

# PART 3: TE MANAHUNA TOMORROW

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### 3.1. Vision

Te Manahuna’s wonder and treasures are restored, protected, and thriving – to be loved and valued while sustaining us, our visitors, and those who come after us.

### 3.2. Guiding principles

To guide the delivery of the vision, four guiding principles have been developed. These underpin TMKU and have also guided the recommendations identified (Table 1).

Table 1: Guiding Principles



#### Principle 1 - Protecting our Treasures

- We acknowledge the role of mana whenua as kaitiaki for the wonders of Te Manahuna that Māori have a whakapapa connection to and have responsibility for
- Our guardianship over the natural environment – from the mountains to the sea - protects, restores, and regenerates Te Manahuna to support generations now and in the future.
- Use innovation, science, and technology to provide sustainable management of water, energy, natural and built environment whilst mitigating climate change risks.
- Holistic system management of Te Manahuna that protects our Dark Sky, water, flora, and fauna.



#### Principle 2 - Enduring Partnerships

- A living Treaty based partnership between Mana whenua and MDC and all agencies in Te Manahuna.
- A relationship where Mana whenua, Community, the rural sector, and the Tourism Industry have a shared worldview and collaborate.
- An integrated, collaborative, and sustainable approach to visitor and destination management.
- A sustainable revenue and funding model that delivers the vision and aspirations and outcomes for Te Manahuna Ki Uta, community, and stakeholders.



#### Principle 3 - Thriving People and Places

- Thriving people and cohesive communities create a welcoming and inclusive place.
- An enriching and authentic experience that benefits well-being and contributes to the place.
- Re-establish mana whenua pride, connection and presence in the stories, whakapapa, and landscape of Te Manahuna.
- In supporting the visitor system, the people who live in Te Manahuna are enabled to build a cohesive community and have equitable access to quality services.
- All infrastructure servicing the community and visitor system is sympathetic to the landscape and supports resilient communities and improves the visitor experience.



#### Principle 4 - A Unique Experience

- A world-class visitor experience based on our peaceful and tranquil natural environment, outstanding landscape, and guardianship values.
- Visitors learn and celebrate the hidden wonder of the place and its people – our whakapapa, shared history, nature, and heritage.
- Visitors develop a meaningful connection to the Te Manahuna story and create future generations of Kaitiaki and Guardians.
- Visitor activities and tourism infrastructure are adaptive to change and resilient to risks.
- Innovative technology and approaches to support the visitor experience and protects our taoka and whakapapa.
- Te Manahuna’s treasures are accessible and can be enjoyed by all.

### 3.3. Visitor Projections

Figure 7 provides visitor projections for Te Manahuna out to 2121 (more detailed data are included in Appendix 5). Projecting visitation over an extended period is challenging. While these projections attempt to consider anticipated trends and changes, they are unable to factor in any future major macroeconomic events such as new pandemics etc. They do, however, provide a picture of what visitation could look like based on historic and current trends. They are also modelled on recommendations in TMKU being adopted, particularly those focused on converting day trip visitors to overnight visitors.

The projections demonstrate that in the short term, visitation is anticipated to slowly recover from COVID-19 impacts. The domestic market is anticipated to rebound quicker because it has been less impacted by COVID-19 border closures than the international market and because interest in domestic travel by New Zealanders is very strong due to uncertainty surrounding border closures.

The international market is projected to recover over the medium term, driven largely by the Australian market followed, in time, by the Southeast Asian, Japanese, UK, Europe and USA markets. The Chinese market is unlikely to recover to pre-COVID-19 levels because:

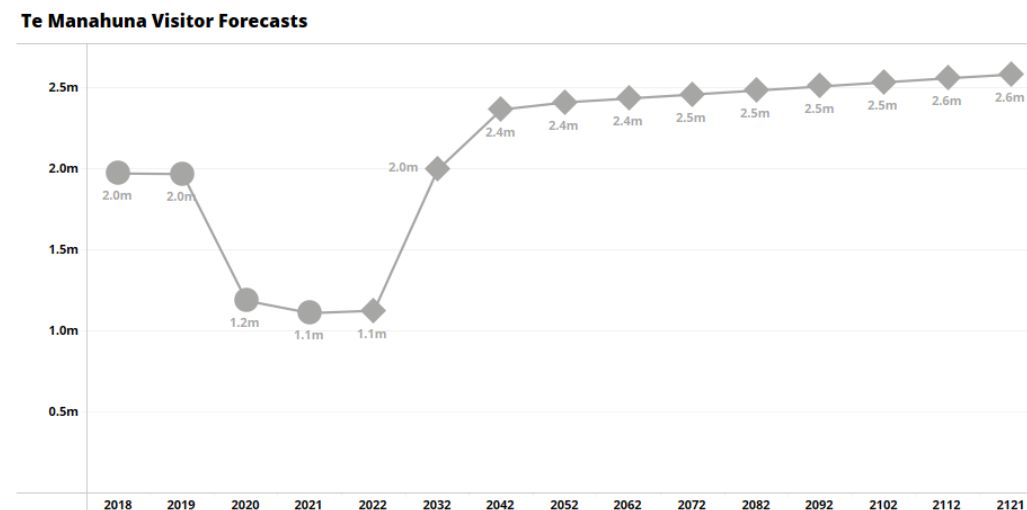
- Tourism New Zealand and New Zealand tourism policy generally is targeting lower volume, higher-yielding tourism which may have an impact on the number of larger, structured tours that are popular with the Chinese market; and
- of hesitancy within the Chinese market to travel as free independent travellers due to COVID-19 border closures and restrictions.

Over the period assessed, visitation to Te Manahuna is anticipated to grow, reaching an estimated 2.5m visitors by 2121 assuming that growth can be sustainably managed. This growth is driven by:

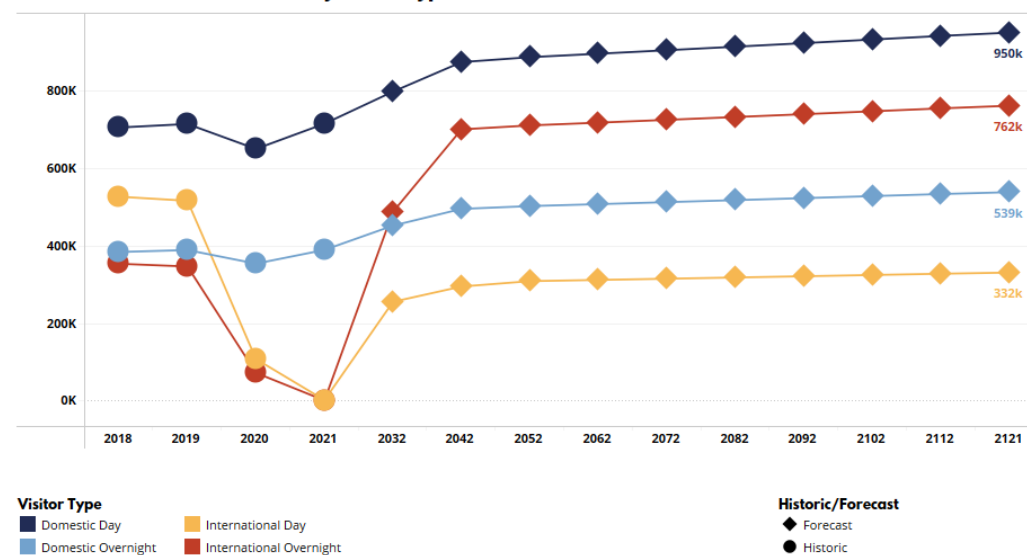
- increased interest in Te Manahuna due to global warming having a significant impact on the glaciers (Franz and Fox Glaciers in particular) and the ability for visitors to access glaciers from TMKU more easily
- recommendations provided in TMKU which include enhancements to existing infrastructure, accommodation, and attractions; improved destination marketing; and the introduction of a more diverse range of visitor experiences; and
- changes in the way visitors travel, with tourism anticipated to continue to shift from a packaged market to free independent travellers who are more inclined to travel off traditional tourism routes.

Figure 7: Te Manahuna Visitor Projections to 2121

(historic data is annual growth, forecast data is shown in 10 year projections)



Te Manahuna Visitor Forecasts by Visitor Type



### 3.4. The Scenarios

#### 3.4.1. The scenarios assessed

Using the results of the community, industry, mana whenua, agency and previous studies, the project team developed three future scenarios for Te Manahuna for evaluation. These were then scored by the project team, partner agencies, mana whenua and other stakeholders, based on their alignment to the vision and principles, to identify the preferred scenario to be adopted for TMKU.

- Scenario 1: Status Quo – plus. The first scenario was a ‘demand driven’ scenario that represents life as it was pre -COVID-19, but one which is more mindful of avoiding sustainability issues and peak seasonal pinch points. This scenario retains issues of uncertain, uneven demand, with development largely initiated by public sector initiatives.
- Scenario 2: Growth. This scenario is more ambitious and sees demand rebound and private investment follow. Sustainability principles are widely accepted and there is greater certainty post -2030 with consistent demand. Developments are initiated through a partnership approach between the public and private sectors.
- Scenario 3: Aspirational. This scenario sees a strong return of visitors but with a focus on higher -value visitors. The adoption of this scenario would see Te Manahuna become an exemplar of regenerative tourism<sup>6</sup>, with mana whenua and pakeha stories woven together. It would involve increasing the length of stay opportunities and appealing to a broader market with a focus on visitor experience and sustainable practices. This scenario also sees the earlier activation of projects leveraged by public sector funding strongly linked to private sector investment initiatives and the development of key infrastructure ahead of time.

Ultimately, the scenario selected to guide the development of TMKU was Scenario 3.<sup>7</sup>

#### 3.4.2. The Preferred Scenario – Scenario 3

Figure 8 provides a summary of the preferred scenario and its aspirations. Detail on each element in the preferred scenario is included in Appendix 6.

