



A man and a woman are sitting on a patterned picnic blanket in a grassy field, facing away from the camera. They are holding glasses of red wine. In front of them is a plate of food, including what looks like bread and vegetables. The background shows a vast vineyard with rows of grapevines stretching into the distance under a clear sky. A large tree is on the right side of the frame, casting a shadow over part of the couple.

Hawke's Bay Visitor Strategy



Foreword

**Hawke's Bay is New Zealand's
Food and Wine Country.**

We are excited about the future of tourism in Hawke's Bay.

Tourism businesses have battled through a couple of extraordinarily difficult years, but the region has strong fundamentals, we have talented and creative industry participants, and visitors are increasingly charmed by what Hawke's Bay has to offer. The sector will continue to play an important role in the economy and in meeting community aspirations.

Hawke's Bay has a different starting point to many visitor destinations. The region has not suffered the ill effects of volume travel, and tourism is acknowledged as an important component of the regional economy and is still considered desirable by the community. The desire is for more visitors, not less, spending longer periods in the region enjoying paid activities.

In order for Hawke's Bay to have a successful year-round visitor economy that continues to play a leading role in the Hawke's Bay economy, the region needs to increase demand in the shoulder and low seasons. This will support the productivity and viability of our tourism enterprises.

Success looks like achieving these objectives in a way that avoids the ill effects that have affected other popular destinations; has iwi and community support; and meets the region's cultural, environmental and sustainability goals.

This Hawke's Bay Visitor Strategy is also Hawke's Bay's version of a Destination Management Plan (DMP). The Strategy

responds to the Government's acknowledgment that every region is different, with unique attributes, assets, challenges, and opportunities. This means there is no 'one-size-fits-all' approach to destination management and solutions should be customised for the destination.

This plan focuses on the realistic and achievable areas and actions that are required to support a growing and vibrant Hawke's visitor economy, while maintaining important community support for tourism.

The Plan is clear that the primary role of Hawke's Bay Tourism is to generate the demand that will support business investment into products and services. Hawke's Bay Tourism will also play an advocacy role where that is in the interests of its members and the Hawke's Bay tourism sector. The Plan highlights the important role partner agencies play in supporting the vision and objectives of this strategy.

Hawke's Bay Tourism looks forward to leading the implementation of the marketing and promotion elements of this plan and to working with our partners, in particular mana whenua, the five Hawke's Bay Councils and the new Hawke's Bay Regional Economic Development Agency (HBREDA) on the longer-term planning, investment, and work with local businesses that will underpin sustainable and regenerative growth of the important Hawke's Bay visitor economy.

From Hamish Saxton, CEO, and George Hickton, Chair.

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Introduction

Purpose

The purpose of this Hawke's Bay Visitor Strategy (HBVIS) is to support the growth of the Hawke's Bay visitor economy in a way that delivers value to local businesses and the community and meets the region's cultural, environmental, and sustainability goals.

Hawke's Bay Tourism (HBT) is the official Regional Tourism Organisation (RTO) for the Hawke's Bay region. Its primary role as a marketing and promotion agency is to generate the demand that will support business investment into products and services. HBT has the lead role in implementing the marketing and promotion aspects of this plan.

Growing the Hawke's Bay visitor economy in a way that has community support and meets the region's environmental and sustainability goals will, however, require a range of partners playing a lead or supporting role e.g., investments in infrastructure and public facilities is a key responsibility of local government.

The HBVIS seeks to clearly identify:

1

What success looks like for the Hawke's Bay visitor economy over the next 10 years.

2

The key areas of focus and actions that will underpin and support a successful Hawke's Bay visitor sector.

3

Who has responsibility for implementing the key components and actions of the Plan, and the process that will be used to provide ongoing iwi and community input into the development of the Hawke's Bay visitor economy.

Destination Management Plans (DMPs)

The Ministry of Business, Innovation, & Employment (MBIE) has noted¹ that destination management and planning (DM) ideally brings together different stakeholders to achieve the common goal of developing a well-managed, sustainable visitor destination. It is an ongoing process that requires destinations to plan for the future and consider social, economic, cultural, and environmental risks and opportunities.

DM helps give greater certainty to the private and public sector and this supports long term investment in the products, services, and facilities they need to provide. It involves the management of all aspects of a destination that contribute to a visitor's experience, including the perspectives, needs and expectations of - visitors, Māori/iwi/hapū, the tourism industry, wider businesses, local residents, central & local government.

Importantly, the MBIE guidelines note that DM plans should focus on activation and critically determine key areas that are realistic and achievable, with short, medium, and long-term priorities and actions.

The realistic and achievable elements are important. A strategy will only be successful if it is aligned to clear purpose and accountabilities and when backed by the funding and resourcing required for effective implementation.

The Government has invested in the development of this plan but there is currently no ongoing funding and resourcing for any activities that might fall outside the scope of existing funding agreements, budgets, and responsibilities.

HBT believes the International Visitor Levy, the Regional Strategic Partnership Fund (RSPF), and MBIE's Tourism Infrastructure Fund (TIF) are useful sources of funding; but they are unlikely to be sufficient. Like most RTOs, the extent of HBT's aspirations and activities are dictated to a large degree by the funding that is made available from local government and specific central government initiatives. HBT believes there is an ongoing role for a specific national fund that could support activities and initiatives related to the visitor economy that go beyond the core marketing and promotional role of RTOs, and where there is difficulty in funding these initiatives locally.

This means that in the development of this strategy, HBT has been focused on its core role and mandate as a marketing and promotion agency – a role that will continue to deliver clear benefits for Hawke's Bay – and Hawke's Bay's different starting point (or 'problem definition' which should be at the heart of a good strategy). This role was assessed in late 2020 as part of a regional review of local government investment in business and industry in Hawke's Bay. The review found HBT to be a well-regarded and high-performing agency and that for relatively small investments, effective regional branding, marketing, and promotion was playing a key role in attracting visitors, talent, investors, and businesses to the region.

The 'enablers' (roads, airports, digital connectivity etc.) that underpin and open the door to the smooth running of tourism services and experiences, are areas that require ongoing investment from central and local government. While investment in these areas

will be important – particularly additional airline capacity and competition – they are not currently presenting as critical constraints for Hawke's Bay. A key action of this strategy is to ensure the enabling infrastructure relevant to the visitor sector is appropriately considered in Council Long-Term Plans and central government investment planning.

An area that will require further discussion is support for SMEs, including tourism businesses, that will underpin sustainable and regenerative growth e.g., understanding carbon footprints and making plans to reduce these in line with the 2050 net zero target and/or customer expectations. In many ways this area is similar to SME digital capability where central government has played a significant role over the last few years. There is a strong case for new central government investment in this area and consideration should be given to expanding funding for practical advice to assist SMEs with their carbon and sustainability planning, along the lines of the 'Digital Boost' programme.

Alongside effective promotion and marketing, funding for key infrastructure and business support services can act to unlock private sector investment in new destination experience and service opportunities.

