

Tātaki  
Auckland  
Unlimited



A  
AUCKLAND  
TĀMAKI MAKĀURAU

A NEW DIRECTION FOR MATAKANA  
COAST'S VISITOR ECONOMY

# MATAKANA COAST DESTINATION MANAGEMENT PLAN



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**staffordstrategy.com.au    ACN 079 055 100    ABN 34 565120 454**

**SYDNEY OFFICE**

A 3.02 POST 46a MacLeay Street, Potts Point NSW 2011, Australia  
E [sydney@staffordstrategy.com.au](mailto:sydney@staffordstrategy.com.au)  
P +61 2 9331 6222

**MELBOURNE OFFICE**

A 36 Cobden Street North Melbourne VIC 3051, Australia  
E [melbourne@staffordstrategy.com.au](mailto:melbourne@staffordstrategy.com.au)  
P +61 416 200 458

**BRISBANE OFFICE**

A PO BOX 265 Sandgate QLD 4017, Australia  
E [brisbane@staffordstrategy.com.au](mailto:brisbane@staffordstrategy.com.au)  
P +61 417 721 342

**WELLINGTON OFFICE**

A Level 1, 2 Broderick Road, Johnsonville 6037, Wellington, NZ  
E [wellington@staffordstrategy.co.nz](mailto:wellington@staffordstrategy.co.nz)  
P +64 21 337 377

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# Abbreviations & Definitions

AT	Auckland Transport
CAPEX	Capital Expenditure
COVID-19	Coronavirus disease
DMP	Destination management plan
DOC	Department of Conservation
F&B	Food and beverage
IVS	International Visitor Survey
MBIE	Ministry of Business, Innovation & Employment
LDMP	Localised Destination Management Plan
NPS	Net Promoter Score
NZTA	Waka Kotahi NZ Transport Agency
TAU	Tātaki Auckland Unlimited
TLA	Territorial Local Authority
TNZ	Tourism New Zealand
YE	Year End

# Introduction Note from Nick Hill

In 2018, the *Destination AKL 2025* strategy was launched by Tātaki Auckland Unlimited (then Auckland, Tourism, Events and Economic Development), establishing a unifying vision for Tāmaki Makaurau Auckland's visitor economy, and ensuring it contributes to a sustainable future for the region we call home.

*Destination AKL 2025* articulated the importance of 'destination management', and the need to plan to manage the impact of our visitor economy in a way that ensures Auckland will be in a stronger position not just economically, but also socially and environmentally.

Areas within the Auckland region that enjoy the benefits of the visitor economy - including Matakana Coast, the local area for which this plan has been created - are all too aware that balance must be achieved if we are to achieve this.

While Matakana Coast does not face the pressures from visitor numbers that other local regions within Auckland face - such as Waiheke Island, for example - it is important to look to the future and plan accordingly. This Local Destination Management Plan aims to do just that.

Tātaki Auckland Unlimited role as the region's economic and cultural agency, and as a connector and facilitator within the destination industry has meant we are well placed to provide the cross-sector leadership destination management requires. Destination management cannot however be achieved by one organisation alone.

This Local Destination Management Plan (LDMP) has been prepared for the Matakana Coast destination sector by Tātaki Auckland Unlimited. It focuses on the visitor economy only and identifies ways to sustainably manage Matakana Coast as a destination.

Genuine collaboration between many groups - mana whenua, the Matakana Coast community, and the public and private sectors amongst them - will be key. The opportunity to work together to preserve what makes Matakana Coast special, while ensuring the benefits of the visitor economy continue to be enjoyed, is one we are excited to undertake.

## **Nick Hill**

Chief Executive

Tātaki Auckland Unlimited

# Part 1: Executive Summary

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## 1.1. Matakana Coast: A Destination for Discovery

Matakana Coast is home to a string of charming settlements, from Pūhoi in the south, to culturally rich Te Hana in the north. Each settlement possesses its own character and atmosphere, which make them appealing to visitors from across Tāmaki Makaurau Auckland, Aotearoa New Zealand and abroad.

Located less than an hour north of central Auckland, Matakana Coast has been a firm favourite with Aucklanders looking for a weekend away for many years. With thriving artisanal food and beverages and arts scenes, it is also fast becoming an attractive destination for domestic and international travellers too.

Matakana Coast is home to New Zealand's oldest marine reserve at Goat Island; the country's first farmers' market, Matakana Village Farmers' Market; some of Tāmaki Makaurau Auckland's most pristine beaches; and historic Kawau Island, one of the largest islands in the Hauraki Gulf.

These are some of the many attractions that have earned Matakana Coast a reputation as being 'a destination for discovery'. This will be assisted by the new Ara Tūhono – Pūhoi to Warkworth motorway, which will extend the Northern Motorway (SH1) from Johnstones Hill Tunnels to just north of Warkworth.

Ara Tūhono, which means 'a connecting pathway', is an apt name. There is concern in some quarters of the destination sector (retail and hospitality included) around the changes to regional visitor flows that this development might encourage, and to Warkworth in particular.

Despite this concern, it is anticipated that Warkworth will see significant residential and employment growth over the next 30 years. Around 1100 hectares earmarked as future urban land equating to about 7500 additional dwellings and approximately 20,000 more people in addition to the current population of 9000.<sup>1</sup>

With all this development the community and business operating in this region are wanting to ensure that the visitor economy is considered with the plans so as not to experience the impacts of over tourism that are being seen and felt in other parts of Tāmaki Makaurau.

## 1.2. Aspirations for the Visitor Economy

The challenges of recent years, including the COVID-19 pandemic, international border closures and climate change impacts, have resulted in a substantial shift in the narrative of tourism and the visitor economy globally. Along with this, the way domestic and international visitors seek, plan, provide and consume travel, business and holiday experiences have completely changed.

There has also been a considerable shift in the tourism narrative across New Zealand, with far greater emphasis placed on destination management and ensuring that "tourism growth [is] productive, sustainable and inclusive".<sup>2</sup>

This Localised Destination Management Plan (LDMP) is set within this dynamic environment, taking a local view, while being cognisant of the broader visitor economy planning work being undertaken by Tātaki Auckland Unlimited and central government.

This LDMP recognises the aspirations for Matakana Coast's visitor economy that the consultation and stakeholder survey findings clearly provided (which are summarised in Section 2.5.2 on p.16). This consultation illustrated the need for an integrated approach that:

- Supports sustainable growth for the region's visitor economy
- Encourages community support and ongoing host community social license for the visitor economy
- Offers a partnership approach with mana whenua that encourages a better understanding of needs and values while also enabling opportunities for product development and associated economic uplift (e.g., employment, investment).

<sup>1</sup> Mahurangi Rodney: Complex Growth New Zealand Education Growth Plan to 2030, Ministry of Education

<sup>2</sup>2019 New Zealand-Aotearoa Government Tourism Strategy, MBIE, page 2.

## 1.3. A Destination Management Plan for Matakana Coast

This LDMP provides a framework to support the ongoing development and growth of Matakana Coast, ensuring it continues to be sustainable and appealing to locals and visitors alike. It does this by:

- Supporting the development of a collaborative environment between mana whenua, the wider community and industry, and one that supports businesses to thrive
- Offering a partnership approach with mana whenua that encourages a better understanding of needs and values, while supporting the development of a collaborative environment between mana whenua, the wider community and industry, and one that supports businesses to thrive
- Leveraging the existing strengths of the region including natural, built and its people to leverage the recovery of the visitor economy
- Identifying and supporting the development of new and enhancement of existing experiences and attractions
- Encouraging operators to work collaboratively as a region to create a unique visitor experience
- Seeking to improve the resilience, skills, and networking opportunities for the region's operators
- Connecting Matakana Coast with its neighbours and partners, working to leverage these connections for the mutual benefit of the community and visitors.

Currently, Matakana Coast is home to some 31,000 residents and covers an area of 1200sq km. The region's population is expected to continue to grow as outlined in Section 1.1, driven by the release of significant areas of land for residential development along with major infrastructure upgrades and development.

This LDMP provides industry, mana whenua and community partners who contribute to Matakana Coast's visitor economy, with a road map, strategic directions, and high-level actions for implementation. It brings together the elements of a growing visitor economy, building on the overarching *Destination AKL 2025* strategy.

The plan also recognises the vital role that partnerships between the government, industry, mana whenua and community must play to leverage emerging trends and opportunities. It will contribute to building Matakana Coast as a sustainable and renowned destination that will be a legacy for future generations.

This LDMP outlines a combination of targeted and tactical short-term recommendations, as well as long-term actions to work towards, to help the sector recover and thrive moving forward. Many of the recommendations identified build on product gaps identified during consultation, reflect the success of existing tourism activities, and aim to offer value-added elements to support the region's growth and sustainability.

*Image credit: Pouwhenua maintained by local iwi, Ngāti Manuhiri, Omaha Beach, Matakana Coast Tourism*



# 1.4. Strategic Framework

Figure 1 outlines the strategic framework that guided the development of this LDMP and should be used to direct tourism development and marketing for the Matakana Coast region going forward. The framework has been aligned with the *Destination AKL 2025* strategy, the overarching destination management plan (DMP) strategy for the broader Tāmaki Makaurau Auckland region.

Figure 1: Strategic Framework

## The Vision

“Matakana Coast will continue to strive to be a sustainable visitor destination, building on its reputation as a leading visitor hub for greater Tāmaki Makaurau Auckland and a gateway to Northland, and offering a range of exciting recreation and tourism activities to benefit a range of visitor markets, and to support a diverse resident community. The visitor economy will continue to grow strongly and sustainably, actively supported by mana whenua, industry, government, and community, all working collaboratively.”

## Guiding Principles

**Kotahitanga –  
Collaboration**

**Kaitiakitanga –  
Guardianship**

**Manaakitanga –  
A Warm Welcome**

## Strategic Imperatives

**An Insightful  
Place**

A place that makes evidence-based decisions, encouraging business support and improved viability while maintaining identity and showcasing community resilience.

**A Place of  
Partnership &  
Planning**

A place where mana whenua has opportunities to input and prosper with mechanisms in place to ensure that community social license for the visitor economy is being monitored.

**A Sustainable &  
Resilient Place'**

A place that advocates for the well-being of the terrestrial, land, and marine environments with an aim of transitioning to a low-impact and low-emissions visitor economy.

**A Connected  
Place**

A place where principles of economic, social, and environmental sustainability are not compromised by planning that is being undertaken to better connect the destination.

**A Unique Place**

A place where visitors are enticed to stay longer and embrace the communities for what makes them special.

**A Captivating  
Place**

A place that enriches the visitor experience in a way that gives back at least as much to a destination's people and places as it takes.

## 1.5. Recommendations

A comprehensive suite of recommendations has been developed, directly aligned to the strategic imperatives outlined above. These recommendations will contribute to achieving the LDMP's desired outcomes. The recommendations are non-exhaustive and will need to continually be validated over time. These recommendations have been summarised below but are available in more detail in Section 3.2 of this plan.

It is also important to note that although there is a long list of suggested recommendations, it is not expected that most of these can be implemented in the short to medium term (the next four to five years). Many will need to be considered over the longer term (out to 2030 and beyond) based on resourcing capability and overall prioritisation. This is also expected to change over time.

Table 1: The full list of recommendations

An Insightful Place	A Place of Partnership & Planning	A Sustainable & Resilient Place
<ul style="list-style-type: none"> <li>Advocate for good visitor data, research, and insights to support destination management</li> <li>Visitor journey mapping</li> <li>Improve existing destination events calendar on <a href="http://matakanaoast.co.nz">matakanaoast.co.nz</a>.</li> </ul>	<ul style="list-style-type: none"> <li>Introduce an industry famil programme</li> <li>Facilitate tourism industry networking events</li> <li>Upskill operators with collaborating opportunities and understanding of international target markets.</li> </ul>	<ul style="list-style-type: none"> <li>Advocate for investment in marine reserves and regional parks</li> <li>Advocate for resources to address major infrastructure constraints</li> <li>Advocate for EV infrastructure</li> <li>Carbon Zero Matakana Coast Initiative – support the area’s visitor economy to develop a pathway to reduce emissions to achieve zero carbon</li> <li>Conduct regional park carrying capacity assessments.</li> <li>Investigate wetland nursery development with Ngāti Manuhiri.</li> </ul>
A Connected Place	A Unique Place	A Captivating Place
<ul style="list-style-type: none"> <li>Position Matakana Coast as the market epicentre for Tāmaki Makaurau</li> <li>Activate Mahurangi riverfront, Warkworth</li> <li>Engage with iwi and mana whenua on tourism initiatives they are keen to activate and assist with development</li> <li>Investigate an interactive experience at Mansion House, Kawau Island</li> <li>Investigate iwi-based visitor experiences and interactive narrative for Kawau Island</li> <li>Investigate a pou-to-pou walking experience at Omaha Beach, with links to significant sites delivered by Ngāti Manuhiri.</li> </ul>	<ul style="list-style-type: none"> <li>Development of a branded hotel and conference centre that fits the ethos of the region (100-160 rooms)</li> <li>Address zoning constraints through tourism as a preferred use</li> <li>Create designated visitor hubs (e.g., Puhoi, Warkworth, Matakana Village, Leigh, Pakiri)</li> <li>Grow the paddock-to-plate offering including a cooking school</li> <li>Enhance the destination events calendar (e.g., marine festival, harvest festival – celebrating the hinterland, food, and beverage events)</li> <li>Position Matakana Coast as a hub for Hauraki Gulf water sports and boat hire</li> <li>Develop further packaged tour-based products that are commissionable</li> <li>Investigate a wellness day spa (high end small accommodation alongside would be optimal)</li> <li>Package and promote diving experiences with Matakana Coast as a base</li> <li>Promote as a family-friendly (all-weather) visitor attraction</li> <li>Ensure Warkworth township is a destination for visitors post-opening of the new motorway system.</li> </ul>	<ul style="list-style-type: none"> <li>Advocate for improved public transport and car parking to key locations within the region (including a park and ride facility)</li> <li>Support a Pūhoi and Mangawhai cycle trail (staged) with visitor hubs and park and ride option. Advocate for connection to regional parks and townships for commuters off the back of the cycle trail</li> <li>Leverage increased accessibility due to the new motorway development to attract investment and new businesses to the region, Warkworth as key hub.</li> </ul>

## 1.6. Priority Recommendations

Table 2 outlines the suggested priority recommendations that should be focused on. They offer a starting point for activation of this LDMP as it is impractical to try and activate too many projects at the same time. It should be noted that there is great diversity in their scale, type of development, location, and timeframe for activation.

Table 2: The priority recommendations

	<b>Advocate for investment in marine reserves and regional parks</b>	<b>Branded hotel and conference venue</b>	<b>Carbon Zero Matakana Coast Initiatives</b>	<b>Hub for Hauraki Gulf water Sports</b>
<b>Rationale</b>	<p>The region is rich with diverse marine reserves and regional parks. Many of these have been in existence for many years but for most, there has been relatively little reinvestment into supporting infrastructure over time. Yet demand for these quality assets grows as locals and visitor numbers increase, and demand to visit these sites increases. The investment that should be considered into these sites includes updated jetties and wharves, expanded paths and walking trails, pontoons, and moorings.</p>	<p>Development of a 100-160 room branded hotel property with associated conference/function venue (with capacity for up to 400 patrons).</p>	<p>While several places around Tāmaki Makaurau Auckland assert to be sustainable or a good example of green living, Matakana Coast has a strong underground swell of community support for this, which could potentially be linked to advocating for funding to further enhance improved sustainability within this region.</p>	<p>The region is a natural gateway to the Hauraki Gulf, with ferry services to various islands including Kawau Island and to get to Te Hauturu-o-Toi Little Barrier Island. A growing heli-fishing and heli-sightseeing market exists with interest to access more remote locations in the Hauraki Gulf. A strong fishing charter market is also present but with little collaboration with the existing visitor economy. Note: There is a need to ensure these operators have a sustainable ethos such as that of commercial operator Leigh Fisheries, and which is being driven by mana whenua and locals.</p>
<b>Actions</b>	<ul style="list-style-type: none"> <li>Work with Auckland Council Parks, DOC, and other stakeholders to identify key investment requirements for marine reserves and community jetties/wharves that are under pressure due to growth in residents and visitors.</li> <li>Identify funding options.</li> </ul>	<ul style="list-style-type: none"> <li>Prepare investment prospectus to identify opportunities and encourage operators and their investors</li> </ul>	<ul style="list-style-type: none"> <li>Position region as the lead region for zero carbon emissions.</li> <li>Promote the region's zero carbon goal.</li> <li>Encourage industry operators to support this goal.</li> <li>Offer workshops to visitor economy operators for pathways to reduce their carbon footprint.</li> <li>Promote progress as an annual KPI.</li> </ul>	<ul style="list-style-type: none"> <li>Identify improvements needed at Sandspit and other staging posts to access the Hauraki Gulf reparking, public transport links and other site improvements.</li> <li>Assess water sport limitations in and around the coastline and islands within the gulf.</li> <li>Develop a promotional campaign to encourage the positioning of the region as a gateway to the gulf.</li> </ul>

	<b>Position Matakana Coast as the market's epicentre for Tāmaki Makaurau</b>	<b>Tourism Industry networking events</b>	<b>Pūhoi and Mangawhai cycle trail</b>	<b>Wellness day spa with accommodation</b>
<b>Rationale</b>	Offering a variety of well-developed existing markets, the region is well-recognised as an epicentre for the wider Auckland region. The fact that many of these markets have been established for years and are visited by people from throughout the greater Auckland region and further afield reflects their strength and level of market demand. Each is a showcase of the produce grown and made in the region.	The tourism industry within Matakana Coast would benefit from stronger collaboration and connectivity. To help facilitate this a series of quarterly networking events is recommended to provide a platform for all industry operators to meet regularly as a social networking opportunity.	A cycleway trail developed in stages would be a major visitor attraction and a mechanism to encourage far greater dispersal throughout the region. This would support a range of smaller overnight experiences including lodges, motel, campground, and B&B. This would also support local food and beverage outlets that are along the cycle trail. The cycle-trail would ideally start and finish with park-and-ride facilities, so riders can leave personal cars secure and return by shuttle vans. This is a low impact, low emission visitor experience.	With its various water- and land-based outdoor attractions and experiences, Matakana Coast would benefit from a quality day spa and wellness facility with adjoining accommodation to encourage a range of visitor markets to benefit from the facilities.
<b>Actions</b>	<ul style="list-style-type: none"> <li>▪ Develop a promotional campaign to promote the region as a market epicentre.</li> <li>▪ Identify operator partners for the funding campaign.</li> <li>▪ Work with TAU to promote the market epicentre campaign.</li> <li>▪ Monitor market development and visitor growth.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Implement industry networking events with support from TAU.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Strongly advocate for the Matakana Coast Trails Trust to activate each stage of the cycleway.</li> <li>▪ Identify potential funding partners to work with sector to deliver this project.</li> <li>▪ TAU to include narrative for this project in investor packs looking at this region.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Identify potential sites.</li> <li>▪ Prepare investment prospectus to identify opportunities and encourage operators and their investors.</li> </ul>

## 1.7. Next Steps

To successfully activate and deliver this LDMP, the following steps are suggested:

- A mechanism is introduced for helping to adequately fund Matakana Coast Tourism, the local tourism organisation, to ensure core stakeholders representing all areas of the visitor economy are actively involved in driving the agreed outcomes and the resourcing of this.
- There is an acknowledgement that this LDMP only covers part of the Rodney Local Board region (eastern side), and that further work will be required to support and integrate the remainder of the region either by adding to this LDMP or by creating a separate LDMP when resources are available for this.
- Although this LDMP has deliberately identified the priority recommendations to support the sustainable growth of the Matakana Coast visitor economy, the local tourism organisation, in collaboration with other major stakeholders, should select three to five recommendations only to drive the LDMP as the top priorities for the short-medium term (acknowledging that other initiatives can be added to over time once priority short-term projects are already activated).
- The delivery of new tourism projects identified within this LDMP will likely require funding for feasibility study analyses and business cases. Funding should be identified and set aside for allowing at least the top three priority recommendations to move to the next stage of development, whether the funding is coming from public or private sector sources.
- An ongoing budget will be required for marketing covering tourism promotional campaigns and offering the chance to leverage promotional funds from industry partners and the government. To ensure Matakana Coast is well-known and on travel agendas for various domestic and international niche visitor markets, a tourism marketing campaign is required to help build up the region's profile so it can attract visitor interest from other parts of New Zealand (outside Auckland) and international visitor markets. Without a refocus, the region is likely to remain a very Auckland-centric day visitor market. The campaign, however, will need to be well supported by refreshed existing products, and new products as suggested within this LDMP, and with a strong focus on the product that can help grow overnight, rather than a day visitor market.