**Figure 8: The preferred scenario**



<sup>6</sup> Regenerative tourism is being embraced in New Zealand as it seeks to re-frame its tourism offering. In short it encourages and facilitates visitors to ‘give back’ to the places they visit by direct and indirect engagement in environmental and social initiatives.

<sup>7</sup> The scenarios, their implications, and abilities to be activated were discussed and debated by the Working Group and the Governance Group. It was unanimously agreed that an aspirational approach was needed to deliver the outcomes and changes which stakeholders wanted to see, especially noting that the DMP has a 100 year timeframe.

### 3.5. Strategic Initiatives



The following outlines specific initiatives which have application across Te Manahuna, and which are recognised as major drivers to deliver on the principles identified for TMKU. They have been separated from the list of specific projects (Section 3.5), as for many, they are yet to be fully formalised into projects and funding is going to be required from government sources that will enable their activation.

Most of these initiatives are unlikely to generate a commercial return, so private investment to activate these is likely to be challenging to secure. However, these initiatives are recognised as important drivers to help offer a more sustainable and, at times, interesting visitor experience, which may assist in leveraging private sector investment into various projects.

These initiatives relate specifically to:

- **mana whenua partnership** and aspirations for delivery ;
- **infrastructure gaps** that need to be addressed over time ; and
- **environmental initiatives** that are important to protect the special values of the place , deliver a sustainable visitor experience and support the ongoing viability of local communities .

The Implementation of the majority of these is founded on actions within public sector entities (e.g., DOC, NZTA and TLAs) albeit with strong private sector engagement and support. The individual initiatives will take some time to develop as they require feasibility testing and fully costed business cases before they can garner resources to activate them. Some may require statutory or legislative change before they could be implemented, and many will require effective collaboration and partnership. A number sit within broader debates about national priorities, co-governance and co-management and legislative change s.

Notwithstanding, each of these provide clear compass bearings for both short - and long -term actions, as they attend to the foundation elements in destination development and management.

Importantly they speak directly to the vision and first principle of ‘Protecting Our Treasures’, and indirectly to ‘A Unique Experience’, ‘Enduring Partnerships’, ‘Thriving People and Places’.

A critical area that needs to be addressed is how the se various initiatives could be funded. Initial research and analysis indicate the following as possible pathways for funding.

- **User pays models** : Introduction of user -pays models, and potentially differential pricing for domestic visitors, which could range from a levy on all visitors, to a fee (or additional fee) for using various services, infrastructure, transport, or experiences.
- **A higher International Visitor Levy (IVL)** : Seeking funding for specific initiatives that meet the criteria for the IVL, as tourism numbers increase, and the fund is replenished.
- **Grant funding**: Applying for specific grants from programs in Central Government that are for environmental improvements, rather than tourism per se .
- **Business and tourism operator fees** : Taxes or fees that businesses would pass on to visitors, e.g., tourism operators or accommodation providers.
- **Direct contributions from visitors** to environmental projects, ranging from donations to actions ( see Appendix 7 ).

### 3.5.1. Mana whenua initiatives

MBIE’s destination management guidelines<sup>8</sup> draw attention to the special role of mana whenua in DMPs. The mana whenua work stream, incorporating Arowhenua, Waihao, and Moeraki Rūnanga, has provided a set of recommendations to give a voice to mana whenua history and aspirations<sup>9</sup> - see Table 2. This DMP summarises the mana whenua Voice and Physical Manifestation Document (Version 7), which has been developed in partnership with mana whenua. This document should be referenced to support the feasibility and development of the concepts referred to in this DMP.

These in turn are set against each of three core concepts.

- Mana whenua being equal partners in any governance structure.
- That Te Manahuna is recognised as a Wāhi Taoka – a special and treasured place (containing numerous sacred sites - Wāhi Tapu).
- Whare Wānaka (a sacred place for learning) is an overarching concept for the promotion of Māori voice and presence – and an essential framework for narrating sites, journeys, and experiences for all (see Figure 9).

**Table 2: Overarching mana whenua strategic initiatives**

Initiative/Recommendation	Description	Category
Equal share (mana whenua /wider community) participation in future Governance Structure for the delivery of this 100 -year DMP.	<ul style="list-style-type: none"> <li>▪ Determination of a co-governance model which meets criteria established by mana whenua and agreed to at a national level by the government.</li> </ul>	Governance
A commitment to the core concepts of Protection, Presence and Pride for Mana whenua in Te Manahuna.	<ul style="list-style-type: none"> <li>▪ Promotion of cultural narratives developed and controlled by local rūnanga/mana whenua.</li> </ul>	Presence
Mana whenua should have to opportunity to invest in the Te Manahuna economy moving forward and should be given opportunities and support to do so	<ul style="list-style-type: none"> <li>▪ A co-governance model for DMP delivery to provide opportunities for mana whenua to invest (IP, physical product development etc) in tourism opportunities.</li> </ul>	Presence
Demonstrate the Whare Wānaka in partnership . It should be a principle that any approvals by Government Agencies giving access or use to crown land where storytelling is involved should include mana whenua support. Mana whenua support should be documented as a requirement in the consents or concessions.	<ul style="list-style-type: none"> <li>▪ Work with mana whenua to co-design implementation of the Whare Wānaka concept</li> <li>▪ Mana whenua, agencies and community stakeholders collaborate on a framework to support storytelling projects using a range of methods,</li> <li>▪ Education program to support local rūnanga on cultural narratives.</li> <li>▪ Mana whenua are supported to protect their cultural narratives and intellectual property and tell their stories</li> <li>▪ Mana whenua are encouraged to engage in: visitor management, environmental protection, regenerative tourism, and climate change mitigation and adaptation.</li> </ul>	Story Telling
As a matter of course mana whenua should be able to provide guided storytelling in Te Manahuna.	<ul style="list-style-type: none"> <li>▪ Viewpoints/story boards.</li> <li>▪ All interpretation boards delivered by council or other agencies should be done in partnership with mana whenua.</li> <li>▪ All stories involving mana whenua IP will require prior agreement.</li> <li>▪ All agreements should acknowledge the time and resources required by mana whenua experts and should have reasonable timeframes and incorporate appropriate fee structures.</li> </ul>	Story Telling/Cultural IP

<sup>8</sup> <https://www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-projects/destination-management-guidelines/>

<sup>9</sup> NAI and EQMade ‘Mana whenua Voice and Physical Manifestation’ report to DMP governance and working groups. December 2021

Initiative/Recommendation	Description	Category
	<ul style="list-style-type: none"> <li>▪ Pou Whenua visual representation of mana whenua.</li> </ul>	
<p>Translation errors in place names get rectified as soon as practical with the support of MDC and Toitū Te Whenua/Land Information New Zealand (LINZ) Engage with the broader work before the New Zealand Geographic Board Ngā Pou Taunaha o Aotearoa process.</p>	<ul style="list-style-type: none"> <li>▪ Priorities.</li> <li>▪ Corrections.</li> <li>▪ Dual Place Names.</li> <li>▪ Other place names /naming conventions.</li> </ul>	Place Names
<p>An interagency approach should be taken on this project for identified key sites within Te Manahuna with NZTA, DOC, MBIE, MDC and the Mana whenua Rūnanga. Design process to be mana whenua led.</p>	<ul style="list-style-type: none"> <li>▪ Visible representation of mana whenua history, and access routes for journey mapping.</li> <li>▪ Public realm design with mana whenua elements.</li> </ul>	Pou Whenua
<p>For any major works involving design elements from mana whenua, these are discussed, and importance is placed on design elements and inclusion of interpretation at an appropriate level.</p>	<ul style="list-style-type: none"> <li>▪ Visible representation of Mana whenua history.</li> <li>▪ Public realm design with mana whenua elements.</li> </ul>	Public Realm Design
<p>MDC, the partner Government Agencies and the Te Manahuna Rūnanga explore an appropriate location and process to give effect to specific aspirations for a learning centre, and other mana whenua specific community needs identified.</p>	<ul style="list-style-type: none"> <li>▪ Digital extension to site interpretation by AR, VR, and other innovative techniques.</li> <li>▪ Whare ako.</li> </ul>	Visitor Journey
<p>Continue cooperative work with Mana whenua and MDC to define those areas and the protection processes in the District Plan to identify wāhi tapu areas, and sites and identify where mana whenua approval on activity is required.</p>	<ul style="list-style-type: none"> <li>▪ The tourism governance model includes mana whenua as a partner as part of co-governance.</li> <li>▪ Areas that are wāhi tapu are delineated and protected from undesired development.</li> <li>▪ Ongoing review of the co-governance model to ensure aspirations for mana whenua are being met.</li> </ul>	Wāhi Tapu Sites

**Figure 9: Whare Wānaka**

### What is a Whare Wānaka / Place of Learning

The Destination Management plan is seeking to make enduring change and move to a high value tourism system through adding a 'depth of meaning' to the landscape. It is a concept which will guide the decision making, and support the change to a regenerative tourism system and model; promote the manawhenua voice and presence in Te Manahuna; connect the visitor with the natural environment to learn the concepts of stewardship and kaitiakitanga. These align with the vision and principles established for the project.

Whare wānaka are immersive spaces – they allow visitors to experience and build understanding of a place – We want the visitor to see the importance of Te Manahuna, its natural wonders and of the stories and histories unique to this place. We want to tell the story of the shared whakapapa of the region. And we want the visitor to understand and share our values, connect to the values of the people of Te Manahuna and take this concept of being a guardian of a place back to their own communities.





### 3.5.2. Infrastructure Initiatives

Table 3 outlines the infrastructure initiatives that have been identified as part of TMKU, but which are not included in the project recommendations matrix (Section 3.5) because they are core “building block” elements required to leverage private sector investment. If these infrastructure elements can be delivered on a timely basis, they will help ensure that private sector projects can be leveraged in a realistic timeframe.

These initiatives also highlight areas where policy clarity and enabling actions can reduce investment risk for the private sector investors and advance sustainable tourism development. This will help ensure that private sector projects can be leveraged within a realistic timeframe.

Implementing most of these initiatives will require securing funding from various government funding programs, Central government Departmental vote budgets specifically for different government agencies, via funding secured by MDC, and/or via forms of user-pays models.