This HBVIS serves the purpose of a DMP. The MBIE DMP guidelines have been followed but the approach to destination management has been customised for Hawke's Bay. It recognises that Hawke's Bay has unique attributes, assets, challenges, and opportunities.

¹ <https://www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-projects/destination-management-guidelines/>



Background & Context

What we want to build on and what we are seeking to change.

This section outlines the starting point for the Hawke's Bay visitor sector. This includes the region's strong fundamentals and things the region wants to protect and build on, and the issues that have been identified that will constrain the ability to meet the objectives of this visitor strategy.

Hawke's Bay is in a different position to many other regions in New Zealand. The region has traditionally been seen as a summer destination and its position on the east coast of the North Island have meant that it has not been affected by adverse volumes of domestic visitors. The region has also not historically been a key feature of international travel itineraries.

Tourism is acknowledged as an important component of the regional economy and is still considered desirable by the community (see Annex B). The desire is for more visitors, not less, spending longer periods in the region and enjoying paid activities.

Seasonality has likely suppressed investment in year-round visitor products, and the opportunity is to build shoulder/low season appeal and demand to support more investment and the productivity and viability of the region's tourism businesses.

Hawke's Bay's excellent weather has always been a drawcard for domestic travellers and previously the region's significant point of difference (for attracting international visitors) was the Art Deco architecture of Napier. Now the Food and Wine Country positioning, backed by wineries/cellar doors and successful horticulture, viticulture, and agriculture sectors, allows for a wider appreciation of the region. This has seen the region attract a more sophisticated traveller and demand has led to an enviable suite of upmarket accommodation and supporting hospitality and retail.

Before COVID, the agreed measure for success was growth in spend to the region. This recognised the importance of visitation and tourism as an economic driver. Apart from some caution around cruise ship growth, and concern that the infrastructure at some beach settlements was inadequate for peak summer visitor numbers, there were no significant regional discussions relating to the strain from too many visitors. Local government was investing in, and continued to invest in, infrastructure and projects related to attracting people to the region – including Toitū - Hawke's Bay Arts and Events Centre in Hastings; the Municipal Building upgrade (the last piece of the Toitū upgrade); Waiaroha water treatment facility, Ngā Ara Tipuna (which is centred around seven historic pa sites in Central Hawke's Bay); and leveraging Wairoa's rocket industry and celestial opportunities.

Hawke's Bay has some strong fundamentals

The region is naturally abundant in sunshine and warmth, fresh produce, and open spaces set amongst stunning landscapes. There is an ease to connecting with the wealth of activities and experiences on offer, highlighting the region's strengths as well as its sophistication.

Hawke's Bay has five key destination experience pillars.

Destination Experience Pillars	
Food & Wine	Hawke's Bay's regional climate and prized terroir create superb conditions for producing perhaps New Zealand's most diverse range of produce. Our region champions paddock-to-plate and grape-to-glass philosophies, which celebrate the provenance of our produce at every opportunity. Visitors can 'taste Hawke's Bay' at our famous famers' markets and roadside stalls, in our award-winning wineries, urban and luxury retreat restaurants, and at our 70+ wineries, set in stunning locations and home to some of the nation's finest examples of Bordeaux blends and Chardonnay. Hawke's Bay is New Zealand's Food and Wine Country.
Cycle	One of New Zealand's official Great Rides, the Hawke's Bay Trails offer year-round cycling across 200km+ of easy-riding terrain. Our network of connecting trails are perfect for leisure riders to connect the dots between urban and rural, wineries and cafes, oceans and rivers, vineyards and valleys. Easy-riding scenic trails in the Wairoa and Central Hawke's Bay districts, along with an impressive collection of mountain bike parks and family-friendly cycle skills tracks, make Hawke's Bay a first-rate cycling region.
Art Deco	Hawke's Bay is celebrated for its iconic architecture. Napier city, in particular, is considered the most complete collection of Art Deco-style buildings anywhere in the world, while Hastings is also recognised for its large collection of Art Deco architecture. With year-round appeal, many tour and experience options showcase the 'gift' of Art Deco architecture, punctuated by the annual Napier Art Deco Festival in February.
Events	Hawke's Bay has a burgeoning reputation as a year-round events destination, with a focus on the outdoor environs that the region is known for. When combined with the overall destination experience, the regional events programme offers compelling opportunities for weekend escapes or short breaks.
Premium	Hawke's Bay is home to some of New Zealand's most celebrated retreat accommodation and luxury experiences. The region's landscapes and lifestyle are ideally suited to a range of sophisticated visitor offerings, which are blended perfectly by welcoming hosts to create timeless premium experiences.

These pillars are grounded in strong regional foundations.

Regional Foundations	
Māori Culture	Hawke's Bay is known to Māori as Te Matau-a-Māui / The Hook of Māui, in reference to the early navigator Māui, and for whom were bestowed the first placenames to the region over 1,000 years ago. Today, the region specialises in small group, immersive experiences where passionate and knowledgeable guides offer insights into the region's proud Māori heritage, while creating connections to the present day.
Weather/ Climate	The weather in Hawke's Bay is exceptional. The sun loves our little corner of the world, with our unique geography consistently delivering some of New Zealand's best weather – perfect for a short break.
Outdoor Experiences	Hawke's Bay's 360km of coastline and beaches hug the Pacific Ocean, offering a wealth of seaside experiences; while the network of walking tracks, golf courses, wildlife encounters and recreational activities offer endless opportunities to experience the region's beauty.

The region is clear about its key markets and how the Hawke's Bay destination experience is best matched to subsets of prospective visitors, based on a variety of factors including interests and lifestyle. Within this framework, Hawke's Bay Tourism will still develop and promote content and experiences that speak to a wide range of visitor offerings, recognising that other types of visitors are still looking for inspiration to visit Hawke's Bay.

Key Markets	
Domestic	Wellington, Auckland and Manawatu/Whanganui are Hawke's Bay's three highest value visitor markets, accounting for approximately 42% of Hawke's Bay's total domestic visitor spend. In particular, Wellington is considered our highest priority market, given proximity, destination appeal, and population alignment with visitor profiles (see next page). When adding in visitor spend by Hawke's Bay locals*, those four markets account for approximately 68% of all domestic visitor spend. <i>*Spend recorded by New Zealanders in areas more than 40km from their usual area of residence is counted as visitor spend. For example, a Napier resident spending in Central Hawke's Bay or Wairoa would be considered visitor spend.</i>
International	Hawke's Bay is a destination attractive to New Zealand's traditional international markets, with spend typically strongest among visitors from Australia, followed by North America, the United Kingdom, Germany, and Rest of Europe. International markets are almost exclusively activated via Hawke's Bay Tourism's trade and partner activity.

