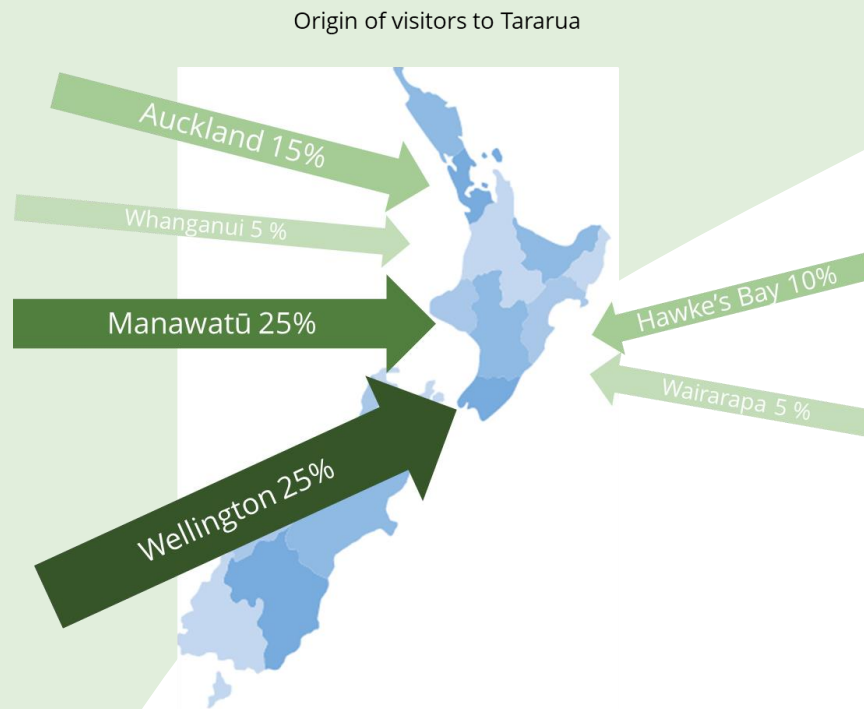
- 25% from Wellington.
- 25% from the Manawatū.
- 15% from Auckland.
- 10% from Hawkes Bay.
- 5% from the Wairarapa.
- 5% from Whanganui.

The origin of visitors to Tararua is an important point to note as it is this information that should inform the content of any market development plan that may be developed by the Tararua visitor sector.

²⁰ We note these numbers do not account for visitors to the district who are in transit to locations outside the district.

²¹ The home locations of the remaining percentage of Tararua visitors are spread in small numbers across all other regions

Figure 7: Home location of domestic visitors to Tararua District



i-SITE Woodville – visitor information

The importance, as identified by Trip-advisor, of visitors wanting to break their journey as they transit either north or south through Tararua District toward other destinations, should not be under-emphasised. We have no data to clearly indicate how many State Highway 2 users of light vehicles will stop on their journey through Tararua for refreshments or for other experiences. However, Woodville based i-SITE staff suggest this may be in

²² Data provided by I-Site personnel.

the order of 10-15% of vehicles. This would suggest 219,000 vehicles will stop in the district.

The origin of the persons visiting the Woodville i-SITE is also informative. The most recent data is for February 2019²². In this month 3,520 persons visited the i-SITE, 17% of whom were international, 35% of whom were from elsewhere in New Zealand and 46% of whom were locals. Longer term i-SITE data indicates the percentage of persons who are local visitors increases during the winter months while the percent of international persons or persons from elsewhere in New Zealand is greatest in summer, particularly during February.

i-SITE operators at Woodville informed us that one of the frequently referenced questions they have addressed over the last two years relates to travellers' uncertainty about the preferred route for travellers heading south to Wellington. This, particularly when combined with potential visitor uncertainty about the alternative Saddle Road route, may have contributed to the recent decline in vehicle movements through Tararua (see Figure 8).

To support the improvement of data capture more detailed visitor insights should be captured. One way to do this is to conduct a survey of visitors to the i-SITE. This may include questions around where they are from, where they are going to, where they are staying in Tararua District, how many nights they are staying and what attractions they have seen or will visit in the district.

Tararua local roads and state highways used by visitors

The total average daily non-commercial private car use of State Highway 2 between Eketahuna and Woodville was 6,698, Woodville and Dannevirke was 5,910 and Dannevirke to Waipukurau was 5,397 vehicles.

It would be valuable to know the percentage of these vehicles that were driven by non-residents and which stopped in Tararua as they transited somewhere else, but in the absence of survey data, this is very difficult to estimate²³.

We note Tararua towns are located midway between well-travelled journeys between Palmerston North, Wellington and Hawke's Bay and therefore, with the 'right information', more road users could be persuaded to stop in Tararua, to take-a-refreshment break, enjoy the experiences on-offer, and spend money.

Tararua has a total vehicle network comprising 1,185 km of sealed roads and 773 km of unsealed roads. This is the fourth largest network of any local authority in New Zealand. What this means is Council rates expenditure priorities, in comparison to city dominated local authorities, of necessity, tend to be directed toward road maintenance rather than other discretionary activities such as visitor market development activities.

A recent and significant strategic change to Tararua's transport environment has been the closure of State Highway 3 through the Manawatū Gorge in 2017. This has resulted in two alternative routes,

known as the Saddle Road and the Pahiatua Track, now being extensively utilised and a net reduction in the volume of through traffic (Figure 8).

A new State Highway located near the Saddle Road (the 'Te Ahu a Turanga: Manawatū Tararua Highway') will be completed by 2024. Commissioners empowered to consider the 'notices of requirement' (NOR) for designations from territorial authorities under the Resource Management Act for construction of this new road, completed their report in May 2019²⁴.

These Commissioners supported the NORs sought by NZTA, with conditions. In brief, the Commissioners suggested the new road '*will yield significant positive social and economic effects*' for Woodville and the wider region.

The construction of this road will overcome current uncertainties about the challenge of driving across the alternative Saddle Road and Pahiatua Track routes. The percentage annual change in volume of traffic using State Highway through Tararua will return to the positive side of the ledger.

The opening of the new road in 2024 thereby provides a convenient focus point for lining up the initiatives required to fully capitalise on the additional visitor growth opportunities arising from the traffic flow returning to a 'new normal' and the associated economic and social well-being benefits to the Tararua District.

In addition, the Commissioners' recommended construction of a separated shared pedestrian and cycle pathway in the broad area near the proposed new highway. This decision is significant as it opens the

²³ It would be equally valuable to know where they stopped and what they did / visited / experienced during the driving break.

²⁴ Te Ahu a Turanga: Manawatū Tararua Highway Notices of Requirement for Designations Territorial Authority Recommendation Report, May 2019

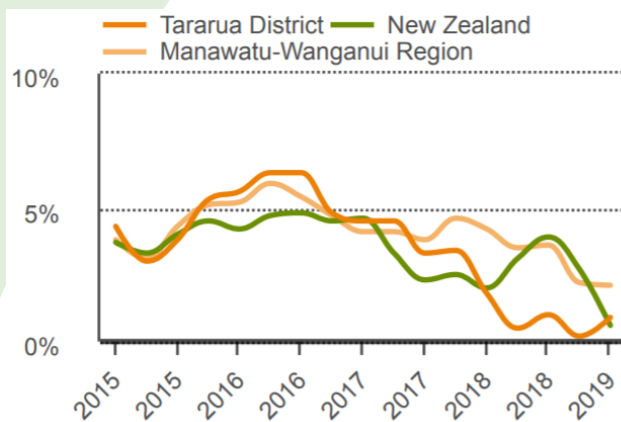
door to a circular walk / cycle experience encompassing both the new State Highway and the Manawatū Gorge tracks, with Woodville being a convenient halfway or starting point – with associated servicing / visitor spending opportunities.

A further roading matter is the commitment of Tararua District Council to improve previously designated State Highway 52, now a local road known as 'Route 52'. While primarily used to service farming and forestry needs, the road also provides travellers with the opportunity to enjoy expansive rural landscapes. The current level of service offered by this road is sub-optimal because of its vulnerability to weather events and the increasing demand placed on it from forestry vehicles. The Council has proposed upgrade expenditure across the 2018-21 period and has approached the NZ Transport Agency for funding but, the latest application has been declined. Council should revisit opportunities for funding for this work.

Figure 8: change in traffic volume through Tararua

Traffic Volume Growth

Annual average % change



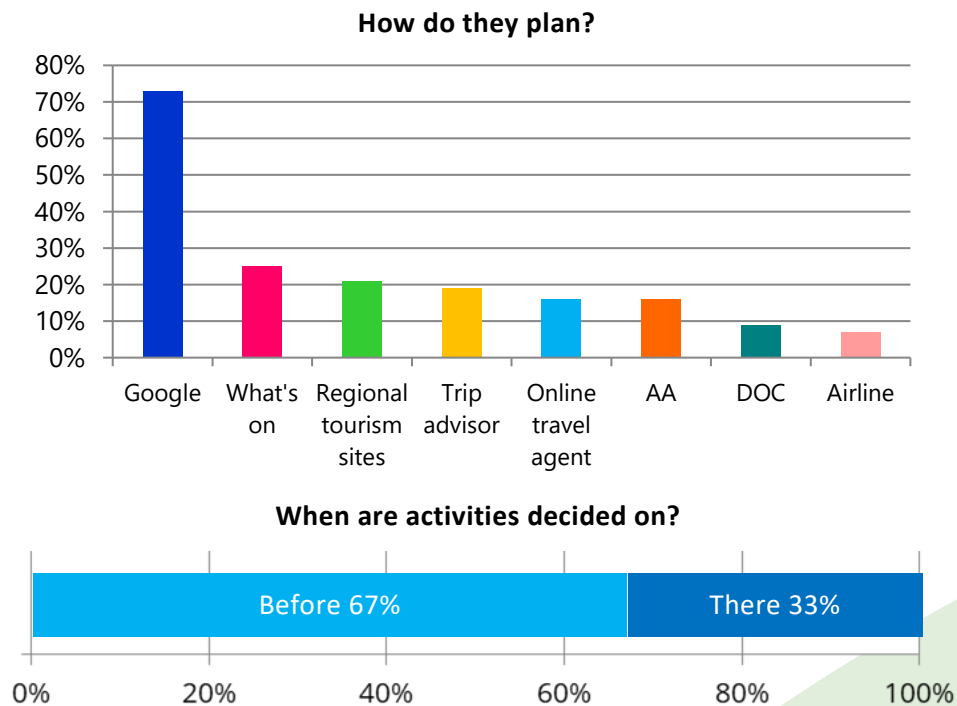
We recommend completion of the 'Te Ahu a Turanga: Manawatū Tararua Highway' in 2024 be viewed by Tararua District Council and Tararua visitor experience and service providers as a 'catalyst' year for bringing together a full suite of agreed market development, destination management and expanded Tararua district-based visitor experiences within a well-resourced action plan.

Trip planning by domestic Tararua visitors

Two-thirds of domestic visitors to Tararua plan what they intend to do before their visit, but one third make their decisions as they go (Figure 9 - right). Of those who decided what they wanted to do before coming to Tararua, 27% decided less than a week before their visit.

This information is important because it implies a need to ensure information about Tararua visitor attractions is well-presented on electronic communication channels and, at the same time, good road-side information is provided, to cater for those visitors who make their 'destination experience' decisions while they are on-the-road.

Figure 9: When and how domestic visitors plan their visit to Tararua



What do visitors want to do when they come to Tararua?

There are several sources of information throwing light on what visitors do when they visit Tararua. These are described in the section of the report which follows.

GENERAL VISITOR SURVEY DATA

The first source of information is that provided by the Domestic Growth Insight Tool 'digit Insight'. Putting aside that most visitors to Tararua are in transit, this data suggests (noting that some responses will overlap) that visitors to Tararua are motivated by the following triggers:

- Attending a specific friend or family event, e.g. wedding, birthday, Christmas etc: 52%
- Getting together with friends and family: 48%
- Seeing or hearing about an activity they would like to do: 38%
- Attending a specific event, e.g. sport, festival or show: 30%
- Participating in a specific event, e.g. sport, festival etc: 16%

This information supports our earlier statement that, apart from those in transit, most people come to Tararua to visit friends and family. It also demonstrates the value and importance of encouraging future visitor expenditure and creating events. Furthermore, it demonstrates the importance of creating experiences and activities such as walks and cycle rides and opportunities for friends and family to enjoy local parks and reserves.

VISITOR NUMBERS AT ICONIC SITES OR EVENTS

The managers, agencies or proprietors responsible for various visitor experiences told us the approximate number of attendees or participants (2018) was as follows:

- Walks in and around the Manawatū Gorge – 76,000
- Tui Brewery (non-locals) – 50,000
- Pūkaha National Wildlife Centre – 45,000
- Norsewood experiences – 40,000
- Woodville MotoX – 6,000
- Waihi Falls – 3,000
- Akitio Easter Fishing competition – 1,000
- North Range Trio – 1,000

Figure 10: Heat Map of visitor attractions



WORKSHOP PARTICIPANTS – VIEWS ABOUT TOP ATTRACTIONS

Workshop participants were asked to identify what they viewed as being Tararua’s top four visitor attractions. Their responses are summarised in Table 1.

Table 1: Top four Tararua visitor attractions

	First	Second	Third	Fourth
Workshop one (TDC councillors and staff)	Pūkaha National Wildlife Centre	Tui Brewery	Te Āpiti / Manawatū Gorge Walks	Fantasy Cave
Workshop two – North Tararua	Tui Brewery	Pūkaha National Wildlife Centre	Norsewood	Fantasy Cave
Workshop three – South Tararua	Tui Brewery	Pūkaha National Wildlife Centre	Fishing and hunting	Visiting friends and relatives

The order of priority / frequency of the top things referenced by our workshop / expert informant sources as Tararua ‘attractants’ may be grouped by theme as follows:

1. Natural beauty, flora and fauna, wide open spaces, untouched mountains, clean / fresh, quietness, scenery, raw beauty, rivers.
2. Friendly, genuine, real, down to earth and authentic people.
3. Rural, farming environments.
4. A good place to take a break / eat while travelling further afield.

5. Uniqueness of the Manawatū Gorge landscape – a river carved through uplifted ranges.
6. The coast and beaches.
7. Small towns with a touch of uniqueness, even quirkiness - under populated, lacking congestion, safe, inexpensive, step back in time, laid back, off the beaten track, filled with shops selling second-hand goods.
8. Exciting, adventurous uncrowded outdoor experiences.
9. Learning from and understanding Scandinavian heritage.
10. The opportunity to better celebrate and understand the link the Manawatū River provides from its source and its importance to Māori heritage.
11. Activities offering family fun with the kids.
12. Opportunities to visit family and friends and share local adventures.
13. Special events such as the Woodville MotoX.
14. Core sporting events like golf and rugby that bring people to the district on a weekly basis.

