

Marlborough Destination Management Plan

SUMMARY DOCUMENT

2022–2032



Planning a collaborative future path
for the Marlborough community and
regional visitor industry

Foreword



Visitation and tourism by its very nature is very personal to us all, occurring within and amongst our local community and environment.

As Marlburians it touches our places and spaces – tourism changes who we are, how we see ourselves, and where we live.

Visitors arrive, they explore, share, experience, learn, spend, stay, eat, and drink our part of the world.

Marlborough is unique from anywhere else and has built its wealth firmly around a healthy environment – in its mountains, valleys, and coastlines. A long and colourful heritage of evolving communities has produced a region of collective ambition, innovation, and rich narratives.

Our climate, wines, seafood, communities, and landscapes attract locals and internationals alike.

Tourism offers the opportunity to give back using resources earned to improve our standard of living and restore the environment.

This is a plan of shared responsibility by the community promoting new opportunity and recognising a collective and regenerative future.

Vision and Aspiration for the Marlborough Destination Management Plan

The regional visitor industry sits both within our community and Marlborough's unique geographic setting. Visitor experiences are shaped by this region's unique destination attributes and bought to life as an experience through the welcome and hospitality offered by the local community. A future focused regenerative visitor space demands a balanced well-planned approach matching the needs of the locals, the environment, and the industry itself.

Success for the Marlborough Destination Management Plan will include.

- **Enhancing the lives** of the local community.
- **Developing** the local visitor industry to **its most suitable potential** ensuring a vibrant diversified economy and profitable businesses throughout the entire region.

- **Creating** a stable, **year-round balanced destination** that sustains, and where possible, **regenerates** the local environment.
- **Improving** regional planning, **coordination, and communication** within the tourism sector as well as with local government, iwi, and other community & agency groups.
- **Celebrating and sharing** our place and all the diversity it offers.

The outcomes as outlined in our regional vision and aspiration will result in

- A community that embraces visitation and benefits from tourism socially, economically, environmentally and culturally
- Visitors who discover Marlborough are enriched by their experience, contribute towards, and become ambassadors for the region
- An environment that is improving rather than degrading through the resources visitation brings to the region
- Marlborough agencies and industry sectors are working in unison and have a clear collective understanding of what tourism offers the region
- Commercial success for all invested in the visitor sector created by a clear unified approach to how the region is marketed
- With visitation shared with the community and seen as a celebration of our unique place

This aligned plan and vision for our destination is essential to ensure all parts of our region stay in tune now and into the future, that business can flourish, that all members of the community and industry align in a common agreed approach.

Tim Fulton, Chair Destination Marlborough Trust, on behalf of the Destination Marlborough Trustees

Marlborough Destination Management Plan

Executive summary

Marlborough, a region blessed with opportunity. It's warm inviting climate, landscapes and initiative-taking proud community ensure this part of central New Zealand welcomes visitors from all over – both domestic & international. Traditional visitors' magnets, the regions globally renown wine and the unique Marlborough Sounds have served the province well - but further opportunities abound. Marlborough has been fortunate to have largely avoided over tourism seen in some parts of the rest of New Zealand, and local community remains supportive with social licence remaining high for visitation.



Tourism, our fourth largest regional industry pillar is responsible for over 6% of Marlborough's total GDP. A traditional split of 60% domestic visitors and 40% international has protected the regions visitor industry from the worst during the current pandemic period. The regions four valleys – Te Hoiere/Pelorus, Tōtaranui / Queen Charlotte, Wairau and Awatere/South Marlborough are home to united yet differentiated communities, communities with the environment – Te Taiao - at their very heart as they live, produce, host, share and celebrate this special and unique part of New Zealand. The additional natural environs and Department of Conservation estate offer quintessential mountain and coastal experiences for locals and visitors alike and align our region to a wider New Zealand experience.

This, the Marlborough Destination Management Plan, seeks to layout a clear and positive future path forward for the local community and visitor industry.

The community

By better understanding regional strengths and opportunities that the region harbours this plan examines how the local community, iwi, government organisations and other groups and agencies can

achieve collective intergenerational success with the environment is at the centre. Alignment of a common future message for all industry pillars and regional segments of the community is core to the success of a wider more, diverse, resilient, and authentic destination.

Marlborough has always been a cultural melting pot as peoples have met and overlapped in this important interisland staging post. There are a multitude of enthralling intergenerational stories waiting to be shared with visitors in a multicultural inclusive future focused fashion. More work and partnerships will uncover rich community narratives, and now is the time to amplify these.

The visitor experience

By identifying visitor product gaps, current experience and sector underperformance, the Marlborough Destination Management Plan seeks to facilitate better visitor experience, increased length of stay, and overall spend, while at the same time spreading and mitigating negative impacts and sharing the benefits to a wider part of the region geographically.

The environment

Changes in our world - politically, socially, environmentally, and digitally over the recent past have called into question the historical approach to destination management globally. Our recovery from Covid, and the future management and preservation of the visitor experience have required this plan to take a regenerative approach and consider tourism industry resource use more in the light of a primary industry, with the land and environment at its heart and a long-term intergenerational perspective, aligning with wider traditional rural and iwi community caring values.

This plan promotes the recognition where possible of the te ao Māori philosophy – (the recognition of the interconnectivity between all living and non living things), carbon reduction initiatives, partnerships with DOC, and other environmentally focused groups that will enhance the local regional cultural environment mindset for generations to come.

Our four valleys

By examining individual valley environment spaces in the region and the community within each while aligning these with centralised urban and town visitor service hubs, Marlborough can proactively broaden the visitor offering, expanding length of stay, present new regionally appropriate visitor products, and at the same time improving local resident lifestyle infrastructure. Visitors will be offered greater options in more locations that will transcend into longer, in depth, meaningful, transformational, and authentic visitor experiences.



Middlehurst Station/Awatere Valley



Kenepuru Sound

The total region as one

This plan, through a range of product development and strategic initiative actions seeks to leverage off regional natural advantages, whilst enhancing local community pride and lifestyles. The collective view through a “Marlborough Inc” lens will allow traditionally separate industry pillars to work cohesively to position our region as a high value primary producer with unique attributes to the world.

Our collective clarity of direction and partnerships

By addressing core issues around regional visitor dispersal, existing and new infrastructure, seasonality, and maximising access opportunities, whether they be externally or internally, the Marlborough Destination Management Plan seeks cohesive clarity of direction for the visitor sector maximising the unique central location of the region within New Zealand.

Partnering with neighbours in Te Taihū, Te Wai Pounamu, and wider Aotearoa will ensure adoption of regional land nationally led environmental and industry management frameworks that share resources and reduce costs on a local level.

Our core regional truths

This plan reconfirms the regions key six unique visitor selling points - wine, seafood, aviation, sounds, heritage arts & culture, and the natural environments while aligning these with the two key geographic strengths of location and climate.

Plan sub strategies

From this process eighteen sub-strategies have been identified and form a roadmap of activations that will drive the main outcomes from the core findings. The immediate key priorities focus on the following areas:

- Improve the wine visitor experience
- Enhance cycleway connectivity and access

- Participate in meaningful partnerships with iwi & incorporate te ao Māori stewardship practices
- Manage and reduce impact of cruise including regional dispersal of visitors
- Support development of tourism businesses in Awatere Valley and South Marlborough
- Enhance visitor access to seafood visitor experiences and support new product development

Targeted projects within the plan

Complementing these sub strategies, nine visitor products and infrastructure projects have been outlined as key areas to target. These include but are not limited to:

- Championing development of Blenheim Rangitāne Cultural centre and Wairau Bar experience
- Transforming Waitohei – Picton from gateway to destination
- Partnering with local iwi, communities and DOC to explore regenerative tourism experiences around flora and fauna
- Identifying and activating future potential visitor experiences, spaces and precincts in central Blenheim e.g. urban wine and food experience
- Connecting the seafood and wine experiences to develop seafood-based product in Te Hoiere – Pelorus and Havelock

Our future

This pathway is just the start of the journey and the plans and strategies outlined with this project are way finders to a better future. The future starts here maximising our existing assets and developing the way forward that aligns with visitor and locals’ expectations. By targeting exciting new visitor experiences and aligning environmental and community projects we will create a clear, tangible, and regenerative direction for Marlborough

Come with us and be part of this journey.

Key outcomes from Marlborough Destination Management Process – which provide the foundation elements for all strategies and actions of this plan

- 1** The core six regional attributes – Wine, Sounds, Seafood, Aviation, Heritage Arts & Culture and Outdoors activities – grow destination depth
- 2** The valleys settings – Te Hoiere, Tōtaranui, Wairau, Awatere – the four environments, the four communities, the four spaces to explore
- 3** The supporting town hubs – Blenheim, Picton, Havelock and Seddon – often home base for visitation – focused services and reduced impacts
- 4** The environment and climate – the core to the success of Marlborough and underpinning a successful visitor sector
- 5** The central national location – An element under-appreciated in Marlborough but recognised in the visitor data– which can be leveraged further
- 6** Access opportunities: wine tourism, cycling, sounds transport, seasons, air travel, rail systems, roading network, foot tracks, and themed accommodation – centralised coordination and existing infrastructure can be developed further
- 7** Development of regionally aligned and unique commercial visitor attractions – for example Blenheim Food & wine or Rangitane Culture experiences, Havelock seafood experiences, Picton Nautical Heritage Centre – will provide more reasons for visitation, repeat visitation and open new markets
- 8** Regenerative and inclusive community participation – paying it forward with visitors – will build an intergenerational future in tourism visitation and open new markets
- 9** An all-inclusive – “Marlborough Inc” approach – multi-industry pillar participation in a common message – will reinforce we are all in this together
- 10** Te Ao Māori approach connecting spaces and environmental management – will provide a powerful and authentic Aotearoa approach
- 11** Target market focus – focus of psychographic and traveller style messaging rather than origin or ethnicity – thinking about the why – not the what

Key components making up the Marlborough Destination Management Plan

- **Destination definition**, vision, and data – What are we? What do we want to be?
- **The brand narrative**, and strategic fit with markets – Who are we? what is our story? and who are we aiming at?
- **Product development**, amenities, services, and infrastructure – how can we improve the full visitor experience & journey?
- **Access** – how do visitors get to us? How can we make it easier?
- **Leadership and management structures**, risk management, – who is setting the direction? Who's responsible?
- **Capability and development** – can we do it better?
- **Environmental stewardship** – sustainable and regenerative for this who come after us.
- **Community attitudes** – is everyone on board with tourism?
- **Success measures** – how will we know if we have succeeded?

Source – Destination Management Guidelines – MBIE 2020 – (defined to 9 items from original 16)

Why a Destination Management Plan and Why now?