Visitor Profiles	
Adults-first	Hawke's Bay's best experiences – those with a point of difference to other regions – naturally position the region as an adults-first destination. This includes food and wine country, luxury, events, and art deco. That does not mean we discourage travel by family groups; in fact, we regularly develop content that speaks to school holiday opportunities. However, most of our marketing activity will focus on developing appeal for prospective visitors who are travelling without children.
Foodies	Travellers who value the provenance of food are ideally aligned to a region that can lay claim to being among New Zealand's most prolific growers and producers of primary produce.
Mid-high income	A sophisticated Hawke's Bay experience will be of most appeal to visitors who are willing and able, to spend comfortably while in region; people who enjoy participating in experiences that are often premium, but also offer good value for money. This type of destination experience typically suits those with higher-than-average income.
Active relaxers / indulgers	Hawke's Bay best suits travellers looking for a short escape to enjoy life's pleasures at a slower pace than their everyday lives. This type of visitor will be drawn to each of our destination experience pillars; all of which encourage travellers to spend and remain active in a way that values a depth of interaction at a pace that suits them.

The things the region needs to focus on

The following issues, constraints, and opportunities have been identified as those most relevant to the work needed to build on Hawke's Bay's destination-related strengths while ensuring the visitor sector has community support and the region avoids the ill effects of volume tourism that other destinations have faced:

- Effective promotion and marketing. This is a core and critical ongoing area of focus for HBT.
- A need to continue to build shoulder/low season appeal and demand to support more sustainable and productive businesses and local employment.
- The region would benefit from more marketable and bookable products, especially those that tie specialty foods and beverages with experiences. The region has some great examples which we are proud of, but there is considerable potential to enhance the region's offering to visitors.
- COVID-19 border closures have had a significant impact on the number of fine dining winery and restaurant experiences (due to reduced demand and lack of skilled hospitality staff). This will take time, and the return of international visitors, to recover.
- Investment in new and/or expanded product offerings will require the business sector to have the information they need and confidence that demand will support the investment.
- There is an opportunity to align and focus regional branding and the provision of information, so the region is clearer about who it is talking to and seeking to influence.
- Further work is required to build broader industry buy-in and support for the region's Food and Wine Country positioning. HBT also wants to protect this positioning, especially in the context of other regions' work on food offerings. Ongoing effort and funding will be required to stand out in an increasingly crowded field.
- The region does not have a large number of business events that could provide demand in the shoulder season, and in the food and wine space the opportunity to connect producers, hospitality providers and creators.
- A lack of accommodation (number of rooms at an appropriate level of quality) will be constraining the role business, school, and sporting groups could play in generating visitor demand.
- There is considerable opportunity in lifting and supporting the profile and potential of Māori tourism and visitor appreciation and understanding of authentic cultural experiences and knowledge about the region's places. There is an opportunity to do this in parallel with a more widely visible regional brand narrative to support the region's identity as Te Matau-a-Māui.



- There is an opportunity to amplify the experience of Hawke's Bay's cycleways so that they also offer a multi-day experience and more effectively connect to the Hawke's Bay food and wine experience.
- The region's Art Deco architecture is a key point of difference for international tourists. This regional asset will require ongoing maintenance and protection if it is going to remain a critical destination experience sought out by visitors.
- The cruise ship sector is important to the region, and it is important the region avoids future issues resulting in 'cruise crush' (too many visitors at once, putting undue strain on infrastructure and the community). This could lead to social license issues.
- It is important the region and product providers are seen as having clear environmental and sustainability stories. This is important for visitors and important for Hawke's Bay to be included in wider marketing campaigns. Most of this work is outside the scope of HBT and will be led by individual businesses and by the leadership, business assistance, and regulatory settings provided or developed by local and central government.
- Skill shortages, particularly relating to the visitor economy. This is a critical issue facing a range of sectors and regions across the country. Immigration settings will need to change to provide greater access to people resources. Product providers will also need to build the right capability to back offerings.
- Local government investment planning (e.g., the process for developing Council Long-Term Plans), needs to actively apply a visitor economy lens to ensure alignment with regional visitor strategy objectives.
- The demands on RTO resources have been amplified without ongoing funding commitments. Strict prioritisation is required to remain effective and focused on core areas of value-add and to ensure financial sustainability.



In terms of adequacy of infrastructure to support the visitor sector, work commissioned by HBT in 2020 and 2021² included interviews with twenty Hawke's Bay visitor sector leaders, an assessment of the Long-Term Plans of the Hawke's Bay councils, and a review of relevant agency policy initiatives. The review specifically sought a view on those 'infrastructure' aspects viewed as being adequate.

Frequently referenced (more than ten informants)	
Air Travel	Expensive airfares and infrequent flights – loss of JetStar
Event Pressure	Accommodation, transport, and parking pressures during significant events
Iconic experiences	Need for additional iconic attractions or experiences such as the national aquarium or a safe beach
Moderately frequently referenced (five to ten informants)	
Culture and heritage	Absence of sufficient cultural and heritage offerings – including the need for more extensive representation of all aspects of Māori and built heritage
Indoor stadium	Need for a larger indoor stadium
Conference facility	Need for a larger conference venue
Collaboration between local authorities	Need for further visitor service planning and collaboration between the region's local authorities
Signage	Need for more wayfinding / signage
Upgrade of facilities	Need to modernise some older facilities such as those at McLean Park and the Hastings showgrounds

Occasionally referenced (less than five informants)	
Accommodation	Loss of some accommodation options because of their use by MSD
Hawke's Bay food	Failure to sufficiently celebrate and entice visitors by providing sufficient access to Hawke's Bay food provenance experiences such as orchards, packing houses, hill country farms etc
Support for small operators	Insufficient support, alignment, capability building and networking with and between the region's smaller tourism operators
Capacity and capability of sector workers	Need for more skills and training / capability building for those employed in the sector to achieve better quality visitor services
Iwi voice	Iwi sector visitor businesses need to be more highly represented in regional destination management
Rivers and streams	Water quality decline – need for more focus on restoring riparian margins
Māhia visitor pressures	Summertime pressure on all facilities, infrastructure, and outdoor recreation experience locations
Drinking Water	Brand damage effect of sub-grade drinking water quality associated with Havelock North contamination issue
Mobile home waste dump station	Need for a new and expanded facility in Central Hawkes Bay
Earthquakes	Fear of being affected by a seismic event
Refresh of mid-level events	Some annual events e.g., Horse of the Year and the A&P Show need a refreshed approach

² Hawke's Bay Sustainable Tourism Growth – adequacy of infrastructure services, HenleyHutchings, June 2020. Hawke's Bay Sustainable Tourism Development: Adequacy of infrastructure services - Report two: Contextual changes, priorities, funding, and policy alignment, HenleyHutchings, November 2021.



Vision & Success

For the Hawke's Bay visitor economy.

Our Vision

We have identified the following vision that encapsulates what we are seeking to achieve:

"Tourism in Hawke's Bay is a vibrant and valued contributor to the region's economy and community aspirations, and authentic sought-after visitor experiences support thriving businesses."

Embedded in this Vision is recognition that ongoing community support for the visitor economy and the value visitors derive from the destination (including alignment with values and expectations), are critical components and drivers of success.

