

TIMARU DISTRICT

DESTINATION MANAGEMENT PLAN

February 2025



CONTENTS

Executive Summary

Introduction	1	Figure 6: Timaru District Monthly Overview tourism jobs April 2024	10
Timaru District's Visitor Economy	9	Figure 7: Quarterly Economic Report Visitor Spending	11
Foundations, Vision and Objectives	30	Figure 8: Timaru District Tourism Expenditure 2015-2024	11
Visitor Profile	15	Figure 9: Origin of domestic & international visitor spending	12
Cruise Sector	18	Figure 10: Regional Economic Report YE March 2024 Tourism Spending by Origin for Timaru District	13
Stakeholder Perspectives	22	Figure 11: Regional Economic Report YE March 2024 Tourism Spending by Origin for Mackenzie District	13
Destination Management Action Plan	36	Figure 12: Breakdown of domestic and international visitor spending Timaru District	14
Consultation, Implementation, and Governance	42	Figure 13: Prolife of last domestic overnight leisure trip, Domestic Visitor Satisfaction Survey (YE March 2024)	15

FIGURES

Figure 1: The Timaru District Destination Management Plan		Figure 14: Commercial accommodation guest nights April 2024	16
Figure 2: The Timaru District boundary	1	Figure 15: Accommodation Timaru District 2024	17
Figure 3: Government's goals for tourism	4	Figure 16: Key target markets	23
Figure 4: Tourism Employment, GDP and spending	8	Figure 17: Te Ana Māori Rock Art Centre	25
Figure 5: Employment in tourism, Timaru District, 2000 - 2023	9	Figure 18: Caroline Bay	25
		Figure 19: Timaru CBD	26
		Figure 20: Geraldine	26
		Figure 21: Summary of destination opportunities and challenges	28

TABLES

Table 1:	Key actions and activities to increase the awareness and visibility of the Timaru District as a destination	36
Table 1:	Timaru District's Community Wellbeing Outcomes	6
Table 2:	Key Timaru District LTP Projects	6
Table 3:	Key actions and activities to increase the awareness and visibility of the Timaru District as a destination	35
Table 4:	Key actions and activities to develop and extend the Timaru District's attractions and experiences for visitors and residents	36
Table 5:	Key actions and activities to maximise the opportunities and potential of the Timaru District's hero experiences	37
Table 6:	Key actions and activities to maximise the opportunities and potential of the Timaru District's hero experiences	38
Table 8:	Key actions and activities to secure the infrastructure required to ensure that the Timaru District thrives as a destination	40
Table 9:	Destination Management Plan – Monitoring Framework	43

EXECUTIVE SUMMARY

Introduction

Venture Timaru has prepared this Destination Management Plan to support the future growth and development of the Timaru District's visitor economy. This Plan has been informed by the Government's Destination Management Guidelines and by extensive engagement with partners and stakeholders, including mana whenua, Te Rūnanga o Arowhenua.

The first iteration of the plan was completed in 2021 and was the inaugural completed Destination Management Plan for the Timaru District. For the initial two years, work undertaken by the Venture Timaru as Regional Tourism Organisation for the Timaru District, was focussed on the key actions within the plan. This work was funded through the two rounds of Central Government funding to support the tourism sector due to Covid-19 and also the core funding from the Timaru District Council. The result of this higher level of funding effectively fast-tracked work identified as priorities in the plan.

In late 2023 - 2024 a fresh of the plan began to reflect progress on work that had been carried out, to reassess priorities and modify as necessary due to the changed environment.

Background

As a destination, the Timaru District is centrally located and is a gateway to the wider South Canterbury region. The district offers a range of amenities

and attractions to visitors including Caroline Bay, Peel Forest, Timaru's historic CBD, Geraldine and the Te Ana Māori Art Centre.

While relatively small when compared to the district's overall economy, the tourism sector, and the visitor economy more broadly, plays an important role, providing amenity, leisure activities and experiences to visitors and residents alike.

Since the removal of the restrictions forced by Covid 19, the region's domestic and international visitor numbers have grown, in particular with the re-entry into New Zealand waters of the cruise sector, and ships now regularly calling on Timaru. The district's visitor offering, which pre-Covid was heavily weighted towards domestic visitors, is now changing as awareness of the district builds attracting increasing international markets.

This plan endeavours to look to the future and consider how best to develop a high value, regenerative tourism sector for the district that is embraced and supported by the local community. This includes a focus on the economic returns from visitation and importantly how visitors contribute to the overall wellbeing of the district.

Key Priorities

The 2024 version of the plan has six objectives, and each this has been given key priorities, outcomes and responsibilities (Table 1). New to this edition of the plan is the section on the cruise sector.

While much work has been achieved since 2021, as an emerging tourism destination the priorities are:

- Supporting and developing Te Ana Māori Rock Art as a catalyst for growing cultural tourism and as a platform for acknowledging mana whenua.
- Exploring opportunities to create new commercial destination products and services that enhance resident and visitor experience
- Advocating for the enhancement of Caroline Bay as one of the Timaru District's key attractions.
- Sustainably growing the cruise sector and cruise tourism product offering, to attract more ships, while retaining support from the community

The destination management approach

While the benefits of tourism are clear, the rapid pace of growth of the sector across New Zealand has created concerns regarding the impact of high visitor numbers on our national environment.

Destination management recognises the need for a holistic and coordinated approach to managing tourism and ensuring that the sector adds value to communities. Destination management is an active process, ensuring that tourism is not placing undue pressure on our natural environment.

Environmental sustainability and partnership, including partnership with iwi, sit at the heart of the destination management approach. Tourism is integral to economic development and a tool to achieve wider goals for the district, including building reputation and attracting future residents, businesses and students.

As part of the destination management approach, there is also a growing focus on the concept of regenerative tourism (tourism that gives back more to people and places than it takes) and how a more regenerative tourism system can support social, environmental cultural and economic wellbeing for communities.

The vision for Timaru District

Timaru District Council's vision for the district, as set out in the Council's Long-Term Plan 2024-2034 is for the district to be a place:

Where people, place and businesses prosper within a healthy, adaptable and regenerative environment.

The council has identified several key projects in the LTP, which as they progress, will become important assets for the district's visitor economy. These projects, including the redevelopment of Aorangi Stadium and Park, regeneration of Timaru's CBD and the provision of facilities for performing arts in the district, together with the wider programme of LTP investment, will create significant opportunities for the district's tourism sector.

The LTP also recognises the challenge of climate change and the need for the Council to do more. This further reinforces the need for a destination management approach to be central to how the district's tourism sector develops in the future.

Venture Timaru has an important role to play in supporting the delivery of the Council's vision and maximising the benefits of its investments, which will also create opportunities for the district's visitor economy. Venture Timaru plays an enabling and facilitation role, working across the district, with surrounding districts and with relevant national agencies and partners.

The Destination Management Plan is the basis for collective action across the district and with surrounding areas, to support the sustainable growth of the district's tourism sector and wider visitor economy.

Strategic framework

This Destination Management Plan sets out a framework for shared action, a clear vision, based on three key foundations:

- **Manaakitanga** – as a destination we will welcome visitors to the Timaru District and extend them hospitality, respect and kindness so that they will remember their time with us and share their positive experiences of the district to others.
- **Kaitiakitanga** – we will ensure that the future growth and development of Timaru District's visitor economy is sustainable and not achieved at the expense of our people, our culture or our environment.
- **Kōtahitanga** – across the Timaru District, we will work together to ensure that all aspects of our visitor economy are supported to reach their full potential so that we collectively thrive.

Our vision is that by working together and through our collective actions:

The Timaru District's visitor economy will thrive, bringing benefits to visitors and residents alike, as the district's diverse attractions and experiences are understood and enhanced.

Six strategic objectives support this vision:

- 1 Increase the awareness and visibility of the Timaru District as a destination.
- 2 Develop and extend the Timaru District's attractions and experiences for visitors and residents.
- 3 Maximise the opportunities and potential of the Timaru District's hero experiences.
- 4 Sustainably grow the cruise sector and product offering, to attract more ships, while retaining support from the community.
- 5 Grow the district's portfolio of events to attract visitors, extend the length of stay and support vibrancy for residents.
- 6 Attract investment into the infrastructure required to ensure that the Timaru District thrives as a destination.

Subsequent sections of this Plan set out the wider strategic and economic context for these objectives, as well as the perspectives of key partners and stakeholders. Figure 1 summarises the overarching strategic framework and our desired outcomes for the Timaru District's visitor economy.

Figure 1: The Timaru District Destination Management Plan

FOUNDATIONS



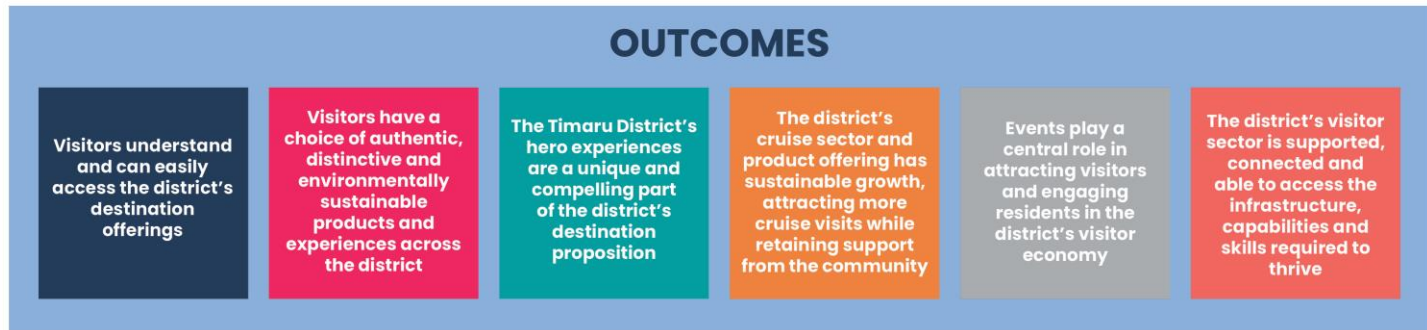
VISION



OBJECTIVES



OUTCOMES



INTRODUCTION

About this Destination Management Plan

The Timaru District is located on the east coast of the South Island and includes the key settlements of Timaru, Temuka, Geraldine and Pleasant Point (Figure 2). The district is home to a resident population of 48,900 people, 5,796 businesses and 27,163 employees¹.

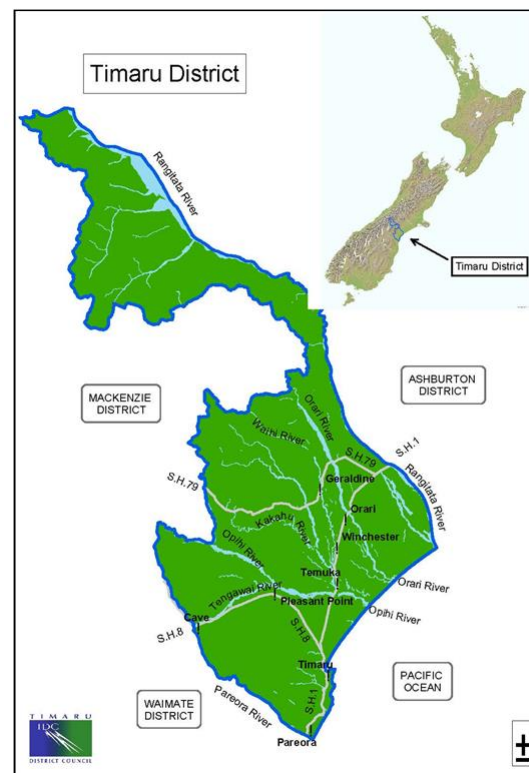
The economy of the district is rooted in the primary sector and production industries, specifically manufacturing, agriculture, fishing and forestry. As a destination, the Timaru District is centrally located within South Canterbury and is a gateway to the wider region.

This Destination Management Plan has been prepared to provide a basis for collective action across the district and with surrounding areas, to support the sustainable growth of the district's tourism sector and the wider visitor economy.

The development of this Plan has been led by Venture Timaru, the integrated Economic Development Agency (EDA) and Regional Tourism Organisation (RTO) for the district.

The process of developing this Plan has involved engagement with a wide range of stakeholders and partners across the district, including mana whenua Te Rūnanga o Arowhenua. The development of the Plan has been overseen by Venture Timaru's Board and informed by Venture Timaru's Tourism and Visitor Advisory Group.

Figure 2: The Timaru District boundary



Source: Timaru District Council

¹ Timaru District Economic Profile, Infometrics

Tourism and the visitor economy

While relatively small when compared to the Timaru District's overall economy, the tourism sector and visitor economy more broadly, play an important role across the district, providing amenity, leisure activities and experiences to visitors and residents alike.