Infrastructure and access to environmental resources are essential elements in destination management and building a sustainable visitor economy going forward. Since 2017, The World Economic Forum has included various elements of infrastructure as one of the core components of their destination competitive index: “infrastructure ... plays a vital role in travel and tourism competitiveness, serving as the arteries of the industry.”<sup>10</sup>

To assist the tourism sector, Ko Tātou LGNZ has identified “public infrastructure” as part of its recently released 30-year strategy which considers the “long-term issues [New Zealand’s] infrastructure is facing - including climate change, population growth and changing technology”.<sup>11</sup> This public infrastructure<sup>12</sup> is typically funded by the government (primarily local government but sometimes by or in partnership with Central Government).

Specific infrastructure initiatives identified as part of TMKU are summarised in Table 3 (note: where specific tourism project initiatives can be monetised or have a commercial element, these have been identified in the full tourism development project list in Section 3.5).

As these are infrastructure requirements that cut across short-, medium- and longer-term periods, funding options are not identified as options will change over time and as infrastructure requirements and priorities change as well.



<sup>10</sup> <https://www.weforum.org/agenda/2019/09/why-infrastructure-is-crucial-to-tourism-growth-and-competitiveness/>

<sup>11</sup> <https://www.lgnz.co.nz/assets/PDFs/NZ-infrastructure-strategy.pdf>

<sup>12</sup> Which can include which includes car parks, potable water supply, wastewater delivery and management, storm water, public toilets, footpaths, public information (digital and in person), access ways and urban public spaces, public roads, public transport, cycleways, conference

and multipurpose community use facilities, cruise facilities, freedom camping facilities, and recreation and sport facilities. They also include “mixed use” infrastructure where tourism demand impacts local residents and communities, who also typically use the infrastructure and a more specific “local tourism infrastructure” that supports tourism activity and is important to the visitor experience at individual locations.

**Table 3: Overarching infrastructure strategic initiatives**

Initiative/Recommendation	Description	Area (and environs)	Category	Timeframe
Integrated spatial plan (rural)	<p>An 'Integrated Spatial Plan (Rural)' that encompasses the entire Mackenzie district is required to provide landscape protection while identifying areas for tourism and recreational amenity and providing greater certainty to investors. The plan will need to set out pragmatic ways to protect the expansive landscapes and viewing corridors of Te Manahuna.</p> <p>Options for funding landscape protection will need to be considered which could focus on a user pays model with all relevant parties who impact the environment being contributors</p> <p>A focus on clustering tourism activities is created to support better management of rural lands and to reduce the risk of negative effects. Infrastructure support needs to be provided to act as a catalyst to encourage and support private sector investment</p> <p>The intent of this integrated spatial plan for TMKU includes helping to create workable planning mechanisms within the current and future legislative framework to help activate private sector investment in rural areas of the region and to provide greater certainty for investors and developers of tourism products. The outcomes will enable Mackenzie District Council, its residents, and ratepayers, to support appropriate forms of tourism development, based on an assessment of locations and natural processes and features, ensuring Council's responsibilities under various pieces of resource management legislation and government policy are met.</p>	Regional	Infrastructure	Short Term (2022 -2031)
Development of view corridors & parking bays to Aoraki/Mount Cook	To improve the visitor amenity, visitor safety and overall experience.	Aoraki/Mount Cook	Urban Enhancements	Short Term (2022 -2031)
Additional public toilet facilities throughout Te Manahuna	Additional public toilet facilities throughout Te Manahuna and with applying green technology for the best biodiversity outcomes.	Regional	Infrastructure	Short Term (2022-2031)
Address funding shortfalls in infrastructure implementation and shorten timeframes	Address funding shortfalls in infrastructure implementation and shorten timeframes, especially for critical urban centre infrastructure in Takapō, Twizel and Fairlie and relating to waste management, potable water, and sewerage systems.	Regional	Infrastructure	Short Term (2022-2031)
Tourism and rural community infrastructure	Including water, wastewater, road, broadband, and power capacity improvements to better match community and visitor demand levels.	Regional	Infrastructure	Short Term (2022-2031)
Wayfinding & connectivity.	To encourage visitor dispersal and improved journey mapping for self-drive circuits, cycle touring and walking tours, and spreading of visitor economy benefits more widely. To support this, The DMP supports the development of product to expand the cycle trails network as outlined in the MDC Parks and Trails Strategy.	Regional	Infrastructure	Short Term (2022-2031)
New expanded waste and sewerage management for Takapō.	Development of new/expanded waste and sewerage management for Takapō specifically as current demand is exceeding supply capability at times, and introduction of best practice green technology sustainable options.	Takapō	Infrastructure	Short Term (2022-2031)

Initiative/Recommendation	Description	Area (and environs)	Category	Timeframe
Parking study capacity assessment	Undertake a parking study to relocate car parking and expand capacity to better meet peak periods. Likely to require re-alignment of road network in Takapō commercial centre.	Takapō	Infrastructure	Short Term (2022-2031)
Traffic planning and management	Introduce traffic planning and management improvements to enhance pedestrian safety and improve pedestrian movements in town centres.	Takapō + Twizel	Infrastructure	Short Term (2022-2031)
Improved highway signage to Twizel	Develop improved highway signage to Twizel to encourage passing traffic to pull into the township to stop and visit as the township is off the highway and too easy to bypass.	Twizel	Infrastructure	Short Term (2022-2031)
Development of view corridors & parking bays to Aoraki Mount Cook	To improve the visitor amenity, visitor safety and overall experience.	Aoraki Mount Cook	Urban Enhancements	Short Term (2022-2031)
Infrastructure for motor homes/camper vans, camping generally	<p>Management of camping is complicated by the apparent availability of open space in the District, a patchwork of land tenure, and inconsistent tools and resources amongst land managers to respond to changing visitor behaviour. In the past, this has resulted in impacts on the environment, communities, and the visitor experience.</p> <p>Responsible camping needs to occur, and a user pays model should be implemented to recover costs. Competitive neutrality should also not disadvantage commercial caravan park operators who are trying to generate economic benefits for Te Manahuna, including local employment.</p> <p>To support higher environmental standards, address issues of ongoing maintenance costs for campsites, and improve the experience for visitors and the community, agencies and stakeholders will need to collaborate on an integrated approach to the management of camping. This work should consider the optimum supply and distribution of dedicated areas for different types of camping, advocacy and enforcement activity, and different charging models.</p> <p>To support higher environmental standards and address issues of ongoing maintenance costs for camping and caravanning sites, improved dedicated areas are suggested for Te Manahuna, with cost recovery via a user-pays model. Sites for caravan and camping should be caravan and camping holiday parks operated by commercial operators, or on designated caravan and camping areas managed by DOC.</p> <p>Freedom camping sites should be gradually phased out and/or user-pays systems introduced to allow for cost recovery to occur. Far higher environmental management standards need to be introduced and rate payers and the general taxpayer should not be required to subsidise those visiting and staying for free, as currently. It should be noted that DOC holds a contrary view and is not in favour of phasing out freedom camping.</p>	Regional	Infrastructure	Short - Medium Term (2022-2051)

Initiative/Recommendation	Description	Area (and environs)	Category	Timeframe
Worker accommodation for tourism and other sectors	<p>To actively encourage more workers for the tourism and hospitality sector specifically along with other industry sectors generally, specific worker accommodation units are proposed for Twizel, Takapo and Fairlie. In more remote locations such as the ski fields, onsite worker accommodation is likely to be needed to avoid daily commutes away from ski fields for accommodation.</p> <p>A model to help fund this requirement is being developed to support the ongoing need for worker accommodation and the growth in this need over the full length of this DMP but most especially for the next 30-year period. This is also seen as a key requirement to support attracting more workers to the region noting that the absence of adequate staff for the sector is expected to be prevalent for several years due to global staffing pressures and lack of adequate supply.</p>	Regional	infrastructure	Short - Medium Term (2022-2051)
Expanded trails and tracks network	<p>Plan for and develop various trail and track networks to offer separate routes for mountain bikers, hikers, and trail runners. Some individual trail projects are noted separately within the project list.</p> <p>As a broader overarching initiative, is the need to create a regional wide series of trails to support current and future niche activity demand including linking sites of interest, ensuring all levels of difficulty can be catered for, to offer different trail and track lengths so multi-day options and day options, and identify and support new seasonal products which may include lake kayaking, mountain biking and/or hiking as part of guided experiences. The region has many opportunities on private land as well as public lands to be considered.</p>	Regional	Infrastructure	Short – Long Term (2022 – 2122)
Public infrastructure improvements at Lake Ruataniwha	<p>Public infrastructure improvements are needed to encourage a stronger urban connection to the lake edge and higher urban design scape standards. This could include a pedestrian promenade along the lake edge, public seating and lighting, landscaping, a clear separation from vehicle movements (so pedestrian needs dominate), the development of an attractive urban edge to encourage retail and hospitality venues, and strong connectivity via cycleways and walking trails back to Twizel town centre.</p>	Twizel	Infrastructure	Medium Term (2032-2051)
SH8 Pedestrian Management Plan	<p>To link Takapō village to the commercial centre and improve pedestrian safety to encourage less use of private vehicle movements across SH8.</p>	Takapō	Infrastructure	Medium Term (2032-2051)
Parking for tourist buses and mini vans in Takapō	<p>Parking for tourist buses and mini vans in town, to avoid parking on the lake edge and/or too close to the Church of the Good Shepherd on the Lake Takapō foreshore. Drop-off areas are required while longer-term parking should ideally be off-site, so pedestrian movements dominate, not vehicles</p>	Takapō	Infrastructure	Medium Term (2032-2051)

Initiative/Recommendation	Description	Area (and environs)	Category	Timeframe
<b>Infrastructure at Lake McGregor and Lake Alexandrina</b>	Noting that these are highly attractive lake environs with the potential for small-scale and gradual development of walking trails around the lakes and environs. This area has the potential, over time, to become an important visitor node, but where visitor numbers are able to be carefully controlled and managed to protect the wildlife and community values, potentially be capped at daily limits, akin to best practice carrying capacity levels so the careful balance between locals and visitors is not exceeded, and the environment is able to be better maintained for the future.	<b>Takapō</b>	<b>Infrastructure</b>	<b>Medium Term (2032-2051)</b>
<b>Improved pedestrian connectivity &amp; walkability</b>	Most areas in urban centres are dominated by vehicle movements over pedestrian needs. This emphasis should be reversed to actively encourage more cycling and walking activities and to make all areas more pedestrian-friendly especially for those with young children, those with disabilities and those older residents and visitors.	<b>Regional</b>	<b>Infrastructure</b>	<b>Medium Term (2032-2051)</b>

### 3.5.3. Environmental Initiatives

As with the infrastructure initiatives mentioned above, the following environmental initiatives (Table 4) are essential for the delivery of TMKU’s vision and guiding principles and should be treated as a core underpinning to guide the sustainable development of Te Manahuna’s visitor economy over the next 100 years. Fundamentally, all projects proposed in this plan need to be designed, implemented, and operated to be culturally and environmentally sustainable.