High-level objectives

We have identified a number of high-level objectives that support the Vision. These objectives are focused on growing value for the visitor sector and ensuring this work has ongoing community support.

1. Increase Hawke's Bay's share of the total New Zealand visitor market.
2. Increase the number of out-of-region visitors who are spending more and staying longer.
3. Increase year-round visitation to support more sustainable and productive businesses and local employment.
4. The community cares and visibly supports the visitor sector because they see the benefits that come from bringing people to place and the activities and investments that are made to support this activity.
5. Hawke's Bay Tourism is clear about its role and mandate and has the funding, capability, and resources to effectively promote and support the Hawke's Bay visitor economy.
6. Partner agencies understand the role they need to play in supporting the vision and objectives of the HBVIS and are actively applying a visitor economy lens in their investment planning.



Strategic priorities and areas of focus

We have identified four strategic priorities that represent the critical opportunities and issues identified in the previous section. Each strategic priority has an objective that supports one or more of the high-level objectives identified above, and a limited number of priority actions.

The areas of focus are:

1

Brand and promotion

This strategic priority is focused on HBT's primary role as a marketing and promotion agency. The actions are focused on generating the demand that will support business investment into products and services. This strategic priority supports high-level objectives 1,2,3 and 5.

2

Product

This strategic priority is focused on ensuring alignment between the regional value proposition and visitor expectations so that iwi and businesses have confidence to develop products that deliver authentic and sought-after visitor experiences. For example, ensuring the role of the region's Art Deco architecture is adequately considered and provided for in local government planning and investment, and work to provide a more cohesive cycleway experience for visitors. This strategic priority supports high-level objectives 1,2,3 and 6.

3

Funding and Community Support

This strategic priority is focused on the funding, resources, and capability required to effectively implement the HBVIS, and the ongoing stakeholder engagement that is required to ensure community support for the role the Hawke's Bay visitor sector plays in the regional economy and in meeting community aspirations. This strategic priority supports high-level objectives 4 and 5.

4

Infrastructure and public amenities

This strategic priority is focused on the enabling infrastructure and public amenities that support a vibrant visitor sector. This strategic priority supports all of the high-level objectives. Actions in this area are outside the scope of HBT's role and so this area is critical in achieving high-level objective 6.

Strategic Priority #1: Brand and Promotion

Objective: Grow visitor demand, the length of stay, and the value of spend. Growing visitor demand in the shoulder and low seasons is particularly important to achieving a year-round visitor economy that supports the productivity and viability of Hawke's Bay tourism enterprises.

Background: This strategic priority is focused on HBT's primary role as a marketing and promotion agency. The actions are focused on generating the demand that will support business investment into products and services. This strategic priority supports high-level objectives 1,2,3 and 5.

Actions	Description and outcome sought	Status / Timing	Lead / Partner/s	Measurement
1. Deliver annual marketing plan for region (see Annex A)	<ul style="list-style-type: none"> The annual marketing plan is aligned with the Hawke's Bay value proposition, visitor profiles, and positioning strategy. The outcomes sought are to grow visitor demand, the length of stay, and the value of spend. 	Underway	Hawke's Bay Tourism	<ul style="list-style-type: none"> Visitor spend, benchmarked against national performance. [Data provided by MBIE's Tourism Electronic Card Transactions]. Target: Annual visitor spend of \$530m by 2030 (an annual increase of 3% from pre-COVID value of \$383m/year).
2. Implement the Hawke's Bay Food and Wine Country Strategy	<ul style="list-style-type: none"> HBT has developed a Hawke's Bay Food and Wine Country Strategy. It has 3 key focus areas – 1) Telling the Hawke's Bay Food & Wine Country story, 2) Support for leveraging provenance, and 3) Events, journeys, and experiences that showcase Hawke's Bay as Food and Wine Country. <i>This action relates to the first focus area of this strategy.</i> The overall outcome sought is that Hawke's Bay is seen as a leading 'foodie' playground where authentic visitor experiences support thriving visitor and food and beverage sectors, and this is driving increased visitor demand. 	Underway	Hawke's Bay Tourism	Actions in Hawke's Bay Food and Wine Country Strategy are being successfully implemented.
3. Develop Te Matau-a-Māui as a more widely visible component of the regional brand	<ul style="list-style-type: none"> More tightly weave the Te Matau-a-Māui narrative into the Hawke's Bay brand and narrative The outcome sought is a stronger regional identity founded on people, place, and planet-based world views, and understanding of Hawke's Bay's unique cultural heritage and landscape. This is then helping to drive visitor demand for authentic and sought-after visitor experiences 	Underway	Hawke's Bay Tourism/ Ngāti Kahungunu/ Ngā Toi	Approach is agreed and a strategy and action plan is developed.
4. Actively market Hawke's Bay as the ideal location for small to mid-sized conventions and conferences	<ul style="list-style-type: none"> Small to mid-sized conventions and conferences offer a significant opportunity to build demand in the shoulder and low seasons. The outcome sought is greater demand, particularly in the shoulder and low seasons, that supports the productivity and viability of the region's tourism enterprises. 	Underway	Hawke's Bay Tourism	<ul style="list-style-type: none"> More small-to-mid-sized conventions and conferences Timing of conventions and conferences i.e., shoulder/low season. Investment in new products/accommodation to support conventions and conferences.

Strategic Priority #2: Product

Objective: There is alignment between the regional value proposition, positioning, and what people experience when they visit Hawke's Bay. This is supporting the demand needed for iwi and businesses to have confidence to expand and/or develop visitor experiences that deliver authentic and sought-after visitor experiences.

Background: This strategic priority is focused on ensuring Hawke's Bay delivers on its promise and that the region meets and exceeds visitor expectations which sustains and supports demand. Iwi and businesses need have confidence that demand will be sufficient to support investment in the development of products/visitor experiences. Demand will depend on meeting the needs and expectations of visitors. This strategic priority supports high-level objectives 1,2,3 and 6.