Destination events and festivals will also necessitate a dedicated budget to ensure they can not only be maintained but to enable them to sustainably grow. Matakana Coast has a strong competitive advantage in the agri-tourism and gastronomy space, with local produce well-recognised and with the potential to create a nationally significant food and beverage-based event, which will need to be well-marketed through a variety of online and other media channels.

# Part 2: Where Are We Now?

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## 2.1. What is a Destination Management Plan?

Adopting a destination management approach can help communities within destinations determine the type of tourism/visitor they would like to have and the benefits they would like to receive and take an active role in managing these.

Unlike traditional visitor strategies which tend to focus on marketing, destination management focuses on product development, investment attraction, planning requirements, industry development, visitor management, infrastructure development as well as destination marketing.

As a result, destination management cannot work in isolation and requires a wide range of stakeholder groups and delivery partners, such as government agencies (local and central), communities and business groups all working together. Importantly in Auckland's case, a successful destination management approach requires a true partnership approach with the appropriate nineteen mana whenua authorities of Tāmaki Makaurau.

To enable Tāmaki Makaurau Auckland to reach its full potential as a destination, the efforts of all interested parties must be channelled in the same direction. It is an ongoing process that requires the visitor economy operating in the destination to plan for the future and consider the social, economic, cultural, and environmental risks and opportunities of their presence.

While DMPs elsewhere in Aotearoa New Zealand are regionally focused, LDMPs – including this plan for Matakana Coast – are being implemented within Tāmaki Makaurau Auckland in areas where visitor volumes are potentially being seen as negatively impacting the natural environment and the local community.

They are also being adopted in areas which have been identified as a new key visitor destination before the feeling of over-tourism, real or perceived, arises. Matakana Coast falls into this latter camp.

## 2.2. Preparing this Local Destination Management Plan

### 2.2.1. Background

This LDMP is focused on the east coast of the Rodney Local Board – referred to as Matakana Coast – and has been developed in consultation with Matakana Coast Tourism, One Mahurangi, TAU, and other local stakeholders, including the Rodney Local Board. It provides a plan, allowing the tourism sector in this region to sustainably develop while, at the same time, carefully aligning with a variety of social, cultural, infrastructural, and environmental requirements.

This LDMP has been built on three core foundations, including:

- Ensuring the infrastructure is in place to meet the needs firstly of the local community both now and into the future and which visitor requirements will need to leverage from
- Ensuring that environmental improvements are introduced to better protect and enhance the quality of both the marine and terrestrial environments which are core to supporting visitor interest and protecting the very thing visitors are coming to experience, and
- Developing a carefully structured visitor economy that aligns with community expectations for tourism, and which can sustain local businesses going forward.

Key outcomes/deliverables of this LDMP include:

- The provision of a simple and focused vision, suggested key goals to be achieved in the process of delivering on that vision and clear priorities with associated strategies that indicate how we will get there
- Focusing on the areas that will make the biggest difference while acknowledging the need to be specific about how best to move forward today to where stakeholders want too ideally be, and
- The utilisation of good baseline data is required to inform these projects and ensure there is evidence-based decision-making.

Importantly, this LDMP is not just focused on delivering destination management principles and outcomes. Nor is it about visitor market growth. It aims to support community aspirations for the future of the Matakana Coast's visitor economy within the parameters of more environmentally and socially sustainable and desirable outcomes.

It is important to note that, like other visitor destinations, Matakana Coast has been disrupted by recent inclement weather conditions. This, coupled with heavy traffic due to roadworks during the 2022/2023 summer, has had a negative impact on tourism operators. Anecdotal evidence suggests that some Aucklanders

who would normally travel north during the summer months chose not to this year.

This, coupled with ongoing supply chain disruptions, lack of staffing and general recessionary economic conditions, continues to impact the ability of the region's tourism sector. This challenging operating environment could extend out to 2025-2026. For more information on the process undertaken to prepare this LDMP, read Appendix 5 - Preparing This Plan – Additional Information.

### 2.2.2. Te Tiriti o Waitangi/The Treaty of Waitangi

Development of this framework has taken Te Tiriti o Waitangi into consideration. This LDMP relies on partnership with iwi, hapū and whānau Māori and the Matakana Coast community. It reflects the principles of kāwanatanga (governance), and tino rangatiratanga/mana motuhake (self-determination, sovereignty), as expressed in articles one and two of Te Tiriti o Waitangi.

These principles require genuine consultation and partnership with Māori through shared decision making and co-governance structure. These include:

- Active protection, equity, and partnership: Upholding the principle of active protection of Māori rights to exercise rangatiratanga and kaitiakitanga. Active protection includes an undertaking to focus specific attention on addressing any inequities experienced by Māori. To achieve this requires a close working relationship with iwi, hapū, and whānau Māori to ensure sufficient understanding of Māori perspectives
- Participation: Ensuring Māori can participate within an enabling environment in decision-making processes will be the basis for achieving equitable outcomes that align with Māori and iwi aspirations for intergenerational well-being.

High levels of care and consideration have been taken in the development of this plan and in engaging mana whenua and Māori communities. Timings that best align to iwi priorities will guide this process. Therefore, engagement will vary, led by iwi priorities.

### 2.2.3. Process

This plan was commissioned by TAU, which has initiated the development of local destination management plans for several regions within Tāmaki Makaurau Auckland. Outcomes of this plan include:

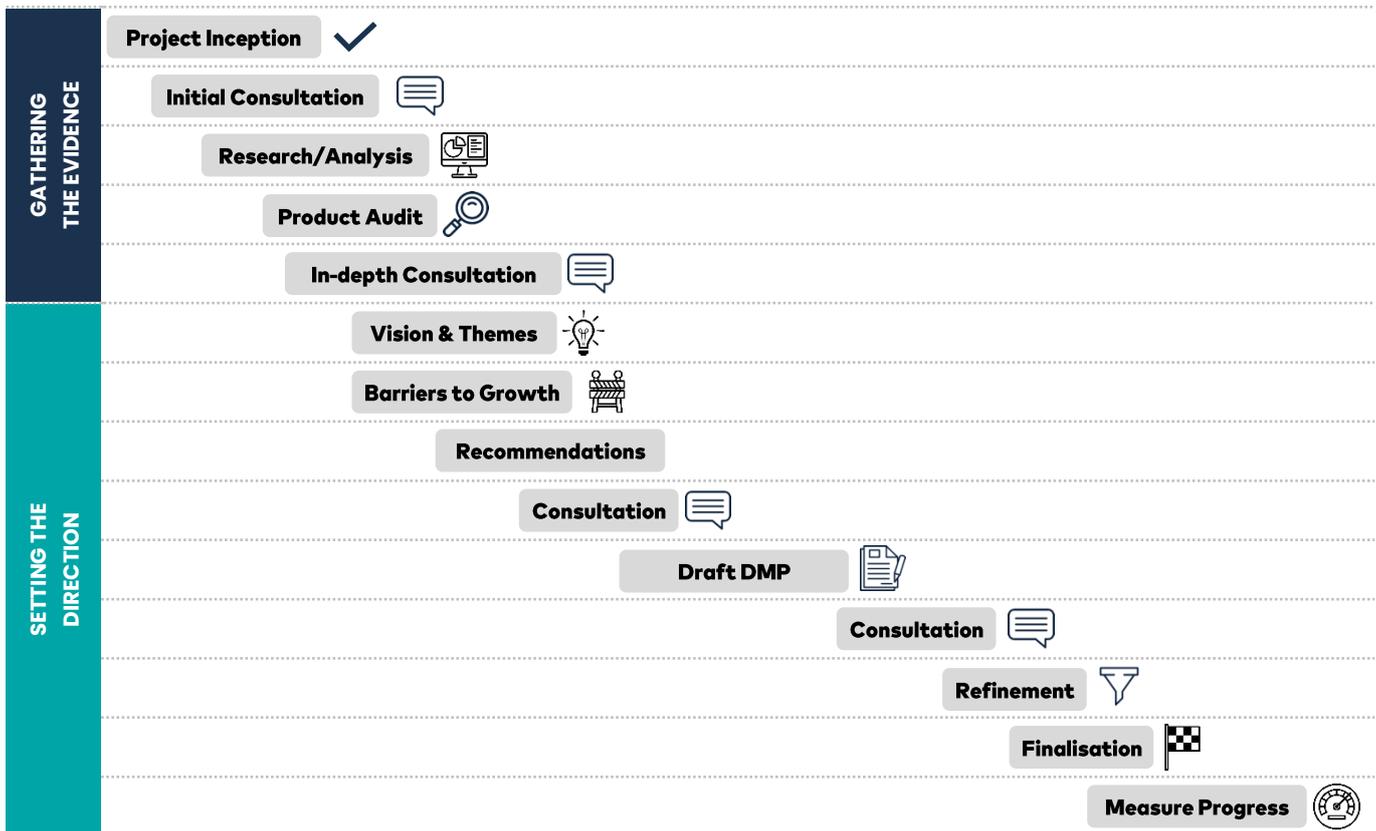
- The provision of a simple and focused vision, suggested goals to be achieved in the process of delivering on that vision, and clear priorities with associated strategies that indicate how we will get there

- Focusing on the areas that will make the biggest difference, acknowledging that Matakana Coast needs to be specific about how it can best move forward from where it is now to where it wants to be.

Working alongside those directly involved in the visitor economy, this plan was developed using a 14-stage process, which is outlined in

Figure 2.

Figure 2: Stages followed to complete the LDMP



This plan has been informed by extensive consultation undertaken with many stakeholders from Matakana Coast as well as those external to the area. Table 3 provides a summary of those consulted throughout the LDMP. For more information on who was consulted see Appendix 5.

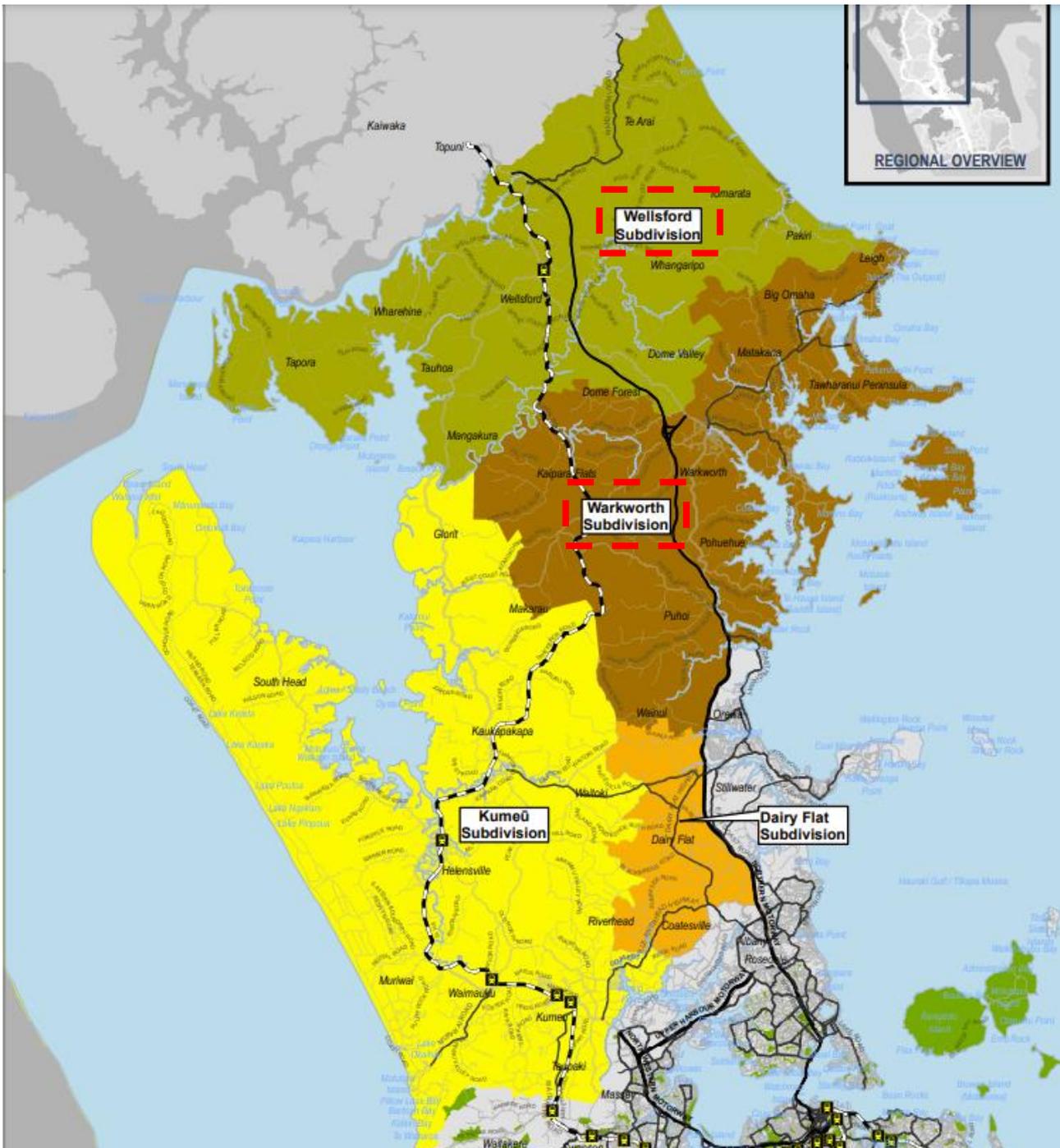
Table 3: Who was consulted

1. Informing and Guiding the DMP	2. Broader Stakeholder & Community Consultation	3. Government Consultation
<ul style="list-style-type: none"> <li>▪ Tātaki Auckland Unlimited</li> <li>▪ Matakana Coast Tourism</li> <li>▪ One Mahurangi</li> <li>▪ Rodney Local Board.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Ngāti Manuhuri</li> <li>▪ Te Uri o Hau</li> <li>▪ Transport providers (Mahu Express, Hauraki Express)</li> <li>▪ Te Hana Te Ao Marama Marae</li> <li>▪ Matakana Coastal Trail Trust</li> <li>▪ Tourism/visitor economy industry stakeholders via workshops, one-on-one meetings, and survey</li> <li>▪ Community via survey</li> <li>▪ Visitor information centres (Warkworth and Matakana Village)</li> <li>▪ Matakana wine growers.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Ministry of Business, Innovation and Employment (MBIE)</li> <li>▪ Auckland Regional Parks</li> <li>▪ Auckland Council</li> <li>▪ Department of Conservation (DOC)</li> <li>▪ Tourism New Zealand</li> </ul>

## 2.3. Geographic Scope

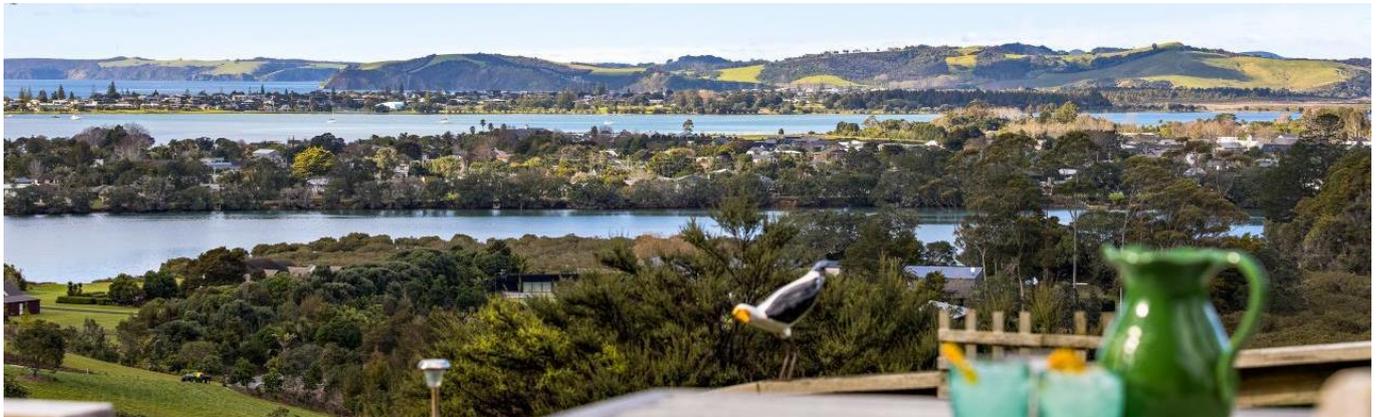
The geographic scope of this LDMP was defined by TAU, in consultation with the Rodney Local Board. The scope is outlined in Figure 3 and demonstrates that it covers only part of the Rodney Local Board region – extending from Puhoi in the south up to Te Hana in the north (this effectively covers the two subdivisions of Warkworth in the south and Wellsford in the north). It includes the key nodes of Warkworth, Matakana, Snells Beach, Leigh, Wellsford, and Omaha. Most tourism products are focused on the eastern side of the region.

Figure 3: Geographic scope (Wellsford and Warkworth subdivisions)<sup>3</sup>



<sup>3</sup> <https://www.aucklandcouncil.govt.nz/about-auckland-council/how-auckland-council-works/local-boards/all-local-boards/rodney-local-board/Documents/rodney-local-board-mapbook.pdf>

## 2.4. Matakana Coast Situation Analysis



Matakana Coast is in the Auckland Council Territorial Local Authority (TLA). The region, which covers just over 1200sq km, is situated approximately 60km, or 50 minutes' drive from central Auckland.<sup>4</sup> It has several towns and villages, each with distinctive identities, communities, and stories.

The region is home to an estimated 31,000 residents— most of whom (76 per cent) reside in the Warkworth subdivision<sup>5</sup> within the towns of Warkworth, Puhoi, Snells Beach and Leigh.

Warkworth is the main township in the region, with a current population of over 9,000 residents, and which is expected to reach a level of 25,000 by 2030. It is expected that this growth will be accompanied by a huge rise in younger families.<sup>6</sup>

The median age of residents across the Matakana Coast is 43.9 years<sup>7</sup>, with the youngest profile being in Wellsford (34 years) and the oldest being around Algies Bay and Scotts Landing (60 years).<sup>8</sup> This older profile (particularly when compared with the Auckland-wide median of 36 years<sup>9</sup>) is important to recognise because:

- An older population requires different services and facilities compared with younger populations
- Older residents are likely to have different consumer preferences regarding visitor experiences
- Older populations typically have stronger spending power due to having higher levels of disposable income
- Older populations are likely to have a wide 'visiting friend and relatives' networks that have a different profile (and preferences) to younger populations

- Older populations are also less likely to want to establish a new tourism business or to make an investment into existing or new businesses generally; and
- For outdoor focused destinations such as Matakana Coast, older populations are also less likely to be interested in acting as tour guides, tour boat operators and more active forms of tourism operators.