TRIP-ADVISOR

Trip-advisor has ranked priority activities to do in Tararua. We have grouped and ranked the top five of the 15 identified experiences as follows:

1. **Outdoor experiences:** Te Āpiti Wind Farm, Woodville / Cliff Walk, Eketahuna.
2. **Hearing experts talk about nature:** Pūkaha National Wildlife Centre.
3. **Great activities for families:** Fantasy Cave Dannevirke / Middleton Model Railway Eketahuna.
4. **‘Hidden gems’:** New Zealand Natural Clothing store Norsewood / Dannevirke Domain Dannevirke.

5. **Speciality museums:** Woodville Reed Organ Museum
Woodville / Dannevirke Gallery of History Dannevirke.

The main drivers recorded on Trip-advisor as the reason for going to Tararua visitor attractions were as follows:

- **Family activities:** Two high ranked activities for families were Fantasy Cave, Dannevirke and Middleton Model Railway, Eketahuna (58 and 20 reviews respectively). As well as sentiments expressed around these being great activities for children, respondents' comments also drew attention to the enthusiastic reception offered by owners and volunteers at both places.
- **Travellers passing through wanting to break the journey:** There was a sense that many travellers were surprised by 'discovering' some of the area's natural beauty. For example, Dannevirke Domain was described as a 'hidden gem,' a great place to break the journey and a good place for kids to play (especially on the Viking ship).
- **People from out of town making special trips to have speciality experiences and visit sites:** Travellers appeared attracted by some of the special experiences offered in Tararua. For example:
 - For music and/or history buffs, the Woodville Reed Organ Museum was viewed as 'an absolute wonderland' and the music experiences offered in Norsewood 'with great hosts, who give a personal touch' was viewed as being very special.
 - The Cwmglyn Farm, Eketahuna is a 'labour of love' and 'quirky'.
 - 'Pūkaha National Wildlife Centre is an experience worth travelling for'.
 - Xmas displays at the Masters Hall in Pahiatua are 'a sight to behold' (1000 attendees).

Travellers taking a break for refreshments while in transit through the district are attracted by a set of comparatively well-known and respected cafés including:

- **Eketahuna:** Lazy Graze.
- **Pahiatua:** Black Stump Café and the Pahiatua Bakery and Café.
- **Woodville:** Yummy Mummy's cheesecakes.
- **Dannevirke:** Barrelhouse Restaurant and Bar.

What other visitor experiences are offered in the Tararua District?

FREEDOM CAMPERS

Tararua District is an attractive location for freedom campers with almost 1,000 recorded as having visited the district in the month of March 2019²⁵. Woodville's Ferry Reserve was the most popular overnight stay location, with Mangatainoka Reserve and the Alfredton Community Centre and Domain also popular.

Other features of the freedom camper market are as follows:

- The freedom campers who come to Tararua previously camped in Masterton (28%), Central Hawke's Bay (23%) and Palmerston North (22%).
- The next districts to be visited by the freedom campers, after Tararua, were Central Hawke's Bay (27%), Palmerston North (24%) and Masterton (21%). NB This implies most are travelling from south to north.
- Most (60%) freedom campers did not stay overnight. Of those who did stay overnight, this was seldom for more than one night.

²⁵ National Freedom Camping Report, Campermate and Geozone, March 2019

- Two-thirds of freedom campers were international and one third were domestic.

MOTORHOME MARKET

Eketahuna, Woodville, Mangatainoka and Dannevirke provide favoured locations for members of the New Zealand Motorhome Association. More off the beaten track locations at Herbertville and Akitio are also frequented by those motorhome owners with slightly more time and ‘good intelligence’ about the attractiveness of these places.

CYCLE TOURS AND MOUNTAIN BIKING

Tararua’s country roads are often used by touring road cyclists. The 263km Route 52 extending from Waipukurau to Masterton is a popular 2-3-day ride. In the words used in the ‘Classic New Zealand Cycle Trails’²⁶ book *‘the route is an excellent alternative to the traffic-laden State Highway 2’*. Other commentators told us *‘planned improvements to the 10 km stretch near Masterton will further enhance the ride but increased use of the road by logging trucks may negatively influence its popularity for cycling’*.

Use is also made of the Te Ara O Mahurangi Mountain Bike Trail (3.6km loop, grade 3 & 4) and the Windfarm ride (41km one way, grade 3).

WALKING

Te Āpiti – Manawatū Gorge is the most popular area for walking. The growth over the last several years in people walking the Te Āpiti tracks has been significant (Table 2, over page) although a drop-off in use has occurred in the last few years, most likely because of the Gorge closure.

²⁶ Classic New Zealand Cycle Trails, the Kennett Brothers, 2018

More than 30 other walks and hikes are listed on the DOC website for the 92,000 hectares of land within Ruahine Forest Park. A further 20 walks are listed as being available in Tararua Forest Park, with the most frequently used Tararua walks being those accessible from Putara Road near Eketahuna. Other popular walks include the Eketahuna Cliff Walk, the Waihi Falls Track and the Copper Mine Valley walk plus a range of town-based and reserve-based walks.

Table 2: Use of Te Āpiti walking tracks

Calendar year	Approximate total track walkers
2012	29,900
2013	59,500
2014	66,000
2015	83,000
2016	83,000
2017 ²⁷	76,000

RIVER FISHING

Keen fishermen refer to the Tararua District as the place with six fishing rivers although one reliable informant suggested the fishing is no longer as good as it once was because of the effects on water quality arising from increased farming intensity. Early season fishing is said by our informant *‘to be best although skill and the right gear is always required’*.

INTERNATIONAL WOODVILLE MOTOX GRAND PRIX

The venue for the Woodville MotoX event is located on farmland near Woodville. Each 26/27 January the farm used for this event is transformed into a unique Grand Prix Motocross style park.

²⁷ Data for 2018 was not available when we were compiling this report.

In 2018, approximately 5,500 people attended the event: 1,400 support staff and officials; 500 riders and 3,500 general public. Nearly 40% came from neighbouring regions (Manawatū, Wairarapa, Whanganui & Hawke's Bay), 50% came from regions beyond the immediate neighbouring districts and nearly 10% were locals from within Tararua.

Most participants²⁸ stayed onsite at the event (45%), with 18% staying in Manawatu, followed by 10% who stayed elsewhere in Tararua District. The remainder of the participants travelled to the venue each day from their non-Tararua / Manawatū accommodation.

The total estimated economic impact (EEI) of the 2018 event for Tararua was close to \$100,000.

TUI BREWERY-BASED EVENTS

The staff at Tui Brewery, Mangatainoka, have established a history of working with sporting and other interest groups to organise a wide range of popular Mangatainoka-based events. These include regular (almost monthly) speciality Japanese, vintage, V8's, American car or car club events; two wheel / motorbike events; the Tui brewery express steam train from Plimmerton; music, bush-run, 'race to the brewery' and bush-cycle-tour events; pre-season Hurricanes rugby events; special 'Santa's lunch' events and; conferences / functions using the Tui Brewery's dedicated facilities that cater for up to 220 people with on-site catering and a functions team.

The venue is also a popular daily stop-off point for travellers as they head further afield. The restaurant, brewery tours, brew-your-own facilities / services and museum are part of the attraction of this venue with locals also being regular attendees, particularly on Friday nights. The estimated number of casual and local non-event patrons total 200 per week during

²⁸ Information provided by tourism consultant Angela Scott, Cloud 12

the summer season. In addition, upwards of 50,000 persons attended the wide range of special events held in the financial year 2018/19.

BEACHES

Akitio and Herbertville are the two favoured Tararua District beaches. Both are located around 70 km east from Dannevirke with bach, campground and farm-stay accommodation. The Easter Akitio fishing contest attracts over 1,000 entrants.

FARM STAY EXPERIENCES

Around 95% of Tararua's 400,000 hectares are farmed. Forestry covers a further 13,000 hectares. Enjoyment of these working environments and landscapes through farm stay experiences, including those provided at rural villages like Pongaroa and Wimbleton, are a feature of the district.



Te Āpiti - Manawatu Gorge walk www.manawaturiver.co.nz

CHALLENGES AND OPPORTUNITIES

Challenges, risks and threats

We asked the participants at each of our workshops, as well as our expert informants, what they thought were the challenges or obstacles slowing down visitor sector growth in Tararua. Views ranged widely but we were still able to group the frequency with which different challenges were referenced into three categories:

1. Frequently mentioned challenges
2. Moderately mentioned challenges
3. Occasionally referenced challenges

Details about these challenges follow.

FREQUENTLY MENTIONED CHALLENGES / RISKS / THREATS

- **Not enough iconic experiences:** Absence of enough sought-after / market-ready experiences.
- **Poor access:** Closure of State Highway 2 at Manawatū Gorge causing less through-traffic from Manawatū and reducing use of the Te Āpiti area for walking and cycling.
- **Limited recognition of Tararua as a destination:** Not enough awareness of the Tararua District as a unique place. Compounded impact of this issue by confusion, in the minds of the visitor market, between the Tararua Ranges and the Tararua District.
- **Insufficient visitor experiences with a competitive advantage when compared to neighbouring regions:** Tararua is viewed as a place to drive through to reach other experiences in Hawke's Bay or the Wairarapa or elsewhere – 'a place to drive through rather than to go to'.
- **Lack of collaboration between neighbouring local authorities:** Absence of arrangements to enable the best features of the larger area to be packaged and marketed to visitors as part of a well-developed broad-area itinerary (NB visitors seldom recognise territorial authority boundaries).

MODERATELY MENTIONED CHALLENGES / RISKS / THREATS

- **Need for more investment and improvement of the appearance of district's towns:** Adequate but insufficient investment in town-centre refurbishment plus the absence of enough financial assistance to earthquake-proof and achieve occupancy of some town-centre buildings, e.g. those in Pahiatua and Dannevirke.
- **Absence of visitor leadership:** Need for more connection and more leadership to be exercised between visitor service and experience providers.
- **Infrastructure to support visitors:** Need for better signage to carparks, better access to some experiences and more facilities at some visitor sites such as Waihi Falls.
- **Absence of collaboration between Tararua towns:** Concern that the north, south and west and the different towns of Tararua are more interested in 'their patch' than the district as a whole.
- **Insufficient market development:** Not enough funding toward promoting the Tararua experiences available for visitors.
- **Not enough Events:** Not enough special events to attract visitors.

OCCASIONALLY REFERENCED CHALLENGES / RISKS / THREATS

- **Lack of the 'right' accommodation:** Absence of three-star plus accommodation in the area, causing some attendees at events to use accommodation located elsewhere, including that located in Palmerston North or Masterton.
- **Lack of things to do for young people:** While there are experiences and attractions for children and adults, apart from the Tui Brewery there is a shortage of events to attract and or employ young people and there is a lack of night-time entertainment.
- **Difficulties with signage:** Red tape associated with erecting signage to attract persons who are in-transit to stop, eat and experience the things on offer in Tararua.
- **Cafés closed:** Unwillingness or complacency of cafés and other food / experience providers to extend their normal hours of operation to cater for the needs of persons attending events such as the MotoX at Woodville.
- **Road use safety and service issues for cyclists:** Concern about the degradation of the attractiveness of Route 52 for cyclists because of its increasing use by logging trucks and because of the long length of travel without support services.
- **Comfort with the status quo:** Apathy and shyness toward adoption of changes that enhance the attractiveness and range of experiences on offer to visitors.
- **Digital connectivity:** Gaps in the current digital and cellular networks and failure to expand the digital skills of those servicing or providing experiences to visitors.

Opportunities / strengths

Visitor growth opportunities are achieved sometimes simply by overcoming the challenges holding growth back, such as those listed above. There is therefore no need to repeat the above listed 'challenges' albeit with a positive overtone. However, there is a need to list the additional visitor priority growth-aspirations and strengths referenced by either our workshop participants or expert informants.

Sometimes these aspirations were focused on getting more visitors to the district by establishing new experiences. Sometimes the opportunity was about expanding existing attractions. Sometimes the opportunity was centred on undertaking marketing focused on reaching the 'right' type of visitor in the right way. And sometimes the opportunity reflected the need to give more weight to essential points-of-difference that make Tararua special.

SWOT analysis

All the above strengths, weaknesses, opportunities and threats may be prioritised and summarised within a single SWOT analysis (Figure 11) over the page.

As part of the SWOT analysis, we assessed the visitor offerings of Tararua District compared to the surrounding districts of Wellington, Hawke's Bay, the Wairarapa, and Palmerston North / Manawatū. All four neighbouring regions have stronger brand awareness, marketing profiles and a

'maturity' in their visitor sectors not present in Tararua:

- Wairarapa and Hawke's Bay have strong wine, boutique shops, regular large-scale special events and significant accommodation and refreshment / restaurant offerings.
- Wellington has a long history of offering a wide range of experiences under their 'coolest little capital' brand.
- Palmerston North and Manawatū are less developed visitor destinations than Wellington, Wairarapa and Hawke's Bay but they also have advantages based on the scale of their home population and the comprehensiveness of their visitor offerings.

The Tararua District has the potential to complement and support the surrounding regions/ districts and grow as a visitor destination through focused and better resourced efforts in the district but also conscious collaboration with neighbouring regions.