Actions	Description and outcome sought	Status / Timing	Lead / Partner/s	Measurement
1. Implement the Hawke's Bay Food and Wine Country Strategy	<ul style="list-style-type: none"> HBT has developed a Hawke's Bay Food and Wine Country Strategy. It has 3 key focus areas – 1) Telling the Hawke's Bay Food & Wine Country story, 2) Support for leveraging provenance, and 3) Events, journeys, and experiences that showcase Hawke's Bay as Food and Wine Country. <i>This action relates to the second and third focus areas of this strategy.</i> The overall outcome sought is that Hawke's Bay is seen as a leading 'foodie' playground where authentic visitor experiences support thriving visitor and food and beverage sectors, and this is driving increased visitor demand. 	Underway	Hawke's Bay Tourism	Actions in Hawke's Bay Food and Wine Country Strategy are being successfully implemented.
2. Enhance the value of the region's walking/ cycle trails	<ul style="list-style-type: none"> There are opportunities to improve the experience of the Hawke's Bay trails. This project could involve, among other things, identifying a linear loop option that takes more than a day to ride, and aligning information sources to ensure expectations are being met. The overall outcome sought is to ensure the region's walk/ cycle trails meet visitor expectations and that the trails continue to support increases in demand that supports other visitor products. 	In development	HB Regional Cycleway Governance Group / Hawke's Bay Tourism	<ul style="list-style-type: none"> Visitor expectations are being met, including a more cohesive trails network experience. [Data provided by Hawke's Bay Trails monthly survey results]. Increasing use by visitors contributes to overall growth in trail usage. [Data provided by Hawke's Bay Trail counters].
3. Enhance the profile, opportunities, and potential of Māori tourism in Hawke's Bay	<ul style="list-style-type: none"> This project involves working with Ngāti Kahungunu and Ngā Toi Hawke's Bay to build a stronger regional identity founded on 'people, place and planet-based' world views and the role and value of arts and culture in the life of the people of Te Matau-a-Māui Hawke's Bay. The overall outcome sought is to enhance opportunities for mana whenua to celebrate, grow and share their unique knowledge, narratives, and places with manuhiri and to derive a sustainable income and mana from doing so. 	In development	Hawke's Bay Tourism/ Ngā Toi	<ul style="list-style-type: none"> A growing number of authentic cultural experiences Greater visibility and understanding of the region's cultural landscape and stories, and visitors have more knowledge of authentic cultural experiences Visitor satisfaction based on opportunities to participate in these experiences.

Actions	Description and outcome sought	Status / Timing	Lead / Partner/s	Measurement
4. Ensure the importance of Art Deco as a point of difference to the market is recognised and provided for in planning and investment	<ul style="list-style-type: none"> The region's Art Deco architecture is a critical point of difference for international tourists in particular. There is a need to ensure the role of the region's Art Deco architecture is adequately considered and provided for in local government planning and investment. The overall outcome sought is to retain and protect the region's Art Deco architecture as a critical point of difference for the visitor market. 	As opportunities arise	Hawke's Bay Tourism / Art Deco Trust	The region's Art Deco architecture is considered and provided for in Council Long-Term Plans
5. Promote Hawke's Bay as an attractive location for investment in additional visitor accommodation	<ul style="list-style-type: none"> This action is focused on raising the profile of Hawke's Bay as an attractive location for investment in new visitor accommodation. This will help support the role business, school, and sporting groups could play in generating visitor demand. The overall outcome sought is to have sufficient variety of visitor accommodation to support demand. 	As opportunities arise	Hawke's Bay Councils/ Individual Investors / Hawke's Bay Tourism	Investment in new visitor accommodation
6. Support regional efforts to develop a climate change decarbonisation and adaptation roadmap	<ul style="list-style-type: none"> Hawke's Bay Regional Council is leading regional efforts to develop a climate change decarbonisation and adaptation roadmap. The overall outcome sought is to have a clear regional climate change plan that articulates what the region is doing to mitigate and adapt. This can then be used to support the region's sustainability and climate change credentials. 		Hawke's Bay Regional Council / Hawke's Bay Tourism	Hawke's Bay has a climate change decarbonisation and adaptation roadmap, and this is aligned with visitor values and expectations and is being leveraged in marketing and promotion campaigns
7. Develop membership engagement on climate change (mitigation and adaptation) and environmental sustainability	<ul style="list-style-type: none"> HBT is not an expert on climate change and sustainability planning but can play a role in ensuring its members know where to seek relevant assistance and expertise. The overall outcome sought is to increase members and visitors engagement on climate change and environmental sustainability and that this is leading to business models and product development that are aligned with visitor expectations. 	Underway	Hawke's Bay Tourism	<ul style="list-style-type: none"> Regional tourism operators know where to seek assistance for climate change and sustainability-related planning Increase in members signing up to Tourism Industry Aotearoa's "Tourism Sustainability Commitment".
8. Deliver Food and Wine Classic (F.A.W.C!)	<ul style="list-style-type: none"> Continue to annually deliver F.A.W.C! as an activation and embodiment of Food and Wine Country to visitors and media. The overall outcome sought is to build and establish F.A.W.C!'s reputation as New Zealand's premier food and wine festival. 	Ongoing	Hawke's Bay Tourism	<ul style="list-style-type: none"> F.A.W.C! is recognised as NZ's premier food and wine festival The event is embodying the Food and Wine Country positioning leading to increased visitor demand.

Actions	Description and outcome sought	Status / Timing	Lead / Partner/s	Measurement
9. Explore proposal for Hastings and Napier to be a 'Great Wine Capital'	<ul style="list-style-type: none"> Hastings/Napier have the rare opportunity to join the Great Wine Capitals (GWC) Global Network, positioning the cities and region alongside 11 of the world's most prestigious and well-known wine regions and their cities. The overall outcomes sought are to: <ul style="list-style-type: none"> to provide a narrative about Hastings/Napier/Hawke's Bay that is totally unique within a New Zealand context Cement Hawke's Bay's positioning as New Zealand's Food and Wine Country Generate significant PR value for the region, both domestically and internationally Elevate the reputation of F.A.W.CI, now in its 11th year Establish a key position in Tourism New Zealand's Food & Beverage Strategy (currently in development). 	Being considered	Hawke's Bay Tourism	Hastings District Council and Napier City Council support the proposal and agree to funding GWC membership.
10. Explore proposal for a Hawke's Bay Apple Festival	<ul style="list-style-type: none"> There is a gap in the events market and an opportunity to develop an event which celebrates the apple industry in Hawke's Bay. A feasibility study has been completed. The concept is supported by key stakeholders. The overall outcome sought is to have an event that is widely supported that celebrates the role the apple industry plays in Hawke's Bay and for this to be flexible enough to meet both a community focus and a visitor destination focus. 	Being considered	Hawke's Bay Regional Events Group / Hawke's Bay Tourism	Case for investment is developed and supported by funders and key stakeholders.
11. Explore opportunities to align regional wine events with F.A.W.CI	<ul style="list-style-type: none"> There is an opportunity to potentially align regional wine events e.g., HB Wine Auction, HB Winegrower events, Annual Wine Awards with F.A.W.CI The overall outcome sought is to maximise F.A.W.CI's role as an activation and embodiment of Food and Wine Country to visitors and media. 	Being considered	Hawke's Bay Tourism	Alignment of regional wine events.
12. Consider and support, as appropriate, proposals and applications for external funding for new or expanded destination experiences and services	<ul style="list-style-type: none"> From time-to-time individual businesses and/or Councils will be developing proposals for new or expanded destination experiences and services. They may also be seeking external funding support (from investors, Central Government, sponsors, philanthropic sources etc), in situations where proposals cannot be advanced otherwise. HBT will consider and assess these proposals on a case-by-case basis and lend endorsement support as appropriate The overall outcome sought is to have good proposals that are aligned with the region's value propositions and opportunities clearly supported so that external investors and funders are clear they have regional backing. 	Ad hoc	Individual businesses and/or Councils / Hawke's Bay Tourism	<ul style="list-style-type: none"> Proposals for new or expanded destination experiences and services are aligned with the region's value propositions and opportunities. External funding for new or expanded destination experiences and services is secured.