Nationally, the tourism futures taskforce and the report developed help set the roadmap for New Zealand's COVID-19 recovery and identifies the need for the country's "future visitor economy [to be] regenerative and resilient."<sup>10</sup> the major outcomes set for the country's visitor economy include the following<sup>11</sup>:

- Enrich visitors in ways that show genuine care and enable life-changing experiences
- Contribute to the unique essence, culture and health of local communities and their places
- Provide meaningful work and opportunities for those working in the industry to develop and grow
- Be enriched by the values of Te Ao Māori
- Improve the health of our natural ecosystems
- Generate durable financial returns and support further regenerative development.

The *Destination AKL 2025* strategy, which was developed pre-COVID-19, sets a vision for Auckland's visitor economy, being for "Auckland to be sustainable — economically, socially, and environmentally — as a place to live and work and as a place to visit."<sup>12</sup>

<sup>4</sup> Auckland CBD to Warkworth

<sup>5</sup> 2022 data, Subnational population estimates (TA, subdivision), by age and sex, at 30 June 2018-2022 (provisional 2023 boundaries), Stats NZ

<sup>6</sup> <https://www.greaterauckland.org.nz/2023/03/28/warkworth-highlights-the-cost-of-sprawl/>

<sup>7</sup> 2022 data, Subnational population estimates (TA, subdivision), by age and sex, at 30 June 2018-2022 (provisional 2023 boundaries), Stats NZ

<sup>8</sup> Based on 2018 Census data

<sup>9</sup> Subnational population estimates (TA, SA2), by age and sex, at 30 June 1996-2022 (2022 boundaries), Stats NZ

<sup>10</sup> The Tourism Futures Taskforce interim report – December 2020, page 14

<sup>11</sup> The Tourism Futures Taskforce interim report – December 2020, page 14

<sup>12</sup> *Destination AKL 2025*, page 10

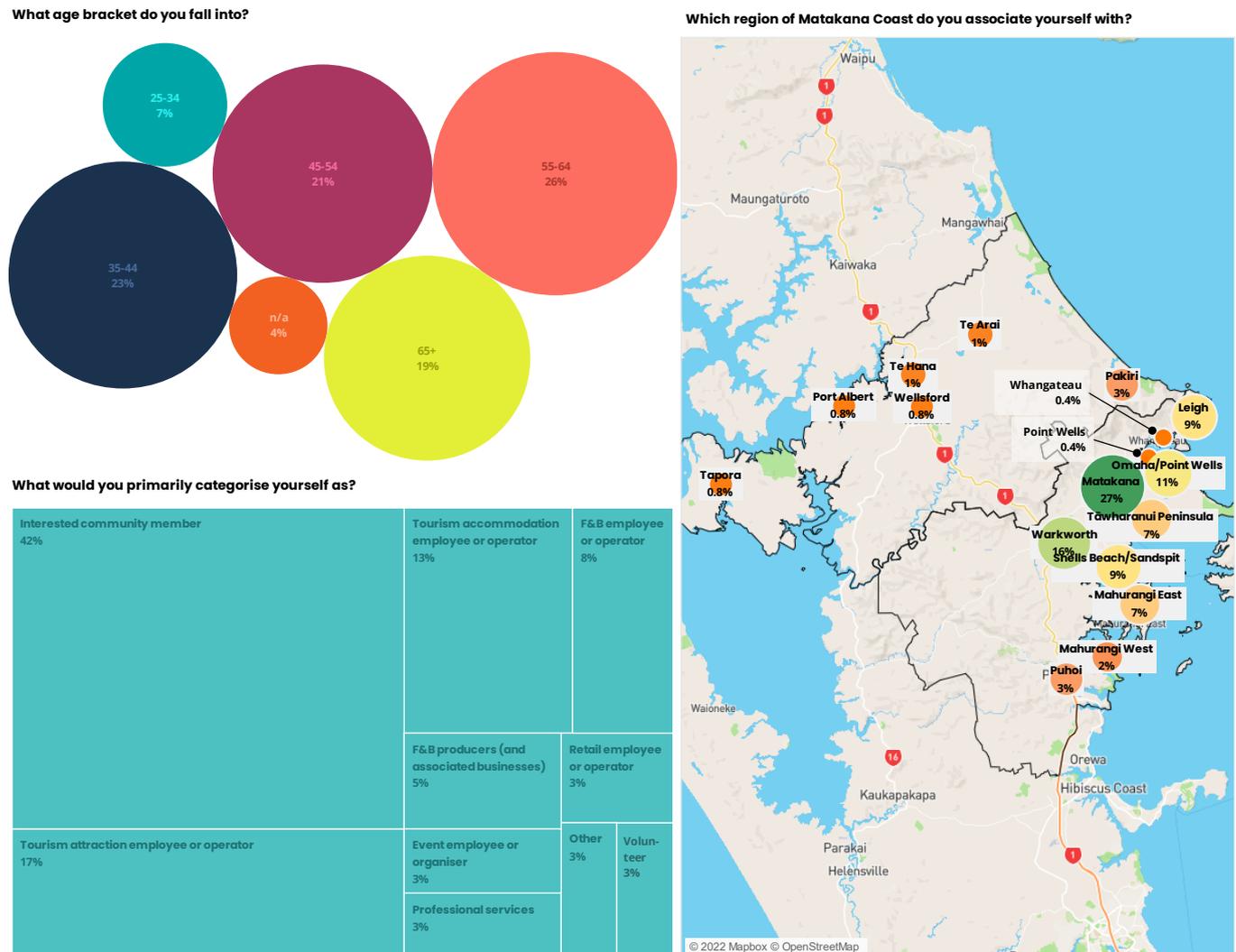
## 2.5. What We Were Told

### 2.5.1. Overview

To enable broader stakeholder input into this LDMP, a survey was distributed via TAU. The survey was tourism-focused and was open for two months<sup>13</sup> and garnered 118 responses across a variety of sectors and from interested residents. The full survey questions are included in Appendix 1.

Figure 4 provides a summary of the profile of respondents. There was a good representation across age brackets and the majority of respondents were from Matakana (27 per cent), followed by Warkworth (16 per cent) and Omaha/Point Wells (11 per cent).

Figure 4: Matakana Coast DMP Survey Findings – Respondent Profile



<sup>13</sup> The survey was open over two separate one-month periods – the first being mid-August to mid-September 2022 and the second being mid-September to mid-October 2022. The second period was to allow stakeholders the additional opportunity to input after Stafford had undertaken its second in-region site visit

## 2.5.2. Survey Findings Summary

Overall, the survey findings indicate that both industry and community are keen for a greater level of tourism activity to occur across Matakana Coast, if this occurs on a sustainable basis and in tandem with the upgrade of existing infrastructure, or introduction of new infrastructure, to support this growth.

There is general recognition that the region requires:

- A broader accommodation offering, including a larger-scale property to cater to larger groups (including events) as well as a more diverse range of accommodation typologies; and
- An increased range of commissionable (paid) tourism products to enable the packaging of products along with increase visitor yield.

Many of the survey respondents (42 per cent) were community members. To enable tourism and business sector perceptions to be demarcated from community perceptions and to ensure all views are considered for this LDMP, the survey responses have been separated. This enables community findings and aspirations to be viewed separately from industry and businesses and helps illustrate where views are aligned and where they diverge.

The key findings reflect the following:

- Overall, both community and industry respondents feel that Matakana Coast would benefit from increased visitor numbers, however, the industry felt far more strongly in favour of this (81% of respondents) compared with the community (46%). Only 1% of industry respondents feel Matakana Coast has too many visitors while 10% of community respondents feel this way.
- With respect to the statements:
  - “Tourism can have positive impacts on the quality of my life”: 26% of community respondents and 50% of industry respondents strongly agreed with this, while no community or business respondents strongly disagreed with this
  - “Tourism contributes to the restoration of the environment”: 12% of community respondents and 18% of industry respondents strongly agreed with this while 6% of community respondents and 3% of industry respondents strongly disagreed with this
  - “Tourism is important to Matakana Coast's economy”: 44% of community respondents and 68% of industry respondents strongly agreed with this while only 2% of community respondents and no industry respondents strongly disagreed with this
  - “Tourism is out of control in Matakana Coast”: only 8% of community respondents and no industry respondents

strongly agreed with this while 18% of community respondents and 33% of industry respondents strongly disagreed with this.

- Across both respondent groups, the number one challenge preventing sustainable tourism development is “lack of transport options, connectivity, parking & other infrastructure.”
- Other noted areas preventing sustainable tourism development according to community and industry respondents included:
  - Community: Red tape (rules and regulations) constraining development (14%), Lack of (skilled or willing) workers and lack of affordable rental accommodation (12%), Environmental constraints (9%) and Lack of destination marketing profiling of Matakana Coast (9%)
  - Industry: Lack of (skilled or willing) workers and lack of affordable rental accommodation (14%), Lack of destination marketing profiling of Matakana Coast (11%) and red tape (rules and regulations) (9%) constraining development.
- The product areas that this LDMP should focus on were quite similar for community and industry respondents. Both groups see the need for:
  - More accommodation, including larger scale accommodation options, more diversity along with a higher quality offering
  - More recreational tourism experiences, including walking and cycling trails
  - Family-oriented tourism experiences
  - Nature-based experiences.
  - With respect to new infrastructure:
    - The community feel the greatest need is for recreational infrastructure (walking trails and bike trails) (17%), followed by a quality road network linking sites/destinations of interest (14%)
    - industry respondents consider the greatest need is for a quality road network linking sites/destinations of interest (14%) followed by recreational infrastructure (walking trails and bike trails) (12%).
  - Both groups feel the most important core value to guide sustainable tourism development is ‘environmental principles – preservation, restoration, and appreciation, addressing climate change’, followed by:
    - Economic development – jobs, economic diversification for community respondents
    - Greater collaboration – between public services, community groups and business enterprises for industry respondents.

For more information on the survey findings, read Appendix 2.

## 2.6. Matakana Coast Visitor Trends

Reliable visitation data is limited across New Zealand, particularly concerning domestic visitation. This is the case even at a national level and the smaller geographic area one goes down to (i.e., to a TLA level, for example), it becomes even more challenging.

While TAU has historically taken charge of developing a visitor dataset for the broader Auckland region instead of one being created by the Central Government (Stats NZ or MBIE), a dataset for Matakana Coast has never officially been developed.

Therefore, in place of a robust visitor database, several assumptions have been applied to the Auckland visitor dataset to derive estimates for visitation to Matakana Coast. These assumptions have been based on:

- Data sent through from operators
- Information provided by TAU along with discussions with personnel at TAU
- International leisure visitor arrivals data for New Zealand
- Visitation data for the broader Auckland region; and
- Population data and forecasts for Auckland (noting Matakana Coast generates strong visitation from an Auckland market).

A recommendation of this LDMP is the rollout of an annual visitor survey for Matakana Coast so that a robust database of visitor statistics can be collected. This will assist in managing the sustainable growth of the visitor economy in the region and assist with informed decision-making.

Figure 5 and Figure 6 provide a summary of historic (2018 – 2022) visitation and demonstrate the following.

- Visitation is estimated to have dropped from 1.07 million visitors in 2019 (noting this is March year end data, therefore 2019 data reflects April 2018 to March 2019 which is prior to the impacts of the COVID-19 pandemic) to 889,000 visitors in 2020 before growing back up to 1.0 million visitors in 2021 (due largely to the domestic day market rebounding) post-lockdown periods.
- Because Matakana Coast is largely a domestic market, it was not as impacted as some other destinations across New Zealand that traditionally have had a far stronger reliance on international visitor markets (such as Queenstown and Rotorua).
- Visitation to Matakana Coast is heavily swayed by domestic day visitors along with locals from Auckland. In 2022, these markets are estimated to have comprised 55per cent and 31per cent of total visitation respectively to Matakana Coast. Many of these visitors are recreational visitors who stay in baches and travel to the region's various beaches and natural areas (such as Goat Island, Omaha and Tāwharanui).
- International visitors have historically been low as a source market (estimated at 90,000 per annum pre COVID-19 in 2019).<sup>14</sup> Potential reasons for this include a lack of local accommodation options, transport options and product packaging.

<sup>14</sup> Based on visitation data to Auckland (NZ IVS, New Zealand Regional Tourism Estimates, New Zealand Visitor Activity Forecast - <https://freshinfo.shinyapps.io/NZVAF/> and the Visitor arrivals by country of residence, purpose, and length of stay (Annual-

March & Jun)), population data for Auckland, discussions with TAU and local industry operators.

Figure 5: Estimated total visitation to Matakana Coast, March YE<sup>15</sup>

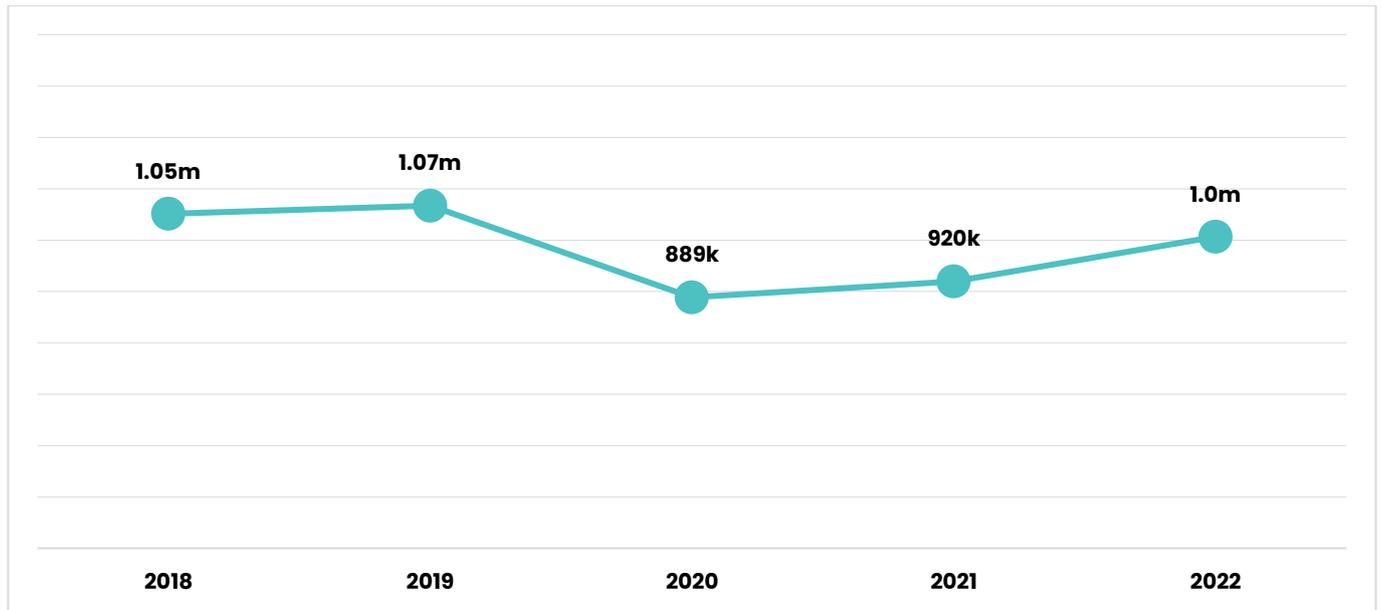
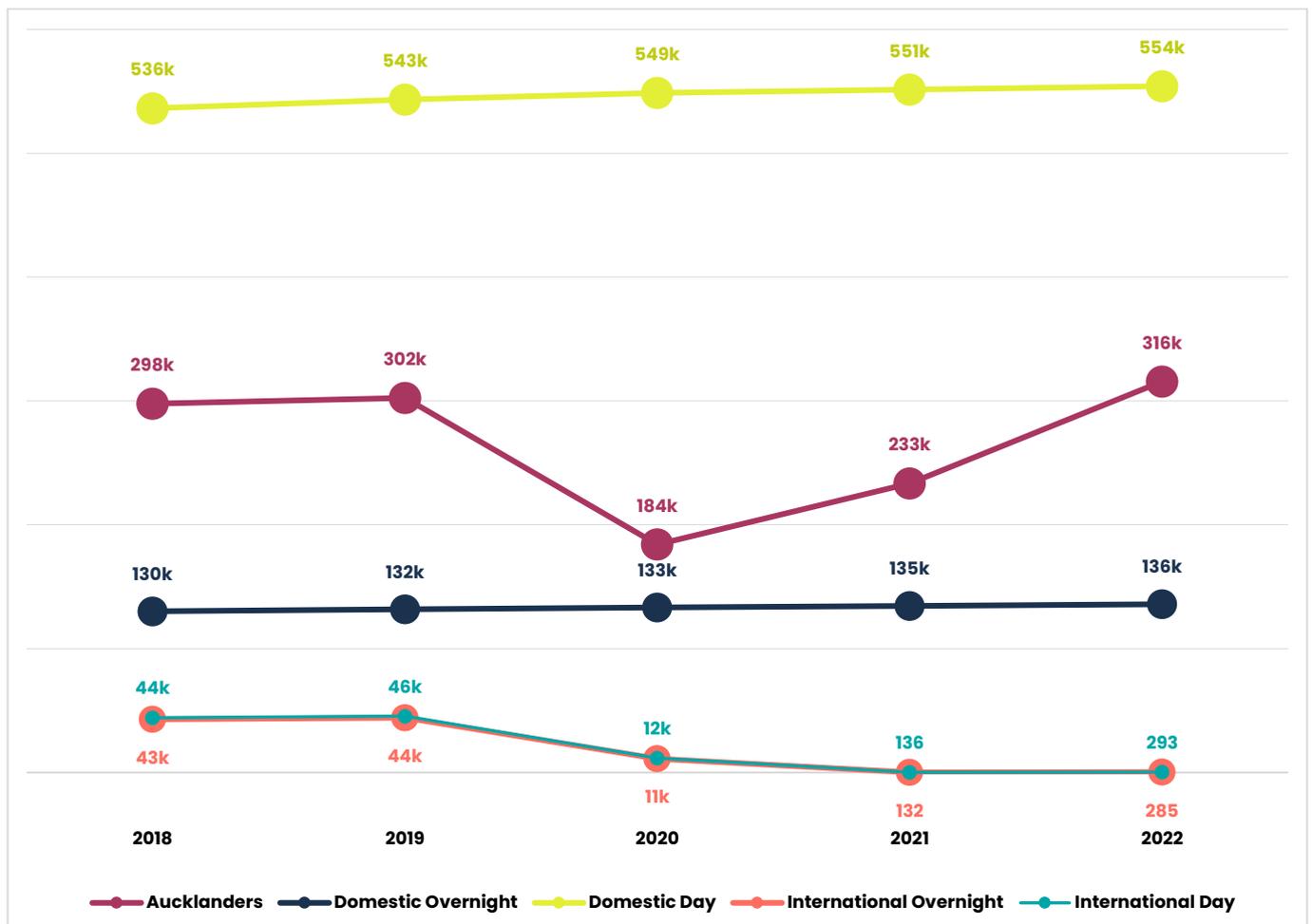


Figure 6: Estimated visitation to Matakana Coast by source market, March YE<sup>16</sup>



<sup>15</sup> Based on visitation data to Auckland (NZ IVS, New Zealand Regional Tourism Estimates, New Zealand Visitor Activity Forecast - <https://freshinfo.shinyapps.io/NZVAF/> and the Visitor arrivals by country of residence, purpose and length of stay (Annual-March & Jun)), population data for Auckland, discussions with TAU and local industry operators.