Figure 11: SWOT analysis

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> – 500,000 domestic visitor market (and growing), within 2 ½ hours travel from Tararua – Presence of three strong existing products / experiences led by proven skilled managers / entrepreneurs and organisations (Tui Brewery, Pūkaha National Wildlife Centre, Norsewood) – Positive community attitude toward visitors / visitor growth – Very large travelling public transiting through Tararua District who, with the right experiences, services and information, may respond positively to opportunities to stop, spend more money and further enjoy Tararua experiences – Competitively priced services and experiences suited to domestic visitors and the family market – Presence of Tararua five towns each with unique brand recognition – Strong community focus from visitor business operators throughout the district (free access, discounted rates, business owners are local) 	<ul style="list-style-type: none"> – Absence of three-star plus accommodation in the district – Limited range of well-known market-ready experiences – Insufficient motivation for travelling public to stop and stay in Tararua – Low key approach to market development – Absence of a coherent, well-funded and strongly supported visitor development plan – Lack of a coordinated approach to the exercise of sector development services and leadership – Poor public and market understanding of destination Tararua / confusion with the Tararua Range – Travel distance / time to reach potential iconic east coast beach opportunities – Market dominance of better-known attractions in neighbouring areas – Poor online presence and physical signage at district entry points
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> – NZTA commitment to construct a new road and dedicated cycle / walkway to replace the Manawatū Gorge Road by 2024 – Collaborative approach to the development of Te Āpiti visitor experiences – New Iwi based visitor experiences in the overlap space between manaakitanga (hospitality) and kaitiakitanga (guardianship) – Research confirming the merit of investing in the upgrade of the Waihi Falls visitor experience – Release (May 2019) of the Tourism Aotearoa Strategy with recognition of the need for more effort to spread benefits of tourism beyond traditional visitor centres and to exercise stronger national visitor sector leadership – Diversify the Tararua agricultural economy embracing agritourism – History of organising successful events - the potential to deliver a portfolio of additional events – Clear recognition from local authority leadership in Tararua and in neighbouring districts that investing in visitor infrastructure and services has leverage benefits for attracting and retaining Tararua residents – Emerging list of expanded and new / prioritised visitor experiences and growth enablers, including the commitment to prepare this visitor strategy – Collaborative approach between industry and council with initiatives being self-funding rather than needing ongoing Council rate payer investment. 	<ul style="list-style-type: none"> – Absence of deep collaboration with neighbouring local authorities and visitor-sector experience and service providers – Failure to think about Tararua as a destination within a connected 'visitor itinerary' context – Failure to act on priority opportunities because of competing demands on scarce public sector funding – Small scale thinking and competition for attention / investment between Tararua communities – Failure to motivate necessary private sector leadership and investment – Dominance of road use by increasing volumes of forestry heavy traffic at the expense of the safety and potential growth in interest from visiting cyclists and 'tour-self-driving' tourists, e.g. Route 52

TARARUA VISITOR OBJECTIVES

Overriding objective

The scenarios for growth in the number of visitors and the spending of visitors to Tararua range from 1% to 10% per annum. One per cent growth will be achieved with little effort and simply by capitalising on the current increased number of domestic and international tourists. Two per cent growth is achievable by continuing with current experience development initiatives. Four to five per cent potential growth is achievable by:

- Establishing a dedicated budget, strong leadership and a clear action plan.
- Supporting and growing the capacity and capability of the Tararua visitor sector.
- More strongly collaborating with neighbouring local authorities / agencies.
- Working with project proponents to seek third-party funds for the development and expansion of a wider range of current and new Tararua experiences.

Achievement of 10% percent growth would require a significant boost to sector capacity, experience and market development, several iconic new visitor experiences and substantial investment – an investment which may be beyond available resources and for which the cost / benefit may be subject to challenge.

We recommend adoption of an aspirational 5% targeted growth in visitor numbers and visitor spending, year-on-year between 2020 and 2030. If this target was achieved, then the district could see more than 213,000 overnight visitors per annum by 2030 (Table 3).

²⁹ Expenditure by visitors considers all visitors including those in transit.

Table 3: Visitor growth and expenditure aspirational growth

Year	Number of overnight visitors	Expenditure of visitors ²⁹
2019	125,000	\$50,600,000 ³⁰
2020	131,250	\$53,130,000
2021	137,812	\$55,786,500
2222	144,702	\$58,575,825
2223	151,937	\$61,504,616
2224	159,533	\$64,579,846
2225	167,509	\$67,808,838
2226	175,884	\$71,199,279
2227	184,678	\$74,759,242
2228	193,911	\$78,497,204
2229	203,606	\$82,422,064
2030	213,786	\$86,543,167

What the number of overnight visitors displayed in the table doesn't account for is the number of daily visitors who currently stop and experience Tararua attractions while in transit to another location, including those who visit the district and then return home. Nor does it account for the opportunity to increase this number.

If just five percent of the daily 'in-transit' non-commercial vehicles stopped to enjoy Tararua experiences and services for various periods of time and if each vehicle contained an average of two persons, then this

³⁰ Data prepared by Infometrics for March 2019 suggests expenditure has already reached \$52 million

would add a further 220,000 to the current (2019) count of visitors to the district per annum³¹, i.e. 325,000 visitors per annum.

If the 5% growth per annum visitor target is achieved for this 'in-transit' type of visitor, and this annual growth rate was able to be sustained each year for the next ten years, then the number of 'in-transit' visitors to the district could grow to close to half a million per annum by 2030 bringing the total number of Tararua visitors to over 1.2 million. Expenditure would grow from \$52 million to \$86.5 million³².

Currently about 5% of all visitors, or 5,700 international visitors, stop in Tararua District. The percent of international visitors could grow although we see best value for money in investing in domestic growth initiatives. We envisage that growth in the domestic market will have flow-on effects that may give rise to an increase of 2-3% in the number of international visitors coming to the district.

In addition, the current Tararua 'freedom-camper-friendly' approach also captures a relatively high number of international visitors who may return and who may select and spend more in their second visit to Tararua than their first, because of the quality of their first experience. If a 2.5% per annum increase was to occur per year for ten years, then the number of overnight international visitors could increase to around 7,500 by 2030.

Other visitor objectives

Simply growing the number of visitors to Tararua is not a 'sufficient' objective on its own. Other objectives are also required. These need to cover such matters as ensuring the benefits of visitor growth are secured

³¹ The difficulty we experienced in accurately estimating the number of visitors to Tararua District is unfortunate. The only way to overcome this is to undertake an intercept survey of persons transiting through the area to ascertain the reason for their visit etc.

for as many of the residents of Tararua as possible, the quality of the experiences on offer are sustained and the social licence of visitors and visitor sector operators alike is sustained. In a nutshell, the objective is to capitalise on the benefits of visitors for the district economy as opposed to simply chasing growth in the visitor market. Stated differently, the focus should be on 'tourism for Tararua' alongside 'Tararua as a place offering experiences for tourists'.

Our workshop participants identified several matters for us to consider when shaping district visitor objectives:

- **Districts should not be in competition** with each other, but they should celebrate their locational differences and combine these points of difference within joined-up visitor journeys.
- **More quality attractions** and higher quality accommodation should be established as a method to encourage more visitors to stay longer rather than driving through the district.
- More effort should be directed toward creating visitor sector activities and **employment for younger Tararua residents** to keep them in the area or to attract them back home.
- More community resilience and prosperity should be sought by diversifying the economy through growth in the visitor sector.
- More **pride** should be sought from within the district by creating a clearer identity, more experiences and better-quality services than at present, noting that these things not only attract visitors but also **attract and retain new residents**.
- More focus should be given to leveraging the financial benefit arising from **events** taking place not only within the district but also outside the district such as Hawke's Bay concerts.
- The district should be better positioned to capture the gains from through traffic.

³² Our assumption is that expenditure of 'in-transit' visitors is currently accounted for in available visitor expenditure data, even if the number of these visitors is not.

- A 'clearer' Tararua **brand, story** and general information about the region is required.
- Focus should be given to building on the experiences and services that **already attract visitors**.
- More visitor sector investors and funding streams should be secured by developing a **visitor prospectus**.
- A higher quota and diversity of **local produce** should be offered within local restaurants and food offerings should be of a better quality than at present.

With the above guidance in mind, we recommend the adoption of the following objectives:

Kaitiaki and sustainability: Sustainably manage and grow the joy that comes from respectful appreciation of the public conservation estate and from a visit to the other visitor attractions on offer within Tararua by working with Tourism Industry Aotearoa and others to further entrench understanding of the Tiaki promise.

Māori economy: Grow the contribution and wealth of iwi as investors and employees and achieve more depth of visitor experience by fostering greater connection between visitors and iwi-based cultural experiences and stories.

Shoulder season: Consciously focus attention on establishing events and growing / marketing experiences that sustain the use of Tararua visitor accommodation and facilities throughout all months of the calendar.

Sector capacity and capability building: Provide visitors with services that are appreciated by them on all occasions by providing training opportunities and exercising sector leadership.

Jobs: Optimise growth arising from the visitor sector by securing connections between the visitor economy and all other parts of the

economy particularly entertainment, retail and fuel sales, food services, passenger transport, guiding, travel, farming (new agritourism ventures) and information provision services and education etc.

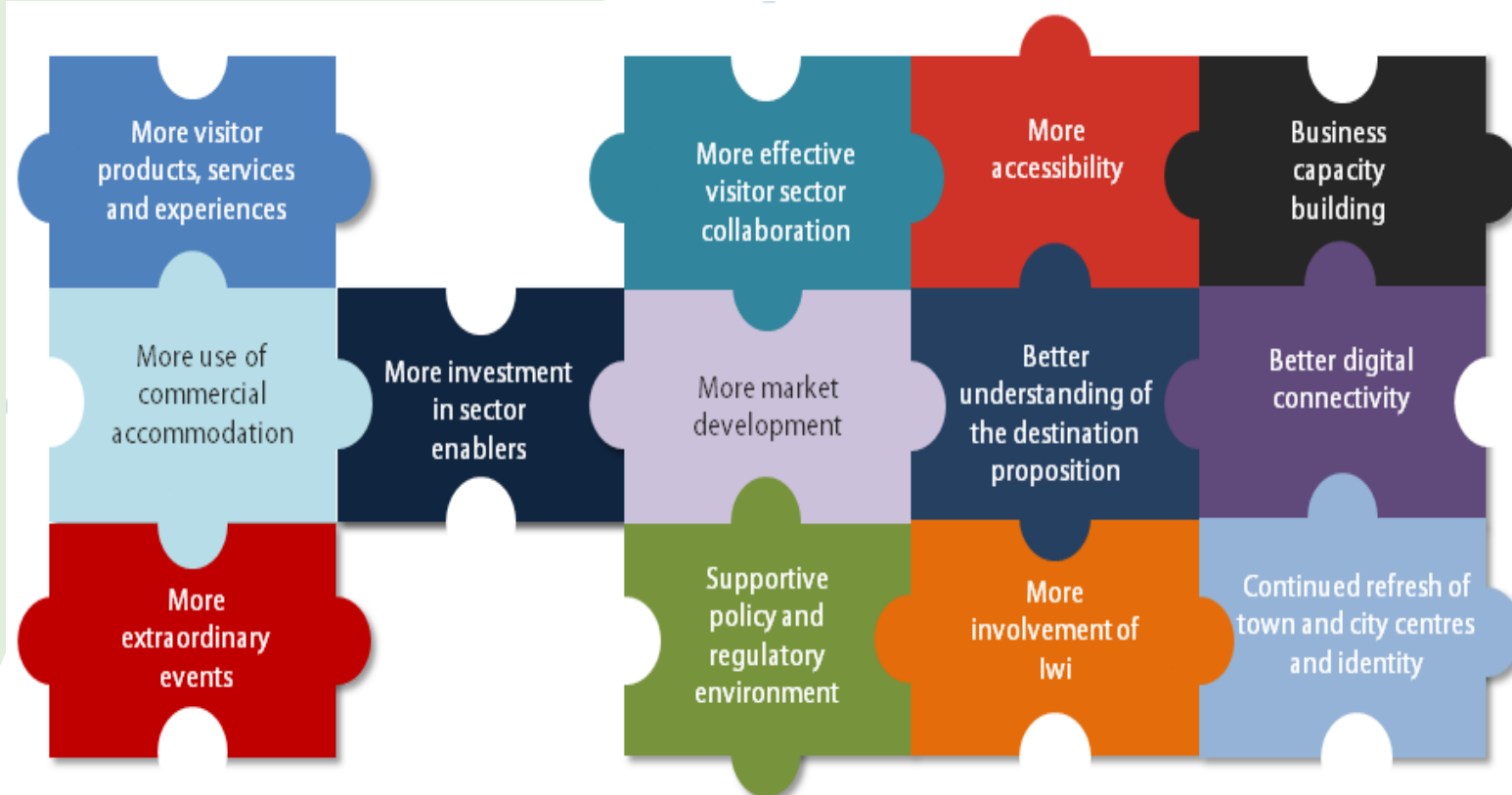
Reputation and brand: Define, market and protect that which is uniquely Tararua, i.e. that for which Tararua has a competitive comparative advantage.

Partnership: View Tararua visitor facilities and experiences as part of a bigger visitor fabric and more strongly work with neighbouring districts, DOC, iwi and all participants in the Tararua visitor sector to promote a joined-up approach.

GROWING THE VISITOR SECTOR IN TARARUA - ENABLERS

Successful growth in the visitor sector in Tararua will require adoption of an approach that integrates new experiences, events and services with the 'enablers' that ensure these experiences and services are able to be delivered with style. These enablers include investment in infrastructure such as roads, training, regulation, digital connectivity etc. (Figure 12).

Figure 12: Enablers contributing to an integrated approach to visitor sector development



Enablers are an important focus for Tararua. This is because the access visitors can enjoy within reserves and public conservation land are a core part of Tararua visitor experience offering. It's also because of the fundamental importance to sector growth of strong leadership and 'quality' visitor-related infrastructure.

As indicated by the prominence of the 'link' piece in the jigsaw displayed in figure nine, additional or expanded visitor experiences need to be established in tandem with investments in 'enablers'. We urge the Tararua District Council to view itself as a key player in the leadership and delivery of these 'enablers'.

In the following section of our report, we address the most important 'enablers' of Tararua visitor sector growth.

More effective visitor sector collaboration

We note that the Tararua District Council does not have a lot of discretionary rate-payer sourced expenditure for things beyond core transport and water infrastructure. Nevertheless, it is clear the Council recognises the importance of facilitating growth in the visitor sector. This is because the Council knows it will add resilience to the economy through diversification, increased visitor expenditure and employment generation³³.

Throw into this mix the fact that the majority of visitors to Tararua are in transit to somewhere else and also the need to think about Tararua visitor experiences as part of a joined-up itinerary, then it is plain that the best return from scarce ratepayer dollars may be for the Council to make a conscious effort to collaborate with all parties influencing the demand for and supply of visitor services and experiences in the broader mid to

lower part of the North Island. This implies clearly designating a person within the Council's economic development team with responsibility for the visitor sector.

The parties with whom Council relationships should be enriched and suggestions about how this may be achieved are provided in Table 4.