Strategic Priority #3: Funding and Community Support

Objective: Hawke's Bay Tourism has the funding, resources, and capability required to effectively implement the Hawke's Bay Visitor Strategy and community support for the visitor sector is maintained through effective communication and engagement.

Background: This strategic priority is focused on the funding, resources, and capability required to effectively implement this strategy, and the ongoing stakeholder engagement that is required to ensure community support for the role the Hawke's Bay visitor sector plays in the regional economy and in meeting community aspirations. This strategic priority supports high-level objectives 4 and 5.

Actions	Description and outcome sought	Status / Timing	Lead / Partner/s	Measurement
1. Continue to deliver value for members	<ul style="list-style-type: none"> As a membership organisation HBT must deliver value to its members to justify the membership subscription. The overall outcome sought is that members value the role HBT plays in promoting the Hawke's Bay visitor economy and support this work through paid membership and engagement with the work programs. 	Ongoing	Hawke's Bay Tourism	Membership funding is stable or increasing.
2. Continue to deliver value to the Hawke's Bay economy by meeting KPIs in performance agreement with HBRC	<ul style="list-style-type: none"> HBT needs to continue to prove and justify that it is adding value to the funding it receives from regional ratepayers via HBRC. This means it must deliver on core KPIs. The overall outcome sought is that HBRC and regional councillors understand the value HBT is delivering to the Hawke's Bay economy and that secure funding is in place to effectively discharge its role and responsibilities. 	Ongoing	Hawke's Bay Tourism	<ul style="list-style-type: none"> KPIs in performance agreement are met Funding from HBRC is secured with 5-year funding agreement in place from June 2023.
3. Explore sponsorship and partnership opportunities for key events and initiatives	<ul style="list-style-type: none"> There is potential to secure funding from sponsorships and partnerships for key events and initiatives e.g., F.A.W.C.I., Great Wine Capital proposal, etc. The overall outcome sought is to broaden and expand the funding availability to support initiatives and to lower the reliance on existing funders. 	Underway	Hawke's Bay Tourism	<ul style="list-style-type: none"> Sponsorship and/or partnership arrangements have been secured for key events and initiatives and to the extent possible these are self-funding. More funding is available.
4. Advocate for, and seek on-going co-investment from central government for infrastructure and amenities that support the visitor economy	<ul style="list-style-type: none"> The 'enablers' that underpin and open the door to the smooth running of tourism services and experiences, are areas that require ongoing investment from central and local government. Existing sources of funding are unlikely to be sufficient. The overall outcome sought is a specific national fund of sufficient scale that can support activities and initiatives related to the visitor economy that go beyond the core marketing and promotional role of RTOs and where there is difficulty in funding these initiatives locally. 	Ongoing	HB Councils / Hawke's Bay Tourism	Establishment of a specific national tourism fund of sufficient scale.

Actions	Description and outcome sought	Status / Timing	Lead / Partner/s	Measurement
5. Consider and support, as appropriate, applications for funding from the Tourism Infrastructure Fund (TIF)	<ul style="list-style-type: none"> HB Councils are responsible for applying for TIF funding. This HBVIS will be useful to the Councils as they consider alignment between funding needs and the key enablers of, and constraints presenting for, the Hawke's Bay visitor economy. HBT will consider and assess TIF applications on a case-by-case basis and lend endorsement support where they are aligned with this HBVIS. The overall outcome sought is to have good proposals that are aligned with the region's value propositions and opportunities clearly supported so that Central Government is clear they have regional backing. 	Ongoing	HB Councils / Hawke's Bay Tourism	<ul style="list-style-type: none"> Proposals for TIF funding are aligned with region's value propositions and opportunities. TIF funding is secured.
6. Advocate for regional perspectives to be reflected in government tourism policy development	<ul style="list-style-type: none"> RTOs have a key role to play in providing insights and views to policy development processes given they work typically in regions and at the coalface with tourism operators. The overall outcome sought is that regional perspectives are appropriately reflected in government tourism policy development. 	Ongoing	Hawke's Bay Tourism	Evidence that regional perspectives are being reflected in government tourism policy development and this is helping to support regional tourism objectives.
7. Monitor visitor feedback/sentiment and community sentiment towards visitors	<ul style="list-style-type: none"> HBT is well connected to visitor and community views by virtue of – having 200 members, daily engagement on social media, regular meetings with Councils and elected members (who represent the community), and reporting to an independent Board. The extent of any additional survey work will be dependent on whether this adds value and additional funding is available, as regular sentiment survey work is not funded. The overall outcome sought is for HBT to understand visitor feedback/sentiment and community sentiment towards visitors and that these views and insights are being used in the development of HBT's work. 	Ongoing	Hawke's Bay Tourism	<ul style="list-style-type: none"> HBT has a clear understanding of visitor views and community sentiment toward visitors and these views and insights are being used in the development of HBT's work. The community is supportive, engaged and is benefitting from the Hawke's Bay tourism sector.
8. Implement HBT stakeholder engagement strategy	<ul style="list-style-type: none"> HBT has a stakeholder engagement strategy which identifies key stakeholders and the focus of communication and/or engagement for each group. The overall outcomes sought are - key stakeholders value the role HBT plays in promoting the Hawke's Bay visitor economy and they support the focus of work programs; and HBT understands what is important to stakeholders and that these views and insights are being used in the development of HBT's work. 	Ongoing	Hawke's Bay Tourism	Stakeholder engagement strategy is being successfully implemented.

Strategic Priority #4: Infrastructure and Public Amenities

Objective: Ensure the enabling infrastructure relevant to the visitor sector is appropriately considered in Council Long-Term Plans and central government policy development and investment planning.

Background: This strategic priority is focused on the enabling infrastructure and public amenities that support a vibrant visitor sector. This strategic priority supports all of the high-level objectives. Actions in this area will typically be led by other organisations. The HBT role will be to ensure that partner agencies understand the role they need to play in supporting the vision and objectives of the HBVIS, a visitor economy lens is being applied to local and central government policy development and investment planning, and the right conversations are taking place in the appropriate fora.