<sup>16</sup> Ibid

## 2.7. Matakana Coast's Tourism Offering

Two audits have been conducted for Matakana Coast's tourism product: one focused on accommodation; and one focused on attractions and experiences. The purpose of these audits is twofold: firstly, to ascertain where product gaps may exist in the tourism product mix; and secondly, to complete sentiment analysis on the existing product.

The audit is primarily based on an extensive 'data scraping' exercise that leveraged the following sources:

- The New Zealand Tourism Operator Database
- Matakana Coast Tourism.
- TripAdvisor
- Google Travel
- Google Maps.<sup>17</sup>

### 2.7.1. Accommodation Stocktake

Figure 7 provides a summary of the accommodation audit undertaken, which demonstrates the following:

- There are approximately 162 accommodation properties throughout the Matakana Coast region. While some holiday rental properties (baches and holiday homes) are included, the size of this market is likely underrepresented.<sup>18</sup>
- Matakana Coast's accommodation typology is dominated by boutique properties (villas, cottages, holiday baches), comprising just under two-thirds (65per cent) of the accommodation product identified. This is followed by lodges and retreats (15per cent).
- Most properties are clustered around the towns of Warkworth, Matakana and, to a lesser extent, Leigh, Point Wells and Snells Beach. There is limited stock in the central part of the Matakana Coast region or on the western coast.
- With respect to product gaps, Matakana Coast's accommodation mix appears to be missing:
  - Larger-scale properties to cater for larger groups and events, conferences etc. (the largest property with room numbers online was a motel property in Warkworth with 26 rooms)
  - Branded properties to appeal to an international visitor market who tend to look for these properties because of the consistent quality standards they tend to offer.



### 2.7.2. Accommodation Sentiment

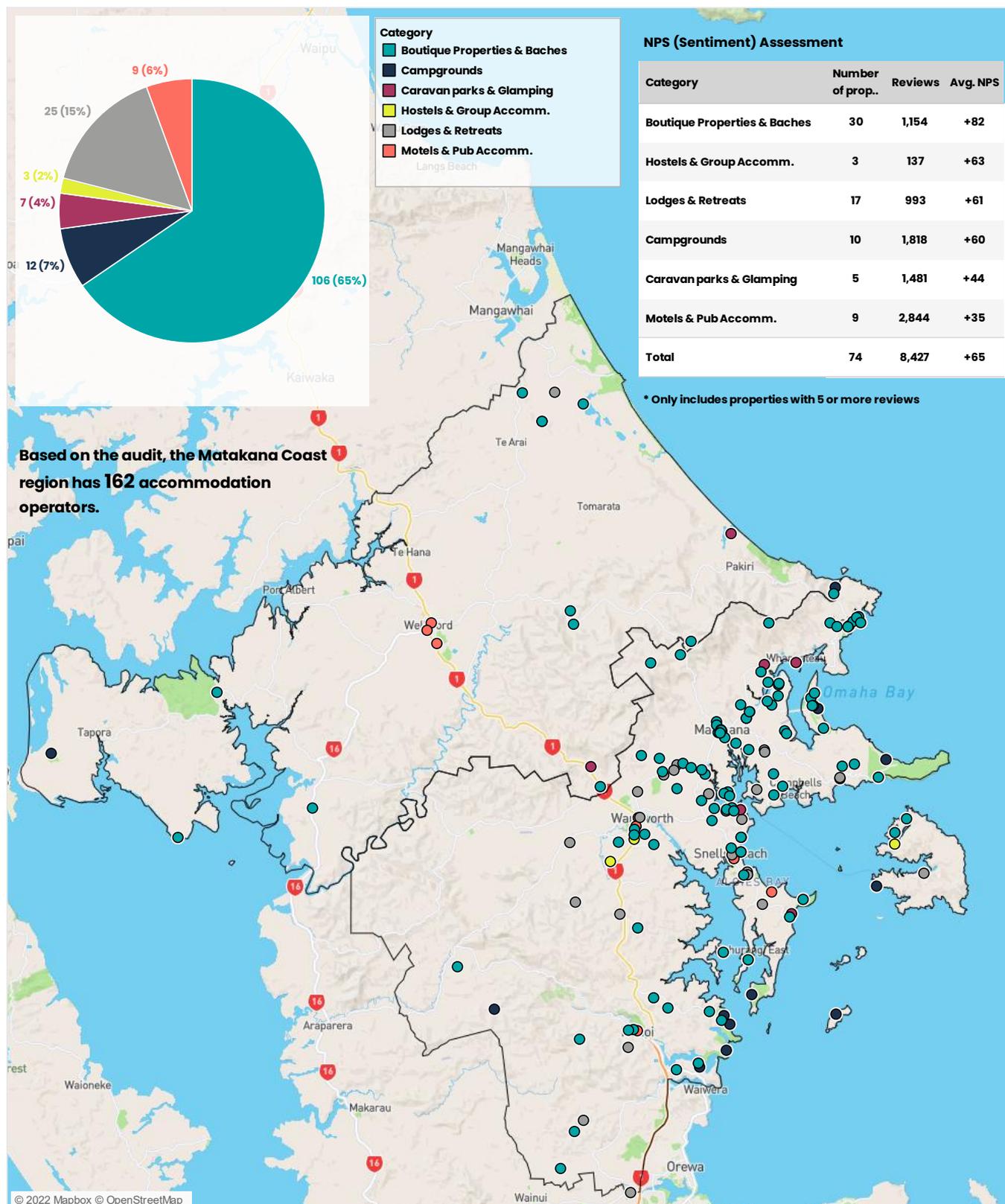
A consumer sentiment assessment was also undertaken on Matakana Coast's accommodation mix (see Appendix 4 for an understanding of how this is calculated). The sentiment assessment findings are summarised in the table in Figure 7. The assessment found that:

- The Net Promoter Score (NPS) for the region's accommodation is quite high, with an overall average score of +65 based on 8427 reviews which is a robust sample size. A NPS of +30 is considered average, while a NPS above +50 is considered very good. Only those properties with five or more reviews were included in the NPS assessment.
- Boutique product rates very well with a very strong NPS of +80 reflecting a high degree of consumer satisfaction. Generally, boutique product trends to rate highly because of the personalised nature of the product.
- Motels and pub accommodation received the lowest NPS score, ranking average, of +35, based on nine different properties and 2844 reviews. This average NPS score signifies that the price being charged is potentially not matching up to consumer expectations for the quality offered.
- On a comparative basis, the following NPS scores were achieved (as averages) in similar exercises in other destinations in New Zealand during 2022:
  - Waiheke Island received a +67 NPS
  - Waitaki District received a +51 NPS
  - Manawatū Region received a +47 NPS
  - Mackenzie District received a +44 NPS.

<sup>17</sup> It is important to note, therefore, that the audit may not be fully comprehensive, particularly for those operators who are not listed online

<sup>18</sup> This is because measuring the exact size of this market is difficult because properties are often listed across many websites under different names and sometimes are taken offline for certain periods of the year

Figure 7: Matakana Coast – Accommodation Audit Summary



### 2.7.3. Attractions Stocktake

Figure 8 provides a summary of the attractions audit undertaken and shows the following:

- 203 different attractions and experiences were identified across Matakana Coast. The vast majority of these are clustered along the eastern coast of the region, largely around the hubs of Warkworth, Matakana, Snells Beach and Leigh.
- The region has a large array of outdoor and passive recreational products. Parks and gardens totalled just over one quarter of the product identified (26 per cent) followed by natural areas (15 per cent).
- Although the region offers several quality food and beverage tourism experiences<sup>19</sup> in select locations (Matakana, Warkworth, Puhoi and Snells Beach), this offering could potentially be grown given Matakana Coast’s natural strength in the agricultural sector and the strong and growing interest in locally sourced food, in particular offering paddock-to-plate experiences.
- With respect to product gaps, there appears to be:
  - Very limited all-weather (indoor) product that can be undertaken during times of inclement weather
  - Limited family-friendly product for both a visitor and local market
  - Limited health and wellness products that would appear to be a natural fit for the region
  - Few major built attractions (aside from attractions including the Matakana Village Farmers Market, the Sculptureum, and Brick Bay Wines and Sculpture Trail).

### 2.7.4. Attractions Sentiment

A consumer sentiment assessment was also undertaken on the region’s product offering. The sentiment assessment findings are summarised in the table in Figure 8:

- The region’s experiences and attractions rate well from a consumer sentiment perspective, receiving a strong average NPS of +63 (based on almost 22,000 reviews). Only products with five or more reviews were included in NPS assessment.
- Interestingly, the product categories that received top NPS scores primarily comprise paid products (tours/tour operators, equipment rental and indoor entertainment [e.g., cinemas]) reflecting that consumers are happy to pay for the

product – and rate it well – when the quality offered matches the price being charged.

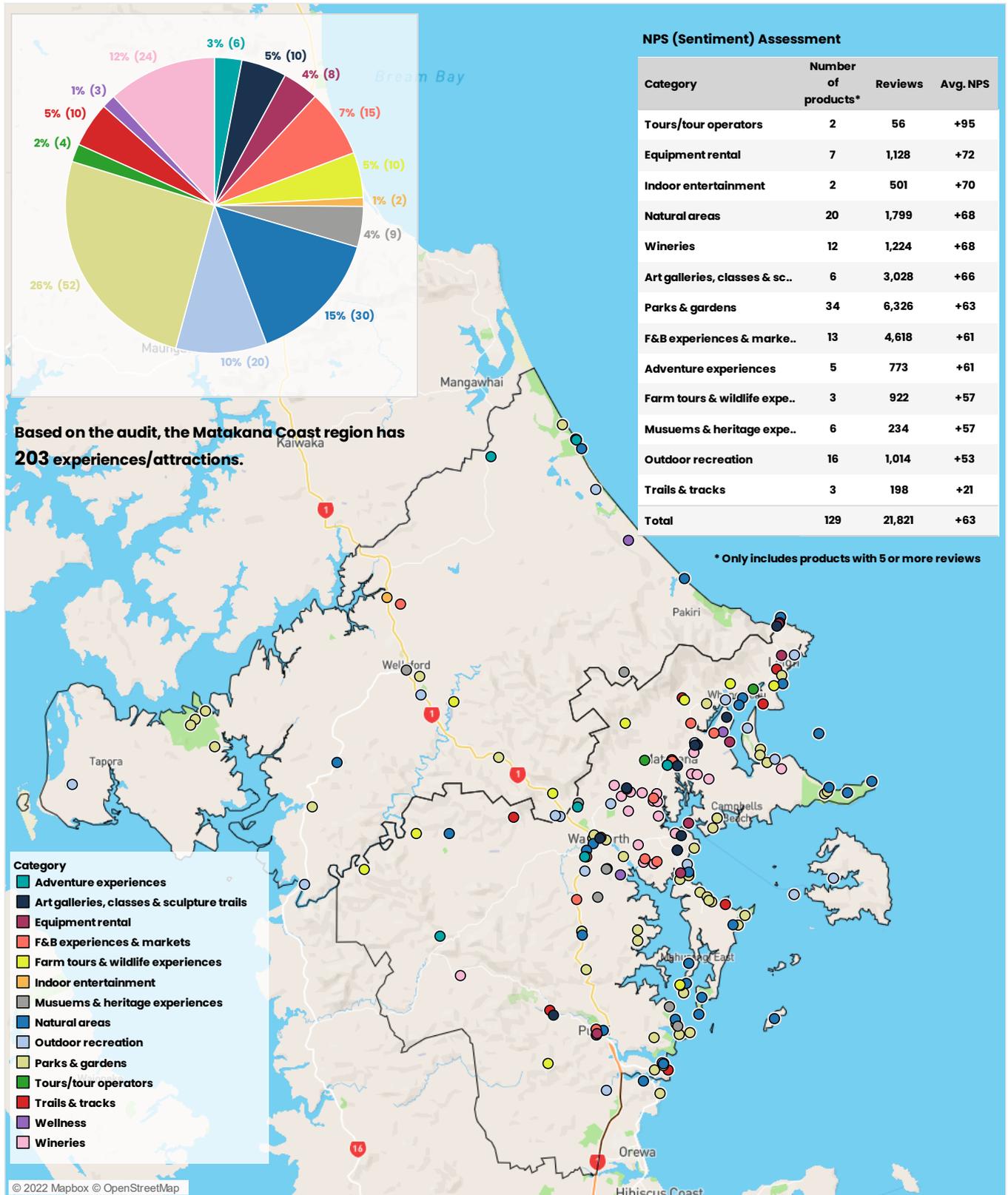
- Of the wineries that had enough reviews to be included in the NPS assessment <sup>20</sup>received a high NPS of +68 (this is on par with Waiheke Island which received a NPS of +70 for its winery product).
- On a comparative basis, the following NPS scores were achieved in similar exercises in other destinations in New Zealand:
  - Waiheke Island received a +68 NPS
  - Mackenzie District received a +61 NPS
  - Waitaki District received a +58 NPS
  - Manawatū region received a +51 NPS.



<sup>19</sup> Note this is not assessing cafés but is looking at food and beverage experiences (e.g., cooking schools, breweries, honey tours)

<sup>20</sup> 12 of the 24 wineries had enough reviews to be included in the NPS assessment

Figure 8: Matakana Coast – Attractions Audit Summary



## 2.8. Target Markets

Matakana Coast is best suited to visitors who are on a journey of discovery and have time to spend experiencing what the region has to offer.

- *Auckland day visitors:* wishing to enjoy the various experiences both natural and man-made including free activities like walks in regional parks.
- *Culinary visitors:* wishing to immerse themselves in the places and culture they are visiting. This visitor has the potential to increase spending, providing a balanced distribution across the region and providing a greater impact on the entire visitor economy value chain.
- *Low impact and engaged visitors:* wishing to immerse themselves into the community and culture they are visiting. This visitor will look to stay longer, stay in small accommodation such as lodges, B&B, and smaller hotels/motels.
- *A new visitor to the region:* Te Arai Links is a new world class golf destination that has recently opened in the Matakana Coast region, with luxury-styled accommodation and several restaurants/cafes on site that is offering great food made from local produce. This will attract international visitors that are wanting to play the world's top golf courses and engage in the surrounding environment.

Mahurangi West Walking Track - Auckland Council





## 2.9. Hero Experiences

There are several exceptional visitor experiences within the Matakana Coast region that can be leveraged to continue to sustainably grow the local economy, benefiting the local community.

### 2.9.1. Art and Sculpture

Matakana Coast is home to a vibrant arts scene, with galleries, design stores and sculpture collections found throughout the area. Brick Bay Winery and Sculpture Park and Sculptureum are amongst the most well-known, while local, national, and international artists can be found in display at galleries located throughout of the region.

### 2.9.2. Marine Reserves

Matakana Coast is well-known for its marine reserves. Cape Rodney-Okakari Point Marine Reserve (Goat Island) – which was established in 1975 and is New Zealand's oldest, fully protected marine reserve – is rich with sea life, making it a renowned spot for divers. Tāwharanui Marine Reserve is also a popular marine area, covering an area of 394 hectares in the Hauraki Gulf.

### 2.9.3. Food Markets and Artisan Producers

Matakana Village Farmers' Market was opened in 2004 and was founded on one simple premise: local people, selling locally produced food. Food provenance is central to the market's philosophy: the people selling the produce are likely to have had a hand in making it too. Artisan products that started at the market now have their own shop faces and are selling their wares further afield.

### 2.9.4. Matakana Coast Wine Country

Wine has been produced in the Matakana Coast region since the mid-1950's when Peter Unkovich and his wife Norma planted Siebel, Palomino and Baco grape varieties at Bay Vineyards in Snells Beach gaining a winemaking licence in 1961. Matakana Coast is now one of the most diverse wine regions in New Zealand. It is home to more than 20 vineyards and wineries, many of which are family owned.

### 2.9.5. Regional Parks

Matakana Coast boasts seven of Tāmaki Makaurau Auckland's 28 regional parks that are open to the public at the time of writing, making it a drawcard for nature lovers.

## 2.10. Matakana Coast’s Brand Attributes

Developing a new destination brand for Matakana Coast is not within the scope of this LDMP. Many stakeholders have however raised the need for this. There appears to be a lack of agreement over the Matakana Coast name and its associated brand attributes.

Table 4 provides a snapshot of some brand attributes that could be used to guide the development of a future brand and associated collateral.

Any future brand needs to be strong and competitive in the market. It needs to be used consistently in all messaging across touchpoints. The brand includes (but is not limited to) logos, tagline, social media hashtags, colour palette, content development and messaging.

Increasing awareness and building on brand identity and affinity for Matakana Coast will assist in attracting new and returning visitors. The brand and associated tools need to be developed and the operators need to be able to easily access these. To strengthen the brand, investment and delivery of consistent public relations and advertising are key.

To increase the online presence of the region, training for businesses in increasing and owning their digital footprint will need to be undertaken, as part of ongoing capacity building.

Table 4: Matakana Coast’s brand attributes

 <p><b>Accessible</b> More accessible and cost-effective to get to than other destinations in the Auckland region (e.g., Waiheke Island)</p>	 <p><b>Harmony</b> The stakeholder survey indicates the harmonious relationship between the community and operators</p>	 <p><b>Culinary/agri-Tourism</b> centred on strong and well-recognised market days, local growers/producers</p>	 <p><b>Recreation</b> A strong recreational destination with aspirations for more quality and commissionable tourism products and experiences</p>
 <p><b>Playground</b> A playground for Aucklanders and an easy day trip excursion</p>	 <p><b>Coastline</b> Stunning coastline (coves, bays, beaches, protected headlands, many locations undeveloped)</p>	 <p><b>Boutique</b> More a boutique-style of destination that appears to fit with community aspirations for tourism</p>	

## 2.11. Challenges/Barriers to Sustainable Growth

### 2.11.1. Macro Challenges/Barriers

Several macro challenges and potential barriers to sustainable visitor growth have been identified through research and consultation. These are summarised in Table 5 and are noted as macro because, while being highly important to acknowledge, they are either:

- Beyond the ability of an LDMP to resolve, and instead need to feed into an updated *Destination AKL 2025* strategy and other

Auckland Council strategies and plans to help mitigate (while some may even require Central Government solutions)

- Prevalent across other local board areas in Auckland, and, therefore, may require a more holistic solution to address them.

The barriers – which are alphabetically ordered – have been aligned with the destination management components of product development, infrastructure, governance, sustainability, and marketing and promotion.

Table 5: Macro Challenges/Barriers

Barriers	Product Development	Infrastructure	Governance	Sustainability	Marketing & Promotion
Carrying capacity challenges		●		●	●
Freedom camping and homelessness challenges (particularly for seasonal workers)		●			
Infrastructure gaps (public toilets in key sites, roads, potable water supply)		●		●	
Lack of robust tourism data			●		
Lack of potable water supply may limit urban development (and tourism) for some time		●			
Land value becoming too expensive for tourism uses	●	●		●	
Limited host community awareness of the importance of tourism			●		●
Limited Māori tourism product and iwi presence in the tourism sector	●		●		
Ongoing uncertainty created by COVID-19 and potential new outbreaks			●		
Seasonality of tourism	●			●	●
Size and regulation of bach/Airbnb accommodation			●	●	
Staffing availability			●	●	
Transport connectivity		●			

## 2.11.2. Micro Challenges/Barriers

Table 6 – in alphabetical order – the primary micro-challenges/barriers identified that pertain to Matakana Coast. These are based on the consultation and research undertaken for this LDMP.