³³ Personal communication with Mayor Tracey Collis, 26 March 2019

Table 4: Methods to achieve visitor sector collaboration

AGENCY / ORGANISATION	METHOD
Regional tourism organisations and economic development agencies, e.g. CEDA, and those located in all neighbouring districts and regions.	<ul style="list-style-type: none"> ➤ Quarterly informal meetings. ➤ Clear statements about the experiences, itineraries, services and 'brand' that make Tararua an attractive place to visit.
Government departments such as DOC, Provincial Development Unit (PDU) and Tourism Infrastructure Fund Units within MBIE and TPK.	<ul style="list-style-type: none"> ➤ Strong relationships based on regular meetings and focused 'issue or opportunity' specific agenda.
Major visitor sector experience and service providers from the district including those associated with Tui Brewery, NZ Natural Clothing and Pūkaha National Wildlife Centre.	<ul style="list-style-type: none"> ➤ Quarterly small and focused meetings facilitated by a skilled and informed Council officer.
Current and potential future event managers.	<ul style="list-style-type: none"> ➤ Focused annual event agenda, discretionary catalyst funding to attract and de-risk new events and conscious exploration of how Council services and policies may smooth the path for the management of events.
All other visitor service and experience providers including accommodation, community, retail, food and information providers.	<ul style="list-style-type: none"> ➤ Six monthly newsletter and forming of a district wide business leaders group and annual forum.

Better understanding of the Tararua destination proposition

Our discussions with workshop participants suggested the Tararua brand, within the visitor market, remains a little confused. Many potential visitors were said to view Tararua as either a type of cheese or the name of the ranges running from the Manawatū Gorge to Wellington, rather than a destination. Some commentators sometimes referred to the district as being part of the Manawatū or part of Hawke's Bay. Others viewed the Tararua brand as being most closely associated with Vikings and aligned to mildly 'quirky' towns – although this was balanced by others who rightly recognised the importance of iwi heritage and the presence in the community of persons from many other nations.

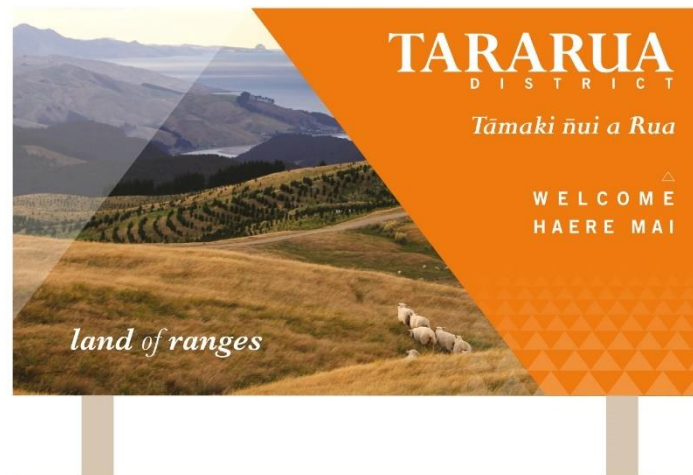
In addition, some workshop participants were critical about the road-side signage branding the district as 'Tararua Country' to leverage association with wide open plains, the farming economy and perhaps the parallel with the South Island's Mackenzie Country, but others supported this style of branding.

The statements best reflecting the 'brand' preferences of our workshop participants were varied. They covered such things as: laid back; community focused; quiet; open, rural and green landscapes; honest, real and friendly; off the beaten track and undiscovered; towns with heart and unique points of interest; and the somewhat disparaging but nevertheless practical statement about Tararua being 'the best place for a toilet and coffee stop on the way to other places'.

We are aware the Council has commissioned specialist work to explore the brand image to be used in road-side hoardings and published material. We support the direction of travel of this material. We like the stand-alone emphasis on the use of the words 'Tararua District' (figure

13). We can see that with perseverance, this will increasingly gel with the market. We also strongly support reference to Tāmaki nui a Rua and can also see merit in the use of grand landscape images and reference to 'land of ranges'.

Figure 13: Brand development ideas



This image is indicative only and does not represent the finished design for production.

Consideration should also be given to how the district's towns may be woven into the brand, noting that most visitors do not stray beyond State Highway 2. Nor can the attractiveness of the district's core visitor assets (Pūkaha National Wildlife Centre, Tui Brewery, and Norsewood) be forgotten when compiling images or growing the brand of Tararua. Emerging expanding experience assets like Te Āpiti Manawatū Gorge walks and rides, events and visits to the Waihi Falls should also not be forgotten.

Our essential conclusion is that Tararua must decide on the image and brand it wishes to project and then stick with it, in all marketing material, for the long haul. This image and brand should clearly differentiate Tararua from its neighbouring regions.

Other market development considerations

Developing the size of the market of persons who may consider visiting Tararua can be an expensive and sometimes a challenging exercise. Our experience suggests the secret to success is to undertake the following:

- Segment your visitor market into its components and target your market development in a way that is best suited to that market, with priority given to the domestic persons who most frequently visit the district.
- Acknowledge that two-thirds of the visitors who stay overnight research information from the internet and one third make their decisions about accommodation and food when they are 'on-the-road' – and target your market development accordingly.
- Leverage the attractiveness of Tararua in the market development material prepared by your neighbouring regions and districts.
- Recognise that most of your visitors come from Wellington, Wairarapa, Manawatū / Palmerston North and Hawke's Bay and target these markets with any material you may prepare.
- Invest in further improving the Tararua District website - with great visitor content navigability and strong exposure of the district's core attractiveness for potential visitors.
- Be honest about the fact that most Tararua visitors are in transit to another district and that many visitors make their decision to stay in Tararua or to 'travel-on without stopping in Tararua' while on the road.

Additional information about three further market development and branding matters follow.

'QUIRKY?'

We toyed with the idea of Tararua market development based on packaging awareness of Tararua's 'quirky' towns. Our non-Tararua expert informants informed us many visitors view the features and character on offer at Eketahuna (e.g. Lazy Graze, erotic toy shop), Pahiatua (e.g. art décor buildings, accommodation at an old hospital), Woodville (e.g. second-hand stores and Yummy Mummy cheesecakes, Dannevirke (e.g. Fantasy Cave) and Norsewood (e.g. tame eels, Dave Selfe's house concerts and natural fibre clothing) as being quite 'unique.'

In addition, the people providing visitor services and experiences are viewed as being 'real' and 'friendly'. Our issue is that the residents of the so called 'quirky' towns are likely to not take kindly to being branded in association with a place known as being 'quirky'. We have therefore 'parked-up' this idea but nevertheless urge that this perspective is not forgotten when further developing the district's brand, products and events. The preferred position may be adopting it as a 'support' concept rather than a centre piece of the district's market development planning.

INTERNATIONAL VS DOMESTIC FOCUS OF MARKET DEVELOPMENT EFFORT

We recommend the focus of future Tararua visitor growth market development initiatives should be on the domestic market rather than the international market. This is because the cost of market development, if directed toward international visitors, tends to be prohibitive for small local authorities like Tararua District Council. Nevertheless, if opportunities arise to partner with neighbouring local authorities and agencies to leverage exposure of Tararua experiences and services, as part of the development of 'joined-up' in-bound tourism itineraries, then these opportunities should be taken with open arms.

SIGNAGE AND PACKAGING OF 'REST AND REFRESH' EXPERIENCES FOR TRANSITING VISITORS

In an ideal world, more visitors to Tararua District would 'go to rather than drive through' Tararua. The fact is, most visitors to Tararua will be heading for destinations outside Tararua. They will still all need a refreshment break. If this can be combined with experiences such as those provided at Fantasy Cave or the possible purchase of a product at one of Woodville's second-hand stores or at Norsewood, then the visit will be more valuable for both the visitor and Tararua.

This implies a need to encourage visitors to stay longer and to spend more money by providing for the erection of safe but good roadside signage and by providing targeted information about such things as how children can be entertained, e.g. by visiting the Fantasy Cave and town playgrounds.

Supportive Council policy, infrastructure and regulatory environment

It is the leadership, courage and skills of individuals that make businesses and communities successful. Central government has a fundamental leadership role to play in many of these dimensions. The new Labour-led coalition government is certainly playing a stronger role in regional economic development than was the case in the past. The Tararua District Council, in partnership with iwi and local businesses, also has a strong role to play – both on their own and as a successful partner with central government.

The Council's service-based role is to provide the regulatory environment, visitor sector support services and a general atmosphere within which individual businesses are enabled to flourish. The Council's infrastructure provision role, particularly the supply of quality roads and transport

systems and the provision of quality water / waste and storm water systems is equally important as these things provide a foundation or 'enabler' for growth.

In addition, attractive and well-functioning towns create pride and community cohesion and act as an 'incentive to stop' for the passing motorist. The Council's recent investments in the upgrade of town centres in Eketahuna, Pahiatua, Woodville and Dannevirke are a valuable manifestation of this incentive.

It is not our job to tell the Council how to do its work, but we are conscious of the need to give emphasis to several principles that may be applied when making decisions that may support future visitor sector growth:

- **Cost – benefit:** Ensure potential or expected visitor-related investment costs are outweighed by potential or expected visitor sector development benefits³⁴.
- **Move at speed:** Identify and assist to proactively resolve visitor development challenges without delay or procrastination.
- **Big and small changes all count:** Be prepared to make the many small changes, as well as the big changes, required to maximise the visitor sector development potential of the district.
- **Iwi opportunities:** Growing the Māori economy is an important means of achieving equity of opportunity.
- **Sustainable:** Consider economic, social, cultural and environmental factors in unison when making decisions affecting the visitor sector.

³⁴ In simple terms, a formula may be applied to calculate visitor expenditure. This is usually calculated based on whether the visitor is local, from elsewhere in New Zealand or from an international location and whether they are in transit or staying overnight. The cost of the entry fee (if applicable) plus a multiplier to take account of the benefit of all expenditure across the economy

- **Red carpet rather than red tape:** While delivery of regulatory requirements is a must, so too is the need to make these regulations as easy as possible for visitor sector experience and service providers to meet.
- **Culture of change:** Growth in the visitor sector will only occur if a 'culture of change' is led by the Council and embraced by the community.
- **Local and district perspectives:** There is a need for the community to embrace a 'Tararua-wide' view in their advocacy for visitor-friendly developments, alongside their advocacy for the views of the people in each of their townships.
- **Lead, don't displace:** It is not the role of the Council to provide services and facilities better suited to provision by the private sector but if there is a clear need and opportunity and the market fails to adequately respond, then the Council may wish to exercise leadership or be a catalyst for development by providing seed funding or other assistance.

(usually about 1.7) is added to base daily and expenditure. This can then be applied to the cost of capital and the operating costs to provide a rough estimate of the cost / benefit of investing in a tourism experience.

The key recommendation flowing from the above role description is the need for the Council to clearly include advocacy and facilitation of destination management and development into the position description and KPIs of a mid to senior level Council officer. Without focused attention from an officer designated in this way, there is a risk that clear and apparent visitor growth opportunities / actions will not be capitalised upon.

Digital connectivity

Provision of telecommunications - including cell phone coverage, ultra-fast broadband and optic fibre services, is essential for existing and new visitor sector businesses, for the education of persons of all ages and for the ever-important visitor social networking associated with a visitor experience including taking advantage of Facebook photo opportunities.

In the future, Council may wish to consider what more it can do to resolve mobile black-spot issues and what assistance it could provide to Chorus and Crown Fibre Ltd to roll out their UFB2 programme. Also, not to be forgotten, is the need to explore methods through which widespread visitor sector-provider use of newly established connectivity infrastructure can be enhanced via an 'enablement plan' and digital HUB as is currently being rolled out in several parts of New Zealand including Northland.

Business capacity and capability building

Visitor 'quality of service' expectations continue to grow. We can see a need to work with visitor sector operators and government agencies such as the Tertiary Education Commission and NZTE to provide training and skills development programmes.

This may include provision of business mentor programmes to targeted providers to help them grow and modernise their businesses. Web site enhancement or simply creating a web-site presence as well as programmes for service providing employees are all important business capability building tools.

NEW OR EXPANDED VISITOR EXPERIENCES, SERVICES AND EVENTS

Determining the priority to be accorded to visitor development ideas

Our workshops generated no shortage of good ideas about what products, experiences and services should be grown or established to increase the return to the economy from the visitor sector in the Tararua District.

If an individual entrepreneur has a clear line of sight on a development opportunity, then there is no issue – the risk and reward is for them to bear. However, many developments impact on the use of public conservation land or require the support of the public sector to be successful. This poses the risk that, if all of them were pursued, scarce capital, leadership energy and infrastructure might become thinly stretched or overwhelmed and the chance of failure would grow.

We therefore developed a set of criteria to guide our sector investment priority setting. These criteria included:

- **Cost-benefit:** Number of new visitors / quantities of spending compared to the cost of establishing the project.
- **State of readiness:** Level of consultation, funding support and planning carried out by the proponent(s) and thereby how quickly the visitor sector spending benefits may accrue from investment.
- **Market affinity:** Degree of match between the project and the domestic and the international visitor needs, and the expectations described earlier in this report.

- **Cultural and environmental sustainability:** Size of the footprint of the project - its impact on environmental, heritage, cultural and iwi values.
- **Quality and capacity:** Capacity of the project to grow the number of users without impacting on the quality of the experience for those users.
- **Synergy with destination proposition:** Fit between the project and decisions about the Tararua destination value proposition.
- **Community well-being:** Ability of the project to contribute to the well-being of the Tararua community by generating employment and socio-economic gains.

We have applied the above criteria to the wide range of visitor experience and service ideas put forward by our workshop participants and expert informants to recommend focus be given primarily on walking and cycling and a prioritised short list of other selected visitor experiences and services.

Cycling and walking

The discussion on cycling and walking opportunities which follows is more substantive than that provided on other new or expanded visitor opportunities. This is because a core purpose of this report was to clearly identify cycle and walk opportunities in a stand-alone manner, but in so doing, also place them within the fabric of broad visitor sector objectives, enablers and ancillary experience opportunities.

CYCLING AND WALKING – NATIONAL CONTEXT AND TRENDS

Almost one-quarter of New Zealanders participate in cycling³⁵. In addition, over 60% of New Zealand residents participate in walking for recreational purposes. Cycling and walking improve health, contribute to lifestyle choices, diversify economies and assist achievement of environmental sustainability objectives. Cycling and walking infrastructure also contributes to the government's multi-mode transport objectives, as recorded in their 2018 transport Government Policy Statement (GPS).

Cycle tourism is also a global experience that is rapidly expanding. This interest is driven by the desire to 'slow down' while travelling and appreciate the travel environment at a more 'experiential' level. Consequently, cycle tourists tend to stay longer in an area and hence spend more money than many other groups of visitors.