Several of these initiatives relate specifically to Aoraki/Mount Cook National Park and are presented here to reflect the importance of finding short-, medium- and longer-term solutions for sustainability and regenerative tourism development. Aoraki/Mount Cook National Park is a major iconic destination for New Zealand. As a result, what is eventually developed in the park will have a significant impact on visitor flows, market demand, length of stay and visitor spending within Te Manahuna.

The partnership agreement between mana whenua and DOC for the future management of Aoraki/Mount Cook National Park may take some time to develop. It is not the role of TMKU to pre-

determine outcomes of partnership or statutory processes. This is work that needs to progress to support some initiatives in Table 4. The potential timeframe for determination of activations to address these environmental initiatives will likely take some time to get resourced to activate them. However, it is important that TMKU does not become impeded.

It also needs to be noted that there are some projects within the project recommendations matrix (see Section 3.5) that include environmental elements, but which are retained within the matrix because they contain commercial components and thus offer a mechanism for covering their costs.

**Table 4: Overarching environmental strategic initiatives**

Initiative/ Recommendation	Description	Area (and environs)	Category
<b>Assessment of transport options into Aoraki Mount Cook National Park</b>	<p>Transport presents a key opportunity to improve the visitor experience in the Park while managing the potential for impacts on cultural values and the natural environment. The determination of what is desired for improving transport options into Aoraki/Mount Cook rests with DOC and its partnership with Ngāi Tahu/mana whenua, which is still being developed, and the Park planning process. This initiative is presented now not with the intent of helping to determine a preferred outcome, but rather, to reflect the importance of this for Te Manahuna.</p> <p>Options that could be considered may include a park and ride facility possibly on SH8 near Twizel, to help reduce peak season private vehicle congestion within the Mount Cook Village, or possibly at Glentanner, or other sites yet to be identified. Looking longer-term, other options that might offer alternatives may include some type of people mover (a rail-based experience – monorail, hydrogen, or electric-powered buses) or creating a private vehicle entry model into the park where only electric, hydrogen, and other forms of renewable energy vehicles can enter. Many possible solutions to managing transport into the Park originate in the wider District and therefore need to be considered and integrated with other workstreams resulting from this plan.</p>	Aoraki/Mount Cook	Sustainability and Regenerative Tourism

Initiative/ Recommendation	Description	Area (and environs)	Category
<b>Best practice Visitor Management Solutions (to avoid negative impacts)</b>	<p>Pre-COVID large numbers of people visited the district during peak periods, resulting in congestion on key tracks and at popular locations such as the Church of the Good Shepherd, the start of the Hooker Valley Track, and various campsites. Infrastructure, including toilets and carparks, was put under pressure. The increased popularity of informal camping in vehicles led to many more people spending time in places that were not set up to cope. All these effects led to impacts, some compounding, on cultural values, the environment (including wildlife and ecosystems), and local communities, as well as diminishing the quality of the visitor experience. We need to investigate and implement best practice visitor management solutions to avoid future impacts, particularly once international visitor numbers start to come back to Te Manahuna.</p> <p>Options that could be investigated include: actively encouraging overnight stays in the District, including the National Park, to encourage a far better quality visit or experience; trying to spread visitation throughout the day, and avoiding the current trend of higher numbers from 10 am – midday especially; creating additional trails, places of interest and other experiences so visitors can be encouraged to stay longer (over 2 days or more) and visit more of the District, and determination of maximum daily numbers for experiences under pressure to ensure a quality visitor experience and to help protect and sustain the environment.</p>	Regional	Sustainability and Regenerative Tourism
<b>Natural quiet settings for the long -term</b>	<p>The natural quiet that can be experienced in many parts of the District is a hallmark of its appeal. Different natural quiet settings are needed for different locations within the Mackenzie District depending on the role they play and the noise pressures on that location. The introduction of 'unnatural' (human -caused) sounds from powered aircraft – including overflights, watercraft, vehicles, and other human activities – affects the naturalness of the soundscape. Noise can reduce the benefits people receive from being in a tranquil natural environment. It is noted that some visitor experiences are also enabled through motorised vehicles.</p> <p>Understanding the longer -term noise policy will be important. Future options could include electric aircraft and other low -noise options which need to be considered in the long term. The potential for designated aircraft corridors so their visual presence is tightly controlled and noise is noted.</p>	Regional	Policy and Governance
<b>Investigate issues and options for the long -term future of visitation to Aoraki/Mount Cook Village</b>	<p>Within the protected area network, operators and investors require certainty to enable them to invest and operate with confidence. Ongoing attention is required to determining satisfactory business timelines for existing operators.</p> <p>The impacts of climate change will influence the level of risk presented by natural hazards and likely consequences for both infrastructure and people. We need to understand these and the range of options that will be available in the future to manage these impacts and establish trigger points for any actions.</p> <p>The next severe earthquake on the Alpine Fault is likely to occur within the lifetime of most of us, or our children. This event is likely to result in a cascade of other hazards (such as landslides and flooding) for decades afterwards. It will have impacts across the South Island that could mean, despite disruption locally, that Aoraki experiences even more demand as a location to experience glaciers and snow. This suggests that it could be a trigger for changes to be initiated at Aoraki.</p> <p>Aoraki is highly significant to mana whenua and Ngāi Tahu, and all New Zealand for conservation and recreation, as well as being a location where people and businesses have invested heavily for decades. Any investigation needs to understand and take these factors into account.</p>	Aoraki/Mount Cook	Policy and Governance

Initiative/ Recommendation	Description	Area (and environs)	Category
<b>Climate change mitigation and adaptation</b>	<p>Climate change will have significant impacts on Te Manahuna in the long term, and the District can manage this best by proactively planning and preparing for likely changes. This could include developing resilient transport and communications options, visitor experiences that can be adapted and moved to different locations temporarily or over time and understanding the locations that will offer the most resilient future for significant investments.</p> <p>Glacier tourism is under threat from climate change and continued growth in carbon emissions will only accelerate these impacts. Stakeholders and agencies need to work together to mitigate the effects of climate change where they can. Every sector will have its part to play. In the future, Mackenzie District could be known for being on the leading edge of low emissions transport, accommodation, and experiences, and growing a sector that actively contributes to the protection, restoration, and regeneration of the natural environment.</p>	Regional	Sustainability and Regenerative Tourism
<b>Identification of macro disruptive changes</b>	<p>Major macro disruptive forces include events such as a rift of the alpine fault, which is likely to result in major changes to the mountain landscape and natural hazards due to rock movements and rockslides, river siltation and blockages, and subsequent destruction of roads, bridges, and other key supporting infrastructure.</p> <p>Another example is climate change impacts which are likely to see the reduction in snowfall, likely shrinkage of glaciers and ski fields, and associated impacts on flora and fauna due to an expected drier and warmer winter period and a wetter summer period, all of which may impact the visual amenity and scenic attractiveness of the region.</p> <p>Yet others include fast-moving global technological and social trends; widespread economic crises; pandemics; geopolitical events and wars; extreme weather events; and eruptions (elsewhere but with atmospheric effects). Often these events cascade or compound each other, and their timing and scale are hard to predict.</p> <p>Such events will most likely change the visitor economy and may necessitate very different product offerings for the longer term, all determined by the impact of macro disruptive forces. We can plan for these based on recent history and by recognising our inherent vulnerabilities.</p>	Regional	Sustainability and Regenerative Tourism



Initiative/ Recommendation	Description	Area (and environs)	Category
<b>Regenerative tourism opportunities</b>	<p>Regenerative tourism encourages and facilitates visitors to ‘give back’ to the places they visit and will be key to achieving the vision of this plan. Te Manahuna is home to precious species and ecosystems, many not found anywhere else, which are under pressure from multiple threats, and climate change will only increase this problem. A range of conservation projects is underway to combat this, including some at landscape scale. Cultural values are under similar pressure, often from the same threats, and the mana whenua initiatives in this plan aim to turn that around. Visitors’ engagement with the challenges and a contribution to solutions could turn the situation around. The challenge is working out ways to make this happen at an operational or system level.</p> <p>Regenerative forms of tourism participation are not new, and Appendix 7 lists some examples of how visitors can contribute. While some have a natural affinity with nature and appreciate the need to help support its sustainability by personally undertaking initiatives and or donating to programs, others view nature more as a backdrop to their activities. If Te Manahuna is to become an exemplar of a regenerative tourism destination, different strategies will need to be used for a wider range of visitors, and interventions will need to be multi-layered.</p> <p>Opportunities for encouraging all visitors (domestic and international) to contribute directly to regenerative tourism programs whilst in the region need to be developed and encouraged by operators so their visitor markets see the benefit and need to be contributors. Success will require strong collaboration, the ability to pilot and learn from experience over time, and innovative business models. A range of supporting funding sources is likely to be required, particularly in the short term.</p>	Regional	Sustainability and Regenerative Tourism