Table 6: Micro Challenges/Barriers

Barriers	Product Development	Infrastructure	Governance	Sustainability	Marketing & Promotion
Traffic congestion is expected to worsen as visitor demand grows and the local population continues to grow without announcements for major and timely.		●			
Lack of public transport		●			
Limited funding for major 117km mountain bike/cycling trails (estimated at \$50m for all 3 stages).		●			
Need to dredge the Mahurangi River to get ferries accessible from Auckland.		●			
No facilities in regional parks (Council managed) so very passive.		●			
The council consent process creates challenges for developing new or additional infrastructure		●			
Limited capacity to host small-medium-sized conferences and events		●			
No capacity to expand Matakana Village		●			
Limited taxi services and no Uber		●			
Limited parking in many locations and limited park-and-ride services (only at Warkworth Transport Hub).		●			
Lack of Infrastructure to encourage the movement into electric vehicles including scooters, bikes, coaches, and cars		●			
Lack of tourism product activation on Kawau Island.	●				
Great marine reserves and regional parks but a lack of resources for maintaining these and only very passive products.	●				
Limited commissionable tourism products and much for free so economic uplift is constrained.	●				
Limited commercial accommodation restricting overnight visitation and higher average spending	●				
Limited restaurant choice and some quality concerns expressed by stakeholders.	●				
No branded accommodation properties to support stronger international and domestic higher-spend visitor markets	●				
Limited major visitor attractions	●				

Barriers	Product Development	Infrastructure	Governance	Sustainability	Marketing & Promotion
Limited adventure/action products for under 50s market	●				
Feedback from stakeholders is that there are too many passion projects and insufficient commercial ones.	●				
Many operators are smaller-scale lifestylers with often limited commercial skills and a desire to remain lifestyle operators rather than expanded commercial operators offering services year-round.	●				
Lack of product packaging and collective marketing.			●		●
Lack of local funding resources for the local tourism organisation so highly reliant on TAU.			●		●
No tourism operator strong network, no corporates, and no solid financial base of support regionally.			●		●
Warkworth currently has a community with many retirees, so change is not always wanted or easy to achieve.	●		●		
Fishing charter boat operators tend not to engage with the tourism sector and limited advertising.	●		●		●
Limited stakeholder collaboration historically between operators and towns			●		
Pest control problems within the Auckland Council regional parks.				●	
Behavioural problems with dog and cat owners impacting local wildlife.				●	
Hauraki Gulf sustainability issues for fishing etc.				●	
Pandemic uncertainty going forward – industry nervousness about fully reopening and reinvestment			●	●	
Over 50% of workers living in the region drive to Auckland each day for work.				●	
Some in the community are split on whether they want more tourism (which is driven by traffic congestion at weekends particularly).		●		●	
Warkworth shops face away from the river front so activating the riverfront is not so straight forward		●			
Planning and development costs are seen as very high impacting project viability	●	●			
The planning process (RMA approvals etc) is noted as long, expensive, and time-consuming resulting in a lack of certainty).	●	●	●		
Limited investment over the last 5 years in tourism products and services.	●	●			

# Part 3: Where Do We Want to Be?

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## 3.1. Strategic Framework

The following strategic framework has guided the development of this LDMP and should be used to direct tourism development in Matakana Coast region going forward. The framework has been deliberately aligned with the *Destination AKL 2025* strategy, the overarching DMP strategy for the broader Tāmaki Makaurau Auckland region.

### 3.1.1. The Vision

The vision for Matakana Coast's visitor economy is as follows.

"Matakana Coast will continue to strive to be a sustainable visitor destination, building on its reputation as a leading visitor hub for greater Tāmaki Makaurau Auckland and a gateway to Northland, and offering a range of exciting recreation and tourism activities to benefit a range of visitor markets, and to support a diverse resident community. The visitor economy will continue to grow strongly and sustainably, actively supported by mana whenua, industry, government, and community, all working collaboratively."

### 3.1.2. Guiding Principles

As identified in this LDMP and the *Destination AKL 2025* strategy, destination management is, ultimately, a holistic activity. Which makes destination management more of a process (a way of working) than a project (a list of things to be done).

To align closely with the overarching strategy, the guiding principles (behaviours that will underpin activity and that will be essential to the success of Matakana Coast) from the *Destination AKL 2025* strategy have been applied to this LDMP (see Figure 9).

As noted in the plan, "The guiding principles are drawn from tikanga Māori and set the tone for how all those who have an interest in the long-term development of 'Destination Auckland' will work together. It was Māori who first brought meaning and value to this piece of land hundreds of years ago. The natural abundance of the region created a thriving economy so prized it was named Tāmaki Makaurau: the place desired by many. The ancient stories, prayers, songs, haka, and carvings of this region pay homage to the many ancestors that walked this land creating a unique chronicle of how our city was formed and what it means to be from Tāmaki Makaurau Auckland."<sup>21</sup>

Figure 9: DMP Guiding Principles

<b>KOTAHITANGA</b> Collaboration	We will work together in unity and common purpose
<b>KAITIAKITANGA</b> Guardianship	Guided by mana whenua, we will actively care for our region; our environment and our people
<b>MANAAKITANGA</b> A warm welcome	We share the abundance and spirit of generosity within this special region with our visitors, from their welcome to their farewell and return

<sup>21</sup> Destination AKL 2025, page 8

### 3.1.3. Strategic Imperatives

This LDMP adopts the strategic imperatives (Figure 10) identified in the *Destination AKL 2025* strategy to achieve strong alignment. In a Matakana Coast context, these reflect:

- The need to have a clear identity for what Matakana Coast is as part of the Auckland and broader New Zealand destination proposition and what it aspires to be in the future
- The desire to focus more on value while also maintaining sustainable volume growth (particularly considering the impact COVID-19 has had on the sustainability of many businesses)
- The strong desire of industry and the community to protect the environment, support cultural development and improve profitability
- The need for improved physical connectivity, access, regional dispersal, and wayfinding
- The desire for a far greater level of collaboration amongst industry, community, and government
- The recognition that the visitor economy requires greater human capacity and capability, and this requires investment and dedication.

Figure 10: DMP Strategic Imperatives

<p><b>An Insightful Place</b></p>	<p><b>A Place of Partnership &amp; Planning</b></p>	<p><b>A Sustainable &amp; Resilient Place</b></p>
<p>A place that makes evidence-based decisions, encouraging business support and improved viability while maintaining identity and showcasing community resilience.</p>	<p>A place where mana whenua has opportunities to input and prosper with mechanisms in place to ensure that community social license for the visitor economy is being monitored.</p>	<p>A place that advocates for the well-being of the terrestrial, land, and marine environments with an aim of transitioning to a low-emissions and low impact visitor economy.</p>
<p><b>A Connected Place</b></p>	<p><b>A Unique Place</b></p>	<p><b>A Captivating Place</b></p>
<p>A place where principles of economic, social, and environmental sustainability are not compromised by planning that is being undertaken to better connect the destination.</p>	<p>A place where visitors are enticed to stay longer and embrace the communities for what makes them special.</p>	<p>A place that enriches the visitor experience in a way that gives back at least as much to a destination's people and places as it takes.</p>

## 3.2. Recommendations for Sustainable Growth

Destination management requires collaboration between a range of separate groups, including the public and private sectors, mana whenua and the Matakana Coast community. A variety of recommendations have been identified during the process of creating this plan that are designed to:

- Mitigate or overcome the barriers to sustainable development
- Assist in activating the identified destination vision
- Align with broader destination management work already completed, particularly the *Destination AKL 2025* strategy and the *New Zealand-Aotearoa Government Tourism Strategy*
- Provide the necessary building blocks to develop a sustainable visitor economy, and/or
- Offer the potential to grow the visitor economy sustainably, focusing on growing visitor yield rather than visitor numbers, and maintaining community support (and social licence for tourism activity) going forward.

### 3.2.1. The Full List of Recommendations Listed by Strategic Imperative

#### 3.2.1.1. An Insightful Place

##### 3.2.1.1.1. Visitor Journey Mapping

To assist infrastructure planning, visitor journey mapping could be undertaken. This could include profiles of visitor types to the region, including descriptions of their journeys and how they enjoy chosen attractions and townships. This will also assist in creating effective product development and future packages, visitor transportation strategies, and help identify where pressure points are occurring in the region for public facilities such as public toilets, and the use of parks and reserves. It will also enable better management of visitor flows and volumes to reduce visitor impacts and consequences, increase overnight stays and better manage and control day visitor volumes.

##### 3.2.1.1.2. Advocate for good Visitor Data, Research, and Insights

There is a lack of tourism-related data for Matakana Coast. To guide the sustainable growth of tourism in the region, there is a need to start collecting and distributing tourism-related data. This will also assist with promoting the value of the visitor economy to the community and potential investors into product. This could be undertaken through:

- An annual survey of industry operators to establish/track parameters such as: bed nights, source markets, average stay, reason for travel and visitor sentiment, which may provide guidance for marketing activity
- Working with the business association, One Mahurangi, to gather data from the retail and hospitality sector that it covers on visitor numbers and spend

- Continuing to lobby MBIE, Stats NZ and the Tourism Data Leadership Group to provide international and domestic tourism data at a local level.

##### 3.2.1.1.3. Enhancement of Destination Events Calendar on [MatakanaCoast.com](http://MatakanaCoast.com)

Creating events that take in what the region has to offer should also be investigated (e.g., marine festival, harvest festival – celebrating the hinterland, food, and beverage events.) Matakana Coast Tourism (MCT) should also actively encourage event organisers in the region to promote their events on [matakanacoast.com](http://matakanacoast.com).

#### 3.2.1.2. A Place of Partnership and Planning

##### 3.2.1.2.1. Tourism Industry Networking Events

The tourism industry within Matakana Coast would benefit from stronger collaboration and connectivity. To help facilitate this, a series of regular networking events is recommended to:

- Provide a platform for all industry operators to meet regularly as a social networking opportunity
- Provide the industry with information updates on trends and TAU and Tourism New Zealand (TNZ) initiatives for promotions
- Provide the industry with Matakana Coast Tourism updates on initiatives
- Offer a platform for guest speakers to come and present on topics of interest.

The venue should be moved around the region to ensure operators get to see and better understand what other products exist.

##### 3.2.1.2.2. Industry Famil Program

Following the opening of the Ara Tūhono/Puhoi to Warkworth Motorway, operators should work with TAU to host an industry famil that showcases Matakana Coast tourism product. Different itineraries can be created and offered to inbound operators (including overnight offering and day visitation). This will also help upskill the local industry to the expectations of international markets.

##### 3.2.1.2.3. Upskilling Operators

MCT should work with TAU and TNZ to offer training and upskilling for operators, focusing on:

- Engaging with international markets as well as domestic ones, including training on implementing a pricing structure that accommodates commission
- Programmes which focus on sustainability and capability building
- Providing opportunities for regional operators to collaborate to create new products.

### 3.2.1.3. A Sustainable and Resilient Place

#### 3.2.1.3.1. Carbon Zero Matakana Initiatives

The Matakana Coast has a strong underground swell of community support for sustainability and green living, which could potentially be linked to advocating for funding to further enhance improved sustainability within the region.

Some examples of businesses in the region aiming towards carbon zero or working in the sustainability realm include:

- Sawmill Brewery is a Certified B Corporation, one of the only in Australasia
- Of the 21 wineries located in the Matakana Coast Region many have or are registered as a New Zealand Sustainable Winegrower
- Matakana Village Farmers' Market is a zero-waste market with no plastic bags, everything including food/drinks are served in combustible containers
- New Zealand's first marine reserve – Cape Rodney-Okakari Point Marine Reserve (Goat Island) – is already carbon zero, as is Tāwharanui Marine Reserve.
- Electric Coaches – New Zealand's first and only luxury eCoaches are MahuExpress, which is based in Matakana
- Potential to create pathways for scooter hires with developments of cycleways to move between centres to further support a zero-carbon region.

It is worth noting that Tāmaki Makaurau Auckland has already made progress towards becoming a more sustainable city and region. In 2015, Auckland joined the C40 Cities Climate leadership group allowing us to continue to learn from other leading global cities. Importantly, Auckland Council has signed the green and healthy streets deceleration which includes the following:

- Procuring only zero emission buses from 2025 (with the possibility to pilot their introduction in the Matakana Coast region)
- Ensuring a major area of Auckland is carbon zero by 2030 which Matakana Coast could be the leader for, noting the existing strong community support already. Visitor economy operators within the region will need to support a carbon zero goal and make it mandatory for all new businesses to also support this goal.

#### 3.2.1.3.2. Advocate for Investment in Marine Reserves and Regional Parks

Matakana Coast is home to diverse marine reserves and regional parks. Many of these have been in existence for many years but for most, there has been relatively little reinvestment into supporting infrastructure. Demand for these quality assets grows as demand from locals and visitors increases. Forms of investment to be considered include:

- Updated jetties and wharves
- Expanded pathways and walking trails
- Underwater scuba dive trails
- Pontoons
- Moorings
- Pop up seasonal cafes at primary nodes for visitors
- Opportunity for regional parks to be connected to cycle trails
- Improved visitor parking
- Expanded and improved directional and interpretative signage
- New and/or improved waste management systems
- Visitor social media platforms including updated websites and apps
- Updated areas for discreet camping where permissible
- Other forms of infrastructure support and new and enhanced amenities.

For each regional park and marine reserve, a current infrastructure audit is required with an annual maintenance program over a 10-year period.

#### 3.2.1.3.3. Advocate for Resources to Address Major Infrastructure Constraints.

There is a need to continue to advocate for resources and improved processes (for example, the regulatory process) to address major infrastructure constraints in the Matakana Coast region. This is important to ensure necessary infrastructure is in place to meet the needs of the local community, both now and into the future, and which visitor requirements will need to leverage from.

#### 3.2.1.3.4. Regional Park Carrying Capacity Assessments

MCT and TAU should work with Auckland Regional Parks to conduct a carrying capacity assessment for each of the seven regional parks in the Matakana Coast region to ascertain:

- What the carrying capacity is in the area
- What parks can grow their visitor numbers, and to what level
- Whether there are commercial opportunities for visitor experiences with the regional parks.

#### 3.2.1.3.5. Wetland Nursery

There is an opportunity to expand the wetland nursery for planting around the waterways in the region, including the work that is being done by the Mahurangi East Restoration Project<sup>22</sup>. Work should be undertaken with mana whenua to expand on this offering and scope a piece of work which would look to secure funding options, which could in turn lead to voluntourism programs.

<sup>22</sup> <https://www.ngatimanuhiri.iwi.nz/melr>

### **3.2.1.3.6. Addressing Zoning Constraints Through Tourism as A Preferred Use**

Working with key stakeholders, identify areas within the region for potential tourism development in the short- and long-term, also identifying if there is rezoning of land in this region. A key focus when working with planners to identify sites should be to ensure sustainable infrastructure (roading/wharves) is in place.

### **3.2.1.4. Unique Place**

#### **3.2.1.4.1. Matakana Coast as the Markets Epicentre for Tāmaki Makaurau**

With a variety of well-developed existing markets, Matakana Coast is well recognised as an epicentre for markets across the wider Auckland region. Matakana Coast markets include:

- The famous Matakana Village Farmers' Market, with the Creamery Craft Market sitting alongside
- Matakana Country Park Market (during Summer/Autumn) – held every Sunday
- Puhoi Village Market – held at the Puhoi Domain on the last Sunday of the month in January, February, March, April, September, October, and November
- Warkworth Country Market – held at the A&P Showgrounds on the last Sunday of the month
- Wellsford and Te Hana Friday Night Market – selling local product and crafts, these are held once a month and alternate between Te Hana and Wellsford.

The markets offer a diverse range of products and experiences and help to disperse visitors throughout the region. Many of these markets have been established for many years and are visited by many people from across the greater Auckland region and further afield. This reflects their strength, and the level of market demand.

#### **3.2.1.4.2. Activation of Mahurangi Riverfront Warkworth**

MCT, with support from TAU, should work with the Rodney Local Board, One Mahurangi and key stakeholders to develop and activate the Mahurangi riverfront in Warkworth. This could include:

- Leveraging existing or new events where the riverfront is used as a drawcard
- Advocating for a cycleway that runs from the Warkworth park-and-ride facility along the waterfront area or creating a cycleway between Puhoi to Mangawhai.

#### **3.2.1.4.3. Engage with Mana Whenua on Tourism Initiatives**

There is an opportunity to engage with mana whenua on tourism initiatives that could include:

- Investigating tour guide options led by mana whenua including boardwalk stories of pou at Omaha Beach, or tours of Kawau Island
- Developing boat tours in and around Kawau Island and other islands, sharing mana whenua stories of significance

- Work with Ngāti Manuhiri to introduce a pou-to-pou walking experience including appropriate interpretation on Omaha Beach walkways
- Amplifying Matakana Coast's position as the gateway to Northland, including telling stories from the Te Hana region and the Kaipara Harbour.

#### **3.2.1.4.4. Interactive Experience at Mansion House**

MCT should work with DOC, TAU, and iwi/mana whenua to scope opportunities to create and fund a purchasable interactive experience on the grounds and in Mansion House on Kawau Island.

Iwi/mana whenua to lead in the storytelling and identification of sites of significance on Kawau Island – sharing the island's rich history and culture, and details on the flora, fauna and wildlife that exists there.

### **3.2.1.5. A Captivating Place**

#### **3.2.1.5.1. Branded Hotel and Conference Venue (100–160 rooms)**

Having a branded hotel and conference venue is worth exploring further. This would involve identifying a suitable site (most likely within or close to Warkworth) for a new hotel development. This project is the highest-ranked development project as noted above and as recognised by most stakeholders.

The facility should include a conference-function venue with a capacity for up to 400 people seated theatre-style and allowing for at least 100 rooms twin share (though a larger capacity of up to 160 rooms would offer future proofing if feasible).

The property should ideally be internationally branded so it can be an anchor facility to help motivate visitor markets including the following:

- A domestic market visiting for business and lifecycle (e.g., weddings events and functions)
- A business market visiting for meetings (assuming the property can be designed with separate business and function rooms of various sizes, forums, conferences, and smaller-scale conventions)
- An Australian business market visiting for both meetings/conferences and more likely from the major eastern seaboard cities of Adelaide, Melbourne, Canberra, Sydney, Gold Coast and Brisbane
- Potentially tour groups visiting for food experiences, island tours, outdoor adventure experiences and other products and a mix of domestic and international visitor markets.

#### **3.2.1.5.2. Hub for Hauraki Gulf Water Sports**

Matakana Coast is a natural gateway to the Hauraki Gulf, with ferry services to various islands including Kawau Island and services to Te Hauturu-o-Toi Little Barrier Island. There is a growing heli-fishing and heli-sightseeing market for those wanting to access remote

locations in the Hauraki Gulf, and good access to islands and locations within the Hauraki Gulf for fishing, scuba diving, snorkelling, kayaking, paddle boarding, yachting, and windsurfing.

Matakana Coast should therefore be more heavily promoted as a hub for accessing the Hauraki Gulf and to actively encourage sustainable water sports and activities, balancing this so overcrowding does not occur.