The tourism sector directly employs over 1400 people across the District and indirectly supports employment and expenditure in many other sectors. The latest information on numbers of visitors in the District is currently unavailable, but it is expected the data source will be reinstated by end of 2024.

Timaru District overall GDP for year end March 2024 was \$3,639m of which tourism spending was approximately \$275m. This was an increase on the previous year of 9.6%, compared to a national increase in tourism spending of 7.4%

Total guest nights in Timaru District to the year end March 2024 increased by 5.7% compared to an increase of 11.5% in New Zealand. Visitors stayed a total of 393,700 nights in the District up from 372,300 for the previous year..

Since the reopening of the borders and removal of Covid 19 restrictions, the region's domestic and international visitor numbers have grown, in particular with the re-entry into New Zealand waters of the cruise sector, with more cruise ships are now regularly calling on Timaru. The district's visitor offering which pre-Covid was more heavily weighted towards domestic visitors, is changing as the district begins to attract international markets.

Beyond this data, tourism matters to the Timaru District for several other reasons:

- tourism often provides an entry point to the labour market for many workers, particularly young people, and teaches valuable soft skills such as customer care.
- visitor spending underwrites the amenity of the district, supporting local bars, restaurants and cafés and can support investment in new infrastructure which also brings benefits to residents.
- a vibrant visitor economy helps to create a positive perception of the district and can support wider objectives such as population growth and talent attraction.

It is important through the priorities identified in this Plan that Timaru District works on developing a high value sustainable tourism sector for the district. This requires a focus not simply on the economic returns from visitation but also how visitors contribute to the overall wellbeing of the district.

This Plan sets out a shared vision, objectives and actions to support the sector as a key element of our overall approach to economic development and sustainable, regenerative growth.

The destination management approach

While the benefits of tourism are clear, the rapid pace of growth of the sector across New Zealand, created concerns regarding the impact of high visitor numbers on our natural environment. In some locations this has challenged the social licence of the sector and led to calls to restrict, tax or regulate the sector to minimise its impact upon local communities.

These concerns have contributed to the development of the destination management approach, globally and within New Zealand. Destination management recognises the need for a holistic and coordinated approach to managing tourism and ensuring that the sector adds value to communities. Destination management is an active process to ensure that tourism is not placing undue pressure on our natural environment and that supply and demand are balanced appropriately.

In January 2020 the Ministry of Business, Innovation and Employment (MBIE) published a set of Destination Management Guidelines which were created to inform the development of Destination Management Plan's across New Zealand.

The Guidelines, which sit alongside the New Zealand-Aotearoa Government Tourism Strategy, published in May 2019 by MBIE and DOC, are intended to ensure that tourism reflects the wishes of communities and that the benefits are maximised, and negative externalities managed.

Sustainability sits at the heart of any Destination Management Plan and partnership is essential in developing and implementing plans. Partnership with iwi is recognised as being of critical importance. The Guidelines also acknowledge that tourism is integral to economic development and a tool to achieve wider goals including building reputation and attracting residents, businesses and students.

The Guidelines have informed the development of this Plan. While the Timaru District had not previously experienced some of the challenges associated with over-tourism that impacted other parts of New Zealand, there is still a need to be mindful of the environmental and social impacts of tourism. As the sector prepares for the future there is a need to embrace the principles of destination management.

This is reinforced by climate change projections for the Canterbury region which suggest, among other environmental impacts, that the region will see increases in mean annual temperatures, in the number of days above 25 degrees Celsius, and a rise in sea levels (DOC - Canterbury Region Climate Change Projections).

There is also a growing focus on the concept of regenerative tourism and how a more regenerative tourism system can give more back to the environment than it takes away, supporting social, environmental cultural and economic wellbeing for communities.

Strategic context

Alongside MBIE's Destination Management Guidelines, there is also a need to consider the wider national, regional and local policy context relevant to the Timaru District.

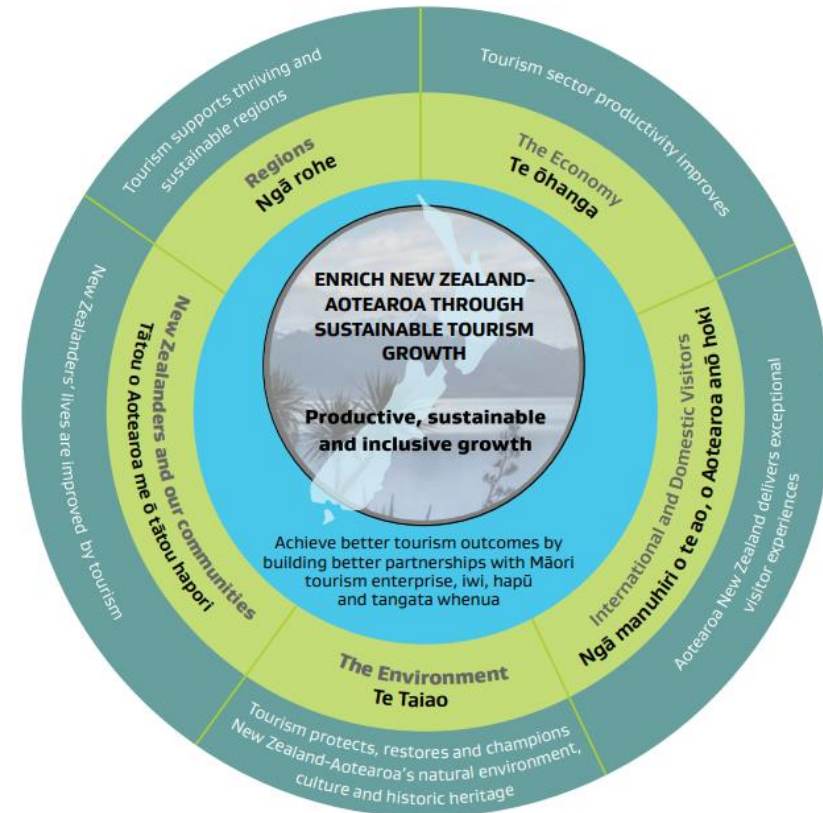
New Zealand-Aotearoa Government Tourism Strategy

The New Zealand Government's goals for tourism are set out in the national Tourism Strategy. The objective of the national strategy is to enrich New Zealand-Aotearoa through sustainable tourism growth. Figure summarises the key dimensions of the national strategy.

The implementation plan within the national strategy contains several work streams and actions which will also support the implementation of this Plan and prioritised four top actions for Government, reflecting the ability of these actions to deliver across multiple outcomes within the strategy, these being:

- Improving coordination across the tourism system.
- Establishing long-term sustainable funding mechanism for the sector.
- Implementing destination management and planning across the sector.
- Developing better data and insights to improve future planning.

Figure 3: Government's goals for tourism



Source: New Zealand-Aotearoa Government Tourism Strategy

Department of Conservation Heritage and Visitor Strategy 2021

Given the highlighted importance of environmental sustainability as well as desire to adopt regenerative approaches to develop the district's visitor economy, it is also relevant to consider the principles and goals of DOC's Heritage and Visitor Strategy (DOC, Heritage and Visitor Strategy, He Rautaki Taonga Tuku Iho, Manuhiri Tūāurangi hoki, 2021). The goals of the Strategy are to:

- **Protect** – New Zealand's natural, cultural and historic resources are protected and restored to maintain biodiversity, cultural and historic values, ecosystem health, landscapes and natural quiet.
- **Connect** – Visitors are enriched and better connected to New Zealand's natural, cultural and historic heritage.
- **Thrive** – Mana whenua, regions and communities benefit from protecting and connecting visitors with their natural, cultural and historic heritage.

The Strategy recognises the significant role that DOC plays in ensuring that the visitor system functions effectively, alongside other organisations and acknowledges DOC's role as a steward, agent and regulator.

Neighbouring Regional Tourism Organisations and Districts

During the period of Central Government funding to support the tourism sector impacted by Covid-19, each Regional Tourism Organisation was required to complete or update its Destination Management. They were also required to collaborate with their neighbouring entities and as a result, Venture Timaru has developed strong relationships with RTOs in the central South Island area, plus national connections.

Visitors do not perceive territorial authority boundaries, therefore it is critical that tourism organisations work together to enhance the visitor attraction and offering of the entire region, and indeed the whole country. The requirement of collaboration as part of the funding has had a significant impact on the relationships of the RTOs and the effects of this will be ongoing and have a positive effect on the visitor economy.

Timaru District Council Long Term Plan

Timaru District Council's Long-Term Plan (LTP) is a key strategy document for the district and needs to be considered a part of this Destination Management Plan.

Table 1: Timaru District’s Community Wellbeing Outcomes

Goal	Focus areas
Connected Citizens	<ul style="list-style-type: none"> • Enabling Community - PRIORITY • Open to Ideas • Sharing Stories • Foster Iwi Relationships • Advocacy and Leadership
Enhanced Lifestyle	<ul style="list-style-type: none"> • Facilities and Services - PRIORITY • Accessible and Active • Shared Spaces • Affordability • Health & Wellness
Sustainable Environment	<ul style="list-style-type: none"> • Clean Environment - PRIORITY • Kaitiakitanga • Low Carbon and Energy • Minimise Waste • Encourage Biodiversity
Diverse Economy	<ul style="list-style-type: none"> • Leverage Local Strength - PRIORITY • Sustainable growth • New and Niche • Thriving Business
Resilient Infrastructure	<ul style="list-style-type: none"> • Invest for Future - PRIORITY • Apply Good Practice • Responsive Planning • Engage with People

Source: Finding the Balance. Timaru District Long Term Plan 2024-34

As a Council Controlled Agency (CCO) Venture Timaru has an important role to play in supporting the delivery of the LTP. The district’s visitor economy can also contribute to LTP outcomes. In addition, several of the projects contained in the LTP are directly relevant to this Plan and will create further opportunities for the district’s visitor economy. Key relevant projects within the LTP are highlighted in Table 2.

Table 2: Key Timaru District LTP projects

Project	Description
Theatre Royal & Heritage Centre	Modernising the hundred year old theatre to meet the needs of modern productions and the expectations of audiences, co-located around a new laneway precinct with a new museum to protect and share the heritage of the region.
Aorangi Stadium Redevelopment	Fast-tracking the development of Aorangi Park and Stadium, with a feasibility study getting underway in Year 1 of the LTP, detailed design planning in Year 2 and moving construction forward to Year 3.
Timaru CityTown Masterplan Enabling Programme	Enabling the regeneration of the Timaru City Centre including leading a work programme to change the look and feel of inner-city public spaces to improve inner city lifestyles, assisting with the creation of focal points and public gathering places.

Source: Finding the Balance, Timaru District Long Term Plan 2024-34

As these projects are progressed, they will become important assets for the district's visitor economy. These projects, together with the wider programme of LTP investment, will create significant opportunities for the district's tourism sector.

The LTP also recognises the challenge of climate change and the need for the Council to do more. This further reinforces the need for a destination management approach to be central to how the district's tourism sector develops in the future.

Venture Timaru's role

The development of this Destination Management Plan followed the transfer in 2020 of visitor related activities from Timaru District Council to Venture Timaru. Since this time, Venture Timaru has operated as an integrated Economic Development Agency (EDA) and Regional Tourism Organisation (RTO) for the district.

During the disruption of Covid 19, when significant central Government funding was received to support the tourism sector, Venture Timaru worked to respond to the impacts of Covid-19 on the visitor sector, and to engage with partners to progress key initiatives.

As a requirement of the Government's STAPP and TSRR funding, tourism organisations were required to develop or update their Destination Management Plans. Venture Timaru was quick to begin work on this and became one of the early regions to complete its Plan.

Venture Timaru is now embedding the destination management approach in its current and future activities while working on the actions in the Plan and ensuring that the principles and practices of destination management are reinforced.

This Plan sits alongside and is integrated with the Timaru District's Economic Development Strategy. Together, these two documents provide a framework for action and implementation to support the sustainable growth and development of the district's economy.

Venture Timaru's Statement of Intent 2023.24 has a vision of "A thriving District". It includes a specific objective to facilitate destination management and event development. The nature and scope of activities for this work is:

- Implement the district destination management plan with consideration of environmental impacts and sustainability.
- Promote an authentic and integrated destination identity for Timaru District. Grow and attract events to the district and promote the case for investment in new destination infrastructure e.g. 4 star hotel.
- Collaborate with surrounding districts to define the wider, and more cohesive South Canterbury and Central South Island offering and sustainably grow visitor numbers and spending across the district.
- Cement a cruise ship offering in partnership with local stakeholders that is of value and benefit to businesses and our wider community.