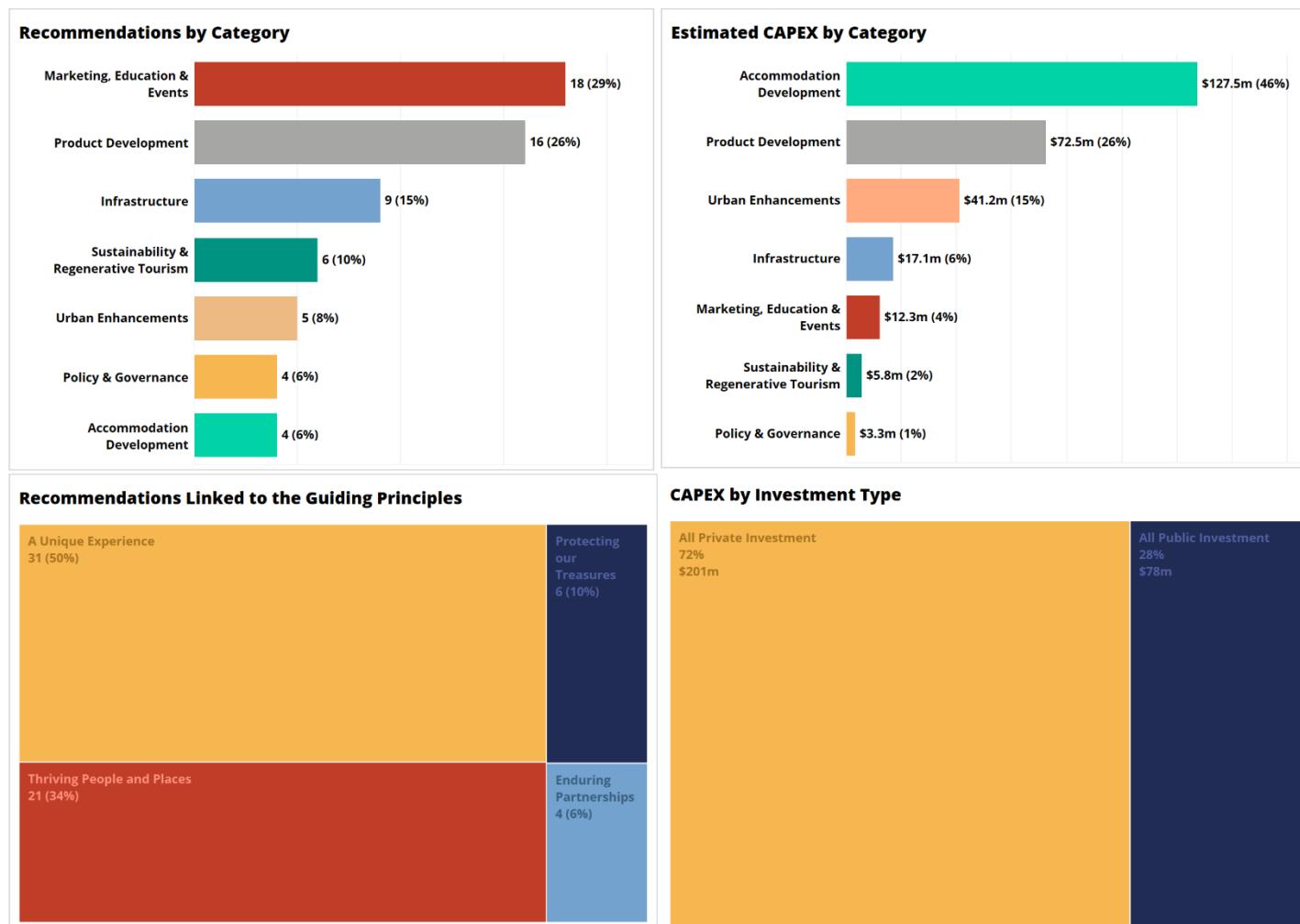
### 3.6. Project Recommendations

In total, 62 project recommendations have been identified as part of TMKU. They are tourism-focused and cover:

-  Accommodation Development
-  Infrastructure
-  Marketing, Education & Events
-  Policy & Governance
-  Product Development
-  Urban Enhancements

Many of the recommendations are supply-led and are aimed at introducing more commissionable products and private investment into Te Manahuna’s tourism offering. Figure 10 provides a summary of all the recommendations identified, followed by the full list of projects linked to the guiding principles (Table 5).

Figure 10: Spatial overview of opportunities



TMKU and its outcomes are founded on an integrated approach. As such, any project can be seen to align with most of the guiding principles, albeit they may have an emphasis on some more than others. Table 5, therefore, indicates the primary alignment only.

**Table 5: The full list of projects**



### Principle 1 - Protecting our Treasures

- Place names - corrections and dual place names
- Whare Wānaka (Pou concept & storytelling)
- Improve the provision of community services
- Reassess location for Pukaki Airport
- Integrated management of camping across the District
- Sustainable travel and transport options
- Electric aviation



### Principle 2 - Enduring Partnerships

- Build stronger marketing partnerships with the two gateway destinations (Queenstown & Christchurch)
- Centralised experience hub (booking & information centre)
- Digital app and QR codes for visitor information and movement tracking
- Storytelling via viewpoints/storyboards



### Principle 3 - Thriving People and Places

- Address the lack of seasonal workers across Te Manahuna
- Assist smaller-scale operators with aspirations to grow
- Commercial centre expansion & upgrades for Takapō
- Community tourism awareness campaign
- Developer forum to guide urban improvements
- Enhanced, future-proofed visitor information services
- Ensure zoning changes in District Plan to encourage tourism
- Greater provision of community services
- Improve pedestrian safety and accessibility across SH8 to link Takapō village to the commercial centre
- Improved sense of arrival into Takapō
- Industry operator digital upskilling & service quality upskilling
- Integration of Fairlie with regional cycle & walking trail network
- A major presence for MDC in Twizel
- New/enhanced F&B experiences
- Position Fairlie as a visitor information gateway
- Redesign and build a new lakefront promenade and landscaping at Takapō
- Robust visitor data collection for Te Manahuna
- Simplify compliance process, regulations, and cost of implementing development for the industry
- Stronger destination link for Fairlie to some of the surrounding ski fields
- Sustainability in building code/urban form design guidelines
- Urban form improvements for Twizel



### Principle 4 - A Unique Experience

- Accommodation property (80+ rooms & conferencing)
- Agri-tourism & aqua-tourism experiences
- Agri-tourism showcase experience centre
- Assess growing A2O access from Takapō
- Cycle-walking trails linking Lakes Pukaki and Ruataniwha
- Destination branding
- Destination events toolkit
- Diversified accommodation mix
- Eco-huts on private or Crown Land outside of Aoraki/Mount Cook National Park linked to new trails
- Electric & solar house boats
- Experiences/attractions for youth and 18-35-year-olds
- Guided storytelling and digital application
- Lake Takapō on-lake recreational experiences
- Leverage the Te Araroa Trail as a national asset
- Links to cycleways and a hub for the A2O
- Mackenzie Great Walk (longer term if supported by DOC)
- Major fishing & hunting destination festival
- Max Smith storytelling experience
- Meridian & Genesis sites for hydro-tourism experiences
- New half- and full-day walking experiences
- New recreation/adventure destination events such as triathlons, ultras etc.
- New trails for accessing Aoraki/Mount Cook National Park
- Regional events calendar to promote regional events
- Series of seasonal fishing competitions
- Ski touring experiences (packaging & profiling)
- Takapō hillside activity precinct
- Trail running development
- Trails trust establishment to grow trail networks
- Unique dark skies experiences
- Visitor attraction and a lakeside promenade (to better link Twizel with Lake Ruataniwha)
- Water visitor experience hub with iconic design

### 3.7. The “Big Moves” for Te Manahuna

To determine the “Big Moves” for Te Manahuna, a weighted criteria has been developed and each project has been assessed against this. The methodology is further explained in Appendix 8 and the full results are included in Appendix 9.

Table 6 summarises the projects that achieved top-10, 20 and 30 scores. These are part of a larger list of 62 tourism development projects. Many of these should be able to be developed by the private sector and other non-government parties. As the projects are gradually activated, the next priority projects should be activated until eventually, each of the top 30 projects are underway and activated. Some of these projects are likely to be developed within the shorter term (next 10 years) while others are likely to take until the medium term (out to 2051) to be fully activated. Some projects will commence in the short term and remain ongoing through the medium term and potentially even longer.

In addition to these priority 30 projects, there are a further 32 projects which are offered for activation; as different priorities occur and government policies change, some of these later projects may need to be alleviated into the category of priority projects. The list should therefore be considered fluid, and subject to change.

**Table 6: The Big Moves for Te Manahuna**

#### Tier 1 (Top 10)

- Water visitor experience hub with iconic design
- Diversified accommodation mix
- Agri-tourism showcase experience
- Agri-tourism & aqua-tourism experiences
- Accommodation property (80+ rooms & conferencing)
- Destination branding
- Meridian & Genesis sites for hydro-tourism experiences
- Takapō hillside activity precinct
- Unique dark skies experiences
- Whare Wānaka (Pou concept & storytelling)

#### Tier 2 (Top 11-20)

- New/enhanced F&B experiences
- Eco-huts on private or Crown Land outside of Aoraki/Mount Cook National Park linked to new trails
- Electric & solar house boats
- Lake Takapō on-lake recreational experiences
- Max Smith storytelling experience
- New trails for accessing Aoraki/Mount Cook National Park
- Guided storytelling and digital application
- New half- and full-day walking experiences
- Sustainable travel and transport options
- Commercial centre expansion & upgrades for Takapō

#### Tier 3 (Top 21-30)

- Ski touring experiences (packaging & profiling)
- Centralised experience hub (booking & information centre)
- Series of seasonal fishing competitions
- Storytelling via viewpoints/storyboards
- Major fishing & hunting destination festival
- Improve the provision of community services
- Mackenzie branded multi-day walk
- Experiences/attractions for youth and 18-35-year-olds
- Stronger destination link for Fairlie to some of the surrounding ski fields
- Visitor attraction and a lakeside promenade (to better link Twizel with Lake Ruataniwha)

### 3.7.1. Tier 1 Projects (the Top 10)

#### 3.7.1.1. *Water visitor experience hub with iconic design*

Te Manahuna has a rich history of produce gathering associated with water, from extensive hydro schemes to historic and modern-day eel and salmon farming. There are also several very important and popular lakes and water bodies within Te Manahuna that are used for a variety of recreational and utility purposes.