Actions	Description and outcome sought	Status / Timing	Lead / Partner/s	Measurement
1. Actively participate in the Hawke's Bay Matariki Regional Development Strategy (HBRDS) Steering Group	<ul style="list-style-type: none"> HBRDS is structured around 5 key pillar or pou. Pou 5 is "Promoting our Place", and this involves work to attract visitors, talent, students, business, and investment to strengthen and diversify the regional economy. HBRDS has been designed as a process and forum to raise cross-cutting issues and to seek alignment across pou and specific work programs. This makes HBRDS ideal for helping to ensure that partner agencies understand the role they need to play in supporting the vision and objectives of the HBVIS. The overall outcome sought is that HBRDS helps to ensure the enabling infrastructure relevant to the visitor sector is appropriately considered in Council Long-Term Plans and central government investment planning. 	Ongoing	Hawke's Bay Tourism	The enabling infrastructure relevant to the visitor sector is appropriately considered in Council Long-Term Plans and central government investment planning.
2. Submit to Council LTPs based on Hawke's Bay Visitor Strategy and long-term vision of the visitor economy	<ul style="list-style-type: none"> Hawke's Bay Tourism will advocate to have Council LTPs consider the needs of the Hawke's Bay tourism sector. This will include making submissions to the relevant processes. This activity also forms a key part of HBT's stakeholder engagement strategy. The overall outcome sought is that the Hawke's Bay visitor sector is appropriately considered in Council Long-Term Plans and investments by local government help to support the Hawke's Bay Visitor Strategy and the long-term vision of the Hawke's Bay visitor economy. 	Ongoing	Hawke's Bay Tourism	The needs of the tourism sector are actively considered and featured in Council Long-Term Plans.
3. Implement infrastructure elements of 'Cruise Hawke's Bay' strategy	<ul style="list-style-type: none"> Cruise travel is a significant opportunity for Hawke's Bay. This was growing rapidly pre-COVID and is set to rebound. Napier has been voted Cruise Critic's top New Zealand port destination a number of times. A number of infrastructure-related needs have been identified to maximise the benefit and reduce ill-effects from passenger numbers. These are set out in the 'Cruise Hawke's Bay Strategy' and include reception facilities at Napier Port, the ability to provide walk off opportunities for passengers, adequate provision of designated space for central bus/shuttle parking, adequate signage and provision of shade at key sites. The overall outcome sought is to improve the cruise visitor experience and ensure that the community continues to be supportive of cruise ship visits by not overwhelming infrastructure at peak times. 	Underway	Cruise Advisory Group / Hawke's Bay Tourism	Investment in infrastructure identified in 'Cruise Hawke's Bay' strategy.

Actions	Description and outcome sought	Status / Timing	Lead / Partner/s	Measurement
4. Support Hawke's Bay Airport's route development and expansion activities	<ul style="list-style-type: none"> Air access is vital to the Hawke's Bay community and the leisure market underpins the availability and frequency of connectivity with the rest of NZ. Hawke's Bay Airport would like to expand opportunities for new and additional services with Air New Zealand and explore opportunities for the expansion of connections with the rest of New Zealand; attract a 2nd competitive airline back to the region; and create more regional point to point connectivity (with smaller airlines as well as Air NZ). HBT's role will be to support the Airport's ambitions with sector data, insights, and in-kind assistance where this adds value and is consistent with HBT's role and responsibilities. The overall outcome sought is that Hawke's Bay has extensive and competitive air connections with the rest of NZ (and through these to international markets), and that this provides choice and ease for visitors wanting to travel to Hawke's Bay via air. 	Ongoing	HB Airport / Hawke's Bay Tourism	<ul style="list-style-type: none"> New and additional Air NZ services. A 2nd competitive airline is attracted back to Hawke's Bay. Smaller airlines offer more regional point to point connectivity.
5. Support partner agencies to improve signage	<ul style="list-style-type: none"> There is a need for improved signage. This would include clearer recognition of where the Hawke's Bay/Te Matau-a-Māui regional road journey stops and starts and how it connects to the journey opportunities provided in neighbouring regions. Signage could also better indicate cycleways/pathways and where these connect to places to eat and drink. The overall outcomes sought are that visitors are aware of the regional access points/entranceways and that these embody the unique identity of Hawke's Bay as a visitor destination, and that visitors are more clearly informed by signage of cycleways / pathways and places to eat and drink. 	Underway	HB Councils / Hawke's Bay Tourism	Investment in an expanded range of signage.
6. Further investment in local roads and State Highways (with SH5 being a priority)	<ul style="list-style-type: none"> A primary perceived reason for not visiting Hawke's Bay is the time and distance of road travel from adjacent regions. The State Highway between Napier and Taupō (SH5) in particular is perceived by some as difficult and dangerous. Speed restrictions are not viewed as an appropriate replacement for investment in the upgrade of this state highway. The overall outcome sought is that further investment in local roads and State Highways supports the efficient and safe connection between Hawke's Bay and neighboring regions. 	Underway	Waka Kotahi / HB Councils	<ul style="list-style-type: none"> Investment is included in LTPs and national investment plans. Actual investment in local roads and State Highways.
7. Inform HB Councils of any presenting issues relating to community frustration from negative effects from tourism	<ul style="list-style-type: none"> A key aspect of destination management and planning is to get ahead of any issues before they become a significant issue and before they start to erode community support for the visitor economy. An example elsewhere has been how freedom camping has created issues for some communities. HBT's role with this action is to ensure it informs the HB Councils of any presenting issues relating to community frustration from negative effects from tourism. The overall outcome sought is to ensure any negative impacts of tourism are appropriately managed and that the community continues to view tourism as a valued contributor to the region's economy and community aspirations. 	Ongoing	HB Councils / Hawke's Bay Tourism	HBT is informing Councils of any presenting issues relating to community frustration from negative effects from tourism



Process, Leadership & Partners

Process

The development of this Hawke's Bay Visitor Strategy (HBVIS) has involved discussions with key stakeholders via interviews, workshops, and information sharing sessions. Participants in this process included iwi advisors, central government, local councils, and Hawke's Bay destination service and experience providers.

More specifically the process involved:

- Two rounds of 'sector leader' informant interviews.
- Two input reports³ were prepared and discussed with the CEOs of the region's local authorities.
- Extensive survey work was undertaken – including that related to community attitudes to Hawke's Bay visitors.
- Two expert informants, with extensive knowledge of Te Ao Māori, contributed to and reviewed a draft of this Plan.
- Work published by Tourism New Zealand, MBIE, Tourism Industry Aotearoa, the local authorities of the region (including their LTPs and the Central Hawke's Bay District Council's visitor plan) and central government agencies has been drawn upon.
- Lessons have also been drawn from the DMPs prepared by other regional tourism organisations (RTOs).

³ Hawke's Bay Sustainable Tourism Growth – adequacy of infrastructure services, HenleyHutchings, June 2020. Hawke's Bay Sustainable Tourism Development: Adequacy of infrastructure services - Report two: Contextual changes, priorities, funding, and policy alignment, HenleyHutchings, November 2021

Leadership

Hawke's Bay has an existing leadership and co-governance structure that has been designed to coordinate, align, and guide the region's development strategy (Hawke's Bay Matariki Regional Development Strategy - HBRDS⁴).

Matariki HBRDS is structured around 5 key pillars or 'pou'. Pou 5 is "Promoting our Place", and this involves work to attract visitors, talent, students, business, and investment to strengthen and diversify the regional economy.

The Matariki HBRDS governance structure and associated meetings are the main focal point for setting regional economic development priorities, including those relating to the visitor economy. The Matariki Governance Group, consisting of the region's iwi and hapū leaders along with the region's Mayors and Chair (of the Hawke's Bay Regional Council), provides insights based on knowledge of the region and areas of expertise and responsibility.