In developing this Plan, Venture Timaru considered Timaru District Council as a key partner and sought to align this Plan with the Council's vision for the district as set out in the LTP. Partnership and collaboration continue to be essential for the objectives of this Plan.

TIMARU DISTRICT'S VISITOR ECONOMY

Tourism sector overview

The Timaru District's tourism sector is a small but important part of the district's overall economy, providing a range of employment opportunities and amenities for the district's residents. Figure 4 provides a summary of how the district's tourism sector compares to some surrounding districts and shows that its tourism sector is more significant than Waitaki and Hurunui. Mackenzie District, with the major drawcard of Aoraki-Mt Cook National Park and the alpine lakes, ranks at the top for GDP in this grouping and spending, while Ashburton District, with the Mt Hutt Ski Area as a key visitor attraction, is also above Timaru for GDP and spending.

Figure 4: Tourism employment, GDP and spending (2023)

	Employment	GDP	Spending
Timaru	1412	\$83.3m	\$251.2m
Hurunui	950	\$61.9m	\$219.8m
Ashburton	1466	\$97.7m	\$241.6m
Mackenzie	1391	\$132.9m	\$265.4m
Waitaki	969	\$53.5m	\$191.3m

Source: Infometrics Regional Profile

Tourism GDP

The Regional Economic Profile 2023 shows that the tourism sector contributed \$83.3m towards GDP in the Timaru District. This amounted to 2.3% of the district's overall GDP, compared to 1.2% in 2000. Growth in the tourism sector in the district has averaged 5.7% since 2000, compared to 6.5% in Waitaki District, 7.8% in Ashburton District and 6.9% in New Zealand.

Economic output in Timaru District's tourism sector increased by 8.9% in 2023, compared with increases of 4.5% in Waitaki District and a decrease of 12.5% in Ashburton District. A new Regional Economic Profile for 2024 is expected to be published late 2024-early 2025.

In the Quarterly Economic Monitor March 2024, growth in GDP in Timaru District was provisionally down 1% for the year, totalling \$3,639m. But during the same period the total tourism expenditure in the district, of \$275m, was an increase of 9.6%. Nationally, there was a 7.4% increase in tourism spending.

NB: data is only available on the Regional Economic Report from territorial authorities who also subscribe to the service.

Tourism sector profile

Tourism employment

The tourism sector in Timaru District employed an average of 1,412 people in 2023, as it steadily rebuilds post the period of Covid lockdowns and border closures. The figures represent an increase in tourism employment in the district of 28.4%, while nationally the figure rose 48%. The 2023 tourism employment figures show that tourism accounts for 5.2% of Timaru District's total employment, compared to 6.3% in 2000.

In 2022 employment in tourism was at its lowest in the district, totally 1100 jobs.

Figure 5: Employment in tourism, Timaru District, 2000 - 2023



Source: Infometrics, Timaru District Regional Economic Profile 2023

Tourism Jobs Overview

The monthly overview in the Destination Insights Dashboard delves deeper in the breakdown of tourism related employment and shows tourism jobs were split between accommodation, activity and tours and transport. Within these areas, it shows that in April 2024 there were 1600 people employed in these roles, with employment earnings in this period totalling \$5.5m. This figure of 1600 is higher than the average identified above in the Regional Economic Profile and is reflective of a greater range of jobs measured for the sector.

Figure 6: Timaru District Monthly Overview tourism filled jobs April 2024

Source: Vistr Destination Insights Dashboard April 2024

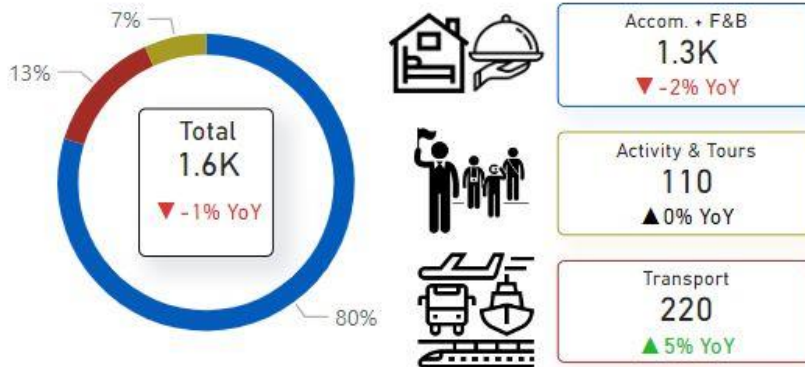
Visitor spending

The Quarterly Economic Monitor March 2024 shows total tourism spending increased by 9.6%, for the year, compared with increases of 12.4% in Ashburton District, and 8.9% in Waitaki District. In New Zealand, the spending increase was recorded at 7.4%.

Total tourism spending for the year end March 2024 was approximately \$275m, up from \$251m the previous year. Figure 8 demonstrates the growth in tourism spending since 2016.

Month Overview - Apr '24

Filled Tourism Jobs



Tourism Employment Earnings

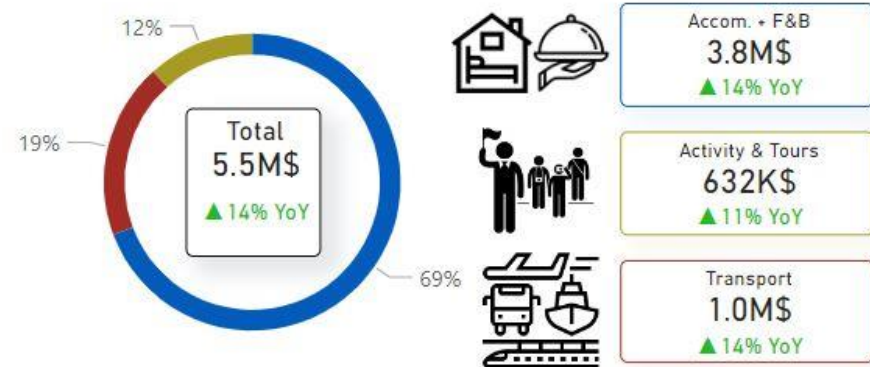


Figure 7: Quarterly Economic Report Visitor Spending



Source: Infometrics, Timaru District Quarterly Economic Report, March 2024

In the March quarterly economic report, the growth in tourism spending for Timaru District is easily apparent from late 2021 through to the most recent peak recorded in 2024. Figure 8 gives evidence that the visitor economy has grown rapidly over the past two years and the challenge will be to continue this growth moving forward.

Figure 8: Timaru District Tourism Expenditure 2015-2024



Source: Infometrics, Timaru District Quarterly Economic Report, March 2024

Visitor Spending profile

Of domestic visitors, Cantabrians are the biggest spenders in Timaru District (70% to year end March 2024) followed by Otago (9%). For internationals, both the Australians (22%) and Americans (29%) dominate, with the United Kingdom ranked in third place (12%).

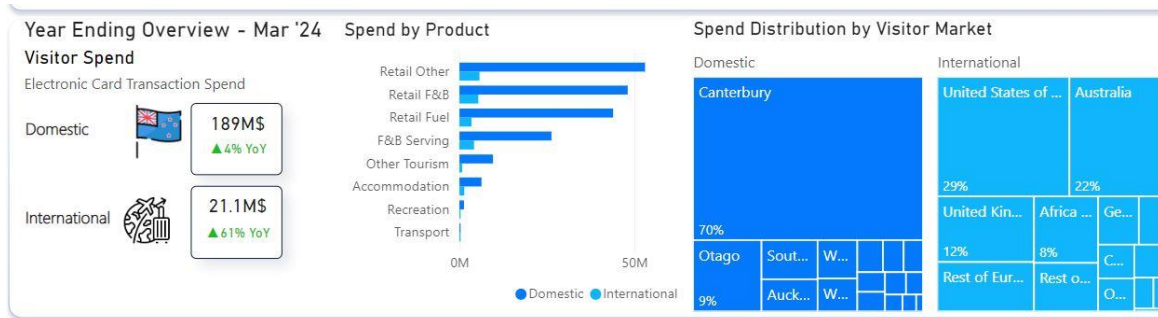
Retail, food and beverage and fuel were the top three spending area segments for both domestic and international visitors. Once again, the summer months are identified as the peak spending times.

It is worth noting that with the return of the cruise sector resulting in the biggest season ever for the district in 2023-2024, may have influenced the large percentage of American spending, as the majority of the cruise passengers arriving in Timaru were North American.

Figures 9 and 10 give a further breakdown of the country of origin for visitor spending in Timaru District, comparing with neighbouring district Mackenzie. While both rely heavily for domestic visitation on Canterbury, Mackenzie derives significantly more visitation from internationals, with Australia and USA the biggest markets.

Further Figure 11 shows that compared to other Central South Island RTOs, Timaru District is more reliant on domestic visitation for spending, with smaller impact currently by international visitors, although ahead of Hurunui and Waitaki.

Figure 9: Origin of domestic & international visitor spending Timaru District



Source: Vistr Destination Insights Dashboard April 2024

Figure 10: Regional Economic Report YE March 2024 Tourism Spending by Origin for Timaru District

Tourism Expenditure by Origin for Timaru District

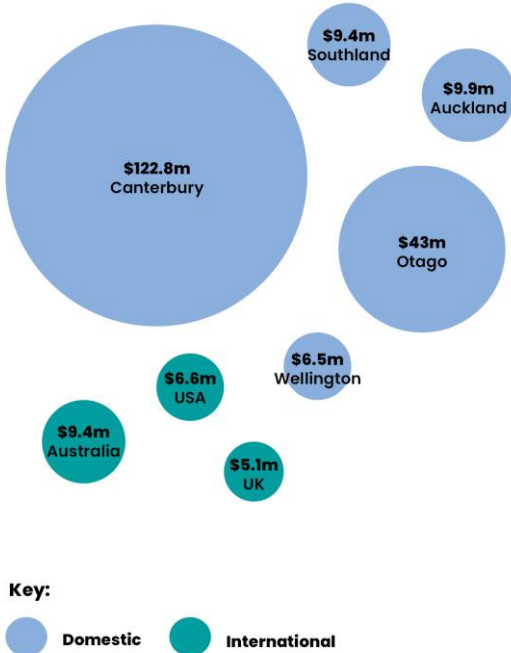


Figure 11: Regional Economic Report YE March 2024 Tourism Spending by Origin for Mackenzie District

Tourism Expenditure by Origin for Mackenzie District

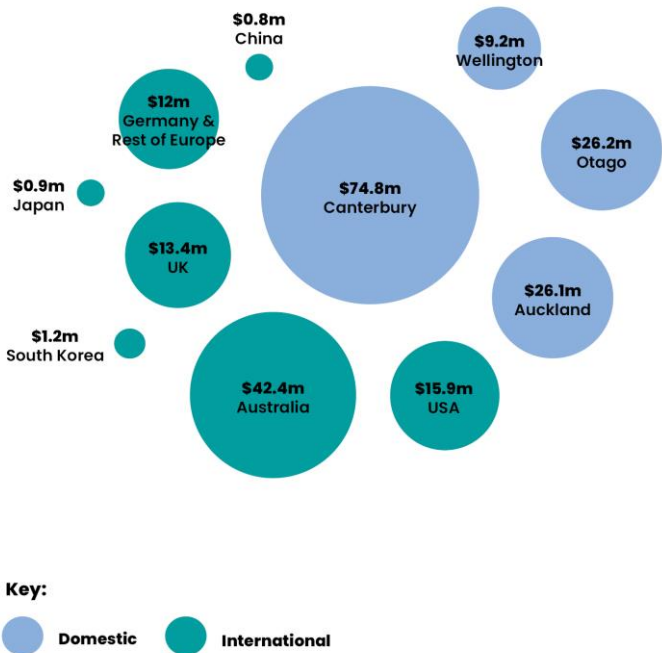
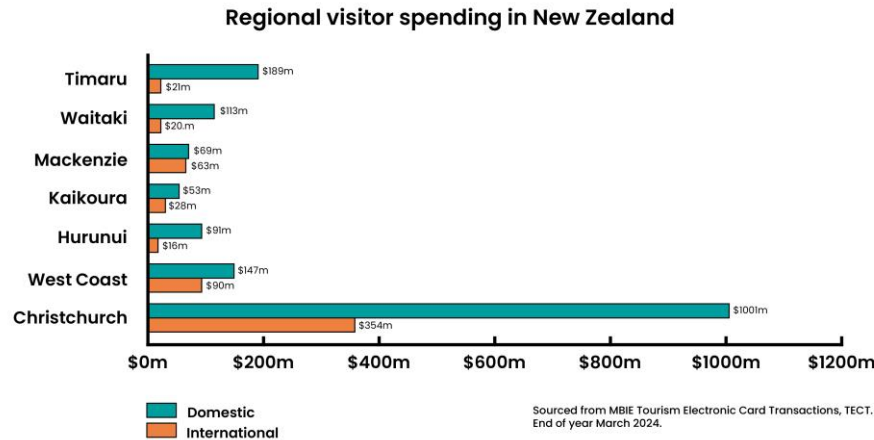


Figure 12: Breakdown of domestic and international visitor spending Timaru District



Venture Timaru has commissioned a Visitor Profile Project focussing on New Zealand and Australian visitors, with the first results due January 2025 and a final report due June 2025. In addition, the nation’s RTOs are collectively advocating to MBIE, for the return the visitation data which will report numbers of overnight stays and day visitors. It is hoped that this data will be available again by December 2024.