The concept to create an immersive, all-weather visitor experience that tells Te Manahuna's water story has been proposed by a private operator/investor.

Concept design drawings have been developed to help explain the project vision and to demonstrate its quality. The project potentially could tell stories relating to:

- The historic stories of food-fish-eel harvesting by mana whenua and the significance of this over hundreds of years
- The development of the hydro schemes in the broader region (covering Mackenzie and Waitaki) and offering information and possibly dioramas to explain how the various hydro stations and hydro lakes link and their significance for New Zealand's hydroelectric generation capacity
- The modern-day story of high-quality salmon farming and its significance and growth potential with the option of being able to purchase fresh produce
- Space available for a future area dedicated to mana whenua and broader stories of significance and as a hub for guided tours to sites of significance
- Space potentially available for DOC if a new DOC relocated visitor centre was to be collocated with other major visitor experiences-attractions.

We consider this project could be a major game-changer for Te Manahuna, by offering an all-weather and high-quality attraction experience that can link the essence of the stories of Te Manahuna in one location and by applying innovation and technology. It is therefore important that these are private sector driven and funded projects (which government can support) and are activated to ensure that they act as catalysts to encourage other private sector investment and government funding initiatives to occur.

Though only at a concept stage of development, the project could potentially include elements such as the following.

- A shared information kiosk offering details to support many forms of visitor activity.
- An audio-visual experience to offer a range of experiences (hydro stories, mana whenua stories, aqua-tourism, fish farming, national park, and conservation etc.)
- A series of virtual and/or augmented reality attractions enabling the visitor to immerse themselves in various experiences (possibly as a paid entry experience).
- A retail and display area to offer visitors the opportunity for purchasing local produce.
- A café to offer all-day dining.

We are also aware that the project proponent is also considering other locations in neighbouring regions should the location within Te Manahuna be too challenging to activate.

#### 3.7.1.2. *Diversified accommodation mix*

Te Manahuna does have a higher percentage of older-style commercial accommodation properties which appear to be marked down by consumer sentiment at times due to the value proposition they offer.

To encourage a broader visitor market to Te Manahuna, there is a need to focus on introducing a wider range of commercial

accommodation options. These could include all-weather glamping (or eco-pods), eco chalets, boutique hotels, youth hostels and serviced apartment complexes etc.

As a region with stunning landscapes and significant cycling and walking trails etc, a broader accommodation mix needs to be encouraged to offer products to encourage a wider range of visitor markets including:

- Mid-to-upper range lodges with a potential focus on fly fishing, hunting, trekking, and other lifestyle options.
- Glamping pods to offer all-year-round accommodation, especially on properties where the landowner may only wish to have 1-3 accommodation units.
- Eco cabins and huts to offer comfortable accommodation to support more walking and cycling trails and which may be able to link to the national park.
- Destination holiday parks offering a mix of powered RV and caravan sites, unpowered camping sites, cabins, and various amenities to particularly appeal to a family market.

It is assumed that over time, those existing accommodation properties which need refurbishment and updating will undertake this and collectively help Te Manahuna offer a more compelling overnight accommodation experience, especially as the region has a high percentage of day travellers coming through but not staying in Te Manahuna overnight.

It is also noted that many private landowners have sites, vistas and landscapes which are as appealing as higher-quality public-crown land. As such, the potential exists to develop new walking and cycling trails on private land and to include attractive commercial accommodation to enable visitors to stay on-site for 2- to 4-day walking-cycling experiences etc.

New forms of commercial accommodation should be considered throughout Te Manahuna including in the major towns along with various remote locations including on rural-farming properties

and around various waterways, as these are features of Te Manahuna and offer options for on-water and land-based activities.

In addition to commercial accommodation, we note the growth in Airbnbs which do offer an alternative form of accommodation, and often during peak holiday periods rather than all year round. While they are noted as an important element of the visitor economy, the direct and indirect employment they support is far lower than commercial accommodation options, so the economic benefits are far smaller for Te Manahuna.

### **3.7.1.3. Agri-tourism showcase experience**

The agricultural sector has historically been the backbone of Te Manahuna's economy, and it is well-known nationwide as an important agricultural region. Te Manahuna generates a range of quality produce covering various seafood products to beef, dairy, lamb, venison, and many related products. As such, Te Manahuna has the potential to encourage greater wholesale, retail, and consumption (via restaurants, cafes etc) sales. For many visitors, finding a one-stop-shop experience that can showcase and provide the produce is an important asset. Fairlie, which is growing its reputation as a food hub could be the location for an agri-tourism showcase centre.

The concept, which could potentially commence as a pop-up facility, could involve using a higher profile main street location and could offer the following.

- Showcasing Te Manahuna's seasonal produce.
- Offering a retail space to offer the chance to purchase goods.
- Potentially offering a café to enable visitors to consume local produce.
- Being a hub for a variety of food trails so these could generate self-drive options to visit farm gate experiences (on a seasonal basis).
- Potentially as a hub for a farmers' market.

- Providing information on the range of cafes and restaurants within Te Manahuna and encouraging these to illustrate in their menus, product grown locally (to build on the notion of paddock to plate and slow food dining)
- Potentially being a hub for cooking competitions and cooking classes.
- Showcasing the major merino wool production companies which use the fibre grown in the region.

There may be existing food and beverage operators within Fairlie who have an interest in expanding their current business to include a showcase facility and which may be able to be developed on a staged basis.

### **3.7.1.4. Agri-tourism & aqua-tourism experience s**

Te Manahuna already has several quality agriculture and aquaculture producers and is well-known as an agri-region. The region is recognised globally for its top-quality merino wool products and strong brand recognition. The potential exists to expand this profile by considering the following.

- Creating several food operator hubs throughout Te Manahuna to offer clusters of opportunity and to share information and ideas.
- Creating food trails to encourage visitors to disperse more widely throughout Te Manahuna and to encourage farm gate sales where possible.
- Development of farmers' markets in different locations throughout Te Manahuna.
- Encourage growers and producers to look to diversify their offering where this is possible and desirable.
- Develop the potential for paddock to plate experiences that can be marketed widely to domestic and international niche markets.

- Support sustainable agricultural practices as part of the wider need for environmental improvements for Te Manahuna.
- Finding ways of linking in the top fibre production companies using the merino wool from the region to build on the agri-tourism strength of the region and brand association.

Sustainability principles are noted as key drivers for TMKU which include the need to consider farming practices more generally and ways to improve their environmental impacts on land, waterways etc. This initiative is expected to be developed and expanded over the full period of TMKU being 2022-2120, reflecting potential changes in sustainability requirements and framing practices.

The marketing for this opportunity may provide for several different food experiences and food-based trails that could offer the visitor drive trail experiences, and cycle and walking options as well. The sector is expected to grow over time as more food experiences and produce suppliers come on stream. This in turn will make this initiative an evolving one as consumer demands change and potential environmental challenges also require changes to elements of agricultural production along with aquaculture development and changing products.

### **3.7.1.5. Accommodation property (80+ rooms & conferencing)**

To support the development of events, there is a need to introduce a new, larger-scale accommodation property that also offers conferencing facilities.

Business tourism including functions, conferences, workshops, meetings, corporate retreats, and incentive travel provides a far higher yield when compared with most leisure holiday markets to Te Manahuna if there are facilities that are state-of-the-art to meet the needs of this very discerning market.

A medium-sized property offering circa 80-120 twin share rooms with conferencing and other facilities has the potential to grow a business market wishing to come for many of the reasons noted above.

This initiative may take some time before demand is sufficiently strong to support its viability but as this niche market prefers having all attendees stay within the one facility, there are very few options currently to attract this important and high-yielding niche market.

### **3.7.1.6. Destination branding**

Te Manahuna has a variety of makers, creators, and producers. The opportunity exists to create a cohesive destination brand for Te Manahuna to profile the following.

- The quality of locally grown and made produce across Te Manahuna.
- The various arts, crafts, and creators within Te Manahuna.
- The activities and attractions that are available, including amazing treks, trails, and ski fields.
- The big landscapes on offer that cover significant waterways of national importance, and icons such as Aoraki/Mount Cook.

These elements provide the content for a quality destination brand, which can utilise and build on some stunning images and experiences for promotional and broad marketing purposes, and which can also offer a standard to which those wanting to use the brand in product marketing, need to reach. The use of the brand needs to be tightly managed, so quality isn't compromised.

The outcome of this initiative should be the creation of brand collateral, so quality regional products and experiences can become brand ambassadors so that in time, Te Manahuna's brand is synonymous with high country landscapes, high-quality experiences (and service standards) and top-quality products

including farming produce, aquaculture products, dining experiences, woollen fabrics etc.

The brand needs to transcend economic sectors and go beyond just a destination brand for tourism promotional purposes but needs to be tightly controlled and managed, so its value is protected.

### **3.7.1.7. Meridian & Genesis sites for hydro-tourism experiences**

These are the two major hydro generating companies within Te Manahuna that control many waterways and surrounding areas for hydro generation. The potential exists to investigate ways to leverage the Meridian and Genesis sites for hydro-tourism experiences. These could include self-drive tours to the various hydro facilities in Te Manahuna, online information along with profiling sites of significance etc.

Telling the story of the creation of the hydro lakes and connected waterways could be undertaken within the proposed discovery centre, noted as project 1 above. In addition, a drive or cycle trail to visit key elements of the hydro experience could be created to encourage visitation to various sites around the hydro lakes and linked waterways.