In addition, the recent growth in the popularity of e-bikes has accelerated the breadth (more age groups) and depth (more people) of interest in cycling.

CURRENT TARARUA CYCLING AND WALKING OPPORTUNITIES – AN OVERVIEW

Tararua has a well-developed network of walks and cycle trails. Much of the network is described in detail in the Tararua District Visitor Guide³⁶.

Some of the walking experiences are based in the Tararua and Ruahine Forest parks. The Coppermine Valley Creek Walk is perhaps the best known and most accessible of these.

³⁵ Sport New Zealand (2015). Sport and Active Recreation in the Lives of New Zealand Adults. 2013/14 Active New Zealand Survey Results. Wellington, Sport New Zealand.

Many short walks are accessible from Tararua's towns. These include the: Anzac Park walk and the Wop Wops Wetland Park walk at Norsewood; the Lime Chip track in Dannevirke; the Cliff Walk at Eketahuna; and the Carnival Park tracks in Pahiatua.

Other walks have been developed within the district's reserves. These include those within the Tamaki, Wahipai, Mangatoro Waihi Falls and Kumeti Reserves near Dannevirke; Pattison's Bush, Whariti Road and the Awapikopiko Reserve near Woodville; and the Marima domain walks near Pahiatua.

Not included in the above list but held in high esteem are the tracks and guided walks established in the Pūkaha National Wildlife Centre. They include a one hour guided tour, night tours, tours dedicated to budding teen and child rangers and tours tailored for schools and other groups.

In addition, other walks are located slightly further afield. These include the Pongaroa Bush Walk and the Cape Turnagain walk. There are also privately arranged walk opportunities on farms adjacent to Akitio Beach.

The most popular area for walking is the tracks adjacent to Te Āpiti / the Manawatū Gorge. Over 76,000 people walked in the hills above and adjacent to the Gorge in 2017. Shorter walks in this area include the Tawa Loop Track and the Manawatū Gorge Loop Walk.

Mountain bike trails in the Tararua area offer a range of experiences suited to different skill levels. Rides suited to more experienced riders include the Wind Farm ride from Hall Block Road and the Tararua Traverse. Rides for adrenalin seeking down-hill mountain bikers include

³⁶ This 2018 guide is available from the Tararua District Council and the i-Site in Woodville

the Te Ara o Mahurangi ride accessible from Hall Block Road. Intermediate rides include the Whariti Peak ride while the Wahipai Reserve Dannevirke Mountain Bike and walking trail is suited to riders seeking small jumps and obstacles.

The current best known Tararua cycle tour route runs from Waipukurau to Masterton on previous State Highway 52, now renamed as a local road 'Route 52'.

TARARUA CYCLING AND WALKING AMBITIONS

The workshop and our interviews with cycle and walking experts and thought leaders indicated a broad desire to:

- Improve road safety for cyclists by providing cycle lanes and improved road shoulders at priority locations.
- Provide more cycle opportunities for families.
- Improve walking and cycling opportunities adjacent to Tararua towns.
- Improve mountain biking opportunities.
- Improve cycle tour opportunities.
- Fully capitalise on the opportunities for cycle and walk opportunities in the Te Āpiti / Manawatū Gorge area including those associated with the new State Highway 'Te Ahu a Turanga' adjacent to Saddle Road.

In addition to the broad ambitions described above, several site-specific ambitions were shared by the persons we talked to. These included:

- The **Lindauer** Group based in Woodville want to fully develop methods for displaying the artworks of Lindauer as an integrated part of a walk / cycle trail between Woodville and Ferry Reserve.

- Mangatainoka and Pahiatua community leaders want to establish a walk and cycle '**Town to Tui Brewery**' track between these two centres.
- Council staff and others recognised opportunities to enhance the attractiveness of the **Waihi Falls and Reserve** as a visitor experience by improving the walkway down to the Falls and by upgrading the Reserve's facilities.
- Many but not all commentators sought upgrades to the cycle touring roads known as **Route 52** between Hawke's Bay and Wairarapa.
- Informants from the south of the district sought a walk or safe cycle route between **Pūkaha National Wildlife Centre and Eketahuna**, possibly using paper roads and tracks where access can be negotiated with the assistance of private landowners.
- A **connecting route** was sought by several cycle experts between the Old Copper Mine Road via the proposed Lindauer Trail to Ferry Reserve and other existing and paper roads ending at Tui Brewery at Mangatainoka.
- A '**coast to coast**' route extending from Akitio to Foxton or Himatangi was a long-term objective referenced at our walk / cycle workshop.
- A new **downhill mountain bike route** near the Tararua Forest Park, in the southern part of the district, was mentioned as a possibility by one informant.
- A **Manawatū River 'source to sea'** route involving Marae and iwi-led cultural and heritage experiences, extending from the smallest tributaries of the Manawatū River west of Norsewood to the mouth of the river at Foxton, has been on the agenda of some members of the Manawatū River Leaders' Accord for some time.

We provide further details about a prioritised range³⁷ of these opportunities in the section of the report that follows.

³⁷ The tracks and trails selected for priority attention are those best satisfying the criteria listed earlier in this report.

Te Āpiti / Manawatū Gorge experiences

Above all other opportunities, the most frequently mentioned new walk / cycle and visitor experience opportunities are those located in the Manawatū Gorge / Te Āpiti area. These opportunities are nicely summarised in a diagram prepared by the Te Āpiti – Manawatū Gorge Governance Group. (Figure 14 – over page). The only omissions from this diagram are the Lindauer Trail and the opportunity currently being developed by the Ngāti Kahungunu ki Tāmaki nui-a-Rua Trust³⁸ to enable visitors to share art, heritage and cultural experiences at the Te Āpiti windfarm³⁹. Tararua future track and trail locations have been highlighted in Figure 15.

The current and new experiences identified for the Manawatū Gorge / Te Āpiti could transform this area into a highly significant visitor destination. With careful planning and advocacy, Tararua District will gain substantial benefit from these developments. These experiences could be marketed under the 'Te Āpiti' brand.

³⁸ Third Bearing Ltd has made us aware of Ngāti Kahungunu ki Tāmaki nui-a-Rua Trust's desire to also run tourism ventures based on art, heritage, cultural understanding and recreational experiences.

³⁹ We do not address this proposal in any further detail because it is the subject of separate development and details are not yet available for sharing in public.

Figure 14: Map of visitor walk, cycle and other recreational experiences (Te Āpiti– Manawatū Gorge Governance Group)

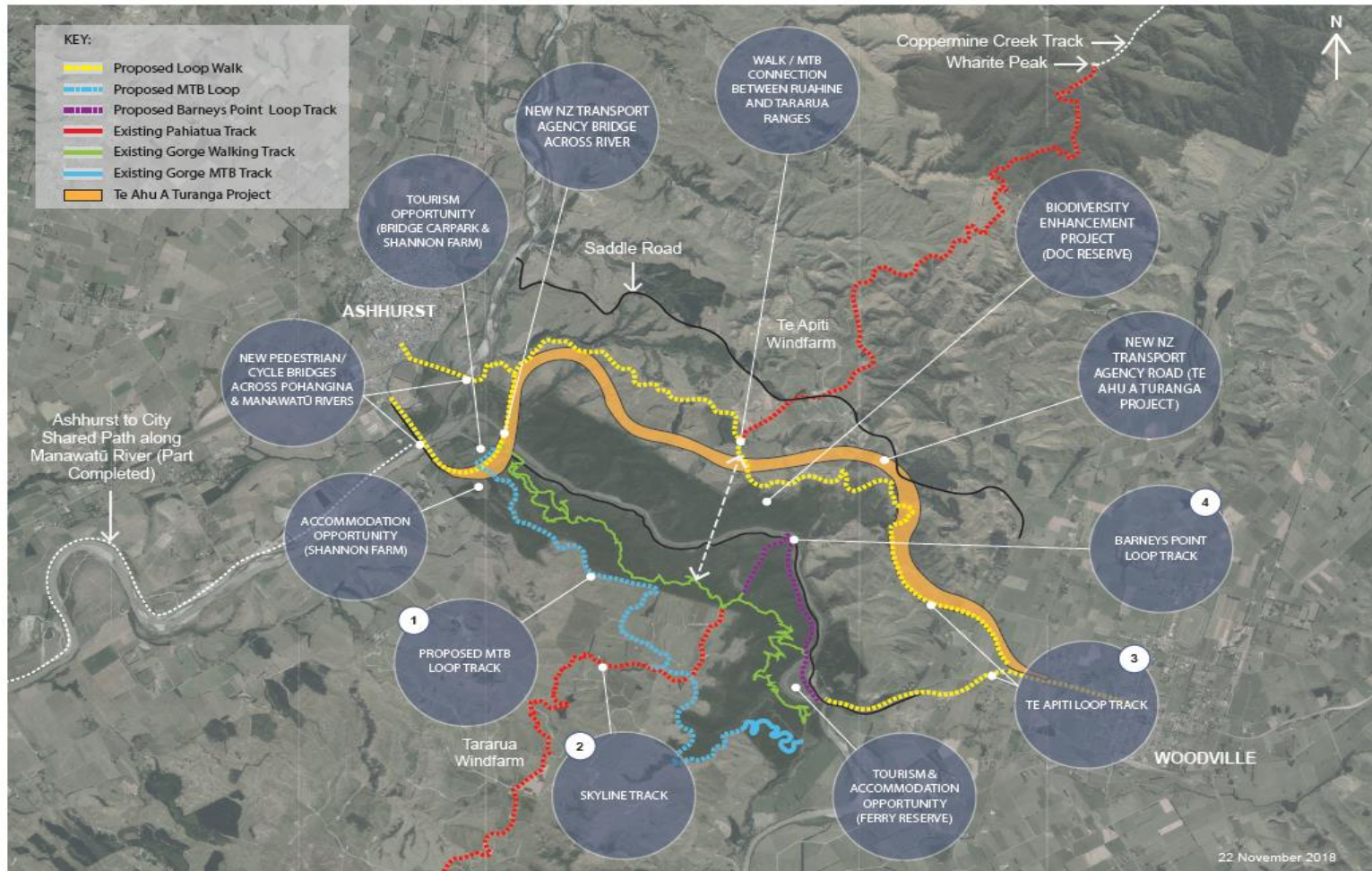
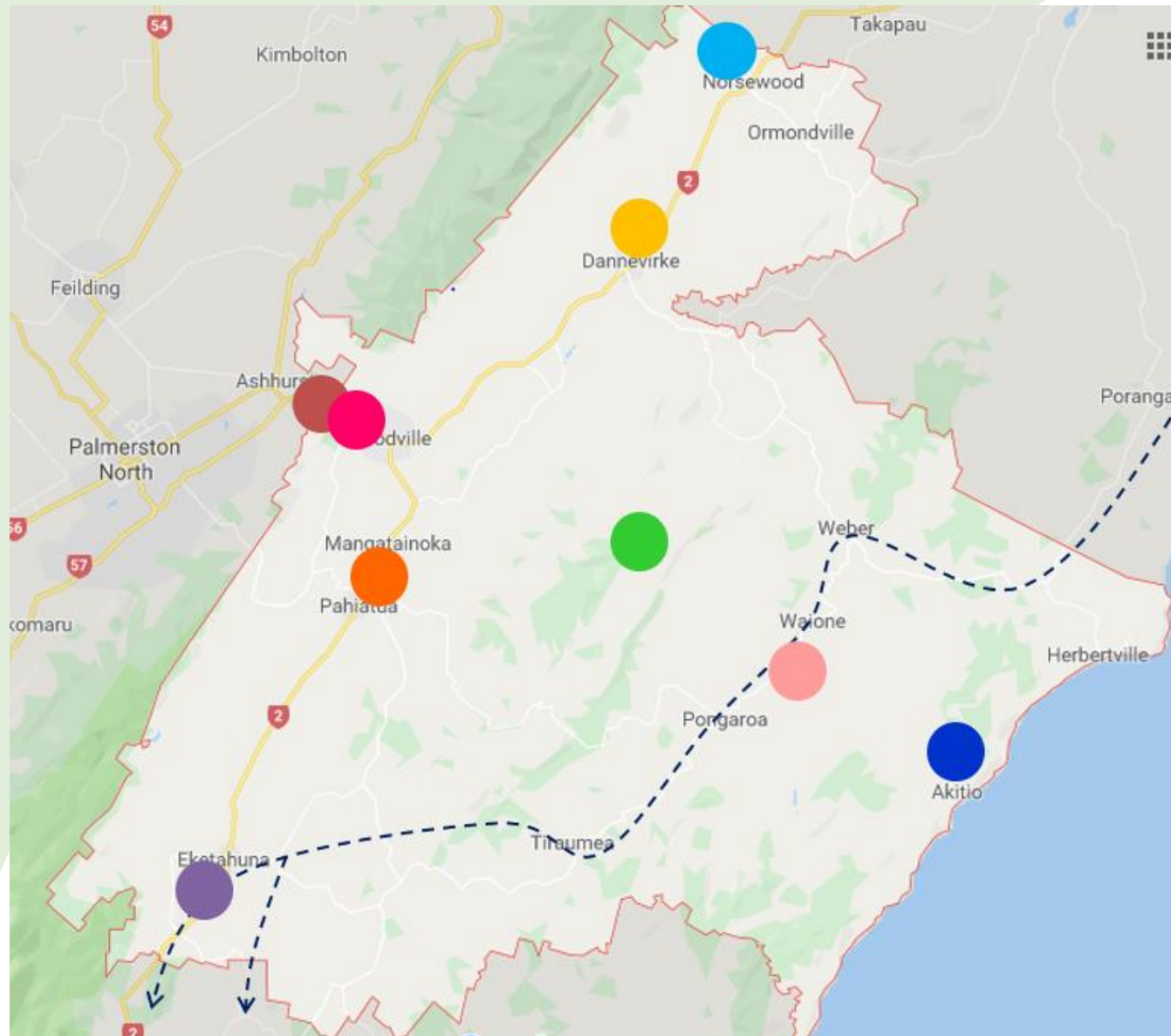


Figure 15: Tararua future track and trail locations



- 1 Te Āpiti Trails
- 2 Lindauer Trail
- 3 Eketahuna to Pūkaha National Wildlife Visitor Centre Concept
- 4 Pahiatua to Mangatainoka
- 5 Route 52
- 6 Dannevirke commuters path
- 7 Waihi Falls
- 8 Akitio farm trails
- 9 start of potential future source to sea trail

As noted by the Te Āpiti – Manawatū Gorge Governance Group, the key strengths of the proposition to further develop visitor experiences and services in this area include the following:

- **Strategic location:** Te Āpiti is close to the intersection of three major state highways and the North Island passenger rail line. It is also conveniently located between popular tourist destinations such as Rotorua, Taupō and Hawke’s Bay to the north and Wellington to the south. It is less than 20 minutes from the city of Palmerston North.
- **Rich natural assets:** Te Āpiti is home to a unique geological landscape, diverse flora and fauna, the natural beauty of the Manawatū river, forests and hill country.
- **Existing visitor assets:** Te Āpiti’s natural assets are complemented by a growing network of current and potential walking and cycling trails and two windfarms which are already popular attractions.
- **A place of geological significance:** Te Āpiti - the Māori name for the Manawatū Gorge, is geographically significant because, unlike most gorges, the Manawatū River Gorge is a water gap and the Manawatū is the only river in New Zealand starting its journey on one side of the main divide and finishing it on the other side.
- **Cultural significance:** Te Āpiti is a place of cultural significance for the lower North Island. The name Te Āpiti, meaning ‘the narrow passage’, was bestowed upon the Manawatū Gorge by Rangitāne. Before the road was built, local Māori would haul their canoes upstream through the rapids of the Manawatū River, which they named Te Au-Rere-a-Te Tonga, meaning ‘the rushing current of the south’.