Historically, data has shown that the district has been primarily a destination for the domestic market, with a high percentage of day visitors compared to surrounding regions.

Domestic visitors

As the closest large population centre, Canterbury dominates domestic visitor spending (70%) while Otago visitors represent the next largest single spending group (9%), as shows in the Destination Insights Dashboard April 2024. It would be logical to assume based on these results, that close proximity of geographic location is the key motivator for both these groups.

Southland visits spend 4.08% of the total expenditure and Auckland visitors spend 3.34%. The direct flight from Wellington appears to have some impact on visitor spending with 2.8% of visitor spending coming from Wellington-based visitors.

International visitors

The Destination Insights Dashboard April 2024 shows Americans and Australians are the biggest international spenders in the district, followed by the United Kingdom. Germans spent enough to warrant a separate category (3.6%) while the rest of Europe’s contribution to the total tourism spending was 8.84%.

VISITOR PROFILE

Profile of visitors to the district

When considering the district’s visitor economy, it is helpful to understand the profile of those who visit the district.

Visitor satisfaction

Currently Venture Timaru does not have recent visitor satisfaction data, and plans are being considered to introduce a visitor Net Promoter Score (NPS) for the district. In the meantime Venture Timaru is surveying whenever possible, event attendees to gauge their satisfaction when visiting the district and whether they would recommend it. Overwhelmingly, the feedback from events, including South Island Masters Games, Rally South Canterbury, 4 & Rotary and Geraldine Festival, is that based on their experiences in attending these events, the respondents would recommend visiting Timaru District.

At a national level, Tourism Industry Aotearoa (TIA) published its Domestic Visitor Satisfaction Report for the year ending March 2024, which showed almost three quarters of New Zealanders took a domestic trip for leisure purposes in the past year. The median length of stay was three nights and domestic visitor satisfaction is 8.5 out of 10 on the experience. The report states that almost half of New Zealanders had their expectations exceeded on their most recent domestic trip and a similar proportion found it as they had expected. Only 4% found their most recent trip fell short of expectations.

The Net Promoter Score (NPS), used to measure an individual's propensity to recommend New Zealand as a holiday destination for New Zealanders, has been steadily declining since 2020, but is still a positive +53, indicating that there are considerably more advocates for domestic travel than there are detractors. The detractors commonly mentioned cost as their main concern.

Older New Zealanders are more likely to recommend a New Zealand domestic holiday. By age group, the NPS steadily increases from +40 for 18 to 29-year-olds, to +76 for over 70s.

The top five themes for why NZ would be recommended as a holiday destination were:

- Variety of things to do and visit
- Natural environment and scenery
- Beautiful country
- Great holiday/experience
- Friendly welcoming people

Figure 13: Prolife of last domestic overnight leisure trip, Domestic Visitor Satisfaction Survey (YE March 2024)

REGIONS VISITED (Top 14)	YE Mar 2020	YE Mar 2021	YE Mar 2022	YE Mar 2023	YE Mar 2024
Auckland	24%	22%	19%	20%	26%
Wellington	14%	13%	13%	13%	14%
Hamilton/Waikato	10%	11%	12%	10%	12%
Taupō	11%	11%	11%	10%	12%
Rotorua	12%	11%	12%	10%	12%
Christchurch	10%	11%	11%	11%	11%
Northland	13%	11%	11%	9%	9%
Bay of Plenty (excl. Rotorua)	10%	11%	11%	10%	9%
Canterbury (excl. Christchurch)	8%	10%	8%	8%	9%
Queenstown	7%	8%	10%	11%	9%
The Coromandel	8%	7%	8%	7%	7%
Hawke's Bay	6%	8%	7%	6%	7%
Palmerston North & Manawatu	5%	7%	6%	6%	6%
Dunedin	6%	6%	5%	6%	6%
Base: Total Sample	n=2,183	n=2,187	n=2,273	n=2,396	n=2,350

Turning briefly to international visitor satisfaction, while data is again not available at a district level, the Quarterly International Visitor Survey to June 2024 found that most international visitors were highly satisfied with their visit to New Zealand. International visitors tend to be particularly satisfied with our natural scenery and enjoyed their experience of Māori culture.

Source: TIA, Domestic Visitor Satisfaction, Update Year Ending March 2024

Visitor stay and flow

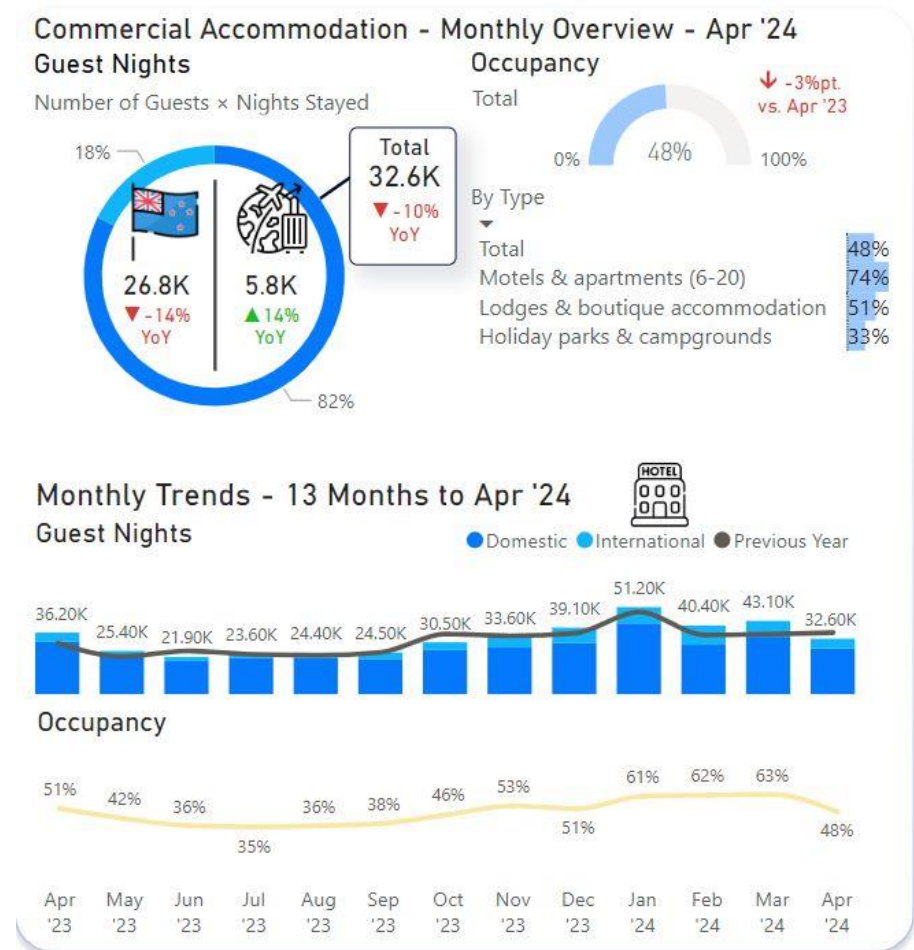
Day and overnight visitation

Currently the collection of data for visitor numbers has been ceased by MBIE. It is anticipated that this data will be resumed late 2024, as which point it will be added to this Plan.

Commercial accommodation nights

Commercial Accommodation Data shows a strong leaning towards domestic visitation, for the period through to April 2024. Of the 32.6k nights stayed, 82% were domestic visitors, and 18% were international. January through to March was the peak period, with occupancy rates of between 61-63% in this period. As would be expected, the winter months were significantly lower with occupancy around 36%.

Figure 14: Commercial accommodation guest nights April 2024



Source: Vistr Destination Insights Dashboard April 2024

Figure 15: Accommodation Timaru District 2024

Number	Accommodation types
16	B&B, bach, guesthouse, boutique resort/retreat
0	Backpacker
6	Commercial caravan park/camping ground
6	DOC campsites
0	DOC huts
3	Hotels
23	Motels
2	Serviced apartments
59	Total accommodation options

Flows

The district is centrally located between Christchurch and Dunedin, the South Island’s largest cities, and provides gateways to popular tourist destinations in the Queenstown-Lakes and the Mackenzie districts (Aoraki-Mount Cook, Lake Tekapo).

In the past, visitor data pointed to Timaru District, as being a place for visitors to stopover rather than a clear visitor destination. This continues to be a particular challenge to Geraldine, as it sits on the inland route from Christchurch International Airport to the southern lakes and tends to be a short stopover point, midway to another destination.

Visitor amenities and attractions

As an emerging tourism region, Timaru District has a small but growing number of visitor attractions. Since the first iteration of the Plan in 2021, there has been a focus on developing new tourism product, and as a result there has been steady growth in the offering, and also further development of existing product.

At this point, however, the majority of attractions in the district tend to be free, with a heavy emphasis on outdoor, nature-based activities.

This however is not unique to the Timaru District, as most of the attractions and activities on offer in the South Island are nature-based. The challenge is one of differentiation and the ability to create commissionable product that can attract visitor expenditure, particularly from international visitors.

Cruise Sector

Cruise sector overview

Prior to COVID, Timaru’s cruise sector was small, with between 2-3 ships calling per season, occasionally four ships. It was marred by the Seabourne Encore incident in 2017 when the vessel broke its moorings at PrimePort Timaru in high winds. The incident put a halt to cruise visits for two years while PrimePort invested over \$7m in upgrades to its main cruise ship berth. to ensure there would not be a repeat of the event.

PrimePort Timaru was fully geared up and ready to welcome cruise ships back at the end of 2019, when Covid hit. The season began with a small number of ships booked, however by March 2020, the sector nationally and internationally ground to a halt due to Covid and amid concerns about ships being high risk incubators for the virus.

Fast forward to 2022 when New Zealand's international borders were reopening, and cruise returned to Timaru with a bang. The first season back in action brought 14 ships to Timaru, and suddenly the cruise sector was being seen as a potential growth visitor area for the district. Concerns about Covid trafficking had abated, and international interest in cruising to the South Pacific was gaining momentum.

Season – ship total, passenger capacity total:

2022-2023 – 14 ships, approx. 20,000 passengers

2023 – 2024 – 12 ships, approx. 18,000 passengers

Three seasons on, and Timaru has now welcomed thousands of international cruise visitors directly into the CBD, and there is strong desire from the port company, tourism operators and the wider community to attract more cruise ships to Timaru.

Community sentiment on cruise

Post 2022-2023 season, a community survey was undertaken to gauge the impact and willingness to increase the cruise sector into Timaru District. Of the 100 respondents 93.75% were keen to see more cruise ships visit, with 37.5% choosing 16-20 ships as the optimal number. A further 21.88% wanted 21-30 ships, and 20.83% wanted 50+ ships per season.

18

Businesses involved in cruise, whether tourism operators or retailers, were equally eager to see the cruise sector grow. Few voices were raised of concern regarding the impact of cruise – indeed most cited added vibrancy to the CBD, boost to businesses and promoting the district as key reasons to bring more cruise visitors to Timaru.

A second community survey in 2024 resulted in a similar sentiment, with 91% of the 144 respondents reporting a positive impact of cruise visits for Timaru District. Further 30% want to see 30+ ships per season, 25% favour between 16-20 ships and 17% want between 11-15 ships per season.

Of the respondents 75% considered there were no negatives to having cruise visits to Timaru. The small number who raised concerns cited environmental impacts as a negative and questioned the extent of the economic benefit to the region.

Cruise economic impact

An economic impact report by Infometrics on the effect of cruise on the Timaru District economy, for the 2022-2023 season based on estimated spending figures of \$284 per passenger and 77% occupancy, showed that \$2.8m was generated into the local economy. With the 2023-2024 season of 14 visits, the estimated economic impact was estimated to be approx. \$3.7m

It is estimated about 60% of cruise passengers return on a land-based holiday after their cruise.