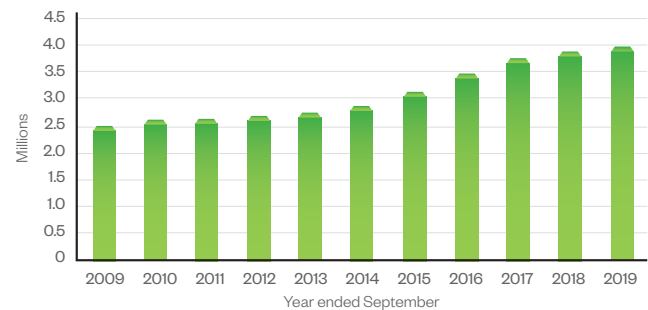
The destination of Marlborough, as part of the wider New Zealand tourism industry has experienced rapid and continued visitor growth over the past 30 years.

In 1992, New Zealand passed the milestone of 1 million international visitors per annum. By 2019, there were over 3.8M international arrivals representing an average cumulative growth of 8.17% per annum over 17 years.

Traditional western international markets including Australia, North America and Europe/UK morphed into a much wider portfolio of visitor segments, and by 2018, China was New Zealand second largest market. Other expanding visitor sources including Southeast & North Asia, South America, and India who had added to swollen visitor arrivals.

Visitor travel styles had evolved from the more traditional coach tours to include backpackers, self-drive rental, motorhomes, cruise ships as well as longer stay education and working visa arrivals.

Annual visitor arrivals



Source – Stats NZ

Launched in 1999 – the New Zealand 100% Pure Campaign positioned the destination as a clean, green paradise at the bottom of the world – a must see on the traveller's long-haul bucket list and globally positioned at the top of the most desired places to visit.

Aligned with this world leading destination branding we have witnessed an increasingly digitised planet providing far flung destinations with easily accessible information platforms that deliver unique visitor offerings instantly to global fingertips.

This combination of information and growing global economies with emerging middle-class wealth resulted in a period of rapid international visitor growth peaking at around 40% between 2015 – 2019.

From this recent 4– 5–year period of strong international visitor growth, wider New Zealand both environmentally and socially noticed the impacts of increased visitor volumes. The combination of peak seasonality and geographically focused visitor experiences in key locations created a sense that not all was as it should be in 100% pure New Zealand. Locations that included visitor icons such as Milford Sound, Punakaiki, and Aoraki /Mount Cook National Park experienced visitor numbers in peak season beyond environmental and social carrying capacity.

Changes in the nature of visitor travel style including freedom camping or cruise ships delivered a wider impact to many new locations throughout New Zealand previously unseen.

As comparatively new markets like China grew very quickly in visitor volumes to become New Zealand's second largest visitor market, this segment had also moved increasing away from bulk coach travel into 40% independent self-drive travel in style, the impacts of which became more obvious and visual to the local communities.

Problems with growing numbers of unmanaged freedom campers staying in poorly serviced free camping spots caused wide public concerns, while the rapid growth of cruise ship arrivals and their associated instant high volumes of often low yielding short stay visitors was a very visual image of global mass tourism in the wider community.

Tourism New Zealand and Tourism Industry Aotearoa have been aware and active for several years seeking to address these growing issues – programmes including the Tiaki Promise and the Tourism Sustainability Commitment have sought to manage impacts as well as educate visitors on the community’s expectations. Undertaking “mood of the nation” surveys, researchers found that by 2017 40% of New Zealanders were worried about the impact of the tourism boom – double the amount in a survey taken 2 years earlier (stuff 18/01/18). The tide had been changing well before Covid struck.

Regional Tourism Organisations have traditionally been funded for destination marketing to produce visitor growth and increased spend. Because of the changing industry position, these same regional tourism organisations have rapidly evolved to cater for the much larger challenge of destination management.

During the earlier phases of the Covid 19 pandemic the New Zealand Government via MBIE developed the Strategic Tourism Assets Protection Programme (STAPP). As part of this 31 regional tourism organisations nationwide were initially funded to a total of \$20.2M in order to develop destination management plans, MBIE recognised “RTOs play an important role in supporting the tourism system. The tourism sector depends on capable, secure, and adequately resourced RTOs that lead and coordinate activities in their regions, alongside the tourism industry, stakeholders, Māori/iwi, and communities.

Overall, the investment will support RTOs to implement destination management and planning and encourage more people to explore their regions. The funding will also allow RTOs to support the broader tourism industry, stimulate regional demand, increase industry capability, and progress the goals of the New Zealand–Aotearoa Government Tourism Strategy.” – source MBIE website 2022.

Focus has needed to shift towards ensuring community licence is maintained and enhanced, the environment is protected, the regions narrative aligns with its unique position and new visitor products are developed accordingly.

Pre Covid there was a growing recognition of New Zealand’s environmental limits in terms of visitation volumes. Since early 2020 the Covid–19 pandemic has allowed New Zealanders to rediscover our country, and time for reflection.

Marlborough as a region is in a more fortunate position than many other regions, with a diversified economy, a strong tradition of domestic visitation and a largely underdeveloped commercial tourism segment. This region can reposition and re–jig its tourism industry to suit the future visitor expectations and evolve further catering to a continued domestic visitor dominance over the near term.



Picton



Mahau



Wairau

Statement by the Minister of Tourism Hon. Stuart Nash – June 2021

A Destination Management Plan aims to create:

“Balanced environmental protection, emissions reduction, maintaining social licence alongside traditional marketing, with local culture and economic considerations”.

A Destination Management Plan therefore must:

- Reflect aspirations of local community, iwi, and wider area stakeholders
- DMP approaches are included and resourced in council plans & budgets
- Seeking initiatives that make a substantive difference to the region’s tourism from a community or environmental perspective
- Identify user pays initiatives
- Move from sustainable tourism to regenerative tourism
- Seeking high level of local consultation

The 4 Well beings – a community opportunity as a destination

“The Local Government (Community Well–being) Amendment Bill reinstated the four aspects of community well–being – social, economic, environmental, and cultural – into the Local Government Act. The reinstatement of the four well–beings is formal recognition that councils have a significant role to play in lifting the quality of life of our people, and the health of our environment.

As the operational arm of government, councils deliver infrastructure vital to our economy, such as roads, three waters and housing infrastructure, cultural and social amenities such as events, parks, libraries, pools and balance the built environment with the natural environment through the RMA. The reinstatement of the four well–beings acknowledges that through all these services, and more, local government has a broader role in fostering liveable communities, than simply providing core services.”

Source – Local Government NZ website – May 2019

Applying the four well-beings in the tourism and visitor space

Social

Tourism provides a sense of community, placemaking, pride, and wellbeing.

Economic

Tourism brings employment, demands housing affordability, and seeks new opportunity, generates primary and secondary spend plus opportunities in business and careers.

Environmental

Tourism must be regenerative, intergenerational, and can bring focus onto the issues – e.g., funding endangered species.

Cultural

Tourism can invite and sustain multicultural expression, innovation, and help develop new community partnerships.

Our Care, our Cooperation, our Welcome as a destination – The New Zealand way

- Embracing the concept of **Kaitiakitanga** at our regional cultural roots – guardianship and protection of our natural resources for future generations.
- Working as a regional team – **Whanaungatanga** – working together, sharing experiences and a sense of belonging.
- **Manaakitanga** – respect, hospitality, generosity, reciprocity, and care through all sectors will grow brand respect.

The Marlborough Destination Management Plan regional assumptions

- That the environment sits at the centre of Marlborough's prosperity and our focus of this plan.
- That visitation and tourism are just one important part of a larger complimentary regional economic jigsaw and partnerships are key
- Brand Marlborough is more than tourism, resources are scarce and so common messaging across sectors builds consistency and makes sense.
- That adopting a wider iwi cultural partnership approach to environmental management will provide a regenerative framework for future tourism.
- That tourism is a consumer of resources and by this recognition we can measure the impact, care for the environment, ensure visitors pay their way, and enhance community licence. Tourism is a primary industry operating within regulatory, community and environmental limitations.
- That Marlborough lies at the central geographic heart of Aotearoa, and we can leverage off this status using known visitor flows, multiple access routes and travel means.
- That within the region we have recognised pillars of natural strength and these need to work more cohesively – e.g., seafood & wine, aviation.
- That we have un-activated new visitor experience opportunities throughout the region, however these possible new product developments should align with the clear regional strategic advantages to amplify our existing position further.
- That Marlborough has a colourful, mixed, and multicultural community and therefore there is an underlying opportunity to amplify this diversity and move away from the predominant traditional monocultural experiences via creating new visitor engagements.
- That a set of collective coordinated sub-strategies are required to enhance opportunities and cure industry challenges moving forward.



Mt Stokes

Regenerative tourism as a concept – what is it?

Regenerative tourism is a paradigm shift

“You can’t solve a problem with the same thinking that created it” – Albert Einstein.

Traditional sustainable tourism has just been about slowing down the degradation.

“Regeneration is about restoring and then regenerating the capability to live in a new relationship in an ongoing way”¹

“Regenerative travel – makes it better for future generations”²

1: Bill Reed – Regensis Group | – USA

2: Jonathan Day – Purdue University

Nydia Track

Covid –19 is allowing us a moment in time to revisit this industry and recalibrate for the future

“Regenerative tourism looks to indigenous people’s ancient environmental approach and not a KPI driven commercialised economic model”³

3: Anna Pollock – Conscious Travel

“Regenerative travel is a supply –side concept that asks operators to do more for the environment and community than they take from them.

Travellers are becoming more aware that their visit leaves a set of costs associated with it, which needs to be paid by someone.”⁴

4: Anna Pollock – Conscious Travel

One example of active movement in this space is with the Future of Tourism Coalition (FTC) an international collective of non-government tourism sustainability agencies and their wider membership.