### **3.7.1.8. Takapō hillside activity precinct**

The current landholder has indicated a desire to create various visitor activity experiences to take people up to the top of the ridge line and allow them to mountain bike down using various trails and/or to introduce various downhill ride experiences (possibly a state-of-the-art zip line or similar options).

The precinct is expected to offer a mix of paid experiences and some free (walk-up) experiences to the ridgeline. With the potential for a people mover to enable those wishing to avail of the views from the top (including allowing those with disabilities or with young children and the elderly) amongst others to take an

environmentally friendly attraction experience potentially up and/or down.

### **3.7.1.9. Unique dark skies experiences**

Te Manahuna has been a leader in dark skies experiences for several years. In more recent times, other regions have also introduced dark skies experiences so the uniqueness of the Takapō experience has been somewhat lost.

New value-added experiences are required to help reposition the dark skies experience as a leader nationally. This may include new under-dark skies dining, glamping pods allowing for under-star, all-weather and weatherproofed accommodation, and new interactive virtual and or augmented reality experiences to offer a more immersive experience into dark skies experiences.

### **3.7.1.10. Whare Wānaka (Pou concept & storytelling)**

The potential Whare Wānaka experience could include a variety of elements including significant gateways into Te Manahuna with Pou erected in appropriate locations to guide visitors into the region and to offer a starting point for Māori storytelling. This needs to be developed by mana whenua to ensure they tell their stories in the manner they wish to and to ensure that their intellectual property is protected, and authenticity is maintained.

The mechanisms for evolving storytelling may take many forms including:

- Guided tour experiences with qualified and accredited guides to take visitors to places of interest and significance for mana whenua.
- Online information including apps, QR codes, websites etc to provide information for those doing self-guided tours.
- Introduction of Pou on arrival points into Te Manahuna.
- Use of Māori place names on regional locations.
- Other initiatives as determined by local Iwi.

### 3.7.2. Tier 2 Projects (the Top 11-20)

The following provides the Tier 2 projects identified and are offered to reflect those projects which can be focussed on once the initial Tier 1 projects have been commenced. There may also be circumstances where specific project funding and/or policy changes enable some of these projects to be activated more quickly.

A flexible approach is therefore required to ensure projects can be activated when resources and demand for these are well aligned.

#### **3.7.2.1. New/enhanced Food and Beverage (F&B) experiences**

An enhanced range of food and beverage experiences throughout Te Manahuna is needed to help meet ongoing local and visitor demand for a wider range of options.

These are expected to occur gradually and are most likely to be centred around the primary urban centres of Fairlie, Takapō, Twizel and possibly Aoraki/Mount Cook village.

A more flexible development approval process is going to need to be considered if options to allow for seasonal pop-up food and beverage outlets in both urban and rural locations are going to be considered.

Like other sites of potential future smaller-scale development are contemplated (areas around Lake Alexandrina and lake MacGregor for example), ensuring options for food and beverage outlets (seasonal and permanent) need to be planned for and processes simplified to support their introduction.

#### **3.7.2.2. Eco-huts on private and Crown Lands outside of Aoraki/Mount Cook National Park**

The option exists for encouraging more half-day, day, and overnight walks outside of the national park and including the introduction of a new hut system to support this. New huts to offer a higher quality level of amenity to appeal to a far wider tramping market should be investigated. These should also include options for locating overnight huts just outside the national park boundary, which allow private operators to become investors in these forms of accommodation (and as part of self-guided and guided walking experiences).

#### **3.7.2.3. Electric & solar houseboats**

Te Manahuna has some stunning waterways, but these are currently underutilised. They offer the potential for kayaking, boating, and on-water accommodation. Houseboats already exist in the neighbouring Waitaki region, and we understand can offer an attractive form of accommodation.

While we appreciate that weather conditions on some of Te Manahuna's lakes can make for challenging on-water experiences, there are sufficient waterways and enough sheltered coves and inlets to offer seasonal houseboat accommodation options.

#### **3.7.2.4. New trails for accessing Aoraki/Mount Cook National Park and regional conservation lands**

While interest already exists on private land to create these opportunities, the opportunity should be investigated for potential trails which start outside of the national park and either end within the national park or which utilise parts of the national park for the experience along with external land holder sites.

This would create the potential need for different access points into the park but in the process, could provide a wider diversity of

products and offer possible future proving for the medium to longer-term especially.

#### **3.7.2.5. Lake Takapō on-lake recreational experiences**

Lake Takapō, with its unique colouring and magnificent mountain backdrops, forms a critical element of the appeal for not only the Takapō lakeside township but also as a key feature of Te Manahuna.

Options should be investigated for recreational experiences such as kayaking and boating etc. to offer options for trail networks around parts of the lake and to provide a diversity of products (cycling, trail running, tramping, kayaking etc).

While local feedback suggests that, at times, the water can be choppy and uncomfortable for travelling on due to weather conditions, it is noted that during other parts of the year, calmer conditions on the water can be experienced and which may offer different seasonal experiences.

#### **3.7.2.6. Max Smith storytelling experience**

Max Smith, the project engineer for the Upper Waitaki Hydroelectric Power Scheme in the 1970s, was the creator of the South Island's top rowing venue, Lake Ruataniwha, near Twizel which is an international quality rowing course. His work included a series of dams and canals across Te Manahuna.

The potential for a rowing sports centre of excellence, which can also tell the rowing story, could be considered for the location, or collocated with other experiences as proposed in the water visitor experience hub as a combined project.

#### **3.7.2.7. Guided storytelling and digital application**

Te Manahuna has a fascinating history which includes mana whenua stories along with colonial and more recent stories. Offering these as separate guided experiences and/or through



self-guided digital means will help provide a far better understanding of the richness of Te Manahuna, and the factors which make it, and its peoples, unique within a wider Aotearoa/New Zealand context.

Too often, storytelling-based experiences have been relegated to social history and museum display experiences. The opportunity exists to bring these alive within the natural environment, so visitors can follow historic journeys (to source produce, or to venture to sites of significance etc) and get out and experience the similar natural and man-made attributes, which Te Manahuna is famous for.

### **3.7.2.8. New half - and full -day walking experiences**

Most visitors are often preferring to undertake shorter ½ day and day walks rather than overnight experiences.

There are sufficient higher quality locations throughout Te Manahuna on privately owned land, on Crown Land managed by LINZ and others, and within land managed by DOC.

These also avoid the necessity for huts, lodges, or glamping pods so the capital development costs can be far lower allowing numerous property owners to introduce new walking experiences. In turn, some of these may also be able to be packaged as various biathlon events etc to offer further product diversity for Te Manahuna.

### **3.7.2.9. Sustainable travel and transport options**

The opportunity exists to reduce private vehicle dependency and introduce a mix of public transport options including the possibility of the following:

- Potential for park and ride to get people into the national park from a transit hub concept which could be close to Twizel.
- Public transit stations with car parking in Takapō.

- A network of electric charging stations in all town centres throughout Te Manahuna.
- A network of cycleways (not mountain biking trails) including road cycling pathways for safe (off-highway) travel between key locations throughout Te Manahuna.
- Identification of areas as safe pull-over stopping areas for capturing views and vistas through Te Manahuna and with signage to advise motorists of the amenity.
- Identification of other forms of sustainable travel and transport options that may extend into forms of aviation etc.

As new forms of sustainable energy are developed over the next 20-80 years, options for hydrogen-fuelled vehicles and the next generation of electric vehicles will open further options for sustainable transport to be explored and introduced.

What is important is the gradual reduction and dependency on private motor vehicle use throughout Te Manahuna and the ability to offer sufficient cost-effective alternatives, so visitors (coming for all purposes) are encouraged to get out into the region and stay longer.

The pre-COVID dominance of day visitors driving through Te Manahuna and not staying overnight, but only taking the occasional selfie, needs to be reversed.

### **3.7.2.10. Commercial centre expansion & upgrades for Takapō**

The current urban design for the commercial centre of Takapō needs attention with pedestrian connectivity, road networks, buildings often facing away from the lake and generally poor lake edge amenities.

Over time, Takapō will grow and its tightly contained commercial centre will need to expand to cater for growth in general retail outlets, food and beverage, new forms of accommodation and attractions and experiences.

From a design aesthetic currently, Takapō does not resemble a high country or alpine town and needs to have urban design improvements to achieve higher design outcomes and appeal rather than only relying on the natural environment which is dominated by the lake and surrounding mountain ranges.

A forward focussing plan for urban expansion is needed to introduce better design guides for achieving a far more attractive and well-integrated urban feel. This should offer guidance on how the town should expand and grow over the next 100 years.

The same design principles should also apply for improvements in urban form and built style for all the other urban centres throughout Te Manahuna.

### **3.7.3. Tier 3 Projects (the Top 21-30)**

The following set of projects reflects the Tier 3 projects which bring up the top 30 for Te Manahuna. While other projects (31-62) are still important, it is the top 30 which are seen to provide the best mix of catalyst projects to stimulate additional forms of tourism-based investment and development to occur.

#### **3.7.3.1. Ski touring experiences (packaging & profiling)**

Te Manahuna has several ski fields; some are smaller club fields and others are more expansive in facilities and terrain offered. There are also surrounding ski fields such as Ohau which are on the boundary with Mackenzie but technically in the Waitaki region.

While the larger and better well-known ski fields are in the Queenstown Lakes area, the international and domestic market is less familiar with the ski field opportunities within Mackenzie including Mount Dobson, Roundhill and Ohau.

Opportunities exist to package up the various local ski fields to offer a 5–7-day ski touring experience with options for accommodation in Takapō, Ohau Village and potentially other towns in Te Manahuna.

We note that the Australian inbound ski market is already a mature market that enjoys flying into Queenstown directly from Sydney, Melbourne, and Brisbane so they avoid the need to take longer flight options via Auckland and Christchurch. This makes the ski fields within Queenstown Lakes far more accessible than the 5.5-hour drive to Australian ski fields from Sydney or the 6–7-hour trip from Melbourne.