⁴⁰ This list has been developed with the assistance of information prepared by CEDA. The list is relevant to the wider Tararua District as well.

The new and expanded Te Āpiti visitor services and experiences may include⁴⁰ those based on the following concepts:

- **Cultural** experiences and sites of significance.
- **Ecotourism** experiences with the potential to link into local biodiversity projects and ecotourism experiences.
- **Agritourism** experiences showcasing the region’s primary sector from Te Āpiti’s working farms.
- **On-water** experiences, e.g. kayaking and fishing⁴¹.
- **Over-water** experiences, e.g. flying foxes.
- **Cycling** experiences catering for all skill levels and ambitions – including a circular ride from Ashhurst, traversing the new Te Ahu a Turanga - Manawatū Tararua replacement State Highway Two walking / cycling trail to Woodville, then via the Lindauer Trail to Ferry Reserve and then back to Ashhurst via local trails located south of the Gorge.
- **Land-based** experiences, e.g. canopy walks, ziplining, ecotourism.
- **Built environment** experiences, e.g. views from a new 350m bridge to be built over the Manawatū River and windfarm attractions.
- **Hybrid experiences**, e.g. river journeys connecting Palmerston North and Te Āpiti or using the river to access experiences within the Gorge.

Details about the best means to progress Te Āpiti visitor opportunities are being collaboratively developed by the Te Āpiti – Manawatū Gorge Governance Group led by Palmerston North City Council.

⁴¹ We have been informed (but cannot confirm) that 1,500 fishermen walked from the eastern entrance of the Gorge in search of trout in 2018.

This Group includes representatives from Tararua District Council. The key recreation projects in the proposed masterplan include:

- A new shared path (walk/cycle) around the northern side of Te Āpiti to provide a 35km loop around both sides as well as connections into Ashhurst and Woodville at either end. This is to be delivered as part of the NZTA's replacement Gorge Road project known as Te Ahu a Turanga: Manawatū Tararua Highway.
- Connecting the Ruahine Ranges with the Tararua Ranges across and around Te Āpiti to provide a 45km 'Skyline' circular walk linking into the Te Araroa Trail.
- Creating a new walking loop at the eastern end of Te Āpiti which utilises a 2km section of the old Gorge Road.
- Creating a new purpose built 11km mountain bike track across the southern side of Te Āpiti.

Well known cycling advocate Jonathan Kennett's projections⁴² about future visitor use (assumed to be at 2030) of the Te Āpiti / Manawatū Gorge area, indicate substantial destination development potential arising from these proposed experiences (Table 5, over page).



⁴² These projections have been drawn from an internal report prepared by Jonathan Kennett for NZTA in 2018

Table 5: Estimate of use numbers per year of Manawatū Gorge and Te Ahu a Turanga Highway separated cycle / walk path

Market Sector	Projected users of a recreational trail located near but not abutting the highway	Projected users Manawatū Gorge
Commuters	10/day 2,000/year	30/day 6,000/year
Local Recreational Riders and Walkers	50,000	80,000
Domestic Holiday Makers	20,000	40,000
NZ bike-packers/cycle tourers	2,000	3,000
International bike-packers/cycle tourers	400	600
International tourists travelling by car/campervan	2,000	5,000
Equestrians	0	1,000
Events	1,000	1,000
Total	77,400	136,600

Other advantages identified by Jonathan Kennett arising from the upgrade of Te Āpiti trails include:

- At the Ashhurst end - establishment of good connectivity to / from the Manawatū River Path and the proposed clip-on access across the Ashhurst Bridge.
- At the Woodville end - good connectivity into Woodville via the Lindauer Arts Trail, as well as to Ballance Valley Road which is likely to become a part of the NZCT network.
- Health benefits amounting to \$1.2m equivalent over ten years.
- Economic benefits calculated based on \$160 expenditure per person at 12,200 visitors per year amounting to \$19.5m over ten years.

What will be important for Tararua is the need to ensure opportunities at the eastern side of Te Āpiti are optimised and that the risk of all the benefits being focused on the Ashhurst end are managed. An ideal potential scenario is one with the following features:

- Woodville is the chosen location for a refreshment break midway through, before or after enjoying Te Āpiti experiences.
- Market and experience development are carried out in a manner enabling Ferry Landing and Woodville to be viewed as equal to Ashhurst in popularity as starting points for Te Āpiti experiences. (NB without this focus, there is a risk the benefits of visitor expenditure to the Tararua economy may be less than anticipated).

- The Lindauer Trail concept (see further details below) is given priority attention by Tararua District Council.
- Kahungunu ki Tāmaki nui-a-Rua Trust is supported in its desires to implement their ideas about using Te Āpiti and the windfarm to expand appreciation of art, culture and heritage.
- Exploring (on a slightly slower time frame) the safety and unique engineering solutions that may be applied to enable some or all the old Gorge road to be used as an integral part of the walking / cycling fabric of Te Āpiti.

The Lindauer Trail

The works required to establish and secure visitor interest in the Lindauer Trail have been developed by a small group established for this purpose. Their core current need is to develop a project plan to assist with securing the funds and access agreements to bring the concept into fruition.

The proposed Trail would extend 7 km from Woodville near the Coronation Baths. It would then traverse Troop Road, road reserve (with three separate bridges), rail reserve to finish at Ferry Reserve. Access right-of-way agreements would need to be secured with all parties, including three private landowners.

Points of interest include the old Gorge cemetery, the Old Coach Road, other heritage sites and views of the Te Āpiti windfarm. The additional unique attraction of the walk / trail is the proposal to erect large scale replicas of selected Lindauer artworks and to place these strategically throughout the length of the trail.

The core opportunity provided by the Lindauer Trail is to leverage and extend the commitment by NZTA to establish a safe, sealed, 3-metre-wide and shared path physically separated from motorised vehicles using the

Te Ahu a Turanga replacement highway and ending at Hampson Street Woodville. The shared path would include an extension of the existing walkway west of Woodville’s eastern roundabout. The path is to be put in place prior to the opening of the new road.

Development of the Lindauer Trail should be placed on a timeframe running in parallel with construction of the new Te Ahu a Turanga - Manawatū / Tararua replacement State Highway Two walking / cycling trail. This implies an immediate need to commit to the design, funding and construction of Lindauer art replicas and associated information. It also implies resolving land access issues including with KiwiRail, ongoing maintenance costs that the Council could not absorb and preparing cost estimates and applications to third parties for funds.

Preliminary estimates of the cost of creating all elements of the proposed Lindauer Trail are in the vicinity of \$0.5m excluding ongoing maintenance. Some of this cost could be met with the assistance of TIF, third-party funding, or Heritage NZ. In addition, we note that the conditions attached to the Notice of Requirement for the new Te Ahu a Turanga road require NZTA to establish a \$1m recreational paths fund accessible during the period of road construction. NZTA envisage this fund being expended on paths determined to have priority after application of collaborative work by various stakeholders.⁴³ The Lindauer Trail could be the type of project suited to support with the help of this fund.

What is now required is strong leadership from Tararua District Council, alongside the existing working group and other stakeholders, to finalise the Lindauer Trail proposal, secure funding and access rights and then commence construction. As noted previously, the ideal timing for all this to occur is between now and 2024 so that the Lindauer Trail can be

⁴³ Correspondence to Tararua District Council from NZTA, 7 June 2019

officially opened in conjunction with completion of the Te Ahu a Turanga replacement highway and pathway. Necessary progress could be made by Tararua District Council commissioning an experienced consultant to prepare an implementation plan⁴⁴.

Mountain bike trails on the southern side of the Gorge

Additional information in support of the development of Te Āpiti / Manawatū Gorge mountain bike trails is outlined in a report prepared for DOC in 2016.⁴⁵ Six trail options were analysed against various criteria including access, likely market interest and cost of construction and maintenance. Some of these options were rejected as being impractical and others have now been superseded by the track and trail decisions related to the Te Ahu a Turanga replacement highway. Others, particularly those located south of the Gorge, remain alive (Figure 16, over page).

The Manawatū Mountain Biking Club believe that, with a cycleway now locked in for the northern side of the gorge, focus should shift to development on the southern side traversing from Hall Block Rd to Ashhurst Bridge. Subject to the normal consultation with landowners, local bodies, DOC, recreational users and other interested parties this track could encompass:

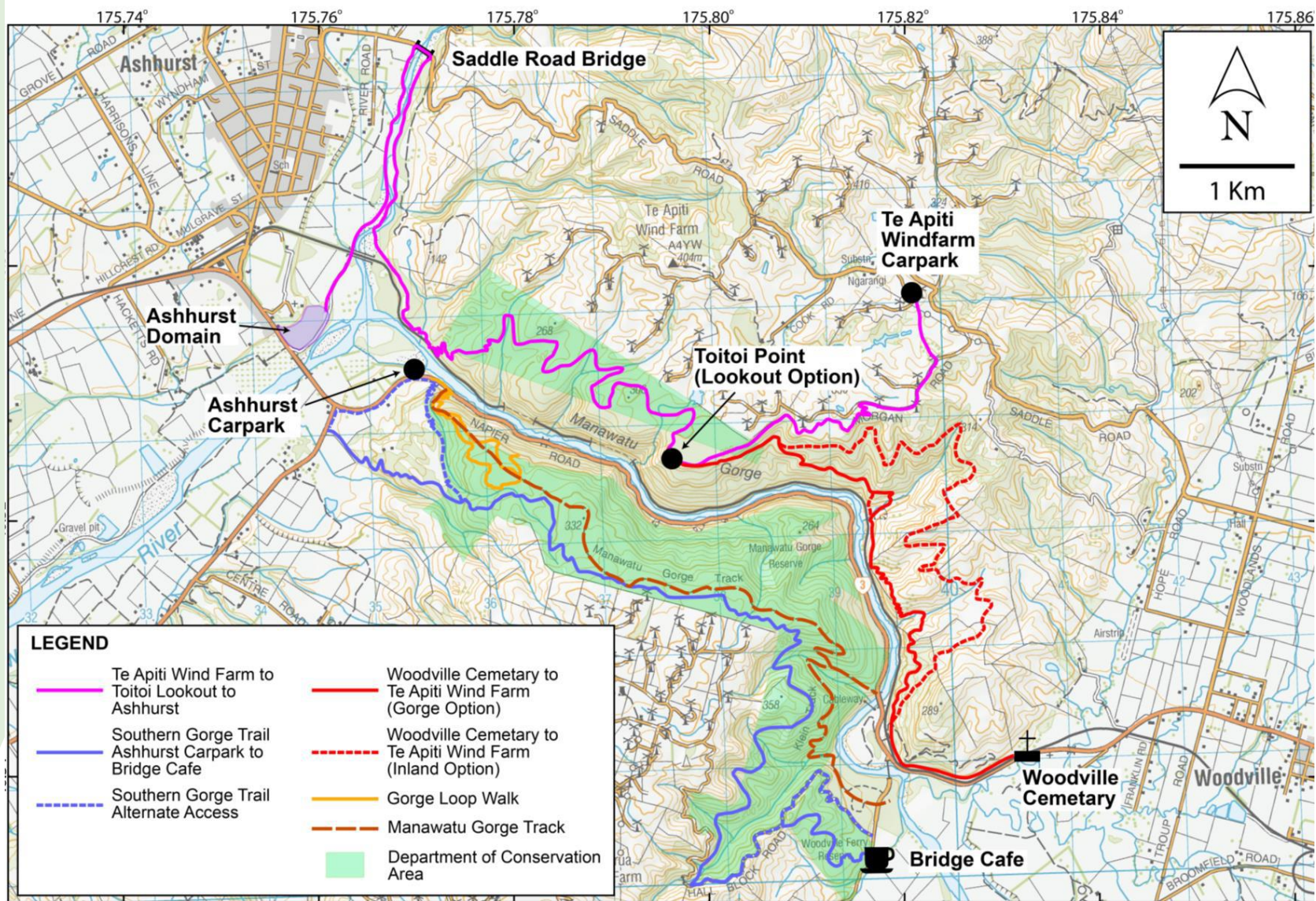
- A trail from Hall Block Rd (Woodville side) to Whatonga as follows:
 - New trail off Hall Block Rd in DOC land to Windy Point built as intermediate (grade 3) trail

- From Windy Point up 4-wheel drive service road to ride to Whatonga with great vistas of first windmills.
- Riders disembark and visit Whatonga. (NB No biking access is proposed to join the walking trail)
- Trail initially an 'out and back' trail, with the added benefit of increasing usage of existing MTB trails.
- Te Aro Mahurangi, located at the bottom of Hall Block Road could be linked to North Range Road and Pahiatua track, provided land access can be secured.
- An extension of this trail from Whatonga to Ashhurst bridge or old Gorge Road carpark as follows:
 - Complete a traversing trail from Whataroa to Ashhurst when and if land access can be secured.