Growing the cruise market

PrimePort Timaru is working to increase the number of cruise ships visits to Timaru, as it has identified the cruise market as a lucrative income stream. As a company that is 50 percent owned by the Timaru District Council (TDC), (50 percent is owned by Port of Tauranga) there is potential for the port to increase its dividend back to TDC if the planned growth in business takes place.

PrimePort has set an ambitious target of up to 30 visits per year to be reached in the next five years. As a proactive move towards this goal, PrimePort attended the leading cruise international trade fair SeaTrade in Miami in April 2024 with the aim of attracting more business.

Traditionally the lead in time for cruise lines to schedule visits to ports can be anywhere from two to three years in advance, as itineraries need to be developed, to give time for planning and marketing. Occasionally last minute alterations can be made to schedules, for instance weather events.

Cruise opportunities & challenges

From a visitor perspective, the challenge for Timaru District is that as a comparatively small, emerging destination, there are currently limited offerings available for passengers visiting the district. This is alleviated to some degree by the offerings from Mackenzie District (day trips to Tekapo, Aoraki lookout), Waitaki (Moeraki and Oamaru) and Mid Canterbury (Erewhon visits).

There is opportunity to grow the tourism offering for the cruise sector and therefore potential to bring more economic benefit to the region with the

arrival of more cruise ships. However, the challenge is that due to the short annual season for cruise visits, tourism products are likely to be an add-on to an existing business rather than a stand-alone venture.

For the tours, operators must decide whether they wish to pursue a relationship with the cruise line to become a shore excursion promoted by the ship, or remain as an independent operator. The advantage of being an approved shore excursion is that there is a guaranteed number of passengers on tours; the disadvantage is that the cruise lines take a commission and seek favourable rates from the operators. The ship-based shore excursions are generally more expensive than an independent operator alternative.

From a wider more strategic view, there are other obstacles associated with the desire to grow the cruise sector for Timaru District, not all of which are within the control of the district. For instance, Cruise NZ reports that for the 2024-2025 season, there is a significant drop in port calls booked throughout NZ. From a peak of 1050 in 2023-2024, the coming season is down to 950. This is reportedly due to operational costs to the cruise lines of visiting the South Pacific.

Bookings currently for the next seasons are:

2024-2025 8 ships, approx. 6400 passengers

2025-2026 14 ships, approx. 14,000 passengers

For the district, if the targeted 25-30 cruise visits per year is attained, infrastructure needs are likely to increase, for instance more public toilets to a higher standard would be required.

Environmental impact of cruise

Environmental impacts need to be considered. Cruise is often considered a poor environmental steward, however Cruise New Zealand asserts that cruise lines have invested many billions of dollars in ships with new technologies and cleaner fuels to help protect the land, air and seas in which they operate.

All members of Cruise Lines International Association (CLIA) have committed to achieving net-zero emissions by 2050, in line with the Paris Agreement and International Maritime Organisation (IMO) goals. Further under CLIA international policies, member cruise lines do not release untreated sewage into the sea anywhere, in normal operations. Instead cruise ships utilise on-board treatment systems to process sewage and wastewater to meet standards established by the International Maritime Organisation as well as the national and local regulations that apply to all vessels.

Future cruise ships are likely to need power sources for charging when in port, but this is similar to predicted requirements from other vessels, so PrimePort is already factoring into its forward planning.

Stakeholder perspectives

Looking beyond the data presented above, it is also important to consider the perspectives of local stakeholders and their views on the Timaru District's visitor economy.

To inform the first iteration of this Plan, 27 individual interviews were conducted with key stakeholders. Eight workshops were held with representatives of all aspects of the district's visitor economy, including tourism operators, event organisers, café, bar and restaurant operators, and accommodation providers. Workshops were held with the Venture Timaru Board and the Tourism and Visitor Advisory Group. In addition, a youth workshop was also organised by the YMCA.

Conversations were also conducted with Te Rūnanga o Arowhenua as mana whenua, who are also represented on the Tourism and Visitor Advisory Group, and whose input was sought at several stages of the project.

In the subsequent 2023-2024 review of the plan interviews were conducted with key stakeholders, encompassing the event sector, tourism operators, hospitality providers, accommodation sector, Geraldine operators and mana whenua.

Through this engagement, several key themes emerged that are critical to growing and developing the district's visitor economy. These themes were seen to be equally as relevant to mana whenua as they were to other stakeholders. These themes were:

- Planning for the future growth of the district's visitor economy.
- Embedding the destination management approach.
- Building upon and better leverage existing areas of strengths.

- Focusing on clear market segments and to tailor tourism products and experiences to these markets.
- Using events as a driver for visitation and a tool for addressing seasonality.
- Maximising the value of potential 'hero' experiences that the district could offer to visitors.
- Sustainably grow the cruise sector market and product offering, to attract more ships, while retaining support from the community.
- Securing the infrastructure needed to support future growth.

Planning for the future

In previous years, the Timaru District missed out on much of the pre-Covid tourism boom that New Zealand experienced. However, post pandemic there is a noticeable increase in domestic and international visitation and spending with accommodation providers noting increases in mixed generation international family groups and increasing numbers of international and domestic visitors.

Local community positive perception of district as a tourism destination had been perceived by sector stakeholders in feedback to be lacking and requiring work to turn this around. Having acknowledged this, it is now considered that since 2021 there has been some shift in this perception, notably on the back of marketing campaigns promoting the district's highlights and visitor attractions. It remains however, an area needing attention to encourage the local community to be ambassadors for the district.

Embedding destination management

Stakeholders recognised that while the district has escaped some of the negative impacts of New Zealand's pre-Covid tourism boom, there is a desire to put sustainability at the heart of how the sector grows and develops.

Consequently, there has been an opportunity to embrace the destination management approach and to ensure that the sector 'builds back better'. As part of this approach, it is also important to recognise the linkages between destination management and economic development, taking an integrated approach to implementation and delivery.

Linked to the desire for the sector to grow sustainably in the future, and to encourage visitors to stay longer, stakeholders also identified the opportunity for the district to focus on 'slow tourism' and for there to be a focus on the principles of Manaakitanga to enhance visitor experience, lessen the impact of visitation and extend the length of stay within the district.

There was a recognition that the destination management approach would also emphasise partnership opportunities with iwi and DOC, to create new experiences for the district, specifically those that are focused on outdoors and to apply Kaitiakitanga principles to unlocking these opportunities.

Through a destination management approach, it was also noted that there were opportunities to deepen collaboration across the district and with surrounding districts to create shared value and demonstrate the principle of Kōtahitanga.

Leveraging existing strengths

As a destination, there was a view that the district had several existing areas of strength which could be better leveraged and promoted to further benefit the visitor economy. These strengths include the district's:

- Central South Island location – an easily accessible destination with multiple visitor attractions within it
- Attractive setting and rich culture and heritage including Edwardian period buildings in Timaru CBD.
- Established arts, culture and heritage offerings, including those activities found in Geraldine, which could be further built upon and enhanced.
- Easy access to outdoors and active lifestyle opportunities, both with the district and surrounding areas, including Centennial Park, Peel Forest and Rangitata Gorge.
- Port close to the CBD is an attractive offering to cruise lines, with easy access to historic town centre and the hinterland

Stakeholders highlighted the central location of the district and how this offered an ideal meeting point which could continue to be leveraged. There was also an acknowledged opportunity for the district to offer a quintessentially kiwi experience to domestic and international visitors alike, and to offer authentic experiences that could tap into a sense of history and nostalgia.

It was also felt that more could be done to build on the Timaru District's strength in primary industries, to create more on-farm experiences and to focus more on South Canterbury's credentials as a 'food bowl'. Lastly, stakeholders saw opportunities to work more closely with Te Rūnanga o Arowhenua to acknowledge and respect mana whenua. This includes promoting existing assets such as Te Ana Māori Rock Art and developing new products and experiences to unlock economic opportunities for Māori.

Market focus

Stakeholders acknowledged that in the immediate future the domestic market will offer the greatest opportunities for growth. However, there is potential to significantly grow the international market, particularly with the cruise sector. There has been rapid growth in the return of cruise ships resulting in a surge of international visitor numbers, particularly for the Timaru CBD.

As the RTO, Venture Timaru has been working on developing commissionable tourism product and upskilling operators' capability. As part of this, exposure to new international markets through trade events such as TRENZ has been taking place. There has also been a focus on increasing connection with Tourism New Zealand, which is resulting in a building awareness of the tourism offering in the district. International visitors are seeking out alternatives to the much-travelled Christchurch-Queenstown route, and this is to the advantage of Timaru and centres along the east coast.

The ability of the district to appeal to families and 'active boomers' was seen as particularly important, and it was felt that there was a good fit between what the district offered as a destination and the requirements of these groups. This included easily accessible and free and low-cost activities and experiences, such as Caroline Bay and Peel Forest, as well as a good range of affordable accommodation options.

It was noted that there are also opportunities linked to business visitors to the district, reflecting the wider strengths of the local economy, and that these would continue to be important to the visitor economy. Finding ways to extend the stay of business visitors, as well as attracting them back with their families to explore more of what the district has to offer was seen as a market opportunity.

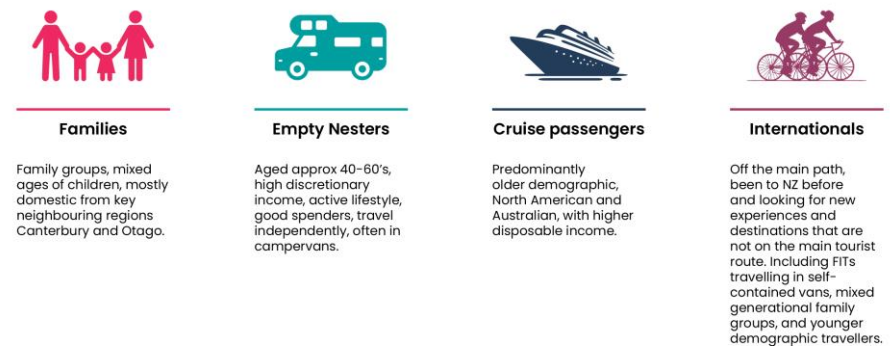
Stakeholders highlighted the established strength of the district in attracting and hosting sporting events. The Timaru District's sporting facilities,

stadiums and related infrastructure was seen as a unique offering in the South Island. It was noted that there were opportunities to focus on this market, to leverage the district's central location and ability to host events of increasing scale and duration. Further potential was seen to leverage off sporting events in the wider region, particularly Christchurch, to attract visitors pre and post their fixtures.

Finally, stakeholders felt that more focus on creating better experiences across some key market segments would not only benefit the district's visitor economy, but it would also serve to provide greater amenity for current and future residents. Moreover, it was recognised that every visitor was also a future resident or employee, both of which would be welcomed and would align with broader economic development objectives.

Figure 16: Key target markets have been identified as:

Key target markets have been identified as:



Events sector development

It was suggested that there were further opportunities to use events as a tool for supporting and developing the district's visitor economy and that the success of events, such as Caroline Bay Rock & Hop, South Island Masters Games, Brews on the Bay, Rally South Canterbury and Geraldine Festival demonstrated the demand and opportunity to grow the scale and impact of the district's events sector.

The district's capacity to host events, sporting and others, was seen to be growing and it was acknowledged that Venture Timaru's focus on this was already making an impact, but there was an opportunity to go further and to extend the length and impact of events hosted in the district. Stakeholders noted that the impact of events was reaching across the district, with all locations potentially benefiting from larger events.

There was agreement from stakeholders that it was important to have a performing arts facility, not only to support the active local community's artistic endeavours, but as an important asset for Timaru in attracting people and events.

In addition, it was also noted that there was potential for the district to explore opportunities for attracting smaller business events and conferences, but that this will require appropriate infrastructure to support such events (including a centrally located quality hotel).

Stakeholders consider the development of a specific Events Strategy was important to progress the development of the events sector for the district, encompassing Timaru, Geraldine, Temuka and Pleasant Point. This should be considered a key action.

Major Events Support Fund

In 2021 Timaru District Council (TDC) established the Major Events Support Fund as acknowledgement of the importance of attracting and supporting medium to large events in the district. The role of administering the fund was given to Venture Timaru and when determining the events to support, VT looked to the actions within this plan in building the events sector, and as a result identified that the three categories to support:

1. **Emerging events** that are new and warrant a kick start grant investment as they are seen to have significant long-term growth potential for the Timaru District.
2. **Cornerstone long-standing events** that have proven performance in delivering high profile and will drive incremental visitation and expansion opportunity.
3. **Significant one-off events** that present an opportunity to deliver substantial benefits to the Timaru District by way of profile, increased visitation, and new business opportunities.