Mackenzie ski fields are therefore between 5.5-6.5 hours travel from Sydney, Melbourne, and Brisbane, and roughly 3.5-4.5 hours flight and drive from Auckland and Wellington.

Packaging up the ski fields into a composite product with accommodation is important to raise Te Manahuna's profile and encourage a ski market ex all the above major generating markets.

This also recognises the important existing Canterbury and Otago markets which have been the mainstay for ski visitors to Te Manahuna's ski fields historically.

### **3.7.3.2. Centralised experience hub (booking & information centre) for Takapō**

The potential exists to create a booking and information centre in Takapō and ideally in a high-profile location close to the lakefront. The centre is needed as a hub for:

- Booth-office space for industry tour operators and others.
- A centralised information hub to share information but in a modern model where online data and information dominates.
- Chance for an audio-visual space to allow visitors to see footage of areas and their attractiveness, options for self-guided touring and areas where guided tours are far more desirable. This space can also double as a local cinema space for locals so should have multiple benefits.

- As a hub for tours to go from so a centralised starting point that is easy to find.
- Potential to offer a café or small retail outlet to support visitor needs.
- Potential for hire facilities for cycling, etc.

Over time, the centralised hub could also become the base for park and ride options to encourage the use of public transport and where renewable energy transport options are actively promoted from.

### **3.7.3.3. Series of seasonal fishing competitions**

It is noted that over 40,000 recreational fishing licenses are sold each year within Te Manahuna, reflecting the scale of market interest in fishing.

To raise the profile of Te Manahuna as a recreational fishing destination, a series of fishing competitions could be introduced. This initiative is important to help raise the profile of Te Manahuna and to actively encourage more visitors to stay overnight rather than supporting the drive-through day visitor market which is currently dominant.

### **3.7.3.4. Storytelling via viewpoints /storyb oards**

Over time, different stories have the potential to be promoted to illustrate the depth of cultural and historic diversity of Te Manahuna and with links to surrounding regions as well.

The food trails which mana whenua historically followed to access eel and other aquatic and natural products etc is a good inter-regional example of this. And different forms of farming and stock route trails used over many years by different pre- and post-colonial communities, are further examples of storytelling.

Storyboards (digital and purpose-built as part of journeys) are useful ways to encourage a greater understanding of Te Manahuna and to enrich the benefits which the region offers.

They are also valuable in helping to promote the importance of environmental principles including the chance for quiet spaces, which are a feature of Te Manahuna.

Importantly, it is also important to recognise that while these storytelling opportunities are important value adds for the region, there are very few options for monetising these other than via guided tour experiences.

### **3.7.3.5. Major fishing & hunting destination festival**

Te Manahuna has a plethora of hunting and fishing opportunities and already has several highly experienced and well-regarded guiding companies to help offer bespoke tours. Options exist to promote Te Manahuna for various fishing and hunting activities with the potential to establish a major festival that could offer:

- Various food offerings (fish, eel, venison etc.) as part of a food-based festival.
- Cooking courses and competitions on offer.
- Information on hunting and fishing.
- Potentially linking to competitions for different forms of game capture.
- The option of encouraging shooting via camera so visitors get to view game.

The potential should exist for a destination festival to be held in various parts of Te Manahuna so the economic benefits from it can be shared more widely.

### **3.7.3.6. Improve the provision of community services**

Community feedback has highlighted the need for improved services and amenities to support not only a visitor market but also to support the growth of the local community. This may need to include services relating to the following.

- Pharmacy outlets.
- Medical services more generally.

- Links to various tertiary training institutions for upskilling and encouraging more youth to stay in Te Manahuna to study.
- Additional entertainment amenities for local families etc.

The challenge for Te Manahuna is that its local population base is limited (circa 5.5k) and its visitor markets pre-COVID were over 1m, so the region may need to rely more heavily on a returning visitor market to support the commercial viability of additional services which benefit the local community year-round.

### **3.7.3.7. Mackenzie Branded Multi -Day Walk**

New Zealand has been very successful at developing and promoting its designated multi-day around the country. With a highly scenic and relatively undeveloped landscape, potential over the medium to long term may exist for a unique multi-day tramping experience to be created for Te Manahuna.

If a multi-day walk were to be developed consideration should be given to planning for its location, where overnight stays would need to be contemplated, and the need to ensure it was a unique experience so could be easily differentiated from existing great walks in other parts of New Zealand. Other considerations include appropriate management of risks for the user group, the costs of maintaining facilities, and the likely distribution of benefits

This initiative could potentially be a cross-regional trail linking parts of the Waitaki with Te Manahuna, like the Alps to Ocean and Te Araroa trails. With many different landowners (private and public), the potential may exist to offer all or part of the walk on private land holdings or a mix of public and private land holdings. The hydro lakes, tributaries, high country pastoral areas, and land managed by DOC all offer elements of potential appeal.

This initiative is something that may also have the potential to be driven as a partnership with mana whenua and various other

parties applying the overlying principles of TMKU for regenerative tourism and greater mana whenua involvement in Te Manahuna's visitor economy

### **3.7.3.8. Stronger destination link for Fairlie to some of the surrounding ski fields**

The opportunity to support a stronger link between Mount Dobson ski field and other fields with Fairlie needs to be explored, so Fairlie can develop as a further regional hub for both skiing and other outdoor pursuits.

This will also help to avoid too much visitor pressure on Takapō and allow for the economic benefits of the visitor economy to be spread more widely.

### **3.7.3.9. Experiences/attractions for youth and 18 -35-year-olds**

Community feedback, along with the audit undertaken, indicates there are limited family market options for Te Manahuna's visitor markets, especially for the younger market and extending to the under-35s.

There is a need to introduce facilities to support a local under 35 market including different amenities to support younger and older age groups with options including:

- An indoor climbing centre to support local recreational needs, to offer a wet weather option for younger visitors and potentially as part of an elite/high-performance training venue for NZ athletes and possibly international athletes wishing to train in NZ
- A possible pump track to offer cycle training for those of all ages
- A larger gym facility with potential for parkour and other sports such as trampolining etc

- An entertainment centre (based in Twizel) to offer locals and visitors a cinema venue
- Potential for an equestrian facility to encourage horse treks and a training venue and noting that there are several riding clubs within the broader region who are often after venues to support not only training but also as a venue for dressage and other equestrian events
- Opportunities for rowing on Lake Ruataniwha which is well recognised as a nationally significant rowing course and encouraging the development of the sport locally.

### **3.7.3.10. Visitor attraction and a lakeside promenade (to better link Twizel with Lake Ruataniwha)**

There is a need to create a strong link between Twizel town centre and Lake Ruataniwha which offers an exciting and attractive natural asset to help support the positioning of Twizel as a more attractive destination hub for Te Manahuna.

Options for the development could include:

- the creation of a major lakeside boardwalk to create a promenade for locals and visitors to use;
- play and activity spaces;
- the introduction of quality landscaping, seating, and lighting; and
- development of spaces for pop-up seasonal retail and hospitality outlets.

A feasibility study should also be undertaken to assess the potential to develop a Rowing Centre of Excellence high-performance centre to encourage far more rowing regattas, events, and training (noting that this location is one of only two recognised national and international quality rowing venues in New Zealand, the other being at Lake Karapiro in the North Island).

### 3.8. Cost Benefit Analysis

A robust economic assessment was integrated into TMKU's process. The economic assessment considered the historic trends, and a 'do nothing future' as well as three growth scenarios. Underlying economic issues, like labour constraints and the need for productivity growth, must be incorporated into the DMP as well as other development programmes to ensure that the true potential of the area is reached.

The assessment highlighted the need to integrate productivity into the overall economic development narrative for the district. The scenario analysis clearly pointed towards scenario 3 as the preferred option, showing alignment between the economic value of shifting towards the higher value visitor sector and the wider principles that the DMP is working towards.

The DMP is a long-term initiative, with the delivery and implementation of individual projects contributing towards achieving the goals and aspirations. The project list was assessed and compared against that anticipated shift in visitor numbers and spending estimates to determine if the DMP would leave the community better off. A social cost-benefit assessment (CBA) framework was used to shed light on the relationships between the costs and benefits. The projects were assessed collectively, and not one-by-one basis<sup>13</sup>.

The CBA integrates a range of costs and benefits, ranging from deadweight losses associated with public funding to the consumer and producers' surplus arising from the additional (new) activity and spending patterns.

The Cost-Benefit Ratio (CBR) provides a useful way to show if the projects deliver benefits that will outweigh the cost (>1 means that the benefits are greater than the costs) and if this is the case, then the community would be better off. A range of discount rates were used to vary the time value (or preference) of money. The default discount rate is 5%<sup>14</sup>.

**The CBA returns a solid ratio of 1.65.** The ratio remains positive even under several pessimistic settings (higher costs, slower growth, and higher discount rates and so forth). This highlights the **robustness of the cost-benefit outcomes**. Over the long term, the DMP would deliver annual gains to the local and NZ community to the value of \$12.4m (average per annum). These estimates exclude the potential gains in important values associated with cultural and environmental improvements that are difficult to express in monetary terms.

Securing the overall gains and positive outcomes will require successful implementation and delivery over the short, medium, and long terms.

Implementation challenges could be encountered but the modelling simulation shows that some volatility in the cost-benefit relationship can be expected over the short term. This can be expected and is related to the market changing and responding to change in delivery approaches, how the market recovers and positioning for the long-term activities and the overall change. Next a period of high annual net positions is identified, capturing the move towards high(er) value activities. It is important to look past the short-term pressures and acknowledge that the true benefits of the DMP and the repositioning will only be truly felt over the long term.

The analysis returns a solid cost benefit ratio ranging between 1.63 and 1.67. This underscores the important point that the DMP is not a quick fix, but a transitioning, and restructuring of the visitor economy that would deliver the outcomes over the long term.

<sup>13</sup> Such an assessment would be needed for the projects as they are designed in more detail and to inform delivery.

<sup>14</sup> This is in line with NZ Treasury and Waka Kotahi's rates. Considering the projects and the duration, it is argued that this rate is towards the upper end of the spectrum.