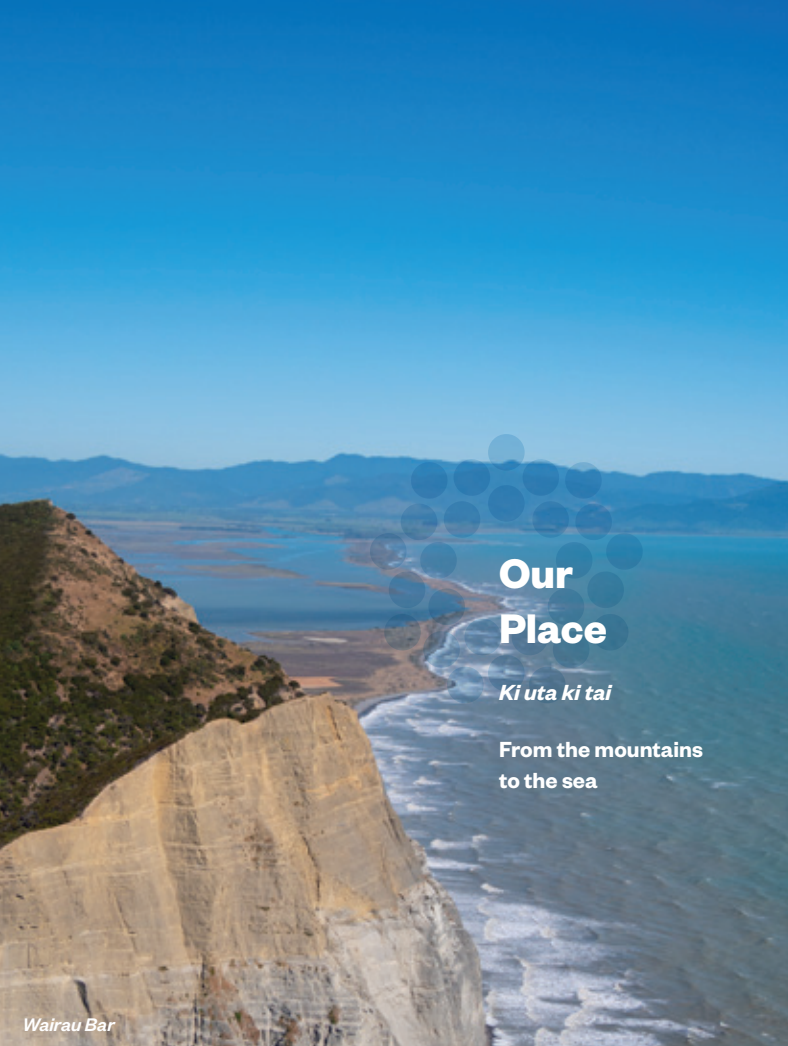
The following list of principles by FTC creates an outline for regenerative tourism management

1. See the whole picture – Tourism happens within a place, an ecosystem or community
2. Use sustainability standards – engage management systems & frameworks

3. Collaborate in destination management – govt, private sector, communities
4. Choose quality over quantity
5. Demand fair income distribution – ensure all benefit evenly
6. Reduce tourism’s burden – who pays for what was previously thought of as free?
7. Redefine economic success – rescope the metrics and measuring bar
8. Mitigate climate impacts – greenhouse gases
9. Close the loop on resources – recycle
10. Contain tourism land use
11. Diversify source markets – e.g., grow domestic
12. Protect sense of place – natural assets, scenic, cultural
13. Operate business responsibly – champion leaders in this field, increase quality

The basic underpinning of regenerative tourism is that it is understood to occur within an ecosystem of natural, social, and cultural elements and interactions. Taking a holistic approach is essential in understanding positive effects (e.g., healing) as well as unintended consequences (e.g., degradation). Everything is connected, and tourism that does not respect or understand feedback loops in the system in which it operates will ultimately erode capital – and with that the wellbeing and health of the system. Regenerative tourism is designed in a way that builds capital and ‘gives back’ to the land and people. This can happen in multiple ways – but system health needs to be the ultimate outcome.⁵

5: Dr Susanne Becken – Department of Conservation



Our Place

Ki uta ki tai

From the mountains to the sea

Wairau Bar



Our Future

Mō ā tātou tamariki, ā, mō ngā uri a muri ake nei

For our children and the descendants that come after us

Ship Cove/Meretoto



Our Community

He waka eke noa

We are all in this together

Picton Foreshore



That the environment IS the heart of our plan

Toitu te marae a Tāne, toitu te marae a Tangaroa, toitu te tangata

Nydia Track

Marlborough – A unique landscape and community setting

Urban and rural based communities nestle and thrive in Marlborough's four valley space, resourced by the precious embracing environment that provides fertile productive and leisure spaces.

The striations of the tectonically moulded valleys, hills and mountains provide some protection from the cooler seasonal southerly weather patterns and provide the unique "hole in the cloud" "Kei puta te Wairau" – forming the unique clear sky and sunny climate.

These clear warm skies are ideal for wine making, salt production, aviation, holidays and boating, growing seafood, and even spying the skies in Waihopai. These are some of the regions most valued unique proof points.

This unique and happy conjunction of latitude and geomorphic landform connects the mountains to the sea via bountiful river valleys, forming the core of our regional environment or Te Taiao – provider of life and feeder of our communities – a harmonious, productive partnership of culture and place.

The regional economy of Marlborough driven by the key pillars of wine, seafood, forestry, and tourism is completely underpinned by the health and future of a sustainable environment. A collective, planned management approach by these and other pillars is essential to maintain Marlborough inc. as a successful region into the future and for generations to come.

Visitation and tourism do not stand isolated or alone, but are intertwined into place, the community, industries, and the environment.

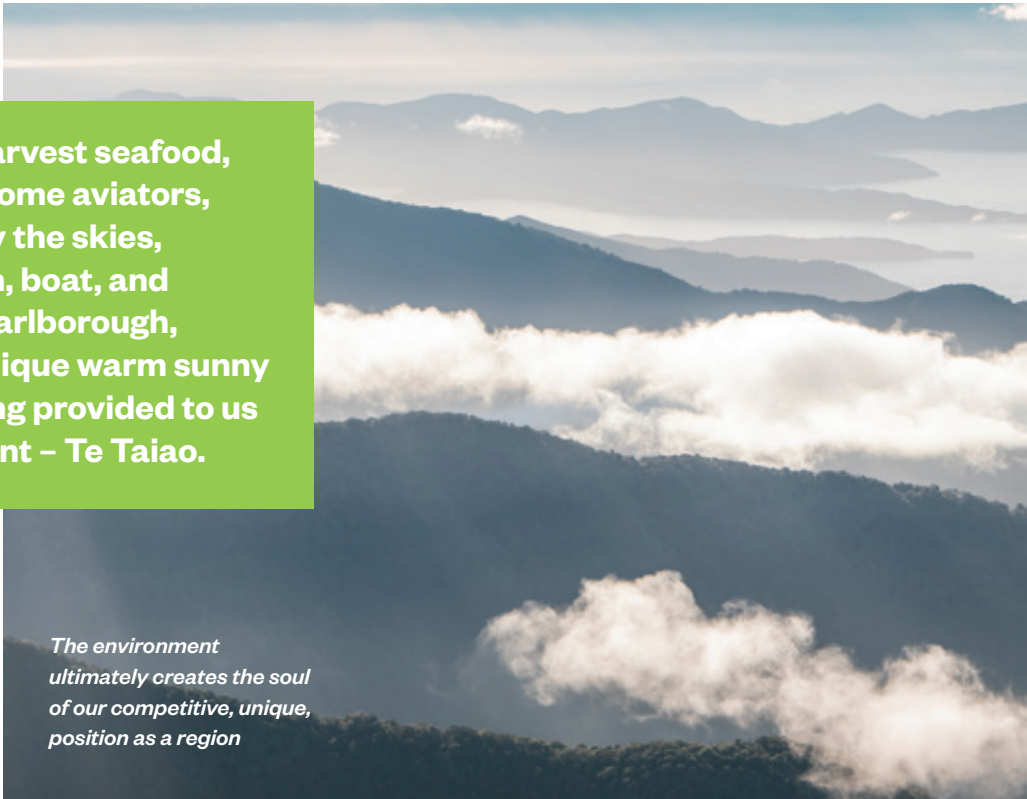
A period of environmental honesty and reflection has arrived for the world – demanded even. Marlborough can, and must, be a leader in this space.

The industry of visitation must also be practical, pragmatic, creative, and profitable delivering a return on capital invested to remain healthy, reliable and intergenerational.

The question of value over volume needs to be considered and managed appropriately, balancing economies of scale with community impacts.

Within this conversation we need to consider the four community well beings, (social, economic, environmental, and cultural) and now additionally, ideas around regenerative tourism – and how that looks now and for future generations.

How does tourism create a happy, well-balanced community while contributing towards the resurrection of lost bio-diversity – a result of over 150 years of localised natural asset stripping by our forebears? This plan directed in part via the regions environmental identity and four valleys cultural spaces framework looks to align the visitor impact and opportunity on a far more immediate and intimate level amongst the local community, iwi, and regional industries – guiding the symbiotic relationship between host and visitor to ensure best economic return, maximum life changing experiences, lifestyle preservation, globally transformative education, authentic narratives, and environmental enhancement.



We grow vines, harvest seafood, produce salt, become aviators, farm the land, spy the skies, holiday, relax, fish, boat, and explore here in Marlborough, because of the unique warm sunny climate and setting provided to us by the environment – Te Taiao.

The environment ultimately creates the soul of our competitive, unique, position as a region

The Marlborough region and its physical parameters

Located on the eastern side of Te Taihū te waka o maui – The northern end of the South Island – and covering an area of 12,484 square kilometres, Marlborough is home to a future focused community embracing the challenge of balancing the needs of the local economy and environment.

A region of verdant fertile soils and uniquely mild climate, Marlborough's global calling card has revolved around the omnipresent Sauvignon Blanc vine, while the sheltered Marlborough Sounds call in the seasonal traveller both local and international.

Situated centrally to the north of Canterbury and Kaikoura, and to the east of Nelson, Marlborough is a short 3 hours by ferry from the capital city of Wellington or a 15 min flight. Auckland is just under 1.5hrs by air.

The region is roughly divided into four geographic spaces – Te Hoiere (Pelorus Valley from Rai Valley to Durville island), Tōtaranui – Queen Charlotte Sound from Anakiwa to Arapaoa Island and beyond, The Wairau Valley from Nelson Lakes to the Wairau Bar, and the Awatere Valley with South Coastal Marlborough. To the northwest lies Richmond Forest Park, with the region protected from the south via the inland Kaikoura's dominated by the brooding protector Tapuae-o-Uenuku at 2,885 metres the highest mountain in New Zealand outside of the Southern Alps.

To the Southwest the high-country station of Molesworth links to the Hurunui via Hanmer Springs, while SHW1 on the eastern coast links down to Kaikoura and further south on to Christchurch.

To the West the Wairau River takes a journey up to the Rainbow Valley, and Nelson Lakes National Park and access to the West Coast beyond.