The overall aim is to grow the portfolio of events in the district, and the build shoulder season offering to spread the impact.

Hero experiences

Stakeholders acknowledged that one of the things that held the district's tourism back was the limited hero experiences available to attract visitors in their own right. However, some hero experiences were identified for development that would potentially be of benefit for the district's entire visitor economy.

Te Ana Māori Rock Art

The Te Ana Māori Rock Art Centre is a unique experience that could also be a gateway to further growth and development of cultural tourism. It is an opportunity to acknowledge, respect and enhance mana whenua and provide a platform for Māori economic development across the district. The downtown Rock Art Centre and guided tour to a private restoration site are the only cultural offering of this kind in New Zealand, therefore attract domestic and international visitors.

Figure 17: Te Ana Māori Rock Art Centre

Te Ana Māori Rock Art Centre is focused on the ancient Māori rock sites and rich tribal history of the Aoraki region. Established by Ngāi Tahu, the centre is in the Landing Services Building in Timaru CBD and provides access to tours and sites across the district and wider region.

The centre operates as a not for profit with all profits being returned to conservation and protection of the rock art sites. Visitors are hosted by local Ngāi Tahu guides, and there are opportunities to explore the rock drawings through hosted experiences at the Rock Art Centre in Timaru, and on guided tours to the region's most iconic Māori rock art sites.

The centre also has a strong focus on education, hosting schools and running activities for school children, raising the profile of ancient rock art and encouraging a new generation of rock art guardians.

Caroline Bay

Caroline Bay is the most significant urban recreational space in Timaru, set on the edge of the Timaru CBD. In 2023 the opening of the destination playground CPlay has been heralded as a major step forward in enhancing the attraction of the Caroline Bay recreational area. Within a short period of opening, CPlay has succeeded in attracting visitors and locals alike in significant numbers.

In 2023-2024 work on a Caroline Bay Masterplan began, to bring a strategic, focussed approach to future development of the bay area.

There is significant potential for maximising the value Caroline Bay offers to the district's visitor economy, which currently is not fully realised. There are opportunities for the tourism sector to work in partnership with the Council to take a more strategic approach to promoting and enhancing the Bay for visitors and residents.

Stakeholders were keen to see reinvestment in infrastructure at the Bay – eg beach volleyball, mini golf – and a café near the waterfront, plus toilets near CPlay. They saw development of the penguin tourism attraction as important.

Figure 18: Caroline Bay

Caroline Bay is the most widely known recreational area in the Timaru District and covers 34 hectares, excluding the beach, and is used for outdoor recreation and events. The Bay has outdoor artwork and sculptures, a new destination playground, CPlay, outdoor gym equipment, beach volleyball courts, mini golf, tennis courts, a skate park, small train circuit, and is home to the world renowned Trevor Griffiths Rose Garden. The various walks are enjoyed daily by many and are also used for events such as triathlons.

The beach itself is the only sandy beach between Oamaru and Banks Peninsula. Caroline Bay beach was voted in the top 10 of NZ favourite family beaches by AA Traveller (2017).

The beach is sheltered by the harbour breakwater and lies near Timaru CBD. The adjacent Piazza provides access for pedestrians to the CBD. The dunes of Caroline Bay have been revegetated with native sand binding plants. Kororā, little blue penguins, have also established a colony in and around Caroline Bay and increasingly attracts international visitors to watch the spectacle of the birds returning home in summer evenings after a day at sea.

The Bay is home to the annual Caroline Bay Carnival, which includes rides, concerts and sideshow style games. The carnival has been running for over 100 years and draws visitors from across New Zealand.

Timaru CBD

Timaru CBD's collection of heritage buildings including the Landing Services Building, as well as the town's Edwardian architecture, has significant potential to enhance the district's destination offering and identity.

Stakeholders were keen to see TDC invest in the CBD, particularly beautification of the Stafford South precinct.

Figure 19: Timaru CBD

Timaru's CBD has a rich history and collection of heritage buildings, Edwardian architecture and visitor amenities. The town was originally developed at the only sheltered point on the coast between Banks Peninsula and North Otago. Growth was fuelled by the development of an artificial harbour in the late 1800s, resulting in the town becoming an industrial centre processing products from South Canterbury farms.

Relatively slow growth since the 1950s means the town has a well-preserved early 20th-century main street and other historic buildings, concentrated along George Street, Stafford Street, Strarhallan Street, and Sophia Street.

Notable buildings in the CBD include the Landing Services Building, the Grosvenor Hotel, the Arcade Chambers and the Chief Post Office. The Landing Services Building is particularly unique, built from local volcanic basalt and was originally used for unloading ships in the 1870s. It is the only remaining example of such a building in Australasia.

Geraldine

Geraldine's location on the inland route from Christchurch to the southern lakes, and therefore is on international visitor routes and is connected to established South Island visitor journeys. Geraldine's boutique feel and growing food and beverage, arts and culture offering, as well as its attractiveness to older visitors can be a focus for growing slow tourism, in the district and a hook for extending stays.

Figure 20: Geraldine

Geraldine sits inland from Timaru and is located on State Highway 79 between the Orari and Hae Hae Te Moana Rivers. Geraldine is a traditional kiwi country town, with a boutique feel and arts and crafts offering as well as a number of established destination experiences including the popular Geraldine Vintage Machinery & Car Museum.

The town's location and variety of attractions has made it a stopping point on the South Island's inland scenic route and supported the development of local cafés and visitor amenities, including art galleries and short walking trails. It has a reputation as a place where visitors can enjoy a range of food and beverage tastings from local producers, including Geraldine Cheese Company, Humdinger Gin, House of Hop and the Barker's Foodstore and Eatery – which celebrates the history and products of celebrated Kiwi company Barker's of Geraldine.

Geraldine is a gateway to a wide range of outdoor and adventure activities including cycling trails, canyoning, farm tour and shearing demonstration, hunting, 4 x 4 adventure tours, kayaking, golf, mountain biking, and fishing. The town lies in close proximity to Department of Conservation's Peel Forest Estate, with its extensive podocarp forest and abundant wildlife.

As well as traditional commercial accommodation providers, Geraldine has a popular and busy Top 10 Holiday Park near the village centre, and more recently a number of high-end luxury boutique accommodation offerings including Ngā Whare Mānatu, Fiery Peak Eco-Retreat and The Vicarage.

In the nearby foothills is Woodbury, a small, quaint village with an historic stone church and old library. The Woodbury Store Café is a new attraction that has been established in the original village store, which has undergone a careful restoration.

The village sits between the Waihi and Orari rivers, whose gorges lie further into the hills and offer camping and tramping.

Infrastructure for growth

During discussions with stakeholders, a range of infrastructure and other constraints were identified, including a need for renewals and upgrades of some facilities and amenities, such as public toilets and parking facilities.

In terms of new infrastructure and experiences, there is potential to collaborate with the private sector to bring forward new assets including those that would support the future growth of the cruise sector, a centrally located 4 - 5 star hotel, food destination restaurants, and cultural experiences.

Stakeholders considered the absence of centrally located quality 4 star hotel a critical issue for the CBD that held back the area from attracting international groups and larger business style events. While the CBD is home to many heritage buildings, the costs and regulations associated with building renewals and refurbishment made it harder to maximise the heritage value of the CBD.

Developing operator capabilities continues to be important and stakeholders across the visitor economy also highlighted ongoing challenges in hiring and retaining skilled staff in all parts of the sector and how this was impacting the services and experiences that could be offered.

Summary of opportunities and challenges

As set out above there are several opportunities and challenges that are central to this Destination Management Plan. These are summarised in Figure 19 and have informed the foundations, vision, objectives and actions for this plan, as set out in the following sections.

Table 21: Summary of destination opportunities and challenges

Opportunities	Challenges
<ul style="list-style-type: none"> • Strong domestic visitation supported by access to a range of free and affordable experiences and activities and affordable accommodation options. • Opportunity for slow tourism and ability to offer a quintessentially kiwi experience to domestic and international visitors. • Centrally located within South Island with easy access to outdoor activities including those across the wider South Canterbury area. • Strengths in primary sector and food production present opportunities to offer more on farm experiences and high-quality food and beverage experiences. • Geraldine is located on the inland scenic route and has an established proposition for international visitors and a growing arts, craft and food offering. • Opportunity to enhance the visibility of the Te Ana Māori Rock Art Centre as a unique experience for visitors and one which highlights and respects mana whenua. • Opportunity for mana whenua led cultural experience, for cruise and other visitors • Historic urban environment, architecture and planned investment in infrastructure, including hotel accommodation, to support future growth. • Access to the outdoors, parks, reserves and scenic domains spread throughout the district including Caroline Bay, Peel Forest and Rangitata Gorge. • Fewer challenges to the sectors social licence than other parts of the South Island and an opportunity to embed a destination management approach in future activity. • Established and growing portfolio of sporting, arts and culture, and food related events and opportunities to scale these in response to proven demand. • Cruise sector and community enthusiasm for Timaru presents opportunity to grow the cruise sector market 	<ul style="list-style-type: none"> • Reliance on domestic visitors, with smaller number of internationals attracted to stay. • Limited range of unique visitor experiences and shortage of commissionable visitor products that would help establish greater visibility in international trade markets. • Limited hero experiences that help position the district as a destination in its own right. • Competition from surrounding destinations and wider South Island. • Reliance on day trippers, especially internationals passing through Geraldine and lack of overnight visitors as well as short length of stays. • Lack of specific insights on visitor perceptions and satisfaction with the Timaru District as a destination. • Lack of a four or five star centrally located hotel limits district's ability to attract more business visitors and events, or leisure visitors seeking higher quality accommodation. • Need for improved and enhanced wayfinding in the Timaru CBD. • Local community perception of district as a tourism destination is lacking and needing to be turned around to make locals ambassadors for the district • Competition for staff across the local labour market.

FOUNDATIONS, VISION AND OBJECTIVES

Our foundations

As the Timaru District moves to embrace a destination management approach to support a thriving visitor economy, there are three firm foundations that sit at the centre of how we will work together as a district, and with our surrounding districts and with national organisations.

- **Manaakitanga** – as a destination we will welcome visitors to the Timaru District and extend them hospitality, respect and kindness so that they will remember their time with us and share their positive experiences of the district to others.
- **Kaitiakitanga** – we will ensure that the future growth and development of Timaru District's visitor economy is sustainable and not achieved at the expense of our people, our culture or our environment.
- **Kōtahitanga** – across the Timaru District, we will work together to ensure that all aspects of our visitor economy are supported to reach their full potential so that we collectively thrive.

These foundations are rooted in tikanga Māori and reflect our commitment to Te Tiriti o Waitangi principles. While these foundations can be applied in many settings, they are well suited to how we support and develop the district's visitor economy and have informed our vision for this Destination Management Plan.

Building on these foundations will allow us to focus on ensuring that our actions and activities are consistent with destination management principles and that they focus on developing a sustainable, regenerative and high-value visitor economy.

Our vision

Our shared vision for this plan is that by working together and through our collective actions:

The Timaru District's visitor economy will thrive, bringing benefits to visitors and residents alike, as the district's diverse attractions and experiences are understood and enhanced.

This vision recognises that as a destination, the Timaru District not only offers experiences to visitors, domestic and international, but also supports the amenity that the district offers to current and future residents, contributing to higher quality of life and increased wellbeing of those that call the district home.

There are important connections between this aspect of our Destination Management Plan and our wider economic development objectives for the district, including how we attract future residents, skilled workers and investment.

Our strategic objectives

Informed by the above foundations and by our shared vision for the district as a destination, we have identified six strategic objectives. These form the basis of the Timaru District Destination Management Plan.

- 1 Increase the awareness and visibility of the Timaru District as a destination.
- 2 Develop and extend the Timaru District's attractions and experiences for visitors and residents.
- 3 Maximise the opportunities and potential of the Timaru District's hero experiences.
- 4 Sustainably grow the cruise sector and product offering, to attract more ships, while retaining support from the community
- 5 Grow the district's portfolio of events to attract visitors, extend length of stay and support vibrancy for residents.
- 6 Attract investment into the infrastructure required to ensure that the Timaru District thrives as a destination.

Increase the awareness and visibility of the Timaru District as a destination

As a destination, the Timaru District has much to offer to both domestic and international visitors but there is a need to capture a greater number of overnight visitors. While the range of commissionable products and experiences is small compared to other South Island locations, the district has a good variety of urban and outdoor amenities that can be further promoted. The district is also close to other locations and amenities which could easily be reached from the district.