⁴⁴ We estimate the cost of preparing such a plan to be about \$10,000

⁴⁵ TRC, Manawatu Gorge Mountain Bike Trails, July 2016

Figure 16: Mountain bike options identified in a report prepared for DOC, 2016



Horse riders

Not to be forgotten are the needs and wishes of horse riders. Horse riders vary in their focus and ambition. They include pony clubs, endurance riders, hunt clubs, dressage / jumping, trek riding groups and others who would just enjoy getting together for an afternoon 3-5km ride in an area with good horse float parking. Mangatainoka provides riding for the disabled services. A horse trek business operates in the Gorge Road area. Opening part of the eastern access to the Manawatū Gorge would provide a multi-use facility for horse riding and wagon opportunities alongside walking and cycling opportunities.

Some existing or proposed tracks lend themselves to shared multi-use. Options include use of: the unblocked eastern part of the old State Highway road in the Manawatū Gorge – including the possibility of providing for a horse and gig / cart riding route; the Lindauer Trail; provision for horse riding on the proposed walk / ride track to be located next to the new Saddle Road State Highway and; beach rides.

One way of progressing these various ambitions is for Tararua District Council to establish a small group of stakeholders with a passion for walking, cycling and horse riding. This group could be charged with the task of reaching agreement about how their varying needs could be collaboratively met.

Summary – Te Āpiti walking, cycling and horse tracks and trails

We do not take Te Āpiti cycle and walk trails and track development options any further here because they are at the heart of work currently being carried out by the Te Āpiti Master Planning Governance Group.

⁴⁶ This employment generation calculation reflects a report prepared by Jonathan Kennett for NZTA in 2018.

In addition to the benefits described above we note that when completed and after a few years of market development, the selected trails and related experiences could generate more than ten new full-time jobs within the broader area's economy, under a medium growth scenario⁴⁶.

The other point we would like to emphasise, in respect of the potential for developing further Te Āpiti experiences, is the importance of Tararua District Council actively engaging with neighbouring local authorities in a way that brings cross-over benefits to all parties. Visitors seldom recognise local authority boundaries. What concerns visitors most is the availability of connected awe-inspiring experiences, linked with food and accommodation within a defined and accessible area. This implies a need to develop market material that talks not just about a track or trail but also about the history, culture and 'connected-experience brand' of an area, in a way that creates a 'story' worthy of being repeated to other potential participants.



Entrance to Bridge Cafe, Horse Treks and MTB car park on Gorge Road

TARARUA TRACKS AND TRAILS LOCATED BEYOND TE ĀPITI

Track from the bridge to the Brewery

The second area with a 'live' track / trail proposition is Pahiatua. Given the popularity of the Tui Brewery experience, the concept being progressed is to establish a walk / cycle track alongside the Mangatainoka River between the bridge at the north west end of the Pahiatua township and the Brewery.

The point of difference and therefore likely visitor interest in this trail is the intent to plant trees and bushes with edible fruit, nuts and berries and other riparian vegetation to help improve the quality of the river. The proposal also recognises the Fonterra-related growth occurring in Pahiatua and the associated need to expand recreation choices in the area.

A Committee involving all affected stakeholders has been formed with the objective of progressing the proposal in four phases. A subsequent 'fifth' phase could include extending the track south toward Carnival Park. The first phase is ready to proceed at a cost of under \$10k. Some parts of subsequent phases will require further negotiation with affected landowners.

This proposal looks worthy of Council support. The critical factor falling in its favour is the leadership and support provided by local stakeholders, as well as the relatively low cost of construction.

We do not have information about the number of expected users but on the surface it appears it would produce a favourable cost-benefit, particularly as it will provide further 'experience' choice to the increasing number of visitors and campervan users taking advantage of the refurbished Mangatainoka Reserve located across the road from the Tui Brewery. As with the Tui Brewery commitment to the Mangatainoka Reserve, the local committee would need to work through the costs of ongoing track maintenance. We recommend that the Tararua District Council consider making development of this track a relatively high priority.

Other town-based tracks and trails

For some time, the Tararua District Council has suffered from rates pressures and population decline. This has been reflected in an appropriate need to give priority to expenditure on roads and water infrastructure. The district is now experiencing population growth and a healthier economy. This may provide grounds to support a programme for refreshing the district's Reserve Management Plans⁴⁷ and for building on this report to develop a refreshed district Recreation Strategy. At the core of this work could be consideration of the priority to be accorded to the upgrade of tracks and trails around Dannevirke, Woodville and Pahiatua. While these tracks and trails will be of primary interest to residents, we are conscious that what is good for residents will also be good for visitors.

Dannevirke is perhaps the prime location to have cycle paths woven into future road improvements. This would be an excellent contribution to road safety in the district's busiest town. Dannevirke has many school children walking or cycling at the beginning and end of each day. The main State Highway 2 is at a "pinch point" with a narrow road through the

⁴⁷ A spread sheet provided by the Tararua District Council identifies over 76 reserves of varying sizes, value, purpose and area.

high street. Cycle paths, if woven into the adjacent streets would keep users safe and away from the main road.

We are also conscious that with an ageing population more residents may consider ditching the car and buying an e-bike. Establishment of new walking and cycle paths in urban Dannevirke would be timely and a good fit with this trend. We are conscious of the positive contribution such works and such trends have made to the quality of the Wellington CBD over the last two years.

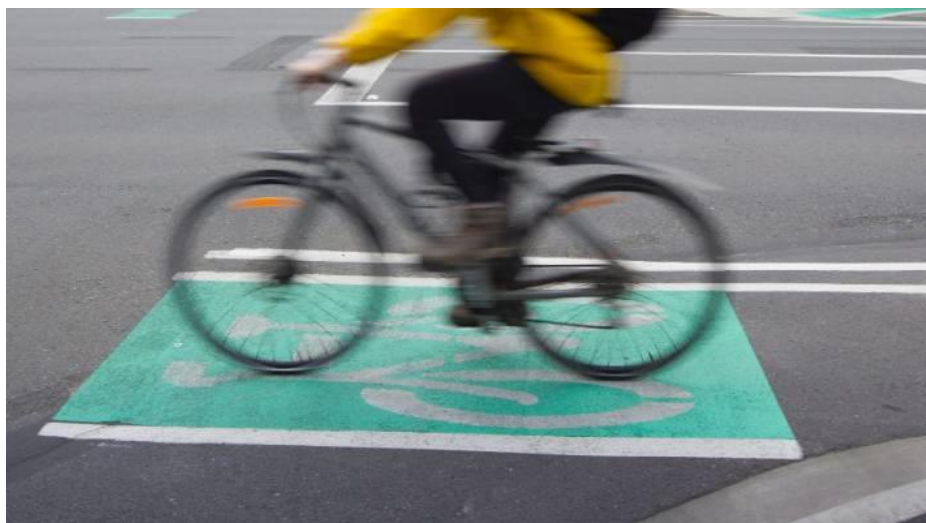


Image credit: stuff.co.nz

Route 52

The total length of the Hawkes Bay to Wairarapa Route 52 cycle ride is 263kms. This is usually completed over 3-4 days. Route 52 is part of the

⁴⁸ Classic New Zealand Cycle Trails, page 136, fourth edition, the Kennett Brothers

⁴⁹ Jonathan Kennett has suggested an improved variation for this ride would be to re-route the final section from Alfredton west to Eketahuna, Parkville, Hastwell, Mauriceville and then into Masterton. Adoption of this variation would be of further value to the Tararua District.

‘officially recognised ‘New Zealand Cycle Trails’ network and has been described⁴⁸ as having enough well-spaced country taverns and rural towns to be possible with a minimum of gear and food. Highlights include the Wimbledon Tavern, the place with New Zealand’s longest place name, the Pongaroa pub, Glenross Lodge, Alfredton Camping area and the possibility of a revised route for the final leg to Masterton⁴⁹.

We estimate that less than 500 cyclists traversed this route in the 2018 calendar year. The route is attractive to touring drivers and motorcyclists. The rural landscapes are expansive and the side route toward Pahiatua on Pongaroa road to the Puketoi Conservation area is impressive.

Some commentators have expressed caution about the wisdom of using the narrow and windy sealed parts of this road because of the risk posed by the recent increase in the number of logging trucks. The absence of enough road-shoulder width is viewed as not enough to achieve a clear separation between vehicles and cyclists.

While sympathetic to this view, our knowledge of the cycle tour market suggests Route 52 should be included in the marketing of the district to cyclists.

In addition, the positive attitude to investment in road upgrades to achieve higher public interest in cycling could be considered by the Tararua District Council as a strong element for inclusion in the resubmission of an application for NZTA funding assistance for road improvements to improve cyclists’ safety. We also note the Government’s 10 June 2019 decision to allocate \$20 million from the PGF toward the upgrade of the section of Route 52 between Waipukurau and the coastal town Porangahau.⁵⁰

⁵⁰ The PGF allocation to the Waipukurau to Pongaroa part of Route 52 was half of the \$40 million allocated to Central Hawkes Bay District – with most of the remainder (\$14.7m) directed toward the Tukituki water project.

Cycle and walk trail between Pūkaha National Wildlife Centre and Eketahuna

Although not a high priority, we can see merit in considering construction of a cycling / walking friendly connection between Pūkaha National Wildlife Centre and Eketahuna. This could be by means of extending the road shoulder on State Highway 2 or by making use of rural roads / the rail corridor located to the East and passing through Hastwell before then connecting to Route 52.

Source to sea – the Manawatū River Walk

Iwi involved with the Manawatū River Leaders' Accord have advocated for a track or trail to be constructed from the source of the Manawatū River near Norsewood to the proposed Te Āpiti walks / trails and then seaward using existing and new trails located near Ashhurst and Palmerston North. Underpinning this advocacy is a desire to not only provide recreation opportunities but also to encourage a greater appreciation and connectivity with the cultural, heritage and environmental values and importance of the river. We support this ambition but note the likely challenges to be encountered in securing access across adjacent farmland may slow progress. We therefore suggest the proposal be 'kept alive' and progressed whenever land access opportunities arise.

Growing the value of existing experiences and services

Putting aside cycling and walking opportunities for now and as noted earlier in this report, the focus of destination development can all too easily concentrate on new experiences and services and forget to nourish and grow the value of existing experiences and services.

With the assistance of participants at the workshops and informed by the views of the persons we interviewed, we consider the following experiences and services to be deserving of further support or investment:

- Waihi Falls
- Pahiatua / Woodville / Manawatū Gorge railcar journeys
- Pūkaha National Wildlife Centre
- Tui Brewery
- Norsewood experiences
- Woodville / New Zealand International MotoX

Details about the propositions to grow these experiences and services follow.

WAIHI FALLS

Located 45kms east of Dannevirke, the 25m drop of the falls over a wide sheer cliff into a large deep pool makes an attractive scene for sightseeing, picnicking and swimming.

Visitor numbers are currently un-recorded, but estimates based on observation of the site indicate the likely annual visitor numbers range from 2,000-4,000 persons⁵¹. With the increasing number of "Free Independent Travellers" venturing to New Zealand, together with the increasing number of retired domestic and Motorhome travellers, the visitation numbers to this site are likely to increase and could easily reach or exceed 10,000 visitor per annum within 10 years, especially if freedom camping is permitted and encouraged at this site. In summary, we can easily see the Waihi Falls becoming part of a sought-after visitor Facebook photo opportunity.

⁵¹ Waihi Falls Track Upgrade, Frame Group Ltd, April 2019

The existing walkway to the base of the Falls is in poor condition and the configuration of the road end and parking area is not well designed. In addition, toilet facilities, biodiversity enhancements, the viewing area, safety features, the boardwalk and the platform at the pool and the site heritage, botanical and geological information could all be improved.

Consultants have estimated the cost of necessary upgrades to the track and pool edge access construction to be \$67,000. Improvements to the configuration of the road-end, the toilet facilities and other upgrades have not been estimated, but our estimate is they add a further \$300,000 to this cost. There are also opportunities to further develop the Waihi Falls area by creating additional track(s). We can see merit in increasing the diversity of the experiences offered to increase the attractiveness of this destination. We recommend these opportunities be fully investigated by the Tararua District Council.

Some of these upgrade components lend themselves to co-investment from the Tourism Infrastructure Fund (TIF). If each of the expected 6,000 extra visitors was to contribute just \$50 to the economy because of inclusion of Waihi Falls (alongside other experiences such as a visit to the Pongaroa Pub) into their itinerary, then the pay-back on this investment may be reasonably quick.

We recommend that the Tararua District Council finalise a comprehensive Waihi Falls development plan and seek TIF funding to assist with the cost of the site's upgrade.

PAHIATUA / WOODVILLE / MANAWATŪ GORGE RAILCAR JOURNEYS

The combination of a ride in a heritage railcar and the opportunity to experience uninterrupted views of the splendour of the Manawatū Gorge is a potential visitor attractant with great future potential.

Currently the limited functioning railcar rolling stock is operated on an infrequent basis by the Pahiatua Railcar Society, with the assistance of the Woodville i-SITE. Available journeys are usually oversubscribed with participants.

The current objective of the Society is to add resilience by completing the



Standard Railcar RM31

major rebuild of the nationally significant Drewry twinset railcar RM 121 which is the last substantial surviving example of 35 railcars of its class. The Society also intend to overhaul the recently acquired Standard Railcar RM34 to mainline operating standards to be able to operate in partnership with its already well-travelled sister railcar RM 31 (see photo one) and operate more frequently to cater for a larger number of visitors to the district than at present.

On the surface there appears to be a case to bring this objective to life. The next step may be for the Tararua District Council to partner with the Society to seek co-investment funding⁵² and then to develop a comprehensive business case and operating model that includes engineering training to deliver this visitor attraction on a more regular / frequent basis. This partnering approach may see further expansion of the inbound operator international tour group market that Pahiatua Railcar Society have more recently started to work with.

PŪKAHA NATIONAL WILDLIFE CENTRE

Although sitting on the boundary or doorway between Tararua and Masterton districts, Pūkaha National Wildlife Centre is clearly an experience that is making a significant contribution to Tararua's brand and visitor economy.

The sanctuary is now visited by 45,000 persons per annum. This is a significant step up from the peak year visitation of 35,000 visitors recorded in any one of the previous eight years.

We were informed⁵³ the key to this increase was the recent shift in focus toward recruiting and building the capability of sanctuary staff, new branding / marketing, better involvement with iwi and better community 'reach-out' including an open day attended by 2,500 persons.

Interest in the sanctuary has been assisted by the presence of 70 kōkako and the ability to interact on most occasions with a strong population of free-ranging kiwi and/or the opportunity to view the albino kiwi. Attendance has also been helped by the roll-out of novel programmes directed toward the interests of 'junior rangers', the provision of guided

tours, the provision of other specialist services and the presence of well-run café services.