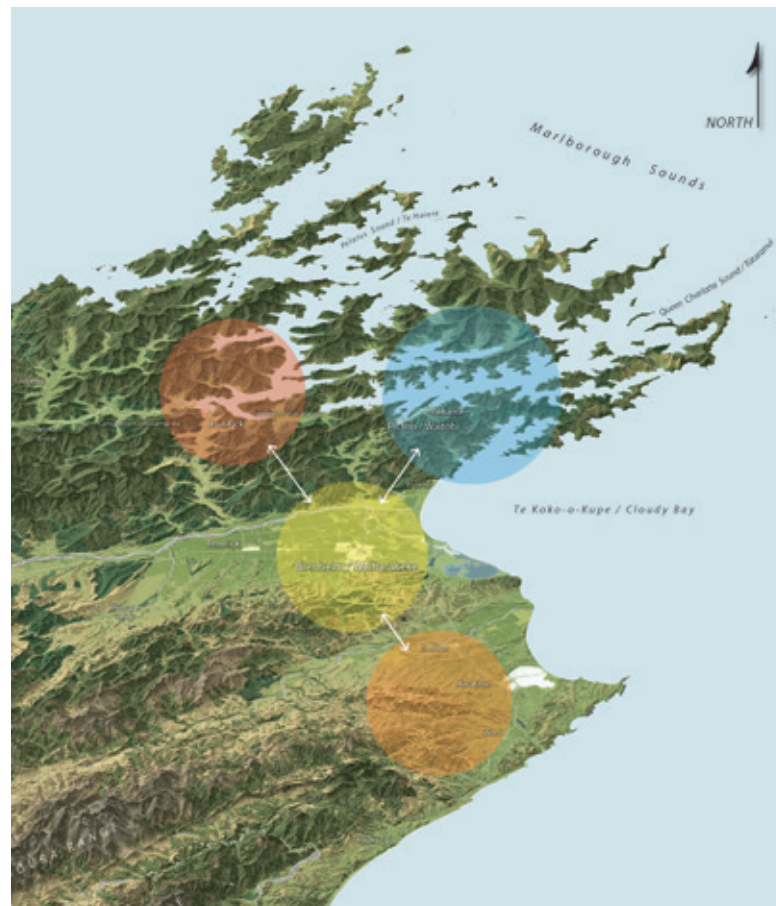
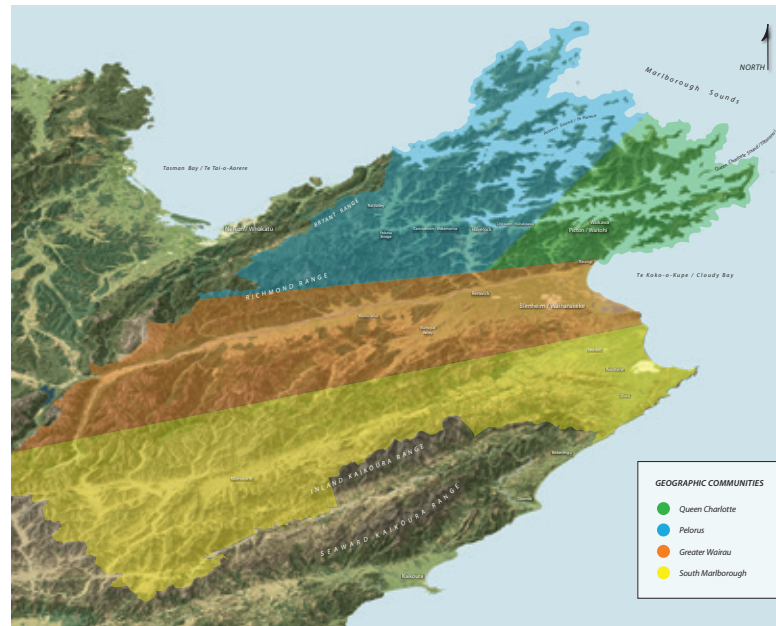
In the lower end of the Wairau and Awatere valleys the landscape opens to reveal the wide stretches of vineyards and associated small towns that the region is famous for.

The Marlborough Sounds – 1500kms in length represent 10% of the New Zealand coastline length offering a plethora of undiscovered journeys. From Okiwi Bay and Durville Island in the west, the towns of Havelock and Picton to the South and to Arapaoa island to the East, the coast space cradles the large and famous Pelorus and Queen Charlotte Sounds.

The region is a central roading axis that links four ways to Christchurch, West Coast, Nelson, and Wellington.

These excellent routes are complimented by Ferry access to Picton, a boutique domestic regional airport near Blenheim, and a rail corridor leading north to south.

As a destination, Marlborough offers a wide range of environments and visitor opportunities – *From the mountains to the sea.*



Marlborough commercialised visitor products and experiences audit 2021

The traditional destination of Marlborough is a combination of visitor attractions, accommodations, tours, and outdoor public spaces. A visitor product audit by Destination Marlborough was undertaken in late 2021 as part of the destination management planning process.

Results as shown in table below show a strong balance of visitor experiences, services and other products located in either the Wairau or Tōtaranui valleys – associated with the traditional Wine and Marlborough sounds experiences, and key visitor service towns of Blenheim and Picton.

Of note are the large numbers of accommodation providers identified – with likely more undiscovered by this process – due to their current lack of website presence. With a total of 210 identified accommodation providers across the region – an opportunity to highlight destination and experience clusters is clear.

In identifying the commercial visitor experience component – 33 cellar doors, charters & cruises seven, visitor activities 25, guided tours three, day tours 41 and food activities 11, the region has at least 120 experience options – again the majority are in the Wairau and Tōtaranui catchments.

In addition are the many publicly available and outdoor visitor experiences – bush walks, campsites and beaches that provide



a broader and accessible experiences for the price conscious domestic or international traveller – and are typical on all regions in New Zealand.

In developing the future of destination Marlborough this visitor product audit revealed a lacking in activations for visitors in the Te Hoiere and Awatere South Marlborough districts.

Type	Awatere South Marlborough	Te Hoiere Pelorus & Havelock	The Wairau Valley	Tōtaranui	Grand T I
Accommodation	10	36	99	65	210
Activity		2	18	5	25
Airline			1	1	2
Campsite	3	25	7	12	47
Cellar Door	2		30	1	33
Charters		3		3	6
Cruise (multiday)				1	1
Food / Activity			11		11
Golf	1	1	3	1	6
Guided tour	1		2		3
Rentals			5	11	16
Tours		8	18	15	41
Transport		6	6	6	18
Walks / Parks	6	15	7	10	38
Grand Total	23	96	207	131	457

Te Taihū Boundary



Marlborough iwi and the wider Te Taihū region

Throughout the Top of the South Island – Te Taihū – there are eight iwi, with borders of individual Takiwā often overlapping.

The environmental perspective of the local iwi forms a vital part of the Marlborough destination narrative with the history, customary practices and more spiritual perspective providing a unique Aotearoa-style approach to facilitate a regenerative visitor experience and potential wider alliance amongst all key industry pillars in the region.

Of note is that while South Marlborough, the Awatere, Ward, and Seddon are in the Marlborough District – the iwi affiliation of this area perhaps also connects with the southern based Ngai Tahu based Rūnanga.

Issues identified with Marlborough iwi as explained by the regional environmental planning process draft document.

- Spiritual and cultural issues of fundamental importance that relate to iwi connection to and use of natural and physical resources.
- Relationship and process issues, including iwi involvement in decision making on resource consent applications and on developing policy to assist in Council's decision making; and
- Issues of significance or concern for both iwi and the wider community, such as adequate waste management, transport issues and the protection of people and property from natural hazards, etc.

Source – Marlborough Environmental plan – draft 2020

Key iwi environmental management concepts to include within the Destination Management Planning framework

The concepts of Kotahitanga – working as one, Whanuangatanga – connection through common experience and reciprocity, and Manaakitanga – the tradition of hospitality, respect and care all echo strongly when iwi engage in the visitor experience. However, underpinning these elements are important culture connections to the environment that underpin iwi world view.

In adopting, embracing, plus engaging these concepts we can better guide the narrative and potential activation of truly authentic regenerative visitor experiences .

Mauri

Life force from wairua – the spirit, or source of existence and all life in the physical world.

In the environment mauri underlies all resources and the total ecosystem, and the wellbeing of the people. Marlborough iwi seek sustainability in resources for this and future generations. Iwi use indicators within the environment to interpret the status of mauri. For example, healthy kai, and other indigenous flora and fauna, resources for cultural use and visibility of important landmarks. These are preserved and recalled through story telling – kōrero pūrākau of whānau and hapū.

Tikanga

Cultural practices developed to maintain mauri. Based on understanding that people belong to the land and as kaitiaki have responsibility to care for it. Tikanga is management of the environment.

Kaitiakitanga

The expression of Māori authority, mana, ethics, and guardianship. The right to access resources but also the responsibility to ensure resources are in a fit state to be passed onto future generations.

Tangata whenua use this as a state of identity and mana.

Kaitiaki – a person with knowledge handed down through generations.

Kaitiakitanga is linked to tino rangatiratanga – customary authority.

Taonga

Identifies elements of value to the tangata whenua and symbolised the Māori approach to environmental management. Can be things like land & water, intellectual, physical, family, and spiritual wellbeing. Also includes sites and resources, tangible, and intangible. Important to cultural and tribal identity.

Ngā Wai

“We are water and water is us” – a powerful taonga. Water quality reflects the health of the land and so the tangata whenua.



“Ki uta ki tai” – (from the mountains to the sea) describes the approach of Marlborough’s tangata whenua iwi to natural resource management. This principle enables a holistic approach to resource management and recognises the relationships and connections between land uses, water quality and quantity, biodiversity, and the sea.

Key environmental touchpoints for iwi

- **Ngā Awa** – Rivers
- **Te Moana** – Sea
- **Ngā Maunga** – Mountains
- **Ngā Whenua** – Land
- **Te Hau** – Air

Mahinga Kai

Customary food gathering, the food, the places, and the methods.

Strong social and cultural meaning, linked strongly to manaakitanga – caring for the needs of guests. Loss of food resources can lead to loss of mana for tangata whenua.

Wāhi tapu

Recognises the tapu of the area, stories, events, history, urupā, waka landing sites and the like. Important and sacred sites or respect, publicly know or unknown.

Source for above sections – Marlborough Environmental plan – draft 2020

The Marlborough destination management planning journey

In late 2020, Destination Marlborough contracted a project manager for the regional destination planning process over a 12-month period, to undertake:

- Review of current and historical visitor market activity – considering Covid – 19 and pre Covid 19 growth and issues
- Development of an industry advisory group.
- Analysis of existing data
- Separate interviews with key stakeholders and Marlborough region and central government agencies.
- Engagement with local iwi partners to seek views and aspirations
- Research around visitor flows – local domestic and international – Dr David Ermen and MarketView analysis
- Development of the district visitor and community geo space model – forming a new narrative and language about visitor opportunity
- Research around existing and potential new visitor experience developments, and development of targeted valid and relevant projects
- Research into key Marlborough village and town visitor delivery as part of a wider regional drive to improve economic returns
- Development of initial draft concept thinking around Destination Management plan for advisory group review
- Development of local media communications soliciting wider community survey views and input

- Development of research piece to verify wider community thinking around future tourism in Marlborough
- Engagement with DOC as a participating partner examining common ground expressed via the DOC Heritage & Visitor Strategy and the Kotahitanga Mō Te Taiao Strategy
- Community consultation meetings – 4 Valleys – seeking input from people in their own environment
- Pursuing and researching new visitor product experience development ideas while working with environmentally sensitive sectors of the community to develop successful cross pollinated projects that serve both the economy and the landscape well.