In the first iteration of the Plan, a lack of shared and compelling destination identity was identified as a key weakness for the district. Three years on however, stakeholder feedback was that work undertaken over the period had improved this significantly. However one of the ongoing challenges was considered continuing to build on local community awareness of the district as a tourism destination, so that the community would become ambassadors for the district. It was considered that this was more of an issues for Timaru urban area, compared to Geraldine. Stakeholders in Geraldine believed that perception of the village and surrounds by locals was mostly positive.

While considering the region's identity, stakeholders agreed on the following strengths:

- *Outdoor environment – walking and cycling trails, scenery etc.*
- *Food story – artisan creators, producers, eateries*
- *Culture & Heritage – Edwardian town, Te Ana*
- *Central location – especially a big driver for sporting events.*

Further they agreed that the key identity was:

A central South Island location - an easily accessible destination, with multiple visitor attractions within it. ***"It's all right here"***.

By focussing on the identity and strengths, along with the key target markets, it was considered that this would give the district significant potential for growth of the tourism sector.

For example:

- Work to maximise the value of the district's central location in South Canterbury and position itself as a hub for visitors and a gateway to the wider region.

- Messaging to attract visitors who are seeking an authentic kiwi experience, access to the outdoors and to arts and culture
- Further targeting families and visitors seeking a slow tourism experience

Work has already begun to enhance visitor signage and wayfinding in the district, including the newly installed bilingual wayfinding signs in Timaru's CBD and Caroline Bay reserve area.

Further enhancing wayfinding signage is to be encouraged and extended as budget and opportunity allows.

Actions to support this strategic objective will include:

- Focusing on the key destination identity and strengths, along with the key target markets, to further grow the tourism sector.
- Leveraging the district's central position in South Canterbury to act as a destination hub and gateway to the wider region.
- Enhancing visitor signage and wayfinding across the district.
- Continuously refreshing and enhancing the Timaru District's visitor marketing channels.

Develop and extend the Timaru District's attractions and experiences for visitors and residents

Overall, the Timaru District needs to continue to extend the range of attractions and experiences available to visitors and residents. Future growth should be sustainable and aligned to destination management principles. This includes exploring opportunities to develop sustainable, low impact and slow tourism across the district. There is also a need to grow

awareness and understanding of environmental impacts of current activities and to mitigate these wherever possible, promoting more regenerative approaches and practices across the sector.

As well as enhancing and scaling existing visitor experience, there is an ongoing need to explore the creation of new commercially viable visitor experiences that can both attract more visitors and give them a reason to stay longer in the district.

Currently, many attractions and experiences available are not commissionable (penguin viewing, CPlay, walking tracks) and this limits visitor spending and holds the district back from gaining more visibility with international visitor and the trade sector.

The district needs to maximise the value of its existing heritage and architecture, as well as its established arts and cultural offering. There is also a need to continue to focus on its strengths in the food and beverage sector, as the food bowl of South Canterbury – this has begun with development of SCOFF (South Canterbury Outstanding Food Festival) and the district food trail.

Recognising the opportunities associated with the district's access to the outdoors, there is a need to work with the Department of Conservation (DOC) and existing operators to further enhance the district's outdoor experience and amenities and contribute to regenerative outcomes.

Opportunities exist to extend the Māori cultural experience, expanding on the existing highly successful Te Ana Māori Rock Art product, by working with mana whenua to explore potential prospects.

Actions to support this strategic objective will include:

- Supporting sustainable growth of tourism products across the district.
- Maximising the district's diverse arts, cultural and heritage attractions and building on strengths in food and beverage.

- Exploring opportunities to create new commercial destination products and services, including Māori cultural experiences, that are high-value and enhance resident and visitor experience.
- Working with DOC and established providers to further enhance the district's outdoor experiences.
- Increasing awareness and understanding of environmental impacts, mitigating these impacts and promoting more regenerative approaches.

Maximise the opportunities and potential of the Timaru District's hero experiences

Hero experiences can play an important role in driving visitation and can often be the hook to capture visitors who may otherwise pass through the district.

Since the first iteration of this plan, there has been significant work undertaken to enhance and build the capability of existing hero experiences and to add to the collection of experiences.

The most significant of the hero experiences is Te Ana Māori Rock Art Centre and the restoration site tours. This experience gains interest from international visitors, and it is promoted by Tourism New Zealand, but it is important to continue to tell the story and attract domestic visitors.

New hero experiences added to the offering since 2021 include Big Rock Canyoning, Geraldine Farm Tours, Raptor Experience, Penguins, Alps to Ocean, Real Kiwi Horse trekking, Cplay, Geraldine Vintage Machinery Museum.

For Caroline Bay, the new destination playground CPlay is a gamechanger, gaining national attention with its unique story and attracting significant domestic visitation, while also being thoroughly enjoyed by the local community.

Caroline Bay itself is in 2024-2025 undergoing a masterplan process that is seeking to enhance the offering, and create the potential opportunities. The future could see development of the currently free penguin experience, a seaside café and water-based activity businesses. The masterplan will be encouraging investment into the Bay area in a carefully planned, sustainable manner.

Timaru CBD has a largely unrealised heritage and architectural value. The CBD has an historic setting and collection of buildings that have the potential to create new tourism experience, products and a unique identity.

Geraldine has long been on the international visitor route, courtesy of its location on the inland scenic highway from Christchurch International Airport to the southern lakes. The challenge for Geraldine is to encourage visitors to stay longer than a few hours to enjoy the attractions of the boutique village – from arts and crafts, to food tastings and a collection of vintage museums.

Actions to support this strategic objective will include:

- Supporting and developing Te Ana to further grow cultural tourism and as a platform for acknowledging mana whenua.
- Further enhancing Caroline Bay as one of the Timaru District's key attractions.
- Encouraging investment in central Timaru to develop new hero experiences for the district.
- Maintaining and enhancing Geraldine's destination offering for the Timaru District.

Sustainably grow the cruise sector and product offering, to attract more ships, while retaining support from the community

The cruise sector has arrived back in Timaru post Covid, with an influx of ships, resulting in the busiest cruise season on record for the port in 2022, with 14 ships arriving bringing approximately 20,000 mostly international visitors directly into the heart of the Timaru CBD. This was an unprecedented amount of international visitors for the district, and the effects of economic benefit and vibrancy were immediately felt. As a result, the community and businesses have expressed their overwhelming support of the desire by PrimePort to grow the cruise sector.

Should the PrimePort aspirations for growth be fulfilled, the challenge for the future will be to retain the community backing and to ensure appropriate infrastructure is maintained and developed to satisfy the needs of passengers and the local community. Environmental concerns regarding the cruise will need to be addressed and future energy requirements for the ships may require more infrastructure capability at the port.

The development of tourism product is a key to growing the cruise market. Work is already underway to achieve this, and while there is enthusiasm from potential operators in the district, the cruise market in itself is not sufficient alone to sustain a tourism business. Any new operator needs to find additional markets to ensure there is a viable business proposition.

Actions to support this strategic objective will include:

- Sustainably grow the cruise sector and cruise tourism product offering, to attract more ships, while retaining support from the community

- Continue to support development and enhancement of tourism products for the cruise sector
- Advocate for appropriate infrastructure to support the cruise sector

Grow the district's portfolio of events to attract visitors, extend length of stay and support vibrancy

Events play an important role in attracting visitors and supporting local amenity for residents. The district has an established reputation for hosting sporting events and has a growing portfolio of other events that can be supported to scale up and expand. There are opportunities to develop existing events and to attract new events to the district, and this has been augmented since the introduction of the Major Events Support Fund by the Timaru District Council in 2021. This fund, administered by Venture Timaru, is a significant acknowledgement of the importance of events to the economy and community wellbeing, and potential for growth in this sector. Along with the economic benefits, events add a vibrancy to the district and assist in increasing its profile.

There is a need to maximise the ongoing investment in events infrastructure by the Timaru District Council – cultural and sporting venues improvements. Any developments that create the capacity to hold larger business events would also be highly desirable and bring substantial benefits to the region. Key to success in attracting business events is the need for investment in high end accommodation, to provide a central city 4 - 5 star hotel.

Development of a district-wide events strategy would assist in providing a framework on which to build the sector.

In addition, to maximise the value of events, there is a need to continue to enhance coordination between event organisers and the district's wider visitor economy. Improved awareness of the portfolio of current and planned events across the district will create more opportunities for collaboration and leverage and create higher levels of visitor expenditure and longer stays.

Actions to support this strategic objective will include:

- Building on the success of established events and enhancing and refreshing older events.
- Exploring opportunities to develop or attract new events to the district.
- Build on track record in delivering sporting events and extending impact of these across the district.
- Enhancing coordination, collaboration and alignment across the district's event sector.
- Development of a district-wide events strategy to provide a framework on which to build the sector.

Attract investment into the infrastructure required to ensure that the Timaru District thrives as a destination

This final objective recognises that resources will always be limited and that it is not possible or practical to easily fund all the infrastructure that the sector might require or desire. In the first instance, there are opportunities to fully leverage current or planned investment across the district, including the investment already underway in Timaru CBD and the investments committed in the Council's LTP.

Where destination-related infrastructure is still required, for example centrally located and high-quality accommodation, there is a need to explore the feasibility of these investments and to look for commercial solutions to fund infrastructure gaps.

Finally, there is a need to ensure that the district's visitor economy and its tourism operators have the capabilities that they need to be successful, including access to the skills and talent required to support growth of the sector.

Actions to support this strategic objective will include:

- Leveraging planned infrastructure investment to maximise destination outcomes for the district.
- Exploring commercial solutions for future infrastructure provision and supporting the case for future development that supports the district's destination offering.
- Enhancing operator capability and ensuring the visitor sector has access to a skilled workforce to support growth and development of the district's visitor economy.

Destination Management Action Plan

For each of the objectives and the associated actions set out above, there are a series of specific activities that together form a detailed action plan. These are set out in the following section, together with nature and expected outcome. All activities will be progressed over the next three years, with subsequent activities to be identified as implementation progresses.

DESTINATION MANAGEMENT ACTION PLAN

Increasing the awareness and visibility of the Timaru District

Table 3: Key actions and activities to increase the awareness and visibility of the Timaru District as a destination

Actions	Key Activities	Activity Type	Desired Outcome
Focusing on the key four key destination identities, along with the key target markets, to further grow the tourism sector.	<ul style="list-style-type: none"> Continue to develop and expand the district's destination narrative, key messages and destination proposition. Key market segments identified and areas of focus for promotional materials and activities. Develop new shared promotional materials and activities targeted at identified markets 	Promotion	Visitors understand and can easily access the district's destination offerings
Leverage the district's central position in South Canterbury to act as a destination hub and gateway to the wider region.	<ul style="list-style-type: none"> Ensure promotional material and messaging reflects the district's central position and look for further opportunities to leverage this to attract visitors and events. Continue to develop and promote collaborative campaigns, visitor journeys across the district and work with surrounding districts to promote integrated visitor journeys 	Promotion	
Enhance visitor signage and wayfinding across the district.	<ul style="list-style-type: none"> Undertake an audit of all existing visitor signage across the district to identify opportunities for improvement and alignment. Engage with key agencies, including NZTA, to explore opportunities for enhancing signage and ensuring cohesive signage and wayfinding across the district. Work with Te Rūnanga o Arowhenua to explore the appropriate use of traditional place names as part of signage and wayfinding. 	Delivery	
Continuously refresh and enhance the Timaru District's visitor marketing channels	<ul style="list-style-type: none"> Review and deliver cohesive visitor information across the district across social channels, websites, collateral and information centres. Use famils and information sharing to grow awareness of the Timaru District's destination offering and experiences. 	Delivery	

Developing and extending the Timaru District's attractions and experiences

Table 4: Key actions and activities to develop and extend the Timaru District's attractions and experiences for visitors and residents

Actions	Key Activities	Activity Type	Desired Outcome
Support sustainable growth of tourism products across the district.	<ul style="list-style-type: none"> Explore opportunities to develop new visitor experiences and attractions, including those that are low impact, slow tourism and emphasise destination management principles. 	Development	Visitors have a choice of authentic, distinctive and environmentally sustainable products and experiences across the district
Maximise the district's diverse arts, cultural and heritage attractions and build on strengths in food and beverage.	<ul style="list-style-type: none"> Promote and leverage existing arts, cultural and heritage attractions and identify opportunities for new experiences of this type across the district. Encourage the development of new food and beverage offerings and experiences. 	Promotion and Development	
Exploring opportunities to create new commercial destination products and services that are high-value and enhance resident and visitor experience.	<ul style="list-style-type: none"> Work with tourism sector stakeholders and operators to identify and support commercial product development that will create impact and attract visitors to the Timaru District Develop new commissionable products that are 'trade ready' for national and international visitors. Engage with tourism trade sector to promote commissionable products and experience across the wider district. 	Development	
Working with DOC and established providers to further enhance the district's outdoor experiences.	<ul style="list-style-type: none"> Identify opportunities for new outdoor experiences and attractions across the district including walking, cycling, rafting, canyoning, hunting and fishing. Work with DOC, mana whenua and existing operators to extend and enhance existing outdoor experiences and establish new outdoor experiences. 	Development	
Increasing awareness and understanding of environmental impacts, mitigating these impacts and promoting more regenerative approaches.	<ul style="list-style-type: none"> Consider environmental impacts of current activities and how these might be better managed and reversed. 	Promotion and Coordination	