### 3.2.1.5.3. Wellness Day Spa with Accommodation (20–30 rooms)

With its various water- and land-based outdoor attractions and experiences, Matakana Coast would benefit from a quality day spa and wellness facility to encourage a range of visitor markets to benefit from the facilities, noting that markets are likely to include:

- Those undertaking outdoor pursuits and wanting to relax at the end of the day
- Those wanting to be pampered and stay within the accommodation units on site or elsewhere
- A local market wanting to enjoy the facilities
- Other markets as well including those staying at the accommodation on site.

In discussion with various stakeholders, certain sites were noted for this type of facility including some high-quality sites with water views. This facility could rate between 3.5 to 6 stars, and could include an indoor pool, gym, sauna, steam rooms, hot pools, and plunge pools.

Figure 11: Health, wellness, and hot pool facility precedents<sup>23</sup>



### 3.2.1.5.4. Designated Visitor Hubs

Projects such as the cycleway between Puhoi to Mangawhai provide opportunities to create designated visitor hubs with their own identity and product offering. To assist with this, work should be undertaken to identify what facilities and experiences are required in centres such as Puhoi, Warkworth, Matakana Village, Leigh and Pakiri.

### 3.2.1.5.5. Grow the Paddock-to-Plate Offering

Growing the paddock-to-plate offering in Matakana Coast should be investigated. This could include:

- Introducing a paddock- and ocean-to-plate trail that promotes and focuses on locally grown and sourced food initiatives, drawing on existing Matakana Coast food operators
- Establishing and supporting a cluster of 'local food producers' to develop a supply chain for homegrown and sourced meat, fish, vegetables, and fruit
- Establishing a cooking school in the region where produce from the land and sea can be cooked. This would require MCT to lead initial scoping work as to where this could be located and the demand for this sort of product. This would require a domestic and international market to make it successful.

### 3.2.1.5.6. Promotion and Packaging of Diving Experiences

Identify gaps in the market for packaged experiences e.g., food and beverage, nature, and wildlife (land and sea) and art, then work with local operators to create and fill the gaps that are there from the current offering. If local operators are not interested, consider promoting to tour operators in the wider Auckland area for them to pick up and offer. Use these packages to promote to what the region has to offer.

### 3.2.1.5.7. Promotion and Packaging of Diving Experiences Based Out of Matakana Coast

Work should be undertaken with existing dive companies in the area to ascertain their willingness to collaborate and or create new package experiences around the region including becoming a base within the region to Northland and/or other parts of Tāmaki Makaurau Auckland.

<sup>23</sup> Queenstown Onsen, NZ; Spa Elysia, Hunter Valley; Blue Lagoon, Norway; Peninsula Hot Springs, Victoria; Lake Tekapo, NZ

### 3.2.1.6. A Connected Place

#### 3.2.1.6.1. Pūhoi and Mangawhai Cycle Trail (Staged) with Visitor Hubs and Park-and-Ride

The desire for high-quality cycle trails was rated very highly by both community and business respondents to the survey. The proposed Pūhoi and Mangawhai cycle trail (see Figure 12) would be a major visitor attraction and a mechanism to encourage far greater dispersal throughout the region. The vision is to create a trail that offers walking, cycling, mountain biking and horse-riding paths for residents, visitors, and tourists.

Ideally, the cycle trail can start and end at a park-and-ride facility so trail users can leave vehicles safely at these hubs and secure returning shuttle vans etc. to help complete the loop if not riding back. It could also be supported by a range of smaller overnight experiences including huts and lodges.

The trail is being developed in three stages and has been planned for some time though access to some areas on privately owned land is still to be negotiated.

Overall, however, it appears the project has galvanised many in the community and has strong support. The capital cost to complete all the stages was initially estimated at approximately \$50 million but this may need to be revised once all planning requirements and the precise trail alignment is confirmed.

Stage one of the project connects urban centres including businesses, schools and attractions for locals and visitors alike. It includes future housing and business areas identified in Warkworth and Snells Beach. It provides walking and cycling options for commuters and school kids between these towns. This stage is family-friendly and has a flat grade. It has an estimated cost of construction of \$12.7 million and achieves a benefit-cost ratio of \$1.00 invested creating \$6.30 in social, health and economic benefits.<sup>24</sup>

#### 3.2.1.6.2. Improved Public Transport and Car Parking

There is a need to advocate for improved public transport (including park-and-ride facilities) and car parking, particularly in areas which experience congestion such as Matakana on market days, and Goat Island and Tāwharanui in the height of summer.

Figure 12: Full network map<sup>25</sup>



<sup>24</sup> <https://mctt.org.nz/project/stage-1/>

<sup>25</sup> <https://mctt.org.nz/>

### 3.3. Visitor Forecasts

Figure 13 provides forecasts for visitation to Matakana Coast over the period 2023 to 2032 (2019 to 2022 have been included for comparative purposes).

Forecasts are based on three different scenarios including low, medium, and high growth scenarios. It is important to note the unstable environment that resulted from COVID-19 and fluctuating conditions.

Growth is likely to be constrained by limited product capacity and infrastructure development constraints (parking, roading upgrades etc.). If new accommodation and amenities are not activated, or are far slower to activate, then achieving growth above and beyond what is indicated is expected to be constrained, and day visitation ex-Auckland is likely to continue to dominate. Importantly, growth forecasts could be far stronger if supply-side constraints can be adequately addressed.

The introduction of more accommodation and commissionable products is likely to support international and domestic visitor growth and higher spending niche sectors. Without the introduction of this product, growth is likely to be dominated by day visitation.

While day visitors are an important segment, they typically are far lower yielding than overnight visitors. For example, in similar destinations, day visitors spend on average, \$90 per trip while overnight visitors spend, on average, four times this (e.g., \$360 per

overnight with accommodation, food and beverage, entry fees to attractions).

International visitation to Matakana Coast could potentially grow more strongly once new product is introduced, for example the Te Arai premium golf course with new accommodation. Infrastructure constraints such as roading and potable water (in some locations) could also challenge growth over the medium-long term.

The data reflects the following:

- The low growth scenario reflects a much more conservative recovery post-COVID-19, with visitation anticipated to reach pre-COVID-19 levels by 2027.
- The medium growth scenario reflects a more likely recovery scenario. This scenario assumes Matakana Coast benefits from several new tourism-related developments becoming operational over the period out to 2032. Under this scenario, visitation is forecast to reach pre-COVID-19 levels by approximately 2025. By 2032, visitation is forecast to reach 1.26 million visitors, up from 1.07m in 2019.
- The high growth scenario sees a much stronger post-COVID 19 recovery and related uplift from a wider range of tourism development initiatives being activated. This scenario assumes most of the recommendations in this LDMP are adopted and implemented with faster development timeframes. Under this scenario, visitation is forecast to grow from 1.07m in 2019 to 1.42 million visitors by 2032.

Figure 13: Visitor Forecasts Total (2023 – 2032)<sup>26</sup>

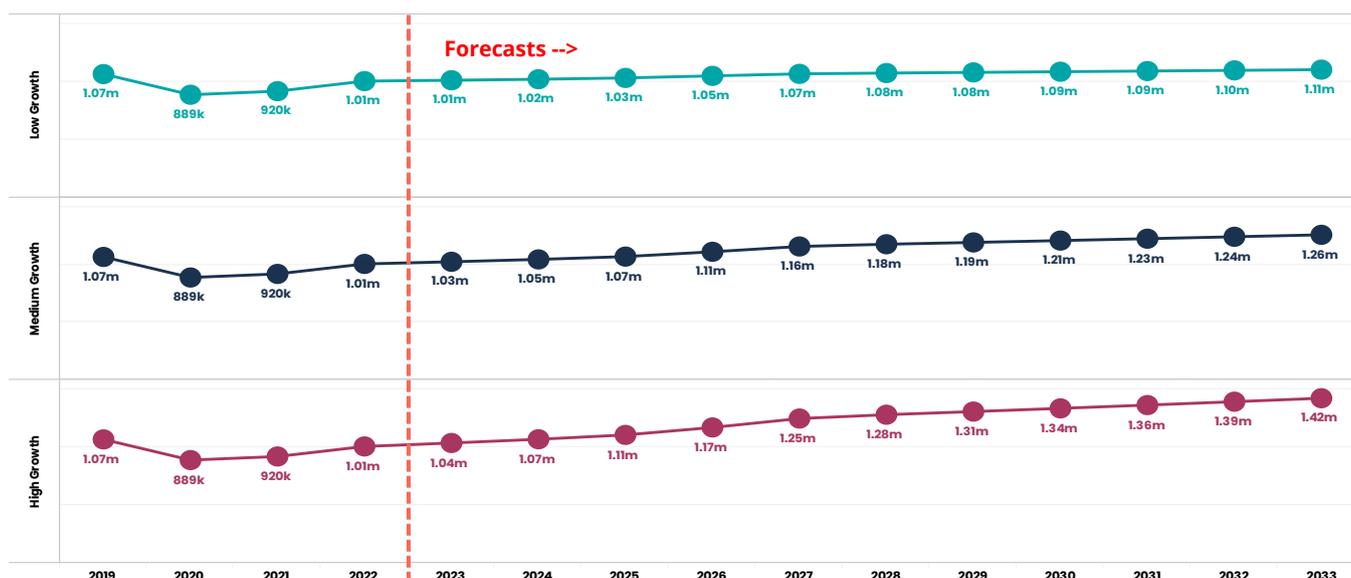


Figure 14 provides forecasts for Matakana Coast by visitor market. It demonstrates:

<sup>26</sup> Based on visitation data (NZ IVS, New Zealand Regional Tourism Estimates and the New Zealand Visitor Activity Forecast - <https://freshinfo.shinyapps.io/NZVAF/>), discussions with TAU, transport providers, and local industry operators.

- The strong domestic profile the region has historically had (with over 90per cent of visitors in 2019 being from New Zealand)
- The impact COVID-19 has had on international visitation to the region, with international visitation falling from 8per cent of visitation to the region in 2019 to approximately 1per cent in 2022 (across all three scenarios)
- The stronger international recovery anticipated in the medium and higher growth scenarios because of the assumed implementation of more DMP recommendations and new promotional campaigns to attract key international markets in Australia, United States, United Kingdom and Europe, and parts of Southeast and North Asia.

Figure 14: Visitor Forecasts by Market (2019, 2023 & 2033)<sup>27</sup>



<sup>27</sup> Based on visitation data (NZ IVS, New Zealand Regional Tourism Estimates and the New Zealand Visitor Activity Forecast - <https://freshinfo.shinyapps.io/NZVAF/>), discussions with TAU, transport providers, and local industry operators.

# Part 4: How Will We Get There?



## 4.1. Action Plan

Table 7 and Table 8 provide the plan for actioning the various recommendations in this LDMP, along with an indication of who will be involved. The tables outline:

- Actions needed to implement this LDMP
- Key agencies that should be engaged to drive each action
- Estimated timeframe for effective activation, noting recommendations may change over time as resources are revised and priorities may change
- Key performance indicators to ensure actions are implemented.

Matakana Coast Tourism (MCT) along with Tātaki Auckland Unlimited (TAU) and other key stakeholders will continue to meet regularly to oversee the implementation of the LDMP. The actions are non-exhaustive and will continually be revalidated over time. The action plan needs to be considered a “living” document. As such, it must remain fluid to consider the needs of different stakeholders and their ability to undertake actions alongside other responsibilities and commitments.

Table 7: Action Plan – Tier I Recommendations

Strategic Imperative	Recommendation	Action/s	Who
A Sustainable and Resilient Place	Advocate for investment in marine reserves and regional parks	<ul style="list-style-type: none"> <li>▪ Work with Auckland Council, Department of Conservation (DOC) and others to identify investment requirements for marine reserves etc.</li> <li>▪ Identify funding options</li> </ul>	<ul style="list-style-type: none"> <li>▪ Auckland Council</li> <li>▪ DOC</li> <li>▪ MCT</li> <li>▪ Regional Parks</li> <li>▪ TAU</li> </ul>
A Sustainable and Resilient Place	Carbon-zero Matakana Coast initiatives	<ul style="list-style-type: none"> <li>▪ Position region as the lead region for zero carbon emissions</li> <li>▪ Promote the region's zero carbon goal</li> <li>▪ Encourage industry operators to support the goal</li> <li>▪ Offer workshops to operators on how to deliver a zero-carbon footprint</li> <li>▪ Promote progress as an annual KPI</li> <li>▪ Advocating for the introduction of EV infrastructure and identify funding options.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Auckland Council</li> <li>▪ MCT</li> <li>▪ One Mahurangi</li> <li>▪ Rodney Local Board</li> <li>▪ TAU</li> <li>▪ Visitor economy</li> </ul>
A Unique Place	Position Matakana Coast as the market epicentre for Tāmaki Makaurau Auckland	<ul style="list-style-type: none"> <li>▪ Develop a promotional campaign to promote the market epicentre positioning.</li> </ul>	<ul style="list-style-type: none"> <li>▪ MCT</li> <li>▪ TAU</li> <li>▪ Visitor economy</li> </ul>
A Captivating Place	Branded hotel and conference venue (100-160 rooms)	<ul style="list-style-type: none"> <li>▪ Prepare an investment prospectus to identify opportunities and encourage operators and their investors.</li> </ul>	<ul style="list-style-type: none"> <li>▪ MCT</li> <li>▪ TAU</li> <li>▪ Real estate agent</li> </ul>
A Connected Place	Pūhoi and Mangawhai cycle trail (staged) with visitor hubs and park-and-ride	<ul style="list-style-type: none"> <li>▪ Continue to assist the cycle trail trust to activate stage one</li> <li>▪ Identify funding options and secure funding</li> <li>▪ Advocate and identify cycleways extensions as part or adjacent to the cycleway to create improved connectivity</li> <li>▪ Assess supporting infrastructure such as signage.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Mana whenua/iwi</li> <li>▪ Matakana Coast Trails Trust</li> <li>▪ MCT</li> <li>▪ Rodney Local Board</li> </ul>
A Captivating Place	Wellness day spa with accommodation (20-30 rooms)	<ul style="list-style-type: none"> <li>▪ Identify potential sites</li> <li>▪ Prepare investment prospectus to identify opportunities and encourage operators and their investors.</li> </ul>	<ul style="list-style-type: none"> <li>▪ MCT</li> <li>▪ Rodney Local Board</li> <li>▪ TAU</li> </ul>

Strategic Imperative	Recommendation	Action/s	Who
A Captivating Place	Hub for Hauraki Gulf water sports	<ul style="list-style-type: none"> <li>▪ Identify improvements needed at Sandspit and other staging posts to access the Hauraki Gulf in regard to parking, public transport links and other site improvements</li> <li>▪ Assess any water sport limitations for islands within the Hauraki Gulf</li> <li>▪ Develop a promotional campaign to encourage positioning of the region as a gateway to the Hauraki Gulf</li> <li>▪ Engage with current local operators to develop packages that promote island experiences with links to boat hire – if no interest locally take to wider Auckland.</li> </ul>	<ul style="list-style-type: none"> <li>▪ AT</li> <li>▪ Local Operators</li> <li>▪ NZTA</li> <li>▪ Rodney Local Board</li> <li>▪ TAU</li> </ul>
A Place of Partnership and Planning	Tourism industry networking events	<ul style="list-style-type: none"> <li>▪ Implement industry networking events with support from TAU.</li> </ul>	<ul style="list-style-type: none"> <li>▪ MCT</li> <li>▪ TAU</li> <li>▪ Visitor economy</li> </ul>

Table 8: Action Plan – Tier 2 Recommendations

Strategic Imperative	Recommendation	Action	Who
An Insightful Place	Undertake visitor journey mapping	<ul style="list-style-type: none"> <li>Create profiles of visitor types to the region, including descriptions of their journeys and how they enjoy chosen attractions and townships.</li> </ul>	<ul style="list-style-type: none"> <li>MCT</li> <li>TAU</li> </ul>
A Unique Place	Engage with mana whenua on tourism initiatives in the region	<ul style="list-style-type: none"> <li>Determine interest from Ngāti Manuhiri to develop a sustainable and marketable culture product</li> <li>Liaise with Ngāti Manuhiri over key areas of significance where they can tell their stories, welcome manuhiri</li> <li>Work with Ngāti Manuhiri to introduce a pou-to-pou walking experience including appropriate interpretation on Omaha Beach</li> <li>Identify funding opportunities to support initiatives</li> <li>Liaise with Ngāti Pāoa to identify their stories and opportunities to link with their Northland products.</li> </ul>	<ul style="list-style-type: none"> <li>MCT</li> <li>Mana whenua</li> <li>Ngāti Manuhiri</li> <li>Te Uri o Hau</li> <li>TAU</li> </ul>
A Captivating Place	Designated visitor hubs (Pūhoi, Warkworth, Matakana, and Leigh)	<ul style="list-style-type: none"> <li>Identify location with Rodney Local Board and other key stakeholders</li> <li>Work with Auckland Council to designate sites.</li> </ul>	<ul style="list-style-type: none"> <li>MCT</li> <li>Rodney Local Board</li> <li>TAU</li> </ul>
An Insightful Place	<p>Enhancement of destination events calendar (marine festival, winter/autumn/spring festival)</p> <p>Ensure all events that will attract visitors from outside the region are shown in one place</p>	<ul style="list-style-type: none"> <li>Build upon the destination events calendar on the MCT website</li> <li>Identify new events and festivals</li> <li>Promote the integrated destination events calendar.</li> </ul>	<ul style="list-style-type: none"> <li>MCT</li> <li>One Mahurangi</li> <li>TAU</li> <li>Visitor economy</li> </ul>
A Captivating Place	Family-friendly (all-weather) visitor attraction	<ul style="list-style-type: none"> <li>Identify opportunities for locating family-friendly products</li> <li>Encourage operators and investors to look at these as a viable opportunity.</li> </ul>	<ul style="list-style-type: none"> <li>MCT</li> <li>TAU</li> </ul>
A Captivating Place	Ensure Warkworth township is a destination for visitors post-opening of the new motorway system	<ul style="list-style-type: none"> <li>Create stories to be featured on matakanaoast.com giving visitors to the region a reason to stop in Warkworth</li> <li>Highlight retail and hospitality experiences in Warkworth - including services</li> <li>Work with tour operators to include Warkworth where appropriate as a stop off point.</li> </ul>	<ul style="list-style-type: none"> <li>MCT</li> <li>One Mahurangi</li> <li>Rodney Local Board</li> <li>TAU</li> </ul>
A Unique Place	Interactive experience at Mansion House	<ul style="list-style-type: none"> <li>Advocate to DOC to investigate opportunities for an interactive experience</li> <li>Identify appropriate designers who could deliver this type of experience</li> <li>Identify funding options</li> <li>Kawau Island heritage/cultural trail.</li> </ul>	<ul style="list-style-type: none"> <li>DOC</li> <li>Mana whenua/iwi</li> <li>TAU</li> </ul>
A Captivating Place	Grow the paddock-to-plate offering including a cooking school	<ul style="list-style-type: none"> <li>Identify where there are product gaps</li> <li>Work with food suppliers and operators to re-introduce a cooking school</li> <li>Look to expand training and other opportunities for culinary upskilling.</li> </ul>	<ul style="list-style-type: none"> <li>Matakana Coast food suppliers</li> <li>MCT</li> <li>Visitor economy</li> </ul>
A Connected Place	Improved public transport and car parking (including increased park-and-ride facilities)	<ul style="list-style-type: none"> <li>Advocate for further sites with Rodney Local Board e.g., with start of Pūhoi part of the cycleway or connecting park-and-ride in Warkworth to Goat Island, Matakana Village.</li> </ul>	<ul style="list-style-type: none"> <li>AT</li> <li>NZTA</li> <li>One Mahurangi</li> <li>Rodney Local Board</li> <li>TAU</li> </ul>