The Destination planning process – A philosophy of listening to the community

- Listening to our community will create the right balance for the people and the environment
- Aligning with community aspiration around the visitor industry is essential – rural, iwi, urban, remote owners, investors etc.
- Getting the “fit” right for Marlborough – finding the balance, relevant visitor experiences, places, volumes, and markets.
- Understanding the “Marlborough way” – Using “Only Marlborough” as a base and further exploring and updating
- Hearing concerns and opportunity to direct and fine tune wider thinking around the future of tourism in Marlborough.
- Listening to the wider community audience – not just the visitor industry.

Notes on participants

An advisory group was established meeting for the first time in January 2020. Included in the group were	Participating agencies consulted and providing input.	Iwi of Marlborough consulted
Marcus Pickens – Wine Marlborough Carmel Horsley – Scenic Hotels Lindsay Parkinson – Rose Family Estate Jane Orphan – Omaka Aviation Heritage Centre Abby Hutchins – Marlborough Tour Company Margot Ferrier – Department of Conservation Jess Jones – Beachcomber Karyn Delves – Marlborough Convention Centre Rob Burn – The Villa Hostel Maria Baxter – Sounds Connection Barbara Faulls – Smiths Farm Holiday Park + others	<ul style="list-style-type: none"> • Department of Conservation • Blenheim Business Association • Whale Trail Trust • Waka Kotahi • Te Hoiere Catchment Project • South Marlborough Business Association • Picton Smart and Connected Group • Marlborough District Council • Marlborough Regional Skills leadership Group • Pelorus Promotions • Wine Marlborough • Marine Farming Association • Ports of Marlborough 	<ul style="list-style-type: none"> • Ngāti Apa ki to Rā Tō • Ngati Koata • Ngati Kuia • Ngati Rarua • Ngati Toa • Rangitāne o Wairau • Te Ātiawa o Te Waka-a-Māui • Ngati Tahu

Key agency partner plans & strategies that we referred to

1. **Marlborough District Council** – Long Term Plan 2021 – 2031
2. **Department of Conservation** – Visitor And Heritage Strategy
3. **Te Taihū – Intergenerational Strategy** – Being Good Ancestors – Tupuna Pono
4. **Kotahitanga Mō Te Taiao Strategy** (Alliance) – working collectively as one for the natural environment.
5. **Parliamentary Commissioner for the Environment** – Not 100% – but 4 steps closer to sustainable tourism.
6. **Proposed Marlborough Environmental Plan**
7. **The Tourism Futures Taskforce** – Interim and final report December 2020 – We Are Aotearoa.
8. **Ministry for Primary Industries** – Fit for a better World – accelerating our economic potential – 2019
9. **The New Zealand Government Aquaculture Strategy** – 2019
10. **Tourism Sustainability Commitment** – TIA
11. **Tiaki Promise** – TNZ
12. **Qualmark** – Quality assurance programme

See Appendix for further details on each of these plans & strategies

Common themes emerging from this selection of work

1. Environmental protection
2. Participation by iwi & Te Ao Māori principles
3. Interagency partnerships and common vision
4. Intergenerational and regenerative approach
5. Community participation
6. User pays



Te Pātaka o Wairau – Māori Night Market

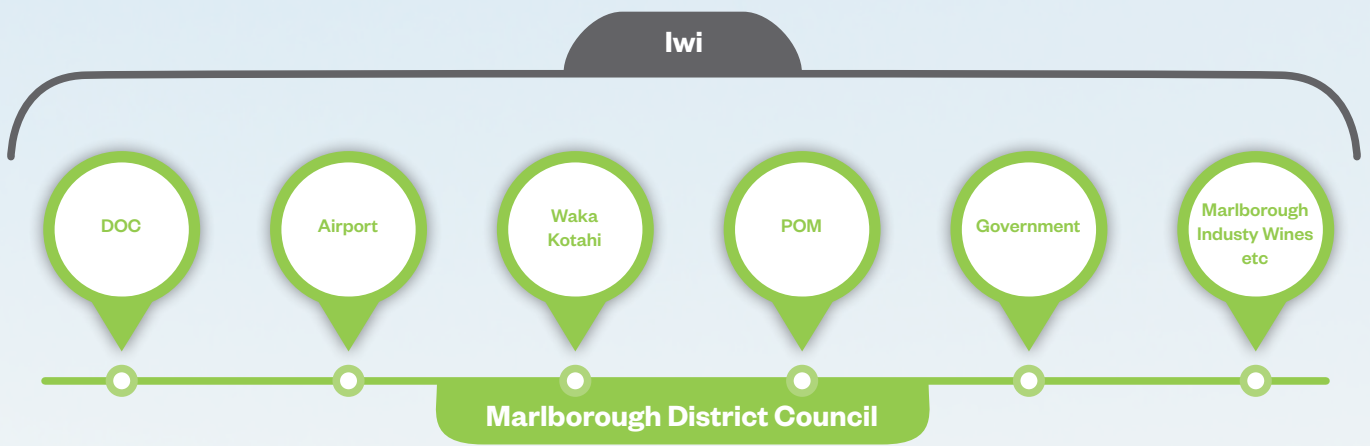


Yealands Estate/MarlboroughNZ

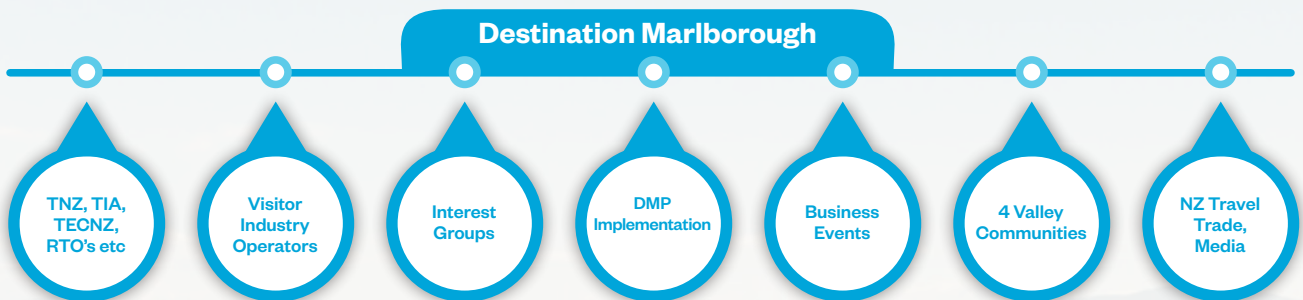
How does the tourism ecosystem work and how does Destination Marlborough fit within this regional structure?

Tourism is an industry that weaves its presence through the wider community and amongst business and industry.

As a council funded organisation, Destination Marlborough reports to the Marlborough District Council providing and facilitating the regional destination marketing role. Traditionally activities include – but not limited to– running the local i-SITE visitor information centres, developing the branding for the regions visitor industry, dealing with travel trade and media, and upskilling locally based tourism businesses. The transition to destination management from destination marketing is a significant shift being undertaken by all 31 nationwide regional tourism organisations. As illustrated Destination Marlborough along with the Marlborough District Council now sit at the heart of a wider industry and community ecosystem. Its objective is to ensure – in addition to the marketing role – great communications with key government agencies, iwi, and communities. The alignment of key infrastructure including roading, air, sea, and land transport within the visitor sector, as well as promoting the development of applicable and relevant visitor experiences which enhance the wider destination appeal. The Destination Management Plan sees Destination Marlborough as a conductor is seen in an orchestra.



Planning



Marlborough Community Consultation Surveys

During 2021 and 2022 the Destination Planning process undertook two community level surveys to collect views and input from the wider region.

The first was an iwi survey that was distributed to all eight iwi who had an interest in the region. The second was a wider community survey that allowed a much wider input into the process.

Iwi based survey findings

- There is a desire for genuine engagements and conversations with the visitor industry
- That iwi are looking for equal voice, joint decision making and to ensure tikanga is not compromised
- There is a desire to share real and accurate stories
- Iwi are seeking visitor and tourism opportunities
- To iwi Manaakitanga is important and brings with it mana
- All would like to see bilingual signage or even just the Māori names – as they are the original names
- The idea of developing place-based story boards and interactive displays was supported
- Iwi seek visitor experiences that are genuinely engaged, open and willing to learn with respect
- Iwi are feeling only consulted when needed. Need to shift the thinking as equal partners under Te Tiriti – tourism has a role

Source – Marlborough iwi survey by Maraka – August 2021



Wider community based survey

- Marlborough residents see value in tourists visiting the region
- Respondents felt having visitors to the region adds vitality to the Marlborough community
- It identified people visiting Marlborough boosts the economy and provides jobs
- Some disagreed that there is enough visitor infrastructure now and for the future
- Feeling was neutral in regard to if there were further environmental and ecological opportunities in tourism
- It was frequently felt there were insufficient cultural or heritage offerings to attract visitors
- There was an agreement that authorities should develop plans to promote and attract visitors through all seasons from both domestic and international markets
- Felt current events are well managed, but unsure if they attracted visitors or were well enough promoted
- There is a strong community awareness of when cruise ships are in port
- Most respondents appreciated cruise ships and what they bought
- Some level of impact by cruise ships indicated
- Tourism is important – 50% had a friend or family member in the visitor industry
- In general respondents did not view overcrowding by visitors as an issue
- Generally found that many popular facilities noted met their needs
- Locals take pride in taking visitors to their favourite spots and enjoying valuable family time
- Respondents valued hidden gems like Queen Charlotte Sound, Omaka, Marfells and Ward Beaches, Pelorus Bridge
- There was environmental sensitivity felt around Pelorus Bridge, Queen Charlotte Sound, Marfells & Ward Beaches

Most popular locations visited by locals in the last 2 years

60%	40%	37%	19%	18%	16%	16%	15%
Picton Waterfront	Wineries	Queen Charlotte Sound	ASB Theatre	Marfells or Ward Beach	Omaka Aviation Centre	Pelorus Bridge	Queen Charlotte Track

Source – Community Survey by Research Insights – 2021-22



Awatere Valley

Key identified unique visitor centric strengths of the Marlborough region

1. **Wine in Marlborough** – producing 75%+ of New Zealand’s wine, the global capital for Sauvignon Blanc
2. **Seafood in Marlborough** – This is the largest marine farming production region in New Zealand – only possible due to the unique environment of the Marlborough Sounds
3. **The Marlborough Sounds** – 1500kms of protected safe coastline to explore and enjoy – important in NZ history, a boating paradise, home to many seafood producers, multiple bays and islands for exploration, walking & mountain bike tracks, commercial accommodation, and holiday homes.
4. **Aviation** – A unique place in New Zealand aviation, a story told via Omaka Aviation Heritage Centre, natural fine weather environment, aviation infrastructure, aviation heritage community, airbase, and airport – enabling exploration from the mountains and valleys to the sounds and sea.
5. **Heritage Arts & Culture** – a vast and long heritage dating back hundreds of years including eight iwi, and the early arrival of colonial settlers who have collectively contributed towards our community of today. Sites like the Wairau bar, Meretoto/Ship Cove, Molesworth and Tapuae-o-uenuku are possible narrative opportunities to be explored. A thriving local arts community.
6. **The natural Marlborough region environment** – conservation lands, coastline, and marine settings – providing a unique range of geology, flora, fauna. Lesser-known spots like Cape Campbell, Mt Richmond Park, Lake Chalice, the upper Rai, and Rainbow valleys are all examples of places with future potential.
7. **The regional climate** – formed by a unique alliance of longitude, hill & mountain terrain, sheltered sounds, bays, and wide sunny valleys.
8. **The central location** – of Marlborough within its geographic position in New Zealand. As a mid-located region, this allows close access to key markets from both directions – often visited as a loop or part itinerary – not always a go-to and turn around to go home location.