Maximising the opportunities and potential of hero experiences

Table 5: Key actions and activities to maximise the opportunities and potential of the Timaru District's hero experiences

Actions	Key Activities	Activity Type	Outcome
Support and develop Te Ana to further grow cultural tourism and as a platform for acknowledging mana whenua.	<ul style="list-style-type: none"> Work with Te Ana and mana whenua to maximise the potential of Te Ana as a hero experience for the district. 	Coordination	The Timaru District's hero experiences are a unique and compelling part of the district's destination proposition
Further enhancing Caroline Bay as one of the Timaru District's key attractions.	<ul style="list-style-type: none"> Work with relevant stakeholder groups to identify actions and enhancements required to maximise the potential of Caroline Bay. Coordinate the development and promotion of complementary tourism products, such as CPlay, hot-pools, and blue penguins viewing, to enhance Caroline Bay's destination offering. 	Coordination	
Leverage planned investment in central Timaru to develop new hero experiences for the district.	<ul style="list-style-type: none"> Work with Council, building owners and developers to identify actions and enhancements required to maximise the potential of Timaru CBD. Leverage the investment in the Timaru CBD to create a new hero experience for the district. 	Coordination	
Maintain and enhance Geraldine's destination offering for the district	<ul style="list-style-type: none"> Work with Geraldine NZ and local operators to build upon the town's boutique feel, arts and culture and position on international tourism routes. 	Coordination	

Grow the cruise sector and extend the product offerings

Table 6: Key actions and activities to maximise the opportunities and potential of the Timaru District's hero experiences

Actions	Key Activities	Activity Type	Outcome
Sustainably grow the cruise sector while retaining support from the community	<ul style="list-style-type: none"> • Work with PrimePort, ground handlers and local operators to grow the cruise market, attracting more quality visits to Timaru. • Continue to monitor community sentiment regarding cruise visits, addressing any concerns quickly. 	Facilitation	The Timaru District's cruise sector grows in a sustainable manner; cruise tourism products are supported and new experiences developed, and the community continues to welcome and support the district as a cruise destination
Continue to support development and enhancement of tourism products for the cruise sector	<ul style="list-style-type: none"> • Work with existing tourism operators to enhance the offering of tourism products for cruise passengers. • Work with new potential businesses to develop new product offerings for cruise passengers to extend the range and variety of products available. 	Facilitation and development	
Advocate for appropriate infrastructure to support the cruise sector	<ul style="list-style-type: none"> • Work with Council and PrimePort to ensure appropriate infrastructure is in place to support growth in the cruise sector. 	Facilitation	

Grow the district’s portfolio of events

Table 7: Key actions and activities to grow the district’s portfolio of events to attract visitors, extend length of stay and support vibrancy

Actions	Key Activities	Activity Type	Desired Outcome
Building on the success of established events and enhancing and refreshing these events.	<ul style="list-style-type: none"> Continue to promote established events and explore opportunities to refresh, scale up and extend existing events. 	Delivery	Events play a central role in attracting visitors and engaging residents in the district’s visitor economy
Explore opportunities to develop or attract new events to the district	<ul style="list-style-type: none"> Identify opportunities to develop and attract new events for the district including shoulder season events. Development of a district-wide events strategy to provide a framework on which to build the sector. 	Development	
Build on track record in delivering sporting events and extend impact of these across the district.	<ul style="list-style-type: none"> Continue to work to attract sporting events to the district, leveraging existing infrastructure and capitalising upon planned future investment. 	Facilitation	
Enhance coordination, collaboration and alignment across the district’s event sector, growing the district’s portfolio of events	<ul style="list-style-type: none"> Maintain a directory of events offerings across the district, including information on facilities, accommodation and local service providers. Take a portfolio approach to hosting regular and one-off events across the district and coordinate the events calendar to promote all events across the district. 	Coordination	

Securing the infrastructure to ensure that the district thrives as a destination

Table 8: Key actions and activities to secure the infrastructure required to ensure that the Timaru District thrives as a destination

Actions	Key Activities	Activity Type	Desired Outcome
Leverage planned infrastructure investment to maximise destination outcomes for the district.	<ul style="list-style-type: none"> Engage and leverage LTP investments to support destination development and activation. Work with Timaru Airport, as a key gateway to the district, to support future development and investment and to unlock destination outcomes. 	Facilitation	<p>The district's visitor sector is supported, connected and able to access the infrastructure, capabilities and skills required to thrive</p>
Explore commercial solutions for future infrastructure provision and support the case for future development that supports the district's destination offering.	<ul style="list-style-type: none"> Develop and promote investment propositions to commercial developers and investors. Where appropriate, undertake feasibility studies on development of new visitor infrastructure, such as new four-five star hotel and conference facilities. 	Facilitation	
Respond to national and regional funding and grant opportunities to address infrastructure deficits or gaps	<ul style="list-style-type: none"> Continue to work with government and key industry groups to secure funding and investment to support the district's visitor economy. 	Facilitation	
Enhance operator capability and ensure the visitor sector has access to a skilled workforce to support growth and development of the district's visitor economy.	<ul style="list-style-type: none"> Develop operator capability in key areas including sustainability, business operations, and digital capability. Support skills development and talent attraction across the district's visitor economy. Promote careers in the tourism sector and wider visitor economy and engage with relevant career development initiatives. 	Facilitation	

CONSULTATION, IMPLEMENTATION, PRIORITIES & GOVERNANCE

Consulting on the draft DMP

The process of developing this Plan has included significant engagement with key partners and stakeholders, including Te Rūnanga o Arowhenua. A variety of interviews took place plus focus group sessions were held.

Venture Timaru will seek regular feedback from stakeholders, key partners and the community, as work progresses to further implement the plan and its actions.

Approach to implementation

The delivery and implementation of this Destination Management Plan requires a collective approach. This recognises that across the district there is already work underway to support and enhance the Timaru District as a destination. No single organisation has responsibility, mandate, or resources to deliver this plan in isolation.

Coordination and collaboration is essential for the district to harness the opportunities associated with the visitor economy and to ensure a destination management approach to future growth. As the district's RTO, Venture Timaru has a central role to play in coordinating activities across the visitor economy, acting as a facilitator and enabler of future activities.

Venture Timaru will work on ongoing facilitation, collaboration and coordination of activities across the destination sector and with neighbouring

districts. Venture Timaru will also lead on the engagement with government, identifying and responding to future funding opportunities for the sector.

Since the establishment of this plan, a significant programme of work has been undertaken for the district, with initially priority given to:

- Supporting and developing Te Ana Māori Rock Art as a catalyst for growing cultural tourism and as a platform for acknowledging mana whenua
- Exploring opportunities to create new commercial destination products and services that enhance resident and visitor experience
- Advocating for the enhancement Caroline Bay as one of the Timaru District's key attractions.

In 2024 a reassessment of key priorities has taken place, and while these continue to be the key to develop the visitor economy for Timaru District, both domestic and internationally, one further priority needs to be added to the mix:

- Sustainably grow the cruise sector and cruise tourism product offering, to attract more ships, while retaining support from the community

Governance arrangements

As a CCO, Venture Timaru is ultimately accountable to its Board and to Timaru District Council, with an annual workplan agreed through the Statement of Intent process. Where activities are funded through other agencies, for example the investment from Central Government, then Venture Timaru is required to report on these activities to funding agencies.

In recognition of the importance of working in partnership with the district's visitor economy, Venture Timaru established a Tourism and Visitor Advisory Group in 2020 to inform relevant activities and to facilitate greater collaboration and coordination across the sector. The Tourism and Visitor Advisory Group continue to play an important role in informing implementation and delivery of this Plan.

Monitoring and Reporting

Monitoring progress in delivering this plan will primarily be achieved through Venture Timaru's regular reporting arrangements to stakeholders and the Council.

In addition, longer-term progress against this Plan will be measured through the reporting framework set out in

Table 9: Destination Management Plan – Monitoring Framework

Objective	Activities	Outputs	Intermediate Outcomes	Long-term Outcomes
Increase the awareness and visibility of the Timaru District as a destination.	<ul style="list-style-type: none"> • Develop shared destination narrative. • Enhance visitor signage, wayfinding and journeys. • Review visitor information systems and approach. 	<ul style="list-style-type: none"> • Timaru destination narrative. • Upgraded visitor signage and wayfinding. • Updated visitor information services. 	<ul style="list-style-type: none"> • Increased awareness of the Timaru District's destination offerings. 	<ul style="list-style-type: none"> • Increase in visitor expenditure. • Retained market share in visitation to the district compared to surrounding areas.
Develop and extend the Timaru District's attractions and experiences for visitors and residents.	<ul style="list-style-type: none"> • Develop regenerative, low impact and slow tourism opportunities. • Maximise the district's diverse arts, cultural and heritage attractions. • Build on inherent strengths in food and beverage. • Enhance the district's outdoor experiences. • Create new destination products and services. 	<ul style="list-style-type: none"> • Enhancements to existing attractions and experiences. • Development of new commissionable products, attractions and experiences. 	<ul style="list-style-type: none"> • Increased range of visitor attractions, experiences and commissionable products available across the district. 	<ul style="list-style-type: none"> • Increase in length of stay of visitors in line with national averages. • Increase in visitor expenditure. • Growth in international visitor numbers.
Maximise the opportunities and potential of the Timaru District's hero experiences.	<ul style="list-style-type: none"> • Support and develop Te Ana as a catalyst for growing cultural tourism. • Enhance Caroline Bay as a key attraction. • Leverage investment in central Timaru. • Enhance Geraldine's destination offering. 	<ul style="list-style-type: none"> • Development and promotion of distinctive hero propositions for the district. 	<ul style="list-style-type: none"> • Increased awareness and visitation to hero experiences. 	<ul style="list-style-type: none"> • Increase in visitor expenditure. • Growth in international visitor numbers.
Grow the district's portfolio of events to attract visitors, extend length of stay and support vibrancy.	<ul style="list-style-type: none"> • Build on the success of established events. • Develop or attract new events. • Development of a district-wide events strategy to 	<ul style="list-style-type: none"> • Regular portfolio and established and new events across the district. • Director of events offerings across the district. • Events Strategy developed 	<ul style="list-style-type: none"> • Growth in number of events run throughout the year. • Increase in event attendance and financial sustainability. 	<ul style="list-style-type: none"> • Increase in visitor expenditure.

Objective	Activities	Outputs	Intermediate Outcomes	Long-term Outcomes
	<p>provide a framework on which to build the sector.</p> <ul style="list-style-type: none"> • Grow number and extend impact of sporting events. • Enhance coordination and alignment across the events sectors. 			
<p>Sustainably grow the cruise sector and cruise tourism product offering, to attract more ships, while retaining support from the community</p>	<ul style="list-style-type: none"> • Work with PrimePort cruise lines and groundhandlers to grow the cruise sector. • Work with tourism operators and new businesses to develop tourism product for the cruise market and develop operator capabilities • Monitor community perception of the cruise sector 	<ul style="list-style-type: none"> • Regular contact with stakeholders regarding planned growth. • New product opportunities explored; training and development for operators. • Community sentiment through social media channels and informal feedback noted. 	<ul style="list-style-type: none"> • Increase in cruise ship visits. • Growth in range of tourism products offered for passengers. • Annual survey of community sentiment for cruise conducted. 	<ul style="list-style-type: none"> • Increase number of cruise ship visits and cruise product offering
<p>Secure the infrastructure required to ensure that the Timaru District thrives as a destination.</p>	<ul style="list-style-type: none"> • Leverage planned investment and support the case for future investment. • Explore commercial solutions for future infrastructure provision. • Respond to future national and regional funding and grant opportunities. • Develop operator capabilities and ensure the visitor sector has access to a skilled workforce. 	<ul style="list-style-type: none"> • Feasibility studies and business cases for new infrastructure. • Training and development for operators • Improved understand of training, employment and career opportunities. 	<ul style="list-style-type: none"> • Investment in new infrastructure. • Improved recruitment and retention rates. 	<ul style="list-style-type: none"> • Investment in infrastructure • Improved recruitment and retention rates.