The sanctuary's management and Board of Trustees are currently considering a range of further development options for the site including such ideas as:

- A 'high end' overnight food and accommodation option.
- Rejuvenation of 'aviary five' to provide more interactive experiences.
- Overnight stays for children.
- Serviced facilities at minimal charge for use by freedom campers and motor homeowners.
- Expanded use of the Pūkaha National Wildlife Centre facilities for conferences, workshops and other events.
- More placement of Pūkaha National Wildlife Centre experiences in the itineraries of inbound tour operators.
- More marketing directed toward domestic and international bird enthusiasts.

The turn-over of revenue at the sanctuary now exceeds \$2m. It has over 2,000 Instagram followers and enjoys strong links / support from the Woodville i-SITE.

We see the future role of Tararua District Council as being providers of support and guidance to the management and Board of Pūkaha National Wildlife Centre when required, including prominent placement of Pūkaha National Wildlife Centre's attractions in any district marketing material. On other fronts, the Board appear to have clear plans capable of being led under their own auspices. Funding support from third-party funding or support-in-kind or cash from agencies like Tararua District Council may be required to deliver on some of these plans including the possibility of a TIF application for powered and serviced sites / facilities for campers.

⁵² We note that the Society enjoys strong support from a number of trusts and other funding organisations already.

⁵³ Interview with Pūkaha National Wildlife Centre Manager, 26 March 2019

TUI BREWERY

The entertainment, events, quality management and general wide range of experiences and services provided at the Tui Brewery have been the recipe for the success of this establishment. The partnership role played by the managers / owners in assisting the Tararua District Council with development of the Mangatainoka Reserve, the popularity of this reserve with freedom campers and the employment provided at the Brewery to local residents is testimony to the establishment's commitment to the community.

There are several measures that may be considered for adoption by the Tararua District Council to help ensure the on-going success of the Brewery and to thereby enable it to continue to contribute to the district's economy. These may include:

- Support for convening additional events.
- On-going close leverage of the proposed market development and event promotion skills of Tararua District Council and the Woodville i-SITE / Council.
- Greater use of the establishment's conference and meeting facilities.
- Marketing of the investment opportunity to construct quality nearby accommodation.
- Commitment to assist with the construction of the proposed walkway / trail between Pahiatua and Mangatainoka.

NORSEWOOD EXPERIENCES

Despite requiring visitors to divert off the main road and despite being a community divided into two hubs, Norsewood remains a significant Tararua attraction.

The Norsewood NZ Natural Clothing Shop is one of these attractions. It features woollen garments and non-extravagant thinking around fashion and functionality including the properties of natural fibres for health and comfort. The Norsewood shop also provides stock from the Kiwi Sock Company, art created by carver Jeff Bryan and the Wop Wop Wetland Park where visitors can feed the native long fin eels and experience the Maori and Nordic history provided by the Kuikui Charitable Trust.

The old dairy factory adjacent to the NZ Natural Clothing shop in Norsewood is operated by well-known musical leader David Selfe.

What more can or should be done to secure Norsewood's contribution to Tararua District's economy? Our workshop participants and expert informants suggested the following:

- On-going Council support, including market development, for each and all Norsewood's business ventures.
- Focused market development support for the music and arts-based events, music recording and house concerts convened by David Selfe with attendance trending toward 1000 participants in 2018.
- Assistance, perhaps via preparation of a prospectus or a Tararua District investment workshop, directed at investors who may have an interest in improving the quality of Norsewood accommodation options.
- Better signage to and between upper and lower Norsewood to encourage more 'transiting' visitors to understand what Norsewood has to offer and to thereby 'take their travel-break' at this location.

WOODVILLE / NEW ZEALAND INTERNATIONAL MOTOX

The annual success of the Woodville / New Zealand International MotoX event is testimony to the benefit of the Tararua visitor economy of convening large regular events to targeted markets.

This MotoX event has been hosted by the Manawatū-Orion Motorcycle Club for 58 years. In 2018, 5,500 people attended inclusive of: 1,400 support staff, 500 riders and 3,500 spectators. The estimated economic benefit of the event to the Tararua District and the broader region was close to \$100,000.⁵⁴

Both the event hosts and Tararua District Council have already committed to exploring how they may grow the size and value of this event. The opportunities to achieve this goal, as identified in a review of the 2018 event carried out earlier this year, include:

- Market the opportunity for event participants to be accommodated not only at the site but also elsewhere in Tararua.
- Provide a higher level of professional assistance to the event organisers.
- Establish wi-fi facilities at the event location.
- Capitalise on the new Te Ahu a Turanga replacement highway to promote the ease of access to the event and Tararua District.
- Enrol Woodville and other Tararua businesses more closely into the event so they may provide higher levels of service to event participants.
- Improve the quality of core event infrastructure such as in-district mobile event infrastructure e.g. container toilets and grandstands.
- Seek higher levels of corporate sponsorship and establish a 'trade-display' zone.

⁵⁴ Summary document about the International Woodville New Zealand Grand Prix MotoX event, Cloud 9, 2019

The key action to ensure the above opportunities are progressed is for Tararua District Council to appoint a person capable of working with MotoX event organisers to leverage additional latent opportunities and thereby secure the continued and long-term success of the event. This person could / should also consider how the event model established by the Woodville MotoX could be replicated for application elsewhere in the region to other events targeted at other specialist markets.

Other events

Tararua District was an 'early achiever' on the events scene with the Akitio multi-sport event being one that was fondly remembered by some of our expert informants. Events are a key component of the visitor economy. They are a highly visible marketing vehicle that can build a district's identity while pumping money into the local economy.

Niche events are becoming a global trend. Events are being created which reflect trends in lifestyle and interests⁵⁵. 'Niche' however, doesn't mean small. 'Wanderlust', which attracts thousands to its events globally, has piggybacked the growing trend around mindfulness, yoga and wellbeing and 'Beervana' in Wellington has grown in proportion to the growth in the craft beer movement. There is also a trend to add additional complementary activities to events. This may be adding an after-party to a marathon, food and wine experiences to an arts festival or concerts to a garden show.

Capacity issues in our large cities, where demand has outstripped supply for a few years now, is causing event organisers and attendees to look beyond the tried and tested to discover new places to hold events.

⁵⁵ Pers. Comm. Terri van Schooten, Director, Verve Consultants / Event Managers

But it's not all about capacity and price. There's a change in motivators too that leaves attendees ready for new and different experiences and open to check out the paths less travelled.

Having a comprehensive event strategy that aligns with the district's economic and visitor strategy is imperative. The strategy needs to have

clear targets and KPIs, leverage existing events such as the MotoX and events sponsored by Tui Brewery, identify the type of events the destination will support, and define what support is available and what returns are expected.

CONCLUSIONS

The purpose of this report was to identify how Tararua's destination development and destination management opportunities may be further developed. Annual visitor spending in the district is now \$52m. This expenditure flows to many parts and many participants in the Tararua economy. The sought-after outcome is visitor sector growth capable of further contributing to the economic resilience, attractiveness, environmental sustainability and economic diversity of the Tararua District.

The new 'Te Ahu a Turanga: Manawatū Tararua Highway' between Ashhurst and Woodville will be in action in 2024. This provides a useful target date for delivery of new and expanded Tararua visitor experiences and services. We believe that a 5% annual growth in visitor numbers and spending is achievable across the district from now up until and beyond that date, provided that conscious effort, leadership and 'enabling' resources are directed toward this task.

The strengths of the existing visitor sector and the opportunities for growth are clear and apparent. Of most significance are the walking and riding opportunities capable of being developed in the area around the Manawatū Gorge / Te Āpiti. There are also clear opportunities to increase the volume and expenditure of visitors who are in transit through the district as they travel to other locations. Other opportunities lie in growing the number of visitors enjoying Pūkaha National Wildlife Centre, the Tui Brewery, the Waihi Falls, Railcar journeys through the gorge and the experiences on offer at Norsewood and within the other four Tararua Towns.

Successful growth in the visitor sector in Tararua will require adoption of an approach that integrates new experiences, agritourism, events and services with further investment in the 'enablers' that will ensure these experiences and services are able to be delivered in a manner suited to the visitor market. To achieve success, the commitment of the Tararua District Council to these 'enablers' of destination development and management actions will be important. These 'enabler' actions, in general order of priority, may be summarised as follows:

- **Sector leader and facilitator:** Act as a coordinator and facilitator of information sharing and support to the leaders amongst visitor sector experience and service providers.
- **Collaborator:** Be an active participant in the visitor development and management initiatives commissioned by adjacent local authorities and agencies.
- **Implementer:** Be an employer of a lead officer capable of implementing the sector development and management ideas listed here.
- **Data gatherer:** Be a visitor sector information gatherer / interpreter and commissioner of an intercept survey of visitors who are visiting or in transit through Tararua as a means of gathering critical information about the needs and interests of these visitors.
- **Town centre development leader:** Provide on-going investment in town centre gentrification.
- **Partner with the private sector:** Act as a catalyst and supporter for visitor sector investors.
- **Website enhancement leader:** Be a provider of clear and enticing visitor attraction content on the Council website.

- **Brand development leader:** Lead the process of developing a distinctive Tararua District brand and socialiser of wide awareness of that brand.
- **Co-investor and seeker of funds from third parties:** Apply for co-investment from TIF, PGF and NZTA for funds for priority destination development and visitor infrastructure proposals including funds for the upgrade of Waihi Falls, tracks and trails in the Te Āpiti / Manawatū Gorge area (particularly the Lindauer Trail) and funds required to expand the services and experiences offered by the Pahiatua Railcar Society.
- **Reserves enhancement leader:** Develop priority reserve plans, with associated track and trail investment upgrades.
- **Market developer:** Participate in developing the visitor market, analyst / supporter of new and expanded experience opportunities and leverage of opportunities being considered or applied by neighbouring local authorities and agencies.
- **Public sector experience / service delivery partner:** Develop relationship with senior managers in agencies such as NZTA, DOC and other public sector organisations with responsibility for providing visitor experiences and services.
- **Māori economy supporter:** Support and provide services to assist iwi to develop their visitor development and management ambitions
- **Policy developer and influencer:** Participate and influence new visitor policy development initiatives of third parties such as those proposed by MBIE's tourism policy unit, DOC, Tourism New Zealand.
- **Skills developer:** Facilitate the provision of capability and capacity building assistance, as a way of improving the quality of visitor sector service provision and digital presence.
- **Road and transport infrastructure provider:** Provide visitor friendly transport infrastructure services.
- **Digital connector:** Support and advocate for the provision of extended digital connectivity and be a facilitator of capability

building services to assist users to make full use of available connectivity.

- **Recruiter of new investment:** Consider developing an 'investment prospectus' to assist establishment of new experiences or for services such as a three-star accommodation facility.
- **Events supporter:** Consider preparing an events strategy and generally facilitate events, including by providing limited and contestable 'seed' funding or easy access to other 'event-related' Council services such as traffic control and rubbish collection.
- **Red carpet provider:** Provide regulatory services in a way that expedites and supports visitor development proposals
- **Road-side information facilitator:** Be a catalyst for the provision of 'road-safety approved' road-side information about Tararua overnight stay experiences. Through this information raise awareness of the refreshment / short stay experiences available to 'break the journey' for those in transit to other locations.
- **Monitor of destination development and management:** Provide regular reports documenting the progress made to achieve the objectives and actions described in this report.

We are conscious implementation of the above actions will incur costs for the Tararua District Council, but the evidence included in this report suggests clear benefit for the Tararua economy from making this investment.

An immediate step forward could be for the Council to add 'destination development and management' to the position description of a lead member of the Council's economic development unit or by other equal contractual arrangements. A first task of this team member could be to prepare a paper for the Council providing detail about the costs that may be incurred and to refine the priority to be accorded to each of the above 'enabler' actions. A second task could be preparing necessary applications for TIF funds for such things as the proposed Waihi Falls upgrade and third-party funds for such things as the proposed Pahiatua Railcar Business Case.

On the question of growing current and new visitor experiences and services, we have identified several development and management opportunities.

Our priority ranking for cycle trails and walkways development in the Tararua District is as follows:

- Te Āpiti / Manawatū Gorge experiences including the Lindauer Trail.
- Pahiatua Bridge to the Tui Brewery trail.
- Route 52 cycle tour enhancements.

These tracks, trails and routes should be constructed or enhanced over the next few years. Other walking and cycling opportunities should be progressed as and when Council or external funding allows or when local community leaders are willing to contribute 'time or cash in-kind'.

In addition, Tararua has several existing visitor experiences and services that are ripe for further assistance and development. We recommend that the Tararua District Council consider undertaking the following:

- **Pūkaha National Wildlife Centre:** Provide support and guidance to the management and Board of Pūkaha National Wildlife Centre when required, including prominent placing Pūkaha National Wildlife Centre's attractions in any district marketing material and providing assistance with applications for funds forwarded to third parties to grow the range and depth of the experiences and services offered at the Sanctuary.
- **Tui Brewery:** Ensure the on-going success of the Brewery and its contribution to the district's economy by:
 - Supporting additional events at this location.
 - Providing guidance and assistance to the market development and event promotion skills of the Brewery managers and staff.

- Encouraging greater use of the establishment's conference and meeting facilities.
- Marketing the investment opportunity to construct quality nearby accommodation.
- Committing to assist with the construction of the proposed walkway / trail between Pahiatua and Mangatainoka.

- **Waihi Falls:** Finalise a comprehensive Waihi Falls development plan and seek TIF funding to assist with the cost of the site's upgrade.
- **Railcar experiences in the Manawatū Gorge:** Partner with the Pahiatua Railcar Society to seek co-investment funding and then to develop a comprehensive business case and operating model to deliver this visitor attraction on a regular / more frequent basis.
- **Norsewood experiences:** Support the on-going high level of visitation to Norsewood's experiences by providing:
 - On-going Council support, including generalised market development assistance for Norsewood's business ventures.
 - Focused market development support for the music and arts-based events, music recording and house concerts convened by David Selfe.
 - Assistance, perhaps via preparation of a prospectus or a Tararua District investment workshop, directed at investors who may have an interest in improving the quality of Norsewood accommodation options.
 - Better signage to encourage more 'transiting' visitors to understand what Norsewood has to offer and to thereby 'take their travel break' at this location.
 - Encourage sharing of tourism knowledge from established businesses e.g. NZ Natural Clothing and David Selfe to raise the standard of the whole Norsewood offering.
- **Woodville / New Zealand International MotoX:** Appoint a person capable of working with the event organisers to leverage additional latent opportunities and to secure the long-term success of the event.





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