Potential risks to the destination of Marlborough

The destination planning process with community feedback has revealed a number of potential weaknesses and exposures.

1. The large corporatisation of primary products including wine and seafood resulting in visitors feeling somewhat disconnected with a lower ratio of boutique, artisan experiences easily available.
2. Environmental pressure applied by traditional primary production and pre Covid visitation volumes could reduce the regional appeal.
3. The general comparative lack of active engagement by the local mana whenua via the eight regional iwi partners in the visitor experience as part of a wider New Zealand cultural journey. Demands on local iwi throughout Aotearoa to engage with local planning and legislative obligations under Te Tiriti as well as the need to address more fundamental issues including employment, health and housing have often seen visitor engagement opportunities further down a long list of priorities.
4. The exposure and risk for the destination by a narrow product offering like wine and the Marlborough Sounds could leave the regional industry exposed if further heavy weather events or vine disease leave the region without these options.
5. The loss of community social licence in the event of high cruise visitor volumes and freedom camping abuse.
6. Future natural events like earthquakes and sea rise due to global warming, wetter summers, and warmer winters.
7. Over dependence on the summer-time Canterbury market.
8. The international visitor market versus domestic – should ongoing pandemic and global disruption reduce international visitation long-term.
9. Ongoing seasonally based visitor gaps that reduce long term investment and maintenance of current infrastructure.
10. Traditional style of regional marketing has limited length of stay and regional dispersal
11. Aging regional infrastructure, which misaligns with future visitor aspirations e.g., too many old motels and not enough immersive experience accommodations.
12. As the lesser of a number of key industries in Marlborough, tourism can suffer from under exposure in the eye of the local community leading to lower investment and public dissonance.

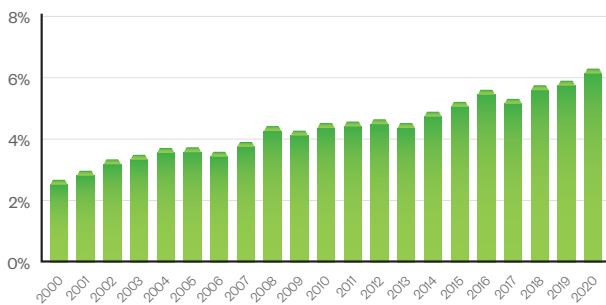
Key Marlborough tourism industry focused data

As an industry that is immersed into the local community, economy and environment, the full worth of visitation can be difficult to measure given the flow on effects through secondary spend and employment. Unlike wine, wood or seafood, revenue generated by visitation is less tangible and so often poorly understood.

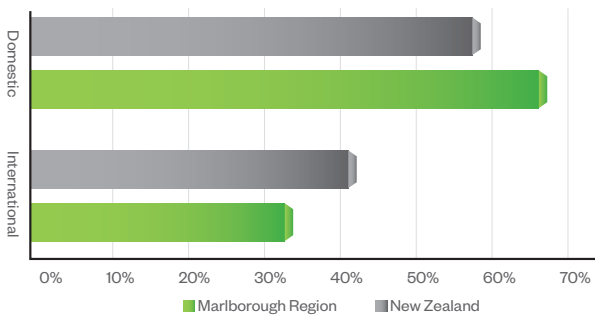
Marlborough visitor spend and impact on GDP

In 2020 tourism's contribution towards total regional GDP was 6.3% with a total spend of \$411m.

Tourism share of total GDP, 2000 – 2020



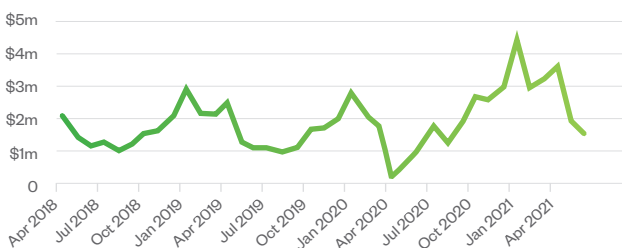
Contribution to tourism expenditure by broad type – 2020



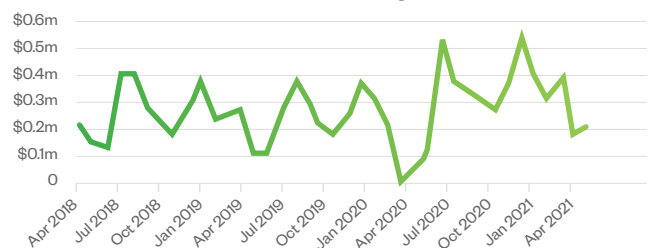
Marlborough individual sector spend based on card transaction data – 2018–2021

Source Statistics New Zealand

Marlborough card transaction spend – Accommodation 2018–2021



Marlborough Card Transactions Culture, Recreation & Gambling 2018–2021



Total tourism expenditure Marlborough region – 2020

Category	Marlborough Region		New Zealand	
	Expenditure	% of total	Expenditure	% of total
Other passenger transport	\$103m	25.1%	\$4,318m	14.4%
Retail sales – other	\$64.8m	15.8%	\$7,934m	26.5%
Food & beverage serving services	\$62.3m	15.2%	\$4,833m	16.2%
Accommodation services	\$58.1m	14.1%	\$3,257m	10.9%
Retail sales – alcohol, food & beverages	\$47.5m	11.6%	\$2,613m	8.7%
Retail sales – fuel & other automotive products	\$42.1m	10.2%	\$2,227m	7.5%
Other tourism products	\$23.4m	5.7%	\$3,589m	12.0%
Cultural, recreation & gambling services	\$9.9m	2.4%	\$1,113m	3.7%
TOTAL	\$411m	100%	\$28,885m	100%

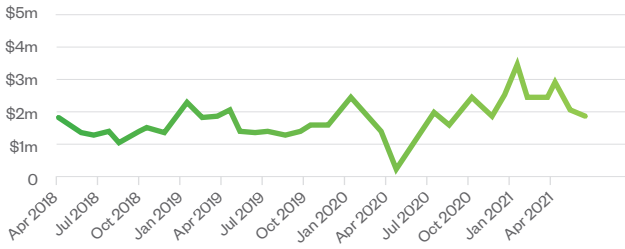
Tourism employment in Marlborough in 2020 was 3234 or 11.5% of all regional employment

Source <https://ecoprofile.infometrics.co.nz/Marlborough%2bRegion/Tourism/TourismGdp>

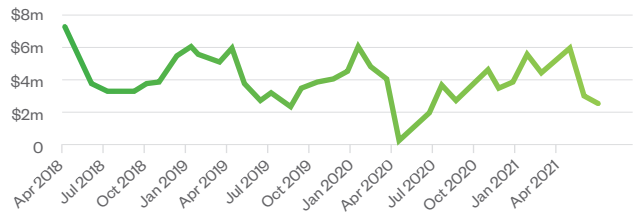
Marlborough as compared to the average New Zealand region caters for a far higher level of domestic visitors as a percentage of overall travellers. This is likely due to a combination of access challenges, lack of commissionable visitor experiences, and the traditional annual pilgrimage by kiwis especially from Canterbury to visit over the summer season for water, bach and boat holidays.

Continued on page 22

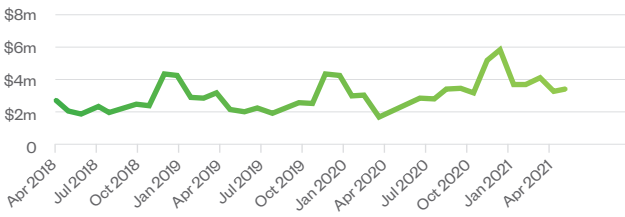
Marlborough Card Transactions
Food & Beverage Services 2018–2021



Marlborough Card Transactions
Other Transport 2018–2021



Marlborough Card Transactions
Retail sales – alcohol, food, and beverages 2018–2021



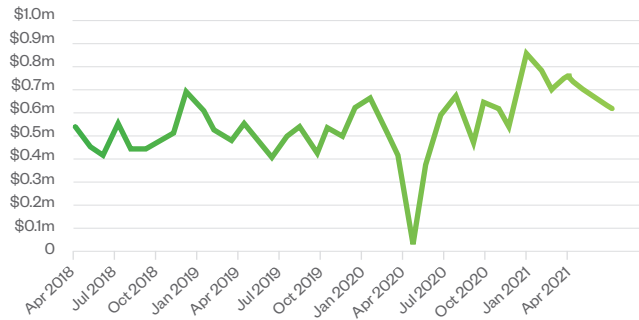
Marlborough Card Transactions
Retail Fuel and Automotive Purchases 2018–2021



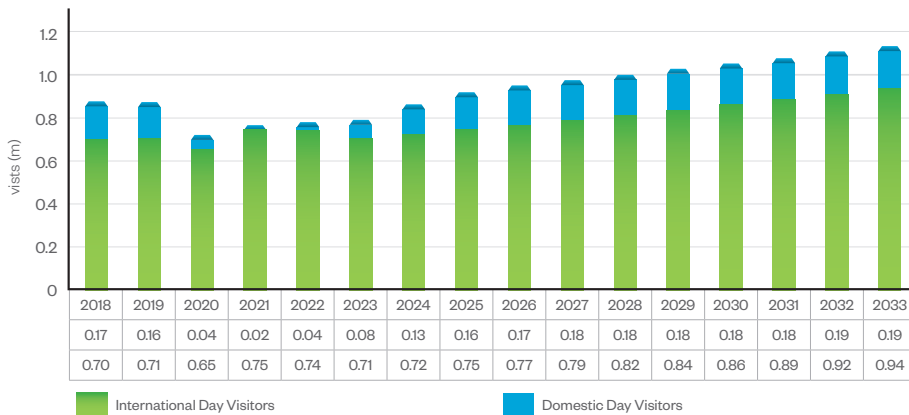
Marlborough Card Transactions Culture
Other Retail Sales 2018–2021