Strategic Imperative	Recommendation	Action	Who
A Unique Place	Activation of Mahurangi riverfront, Warkworth	<ul style="list-style-type: none"> <li>Work with Auckland Council and others to develop the riverfront at Warkworth as an event venue.</li> </ul>	<ul style="list-style-type: none"> <li>One Mahurangi</li> <li>Rodney Local Board</li> <li>MCT</li> </ul>
A Sustainable and Resilient Place	Wetland nursery	<ul style="list-style-type: none"> <li>Assess growth options for a wetlands' nursery with Ngāti Manuhiri for regenerative tourism experiences.</li> </ul>	<ul style="list-style-type: none"> <li>Ngāti Manuhiri</li> <li>Mana whenua</li> <li>TAU</li> </ul>
An Insightful Place	Improve visitor data research and insights	<ul style="list-style-type: none"> <li>Continue to improve visitor data and insights that underpin business improvement, industry growth and investor confidence</li> <li>Once developed, leverage the dataset created by MBIE's Tourism Data Leadership Group to present visitation data for the region and Auckland and its sub-regions</li> <li>Encourage the appropriate stakeholders to undertake regular sentiment surveys of visitors and the community regarding tourism.</li> </ul>	<ul style="list-style-type: none"> <li>MCT</li> <li>TAU</li> </ul>
A Place of Partnership and Planning	Industry famil program	<ul style="list-style-type: none"> <li>Develop a famil programme for key local and domestic tourism destination channels and media.</li> </ul>	<ul style="list-style-type: none"> <li>MCT</li> <li>TAU</li> <li>Visitor economy</li> </ul>
A Captivating Place	Packaged tour-based product	<ul style="list-style-type: none"> <li>Work with industry operators to develop packaged options with themes such as food and beverage, diving, nature walks,</li> <li>Promote packaged products</li> </ul>	<ul style="list-style-type: none"> <li>MCT</li> <li>TAU</li> <li>Visitor economy</li> </ul>
A Captivating Place	Promotion and packaging of diving experiences	<ul style="list-style-type: none"> <li>Work with dive operators to create packaged tour options, including accommodation and other product providers</li> </ul>	<ul style="list-style-type: none"> <li>MCT</li> <li>TAU</li> <li>Visitor economy</li> </ul>
A Place of Partnership and Planning	Upskilling Operators	<ul style="list-style-type: none"> <li>MCT to work with TAU and TNZ to provide training and upskilling programs for operators</li> <li>Roll out training programmes once priority roles are determined</li> </ul>	<ul style="list-style-type: none"> <li>MCT</li> <li>TAU</li> </ul>
A Sustainable and Resilient Place	Advocate for resources to address major infrastructure constraints	<ul style="list-style-type: none"> <li>Work with all relevant government agencies to determine resourcing options to support the major infrastructure constraints identified</li> <li>Advocate for funding resources</li> </ul>	<ul style="list-style-type: none"> <li>MCT</li> <li>Rodney Local Board</li> </ul>
A Sustainable and Resilient Place	Promotion of marine reserves and regional parks	<ul style="list-style-type: none"> <li>Develop promotional programs for marine reserves and regional parks</li> </ul>	<ul style="list-style-type: none"> <li>DOC</li> <li>TAU</li> </ul>
A Sustainable and Resilient Place	Regional Park carrying capacity assessments	<ul style="list-style-type: none"> <li>Develop a model to assess regional park visitor carrying capacity levels</li> <li>Introduce monitoring system</li> <li>Report results annually and adjust as required</li> <li>Encourage dispersal of visitors to other regional parks if capacity levels look like being exceeded</li> </ul>	<ul style="list-style-type: none"> <li>Auckland Regional Parks</li> <li>DOC</li> <li>Rodney Local Board</li> <li>TAU</li> </ul>
A Sustainable and Resilient Place	Address zoning constraints through tourism as a preferred use	<ul style="list-style-type: none"> <li>Identify areas for potential tourism development and the need for rezoning of land</li> <li>Identify the potential of areas where tourism development can be clustered</li> <li>Work with Auckland Council planners to create changes to areas designated for tourism</li> <li>Advocate strongly for these to be zoned for tourism</li> </ul>	<ul style="list-style-type: none"> <li>Auckland Council planners</li> <li>MCT</li> <li>Rodney Local Board</li> <li>TAU</li> <li>Visitor economy</li> </ul>

## 4.2. Activating the Recommendations

Figure 15 provides a top line estimate of potential capital development costs separated by investment type and level of capital expenditure (capex) estimated as well.

These estimates are indicative only and are provided to help illustrate the likely level of capital development required for the projects identified. They also illustrate that to activate interest in many of the suggested privately funded projects, publicly funded infrastructure is needed; without a commitment from both public and private sector funding sources, too little product development may be able to be activated from this LDMP and over the next 10-year period.

As shown, there is a good mix of both public and private investment opportunities with a near-even split of the estimated capex required. This should be viewed positively as far too often the capital cost burden primarily falls heavily on the governments to fund with too little private sector investment able to be leveraged from it.

A review of projects and their indicative capital requirements in the table below indicates that whilst there are fewer private sector funded projects than publicly funded ones, the quantum of private sector investment requirements is often higher.

Importantly, a commitment by the central and local government to fund many projects which cannot generate a commercial return is needed to help leverage sector investment.

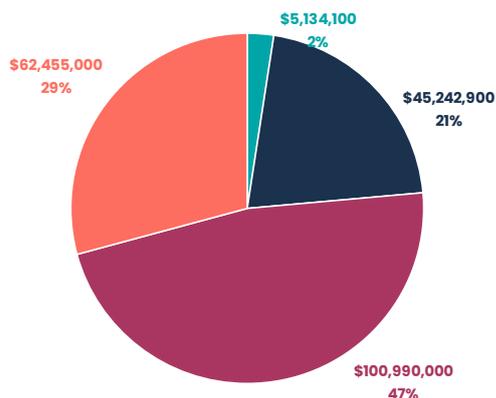
In discussions with potential operators and investors who may wish to consider establishing in the region, key decision-making criteria include the following:

- The attitude of the relevant council to support new investment and speed to get planning approvals
- Whether sites are available for tourism development and whether zoning is fit for purpose (or alternatively, whether re-zoning can occur in a timely manner)
- Funding support by the government to provide infrastructure funding requirements to the site (portable water, electricity, sewer connections)
- Level of sophistication of the existing tourism industry in the region and ability to work with them and leverage off existing successful operations
- Existing level of market awareness and perceptions of the region
- The attitude of the community to be supportive of new tourism investment and facilities to support local employment
- The likely return on investment and commercial payback period
- Ability to access debt capital on favourable terms and conditions.

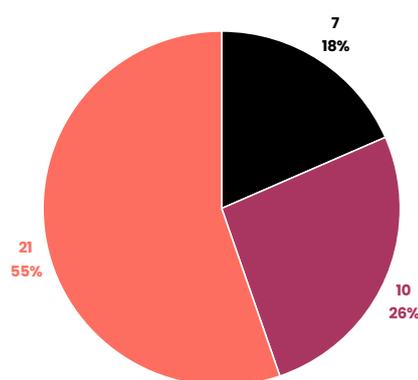
However, sitting above all these points is the desire to ensure that what is being considered for development and investing will also need to find favour with mana whenua in the region. This is important as well for mana whenua, as it potentially opens up opportunities for passive or active involvement in projects (direct investment or partnerships) where site use and/or leasing of land may be possible and also provides the chance to link with well-experienced operators to help de-risk opportunities.

Figure 15: Estimated CAPEX

CAPEX Required by Investment Type



Recommendations by Investment Type



Investment Type

- PPP - private funding component estimate
- PPP - public funding component estimate
- Private funding estimate
- Public funding estimate

Investment Type

- PPP
- Private
- Public

Recommendation	Type	PPP - private funding component estimate	PPP - public funding component estimate	Private funding estimate	Public funding estimate	Total
Activation of Mahurangi Riverfront (Warkworth)	Development Project			\$0	\$2,000,000	\$2,000,000
Adventure-style product for under-40s market	Development Project			\$12,000,000	\$0	\$12,000,000
Advocating for & introducing EV infrastructure	Development Project	\$0	\$0	\$0	\$2,500,000	\$2,500,000
Branded hotel and conference venue (100-160 rooms)	Development Project			\$63,000,000	\$0	\$63,000,000
Designated visitor hubs (e.g., Puhoi, Warkworth, Matakana, Lei..	Development Project			\$0	\$5,000,000	\$5,000,000
Engage with mana whenua on tourism initiatives they are the..	Development Project	\$30,000	\$70,000	\$0	\$0	\$100,000
Enhance the region's dining options and grow paddock-to-pl..	Development Project			\$4,500,000	\$0	\$4,500,000
Enhancement of destination events calendar (e.g., marine fes..	Development Project	\$60,000	\$40,000	\$0	\$0	\$100,000
Family-friendly (all-weather) visitor attraction	Development Project			\$1,200,000	\$0	\$1,200,000
Hub for Hauraki Gulf water sports	Development Project	\$0	\$0	\$60,000	\$0	\$60,000
Improved public transport and car parking (including park & ..	Development Project			\$0	\$5,000,000	\$5,000,000
Improving access to Regional Parks by extending cycleways	Development Project	\$0	\$0	\$0	\$500,000	\$500,000
Interactive experience at Mansion House	Development Project			\$0	\$2,000,000	\$2,000,000
Kawau Island cultural trail	Development Project			\$0	\$150,000	\$150,000
Mahurangi River-side performing arts & concerts (Warkworth)	Development Project			\$0	\$4,000,000	\$4,000,000
Matakana Coast as the Markets epicentre for Tāmaki Makaur..	Development Project	\$30,000	\$30,000	\$0	\$0	\$60,000
Matakana Coast paddock-to-plate cooking school	Development Project			\$85,000	\$0	\$85,000
Omaha Beach pou-to-pou walking experience	Development Project			\$0	\$350,000	\$350,000
Packaged island experiences with links to boat hire	Development Project			\$55,000	\$0	\$55,000
Packaged tour-based product	Development Project			\$45,000	\$0	\$45,000
Promotion & packaging of diving experiences	Development Project			\$45,000	\$0	\$45,000
Promotion of marine reserves and regional parks	Development Project			\$0	\$200,000	\$200,000
Pūhoi and Mangawhai cycle trail (staged) with visitor hubs a..	Development Project	\$5,000,000	\$45,000,000	\$0	\$0	\$50,000,000
Wellness day spa with accommodation (20-30 rooms)	Development Project			\$20,000,000	\$0	\$20,000,000
Wetland nursery	Development Project			\$0	\$250,000	\$250,000
Industry famil program	Strategic Initiative - Collaboration	\$2,000	\$18,000	\$0	\$0	\$20,000
Tourism industry networking events	Strategic Initiative - Collaboration	\$3,600	\$8,400	\$0	\$0	\$12,000
Improve visitor data, research & insights	Strategic Initiative - Data			\$0	\$55,000	\$55,000
Destination branding refresh	Strategic Initiative - Marketing			\$0	\$120,000	\$120,000
Flexibility in visitor servicing	Strategic Initiative - Marketing	\$8,500	\$76,500	\$0	\$0	\$85,000
Visitor economy awareness campaign	Strategic Initiative - Marketing			\$0	\$20,000	\$20,000
Address zoning constraints through tourism as a preferred use	Strategic Initiative - Planning			\$0	\$100,000	\$100,000
Advocate for investment for marine reserves and regional pa..	Strategic Initiative - Planning			\$0	\$20,000,000	\$20,000,000
Advocate for resources to address major infrastructure const..	Strategic Initiative - Planning			\$0	\$20,000,000	\$20,000,000
Carbon Zero Matakana initiatives	Strategic Initiative - Planning	\$0	\$0	\$0	\$80,000	\$80,000
Integrated event planning and profiling	Strategic Initiative - Planning			\$0	\$15,000	\$15,000
Regional Park carrying capacity assessments	Strategic Initiative - Planning	\$0	\$0	\$0	\$100,000	\$100,000
Upskilling operators	Strategic Initiative - Skills			\$0	\$15,000	\$15,000
<b>Total</b>		<b>\$5,134,100</b>	<b>\$45,242,900</b>	<b>\$100,990,000</b>	<b>\$62,455,000</b>	<b>\$213,822,000</b>

A photograph of three young girls interacting with a white donkey in a garden. The girls are wearing colorful clothing and headbands, and they are all smiling and petting the donkey. The donkey is standing on a concrete path, and the background is filled with green foliage and trees. The text 'Part 5: Appendices' is overlaid on the image in a large, white, sans-serif font.

# Part 5: Appendices

# Appendix 1 Full Survey Questions



## What would you like the future of tourism to look like in Matakana Coast?

### Have your say

Our Local Board and Tātaki Auckland Unlimited (AU) are working with the Matakana Coast community and operators to create a Destination Management Plan. AU has commissioned Stafford Strategy to assist this process.

The area included in the scope of the DMP extends from Puhoi through Warkworth/Wellsford, across to Tapora and Mount Albert and across to Te Hana and Te Arai.

Destination Management means not just promoting a destination, but having a plan that manages sustainable growth and that aligns with mana whenua and community desires while ensuring the environment is protected and restored.

Essentially, it's about having a path for tourism to truly support the quality of life of our community and our environment.

This survey provides you with the opportunity to have your say. Your responses will be kept confidential and are only being sent to Stafford Strategy.

This survey will close at 11.59 pm, 9th October 2022.

1. What is your name? (please leave blank if you wish to provide an anonymous response)

\* 2. What age bracket do you fall into?

- |                                |   |
|--------------------------------|---|
| <input type="radio"/> Under 18 | <input type="radio"/> 45-54                 |
| <input type="radio"/> 18-24    | <input type="radio"/> 55-64                 |
| <input type="radio"/> 25-34    | <input type="radio"/> 65+                   |
| <input type="radio"/> 35-44    | <input type="radio"/> Prefer not to provide |

**\* 3. What would you primarily categorise yourself as?**

- |   |   |
|---|---|
| <input type="radio"/> Interested community member                             | <input type="radio"/> Retail employee or operator                               |
| <input type="radio"/> Food and beverage employee or operator                  | <input type="radio"/> Transport employee or operator                            |
| <input type="radio"/> Food and beverage producers (and associated businesses) | <input type="radio"/> Professional services (accounting, marketing, media etc.) |
| <input type="radio"/> Tourism accommodation employee or operator              | <input type="radio"/> Event employee or organiser                               |
| <input type="radio"/> Tourism attraction employee or operator                 | <input type="radio"/> Council personnel   |
| <input type="radio"/> Other (please specify)                                  |   |

**4. Which region of Matakana Coast do you associate yourself with?**

Please select as many as you consider relevant.

- |   |                                      |
|---|--------------------------------------|
| <input type="checkbox"/> Puhoi                  | <input type="checkbox"/> Leigh       |
| <input type="checkbox"/> Warkworth              | <input type="checkbox"/> Pakiri      |
| <input type="checkbox"/> Mahurangi East         | <input type="checkbox"/> Te Arai     |
| <input type="checkbox"/> Mahurangi West         | <input type="checkbox"/> Te Hana     |
| <input type="checkbox"/> Snells Beach/Sandspit  | <input type="checkbox"/> Wellsford   |
| <input type="checkbox"/> Tāwharanui Peninsula   | <input type="checkbox"/> Port Albert |
| <input type="checkbox"/> Omaha/Point Wells      | <input type="checkbox"/> Tāpora      |
| <input type="checkbox"/> Matakana               |                                      |
| <input type="checkbox"/> Other (please specify) |                                      |

**\* 5. Do you consider that Matakana Coast:**

- has too many visitors
- has about the right number of visitors
- would benefit from increased visitor numbers

**\* 6. To what extent do you agree with the below statements?**

	Strongly Disagree	Disagree	Neither disagree/agree	Agree	Strongly Agree
Tourism is important to Matakana Coast's economy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tourism can have positive impacts on the quality of my life	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tourism contributes to the restoration of the environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tourism is out of control in Matakana Coast	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**\* 7. Are there challenges preventing sustainable tourism development and investment from occurring in Matakana Coast?**

Please select as many as you consider relevant.

- |  |  |
|--|--|
| <input type="checkbox"/> Lack of market demand (i.e. not enough visitors)          | <input type="checkbox"/> Lack of support for start ups                             |
| <input type="checkbox"/> Lack of community support or desire for tourism           | <input type="checkbox"/> Red tape (rules and regulations) constraining development |
| <input type="checkbox"/> Lack of destination marketing profiling of Matakana Coast | <input type="checkbox"/> Relative high cost of starting a business                 |
| <input type="checkbox"/> Environmental constraints                                 | <input type="checkbox"/> Lack of transport options and connectivity                |
| <input type="checkbox"/> Strong competition from neighbouring areas                | <input type="checkbox"/> Lack of stakeholder collaboration                         |
| <input type="checkbox"/> Lack of (skilled or willing) workers                      | <input type="checkbox"/> No, there are no challenges                               |
| <input type="checkbox"/> Other (please specify)                                    |  |

**\* 8. What product development areas do you think present the best opportunities for Matakana Coast that the DMP should focus on?**

Please select as many as you consider relevant.

- Quality accommodation options
- Larger scale accommodation
- Unique forms of accommodation (e.g. glamping, eco-cabins etc.)
- Adventure tourism experiences
- Recreational tourism experiences (e.g. walking and cycling trails)
- Family-oriented tourism experiences
- Indoor/all-weather tourism experiences
- Water-based tourism experiences
- Evening tourism experiences
- Major destination events and festivals
- Cultural tourism experiences
- Indigenous tourism experiences
- Free activities/things to do
- A greater variety of and/or higher quality food and beverage options
- A greater variety of and/or higher quality retail offerings
- Nature-based experiences
- Accessible tourism options
- Educational experiences
- Agri-tourism experiences
- Other (please specify)

**\* 9. If new infrastructure and/or services could be introduced to support Matakana Coast's visitor economy, what areas should be focused on as part of the DMP?**

Please select as many as you consider relevant.

- Public transport services
- A quality road network linking sites/destinations of interest
- Car parking facilities at key destinations
- Tourism signage
- Recreational infrastructure (walking trails)
- Recreational infrastructure (picnic tables)
- Sporting facilities and infrastructure
- Event and conference facilities and infrastructure
- Visitor information and services
- Connections to other regions
- Electric vehicle charging stations
- Signage (wayfinding and interpretation signage)
- Other (please specify)

**\* 10. What core values/guiding principles do you think should guide sustainable tourism development in Matakana Coast?**

Please select as many as you consider relevant.