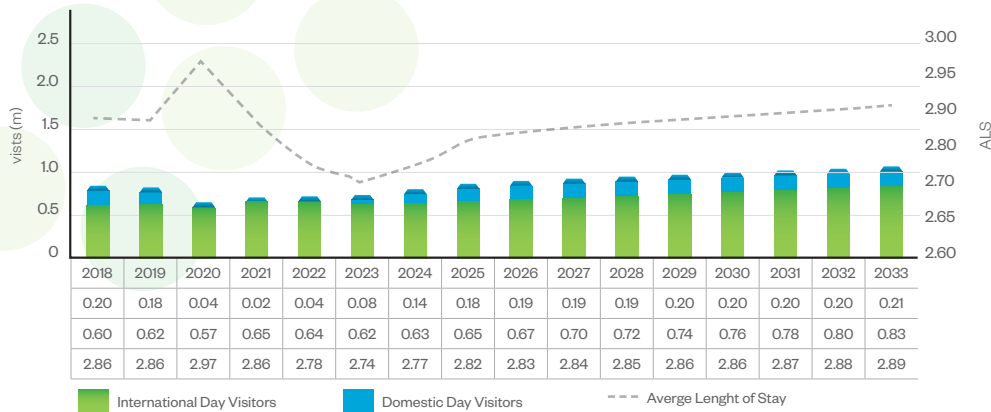
Marlborough Card Transactions
Other Tourism Products 2018–2021



Forecasted International and Domestic Overnight Visitors in Marlborough 2018–2033



Forecasted International and Domestic Overnight Visitors & Average Length of Stay Marlborough 2018–2033



Source – Horwath HTL Ltd – Pre – feasibility study for Blenheim food & wine market 2022

Destination seasonality

Visitation to Marlborough has continued for many years to largely focus around a summer/ winter high and low season rotation.

The type and style of visitor attractions – being somewhat focused on wine and the Marlborough Sounds lend themselves to a summer focused demand model. In a pre-Covid state, international visitor markets also exhibited a peak summer pattern aligned with New Zealand and southern hemisphere global travel. The development of the cruise market segment has also exacerbated this issues in the last 10 years, with a high summer focus of cruise ship arrivals in Picton aligning with high summer season.

In recent years, infrastructure development around the business event market has seen some evolution of winter & shoulder season conference and meeting visitation.

Moving into the future and considering the seasonal impact on our community and workers in the visitor industry, the peak summer season environmental impacts, and the utilisation of plant and capital invested in tourism infrastructure, there remains an urgent need to address some key concerns.

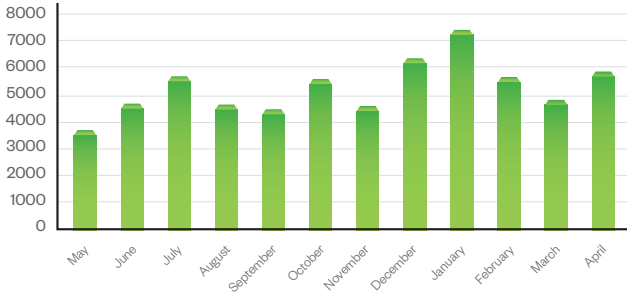
1. How to handle the very high impacts of seasonal domestic visitors to the region – especially in the Marlborough Sounds – overfishing, water quality and impacts on local community wellbeing – crowded boat ramps, parks usage etc.
2. How to extend the current strong demand summer season to take in more travel over the shoulder seasons – extending staff requirements and summer-based visitor infrastructure use.
3. How to grow the quieter winter months between April and October that allows further downward spend in the community and utilisation of unique assets like the Marlborough Event Centre, and ongoing use of summer-based assets like coaches and boats. Also, the need to assist the growth in annual average accommodation occupancy in hotels, motels, and other forms of commercial accommodation.



Seasonal domestic visitation

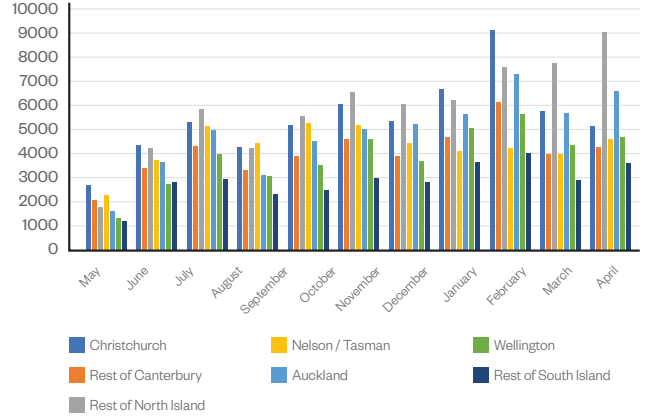
During the recent 2020–21 pandemic and boarder closures, New Zealand has relied solely on domestic visitation. Post lock down in March–April 2020, New Zealanders were keen to travel in June and July. Travel demand in Marlborough naturally peaked in January, but overall broader seasonal trends seem to still exist. A warm autumn and a run of long public holiday weekends, easter and school holidays have assisted with strong early 2021 domestic travel.

Monthly Average – Daily Domestic Visitors present in Marlborough at noon during 2020-21



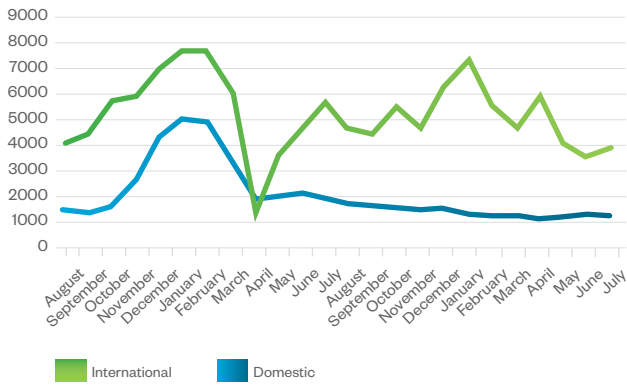
source – Dataventures cell phone user data

Accommodation & hospitality eftpos card spend in Blenheim town by NZ domestic visitors 2020-21



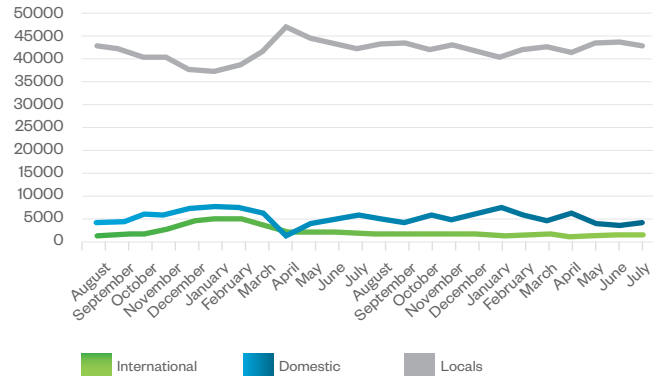
source – Info metrics card spend data

International and domestic seasonal visitor patterns for Marlborough region between 2019 – 2021



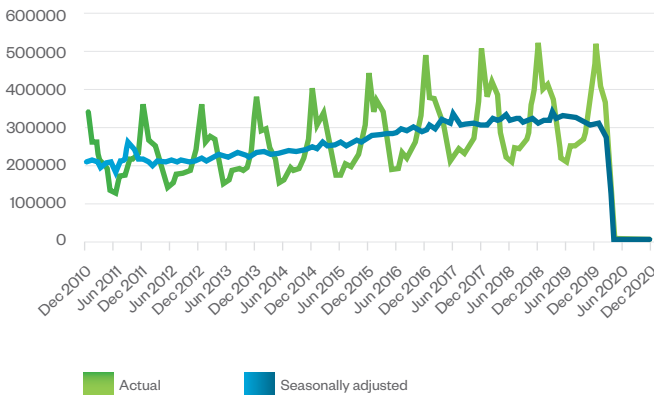
source – Dataventures – cell phone data – at noon monthly averages.

International and domestic seasonal visitor patterns for Marlborough region between 2019 – 2021 INCLUDING LOCAL POPULATION



source – Dataventures – cell phone data – at noon monthly averages.

International Visitor Seasonal Arrival Patterns into New Zealand 2010 – 2020



source – Stats NZ

Marlborough – A destination narrative shift

Building on the established and well executed Marlborough Story messages that are in the market space via Brilliant Every Day campaign.

The destination of Marlborough now has the opportunity via community engagement and product development to shift the focus of messaging to a more sophisticated level of depth and engagement.

By activating visitor community geo-spaces within the four valleys, Marlborough can broaden the offering and shift from being product focused – Sounds & Wine, to a region of four spaces of exploration. This offering is immersed in geographic spaces, amongst the community, which offer unique local experiences that include – for example – wine and sounds engagements. This ability to explore the four districts will be backed by three or four quality town hub locations that offer key infrastructure services and become experiences in their own right – a visitor precinct in Blenheim or developed visitor offerings in Havelock, Picton – and in time, Seddon.

This “Marlborough Inc” concept is a collective idea combining all industry sectors – the majority of which are of the primary sector, uniting under a common banner which seeks to enhance and manage the local environment for the benefit of the community, consumer & visitors, and the sectors themselves.

The name given in this plan – “Marlborough inc” to this idea is irrelevant – as its stands to communicate the idea only at this stage – however the future embodiment of this concept through a further developed “Marlborough Story” is the likely outcome.

By the further creation of new visitor experiences – e.g. the extension to the Omaka Heritage Aviation Centre (aviation as theme), development of a seafood experience in Havelock (seafood, food & wine), the development of a Rangitane Cultural centre in Blenheim (enhancement of one part of the local iwi history), evolution of a Blenheim CBD visitor precinct (urban evening security & visitor services), or evolution of Picton into a true resort town, we are able to amplify the core selling points – and convert these to tangible visitor experiences that align with core community values. These new experiences will enhance the “Four Valleys” proposition and encourage longer stay, higher spend and wider spread of economic benefits in all corners of the region.

Narrative evolution summary:

- Adoption of the four-valley community visitor geo-spaces as a core concept matching visitor experience, community, and environmental overlay
- Supporting and developing towns and villages that provide an attractive home base to explore from pursuing a longer stay and hub & spoke strategy
- Leading a collective effort across all primary sectors to create a common Marlborough environmental message
- Cultivate a seamless understanding between visitor industry, iwi, DOC and MDC about the core values, narrative, and place management

- Development of new and regionally appropriate visitor experiences that leverage the existing strengths and places
- Activate, promote, and educate regenerative community practices throughout the visitor industry in Marlborough
- Regionally spread themed boutique accommodation clusters to match USP's – wine, sounds, whale trail, and farm based

Marlborough specific regional geo-spaces, visitor flows and the hub & spoke opportunity

The Marlborough region is made up of four key sub communities, which exist within four clear valley-based geo spaces.

These geo-spaces and associated communities offer the setting for unique visitor experiences and therefore, any destination management planning needs to recognise the very direct relationship in these spaces between the community, visitor, and the immediate environment.

Understanding that visitors seek out authentic experiences that allow close interaction with local communities which in turn are wrapped within the localised and immediate environment, creates a closer more meaningful exchange and the mutual realisation that care of the spaces and environment is a joint effort. Globally visitors are coming to appreciate more the need to give back and return something to the community and environment that provides these meaningful and life enhancing experiences, that they leave the place better than they found it.

By localising the visitor experiences, within the community realm of day-to-day life – where locals shop, play sports, go to school and commune, brings greater sense of ownership, responsibility and pride when engaging with visitors – that “this place” matters. Locals are then able to identify what level or style of visitation industry is best for their needs immediate impacting localised needs and develop visitor experiences that sit within accepted environmental limitations.

Visitors very quickly notice the authenticity and honesty around experiences delivered by the local smaller community and attach a higher value to these genuine experiences, often attached to lower volume, higher yielding offerings.

Marlborough has traditionally often been positioned as a “wine” – or product-based destination, rather than a place of explorations, communities, and multiple options. By creating a sense of place, space, and loop or hub itineraries with the region, a sense of depth and confidence to invest in a longer stay option is promoted. Depth of character, alternative options for varied tastes.

By illuminating the town or village home base – Blenheim, Picton, Havelock, even Seddon, the sense of “base” is promoted, confidently sending the message that the region offers the essential creature comforts of travel – accommodation, food & beverage, security, information, transport options etc. These are key determinants of travel decisions making – is a potential visitor confident enough about the offering to risk time and money to stay here as compared to other options? Travel is the tension between the known security and the human need to explore and discover, successful destinations provide both.

Marlborough Destination Management Plan – Findings, Strategies and Activations

The Marlborough Destination Management Plan journey has culminated in the following three outcomes:

1.

Core findings and recommendations – a wider holistic view of key directions and core agendas

2.

18 Key Marlborough Destination Management Plan sub strategies – the basis from which to create a roadmap of activations moving forward with the identification of key strategies that will drive the main outcomes from the core findings

3.

9 new specific targeted visitor product and infrastructure plans to deliver aligned projects that feed into the wider umbrella ambition and physically deliver a future destination to visitors and the local community

The framework for this plan has been driven by the wider ambition of the Minister of Tourism and relating to the MBIE destination planning guidelines.

The Marlborough Destination Management Plan seeks to deliver on these via:

1

That viewing the visitor offering through a wider environmental, landscape, and climatic lens will improve regional regenerational outcomes

2

Aligning with all key local community, industry, and government agencies to ensure the future of visitation to the region is understood, recognised, planned for, and funded appropriately

3

That the destination narrative and forward future developments reflect the aspirations of the local community, iwi, and regional stakeholders

4

That via the process of developing a wider range of visitor experiences the philosophy of regenerative tourism and where possible visitor contribution (user pays) are included in the thinking

5

That future structures of governance – i.e., the four valleys community approach – will ensure ongoing consultation of the wider Marlborough populations

Core findings and recommendations:



1 That the environment sits at the heart of this regional and community focused plan.

2 The region of Marlborough needs to embrace and continue to play to its natural climate advantages provided by unique landscapes and the communities within.



3 That adopting a wider iwi cultural partnership approach to environmental management will provide a regenerative framework for future tourism.



The regional narrative is developed further to hang from a “four valleys & towns” concept to create a healthier visitor industry, enhancing length of stay, visitor spend, reduction of environmental impact, and spread of economic benefits.

5 That the visitor destination of Marlborough sits within a much larger “Marlborough inc” cross industry pillar regional brand story and narrative needs to reflect this. We need to collectively leverage our industry sector advantages aligning visitation, viticulture, and marine farming to a higher level.

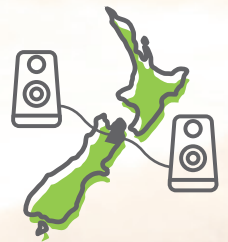


6 That tourism is a consumer of resources and by this recognition we can measure the impact, care for the environment, ensure visitors pay their way and enhance community licence. Tourism is a primary industry operating within a limited environmental framework.

7 Marlborough should embrace and share its many important iwi based tales from the past promoting te reo as much as possible and encouraging visitors to explore an authentic culture and the natural environment via newly created visitor experiences.

TE REO MĀORI

8 The Marlborough region needs to amplify its convenient central geographic position, leveraging seasonality, transport access, and repeat visitation.



9 There is the need for further infrastructure investment into accommodation, central town visitor precincts, and coordination of wider tourist services to provide clarity of offering, and security during visitor decision making.



10 New visitor product development opportunities abound, however those that align with the regional strengths should be promoted and developed firstly.





18 key local tourism industry strategies identified by the Marlborough Destination Management Plan

When undertaking research, partner and stakeholder engagement, many key issues, opportunities, and strategies were revealed, forming the backbone of actions moving forward to coordinate existing visitor segments, align community wishes, fill visitor experience gaps, develop new visitor products, and ensure environmental resilience.

Initial project implementation focus

1

Wine visitor strategy – working collectively to improve the visitor experience

3

Continuing the journey to further develop meaningful iwi partnerships and incorporation of Te Ao Māori based land stewardship practices when applied to visitor experiences and impacts

5

South Marlborough tourism business development plan – assisting with new visitor experience developments and community engagement

2

Cycle visitor strategy – linking and developing existing cycleway opportunities

4

Cruise management strategy – preparing for the return of cruise, reduction of impact and fair regional dispersal of the cruise opportunity

6

Seafood visitor experience, access improvement, and product development strategy

Ongoing and medium-term elements

7

Business and events seasonality strategy – focusing on shoulder season events and winter conference markets

9

Marlborough tourism environmental framework and guidelines programme – including carbon reduction and regenerative community outcomes

11

Participation on a regional level via partnership with other major primary industry segments to amplify a cohesive wider “Marlborough inc.” offering that maximises our regions unique elements

8

Development of valley-based tourism community groups and implementation of subsequent wider spoked multiday regional exploration itineraries linking to town hubs

10

Queen Charlotte Track infrastructure resilience and additional track options to ensure year round delivery and protect associated accommodation and transport providers

Longer term larger project developments and directional change

12

Blenheim, Picton & Havelock town visitor experience improvement

14

Development of local industry education and career path opportunities to address staff shortages, skill levels, service delivery and improve wage and salary issues in the sector

16

Marlborough inter-regional partnerships strategy – development of destinational initiatives throughout Te Taihū, Kaikoura, Te Waipounamu and Aotearoa to leverage shared resources

13

Culture Heritage & Arts – Development of the shared community narrative around heritage and creativity

15

Working with local iwi, Waka Kotahi, and MDC to improve visitor roading, signage, regional narrative interpretation, cycle access and safety

17

Transport access strategy – leveraging our central location to maximise air, rail, road, ferry, cycle, and walking opportunities

The Marlborough Sounds Opportunities Project – taking a larger longer-term view inclusive of all parties.

18

Marlborough Sounds Opportunity Project – Creating a future vision



Targeted new visitor product & infrastructure projects

1

Complete – Omaka Aviation Heritage Centre product development and expansion to drive family, off season, and business event markets.

4

Partner – With local iwi, communities, and DOC to explore localised valley based regenerative tourism experience developments – wrapping around natural environment, flora, and fauna opportunities– e.g., long tail bat visitor experience in Te Hoiere.

7

Flesh out – Aviation as a wider visitor experience, engage with commercial and vintage aviation groups and tour operators. Leverage climate and existing infrastructure, promoting tours, events, conferences, education, and agency partnerships. Exploring new visitor experiences/tours built on aviation

2

Champion – Development of Blenheim Rangitāne Culture centre and Wairau Bar experience – combining with other activations to grow visitation to central Blenheim.

5

Coordinate and advise – identifying and activating future potential visitor experiences, spaces, and precincts in central Blenheim. e.g., proposed wine & food market offering.

8

Expand – Regional accommodation offering via themed clusters vineyard, Sounds based, Whale Trail opportunities, South Marlborough New 4–star hotel in central Blenheim.

3

Transform – A wider visitor development plan for Waitohi – Picton – from gateway to destination – aligning new visitor experiences, town spaces, ferry terminal facilities, accommodation options, and better connectivity to the wider Tōtaranui – Queen Charlotte Sound.

6

Develop – Seafood–based visitor experiences based around Havelock and Pelorus. Connecting seafood and wine experiences, transforming Havelock from drive–by to destination.

9

Embrace – new technologies to enable better tourism business management – e.g., wine tours, cellar door staffing, Ebike cycle tours, electric cars etc.

With reference to the MBIE provided destination guidelines, this plan has:



Used data and community consultancy – identified a vision forward



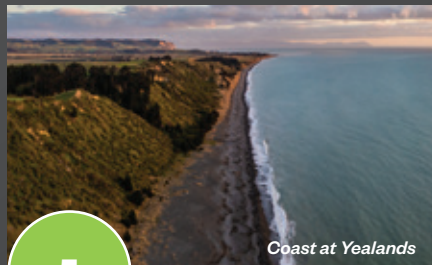
Evolved the current regional narrative to a new level – expanding on our story and identifying aligned markets



Identified new appropriate visitor experience and product developments to align and accentuate the regional narrative



Researched visitor access issues and a wide range of opportunities



Confirmed the regional tourism planning structure and how the various players and stakeholders fit together to achieve the wider goals



Constructed recommendations, strategies and projects that provide a clear direction forward



Formed a view around the environmental direction underpinned by the Te Ao Māori approach that seeks to partner with local iwi and the Department of Conservation, align with wider regional primary industry, begin to measure impacts, and create new visitor experiences that can create regenerative outcomes



Sought input from visitor industry, local community, iwi, and wider agencies to ensure the pathway forward is clear



Identified the measurements that need to be put in place to gauge success – including reduction of carbon emissions, increased spend and length of stay, reduction of seasonality, improvement of access, improvement of quality of visitor experience, reduction of risk and improvement of industry resilience, and expanding the visitor offering to include presently non activated opportunities

Marlborough Destination Management Plan

SUMMARY DOCUMENT

2022–2032

The full Marlborough Destination Management Plan (135 pages) provides a considerably more comprehensive and in-depth approach than this summary document (32 pages).

The full document will be made available on the Destination Marlborough website. Please contact Destination Marlborough directly for further details on any other points included in this brief overview

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