- |   |   |
|---|---|
| <input type="checkbox"/> Environmental principles - preservation, restoration and appreciation, addressing climate change | <input type="checkbox"/> Social development - growth is guided by principles that support and improve social wellbeing of the community |
| <input type="checkbox"/> Economic development - jobs, economic diversification  | <input type="checkbox"/> Mana whenua principles - respect, sustainability, partnership, collaboration                                   |
| <input type="checkbox"/> Greater collaboration - between public services, community groups and business enterprises       |   |

**11. Do you have any other comments or suggestions to make?**

# Appendix 2 Survey Findings

Figure 16: Matakana Coast DMP Survey Findings – Part 1 (Interested Residents)

## Matakana Coast DMP Survey Findings: Community Responses pg. 2

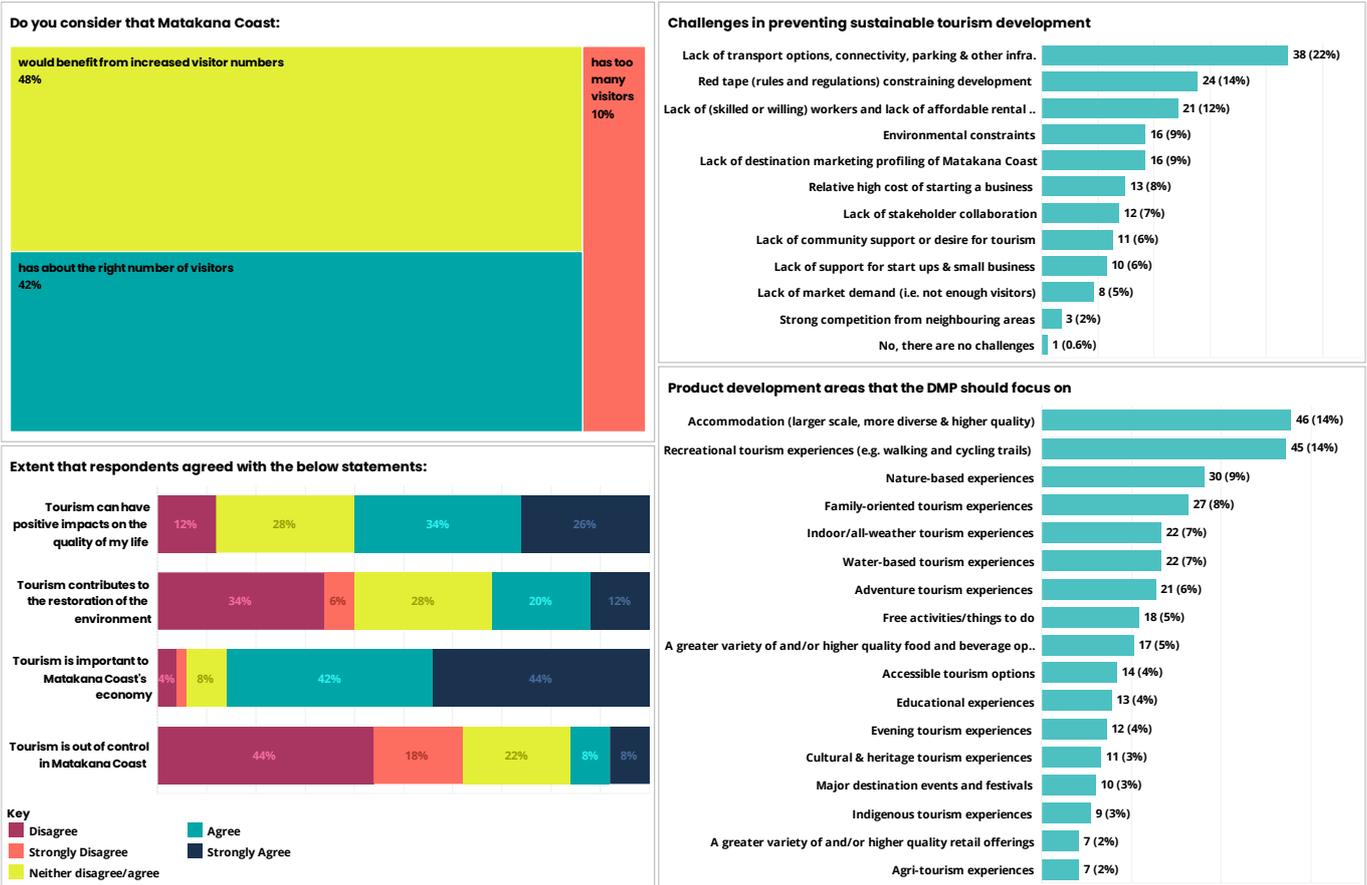


Figure 17: Matakana Coast DMP Survey Findings – Part 2 (Interested Residents)

**Matakana Coast DMP Survey Findings: Community Responses pg. 3**

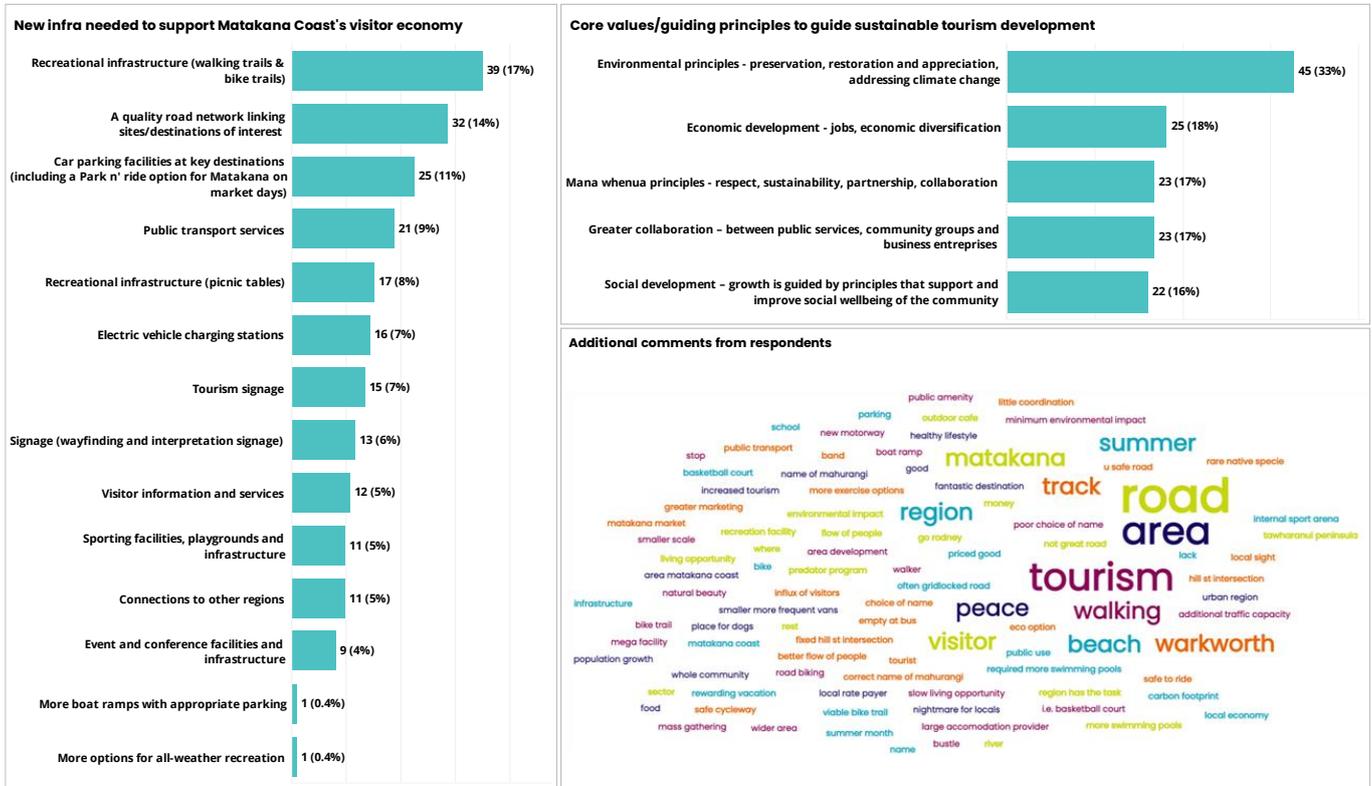


Figure 18: Matakana Coast DMP Survey Findings – Part 1 (Tourism and Business Sector Stakeholders)

**Matakana Coast DMP Survey Findings: Industry Responses pg. 2**

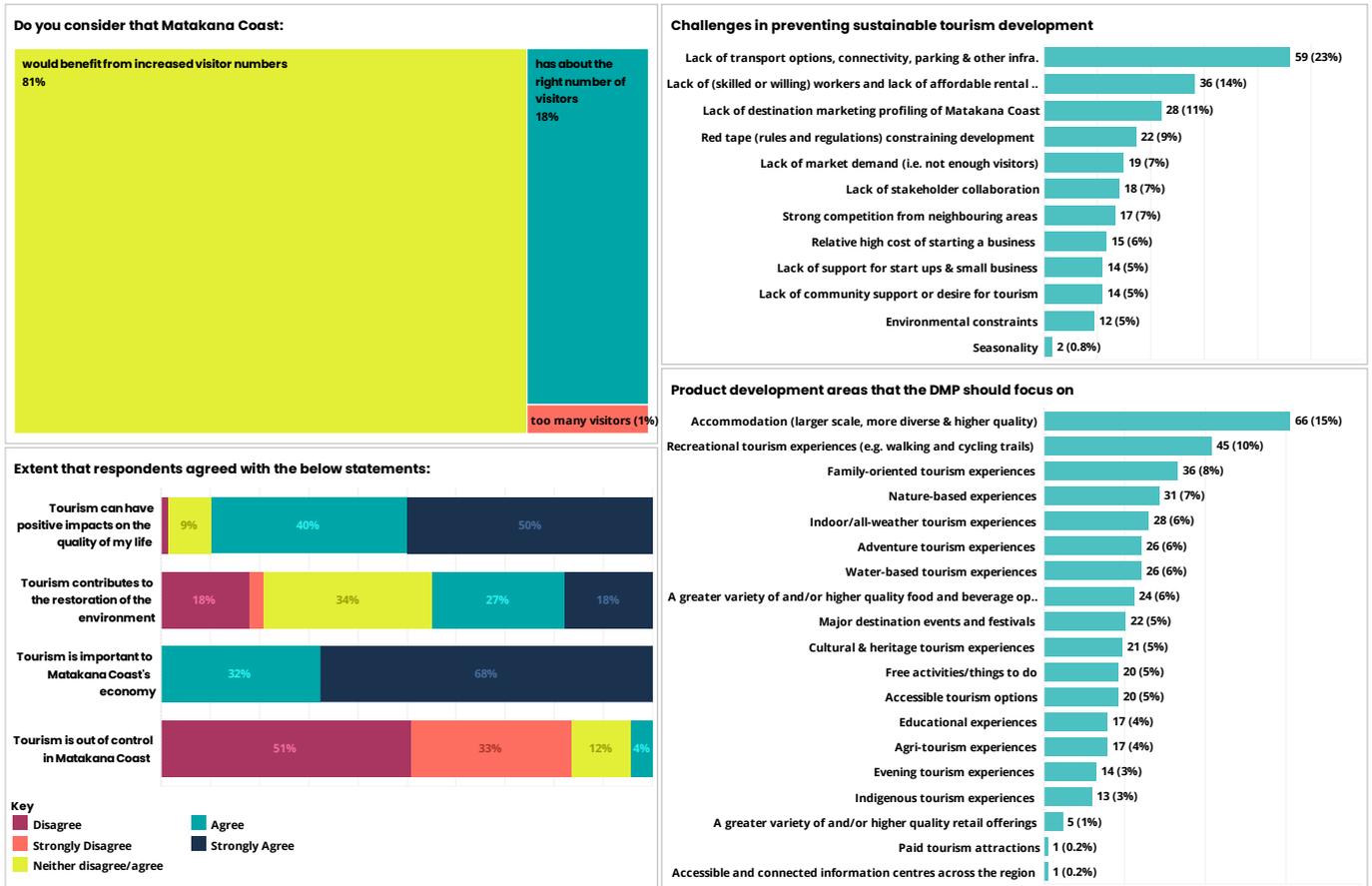
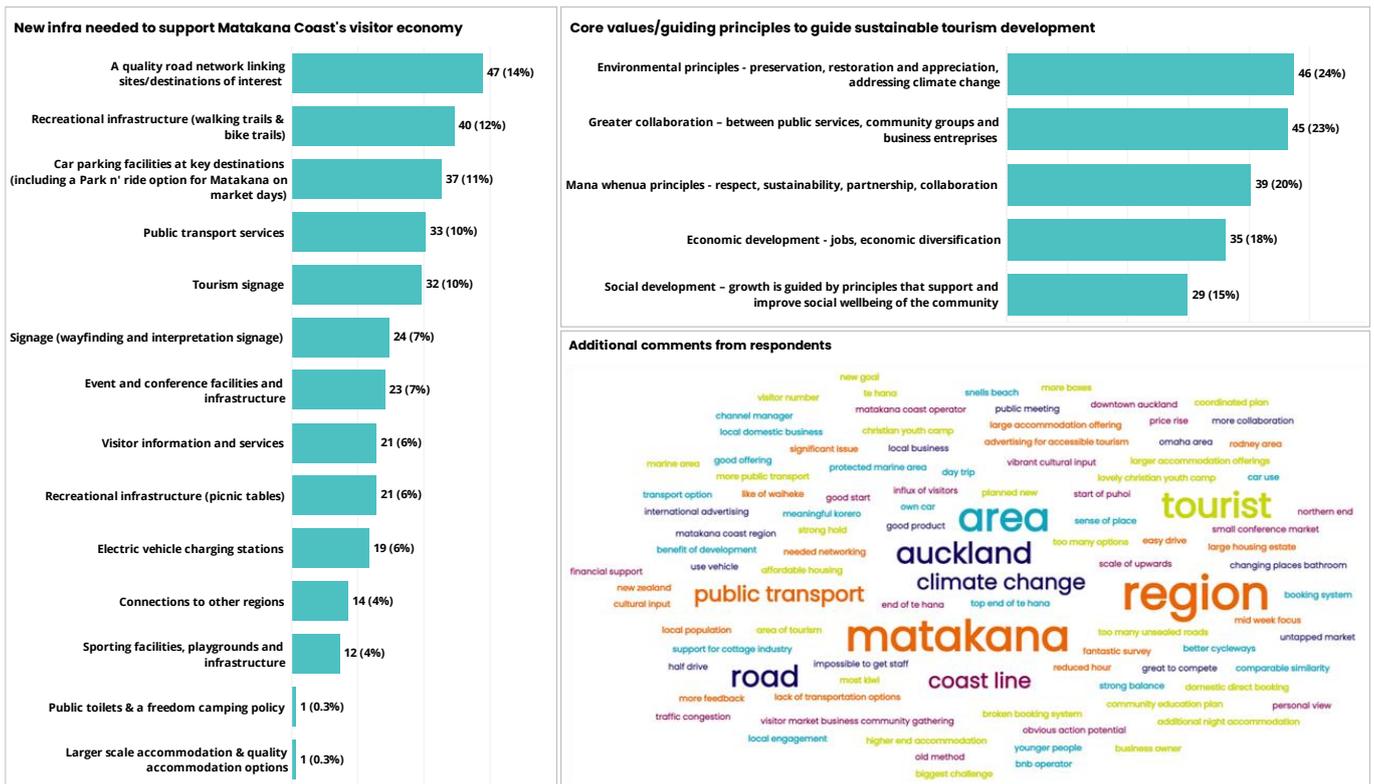


Figure 19: Matakana Coast DMP Survey Findings – Part 2 (Tourism and Business Sector Stakeholders)

**Matakana Coast DMP Survey Findings: Industry Responses pg. 3**



## Appendix 3 Destination Branding Refresh

A destination branding refresh has not been included in the main recommendations of this plan but was acknowledged as an idea during consultation for this plan. This is due to the strength and recognition of brand Matakana (Coast) for the visitor sector and the adoption of One Mahurangi (formerly One Warkworth) for the business association, then added complication of sitting in the Rodney Local Board region that covers four different wards.

A rebrand would require a significant investment with an estimated budget upwards of \$150,000, for the development and implementation of a new brand. It would require a group from within the region to represent the interests of the Rodney Local Board, mana whenua/iwi of the region, Matakana Coast Tourism, business associations, and community from Puhoi to Te Hana and across to the east coast.

Rebranding would involve re-imaging places within the region, using a variety of media to portray both the urban and rural locations and make them attractive for potential visitors, investors, and people who live and work in the area.

How and who should pay for this development is unclear, with a brief needing to be developed and funding secured before engagement with a destination branding specialist. Until there is an agreement on who would pay, the level of investment and desired outcomes of the investment, it was agreed to not note a potential rebrand in the main part of the document.

## Appendix 4 Net Promoter Score

To undertake a top-line assessment of the quality of a region’s product offering, the Net Promoter Score (NPS) metric can be used. This is a measurement of consumer loyalty. In a tourism context, this translates to a visitors’ willingness to not only return for another stay but also make a recommendation to their family, friends, and colleagues. NPS scores are reported with a number from -100 to +100, with a score above 30 considered good and a score above 50 considered excellent.

The NPS is calculated using a scale (see Figure 20), with:

- a score between 0-6 is considered unhappy customers who are unlikely to return, and may even discourage others from staying with the provider;
- a score between 7-8 being passives, meaning they are satisfied with the provider but not happy enough to be considered promoters; and
- a score between 9-10 is considered promoters who are typically loyal and enthusiastic customers and who are likely to return and strongly promote the provider.

TripAdvisor and Google<sup>28</sup> use a scale of 1-5 for consumer ratings on accommodation products. Converting this to the NPS scale means that a rating of 1-3 is considered “detractors” for the product, a score of 4 are the product’s “passives” and a score of 5 is the product’s “promoters”.<sup>29</sup> Only product with more than 5 reviews was included in the NPS assessment to ensure a robust sample size.

Figure 20: NPS Score Scale



<sup>28</sup> Booking.com has not been used to derive a NPS because it does not provide a scale of scores, but rather, only provides an overall score. Therefore, an NPS is unable to be calculated from Booking.com listings.

<sup>29</sup> <https://birdeye.com/blog/net-promoter-score-explained/>

# Appendix 5 Preparing This Plan – Additional Information

## Overview

To help frame the preparation of the LDMP, the following principles were established to help guide the planning process and industry consultations:

- Improve communities' quality of life
- Ensure tourism growth is productive, sustainable, regenerative, and inclusive
- Promote the development of sustainable and commissionable visitor experiences as there are many free experiences already
- Ensure infrastructure is catering to the needs of the community and visitors
- Maintain local resources (e.g., people, open spaces)
- Create experiences for specific market segments
- Ensure the quality of the visitor experience is maintained
- Gain/maintain competitiveness in the market
- Value and celebrate local cultures and identities
- Improve industry cohesion and collaboration.

Image credit: Sawmill Brewery, TAU

## Methodology

The following investigations and inputs were undertaken or reviewed to inform this LDMP:

- Ongoing desktop research and literature review
- Situation analysis of what exists now and why
- Workshops with industry and other relevant stakeholders
- Ongoing liaison with individual stakeholders (public and private)

- Visitor economy assessment (including historic visitation and spending data)
- Tourism product audit, gap analysis
- Consumer sentiment assessment of the region's quality and value for money
- Community and industry visitor economy survey
- Analysis of macro factors relevant to the visitor economy
- Identification of preliminary recommendations
- Workshop with industry to discuss findings and preliminary recommendations
- Prioritisation of recommendations
- Development of draft LDMP document
- The socialisation of draft LDMP and integration of any feedback
- Finalisation of the LDMP.

## Industry and Community Consultation and Investigations

The input received from the community and industry was invaluable and provided a key resource for the LDMP's preparation. The following consultation was undertaken:

- Industry consultations (one-on-one sessions) along with several workshops and focus group sessions with a variety of stakeholders across the region
- A major survey that was distributed to community and industry focused on Matakana Coast's visitor economy (the findings of which are included in Appendix 2). This provided feedback from a wide range of stakeholders which illustrated alignment between community and industry in aspirations and outcomes.