The Matariki Executive Steering Group, consisting of the CEs of the region's councils, iwi and hapū leaders, and representatives from key central government and economic development agencies, provides advice to the Matariki Governance Group. They sponsor and provide the appropriate oversight of key actions and activities within Matariki HBRDS.

This structure and forum make Matariki HBRDS ideal for helping to ensure that partner agencies understand the role they need to play in supporting the vision and objectives of the HBVIS.

⁴ <https://www.hbreds.nz/>



Partners

Key implementation partners

Successful delivery of this HBVIS will require a range of partners playing a lead or supporting role.

HBT is the official Regional Tourism Organisation (RTO) for the Hawke's Bay region, encompassing Central Hawke's Bay District, Hastings District, Napier City, and Wairoa District. Our primary role as a marketing and promotion agency is to generate the demand that will support business investment into products and services.

Apart from recent COVID-related funding from Central Government, HBT has not been funded or resourced to pursue initiatives that go beyond its marketing and promotion functions. As noted in the background section the Government has invested in the development of this plan but there is currently no ongoing funding and resourcing for any activities that might fall outside the scope of existing funding agreements, budgets, and responsibilities.

This means HBT's role in this plan is focused on its core role and mandate as a marketing and promotion agency. The plan seeks to be clear where partners in this strategy – particularly the five Hawke's Bay Councils – will need to play a leading role if the objectives of this strategy are going to be achieved.

Hawke's Bay Tourism looks forward to leading the implementation of the marketing and promotion elements of this plan and to working with our partners, in particular mana whenua, the five Hawke's Bay Councils and the new Hawke's Bay Regional Economic Development Agency (HBREDA) on the longer-term planning, investment, and work with local businesses that will underpin sustainable and regenerative growth of the important Hawke's Bay visitor economy.

The following are key partners or stakeholders with an interest in this HBVIS:

- Private sector providers of, and investors in, visitor experiences.
- Mana whenua across Hawke's Bay - there is considerable potential in developing iwi-led experiences that connect to the rich history of Te Matau-a-Māui/Hawke's Bay. Hawke's Bay is within the rohe of Ngāti Kahungunu. The Plan therefore builds on the critical importance of the Te Matau-a-Māui narrative.
- Local and Regional Councils – Central Hawke's Bay District Council, Hastings District Council, Hawke's Bay Regional Council (HBRC), Napier City Council, and Wairoa District Council. HBRC is a key funder of Hawke's Bay Tourism on behalf of the region. The HBVIS acknowledges the critical role local government plays in providing enabling infrastructure and public amenities that support destination Hawke's Bay / Te Matau-a-Māui.
- The new Hawke's Bay Regional Economic Development Agency (REDA). Note, this is in the process of being stood up at time of writing. The new REDA will be responsible for region-wide economic development initiatives that will likely intersect with the visitor economy which is the core responsibility of Hawke's Bay Tourism.
- Central government agencies – in particular the Ministry of Business, Innovation & Employment (MBIE).

Annex A

Annual marketing plan

HBT market development activity currently includes the following:

- Embedding regional destination positioning as New Zealand's Food and Wine Country, in support of entire destination experience.
- Maintaining the authoritative digital visitation guide for the region to inform current and potential visitors, using best-practice design, content creation, search engine optimisation and search engine marketing.
- Engaging channel-specific audiences across all relevant social media channels by creating inspirational destination content which builds interest and preference for the region.
- Building and activating databases to receive direct communications which encourage repeat visitation.
- Preparing regional collateral which meets the needs of partners, operators and, most importantly, visitors, to showcase the many ways to experience Hawke's Bay.
- Delivering seasonal campaigns which aim to build demand outside of the peak summer season, including creating opportunities for paid extension by partners and members.
- Crafting event-specific campaigns for activations delivered by Hawke's Bay Tourism, such as F.A.W.C! Food and Wine Classic.
- Profiling regional events likely to drive visitation including events such as the Art Deco Festival, Hawke's Bay Marathon, Spring Fling Central Hawke's Bay, and summer concerts.
- Nurturing a wide range of local, national, and international news and lifestyle media and providing them with well-considered, targeted and timely story opportunities.
- Conducting familiarisations (famils) for a range of high-value media, trade, business events, and content creators, in order to showcase the destination and earn favourable profile through external endorsements.
- Developing productive and trusting relationships with Tourism New Zealand to ensure the Hawke's Bay destination experience is well understood and appreciated, and HBT is seen as 'easy to deal with'.
- Activating travel trade distribution channels including those provided by the retail travel agent network, wholesalers, inbound tour operators and on-line travel agents.
- Actively marketing Hawke's Bay as the ideal location for small to mid-sized business events by, among other things, selectively placing advertising, assisting operators to prepare bids, and preparing engaging and informative sector collateral and assets.
- Supporting partners in the cruise sector to encourage the successful reintroduction of cruise visitation to Hawke's Bay.
- Attending trade shows, central government and industry events and meetings – both to market Hawke's Bay and to stay in front of emerging market trends and policies.
- Being an active participant in relevant collaborative RTO initiatives, such as the Explore Central North Island marketing alliance and the Classic New Zealand Wine Trail touring route, to leverage the promotional value in targeted markets.

Annex B

Visitor sector situational analysis, characteristics, and dynamics

Visitor sector characteristics - overview

Despite Covid, the percentage of New Zealanders travelling in 2021 remained stable at 77%. What changed was increased domestic competition and increased domestic marketing by all regions.

Hawke's Bay's key markets are Wellington, Auckland, Manawatu, Waikato, and Bay of Plenty – accounting for 79% of all out-of-region domestic visitor spend in 2021⁵.

Popular visitor experiences

Research commissioned for this strategy sought the views of sector leaders on the most popular, 'iconic' visitor experiences, services or features drawing visitors to Hawke's Bay. The scorecard developed from this exercise was as follows:

1. Te Mata Peak (70 references).
2. Food and wine facilities (65 references).
3. Art Deco event (60 references).
4. Cape Kidnapper gannet colony (60 references).
5. Sunshine (55 references).
6. Walk and cycle trails (50 references).
7. Mission Estate and other wine estate concerts (50 references).
8. Golf (40 references).
9. Beaches (35 references).

⁵ Tourism Electronic Card Transactions, MBIE, December 2021

⁶ Angus and Associates, January 2022

Attitudes toward destination Hawke's Bay

HBT commissioned research on market perceptions has found the following:

- Hawke's Bay has the second highest rating of any destination as 'a great place to enjoy food and wine experiences'.
- A total of 67% of domestic visitors indicated they had visited Hawke's Bay in the past.
- 83% of those said Hawke's Bay was either 'highly appealing' or 'somewhat appealing'.
- The main reasons quoted by a random sample of New Zealanders for not visiting Hawke's Bay were:
 - No connections (implying no links to Hawke's Bay-based friends and family).
 - Inconvenience of getting to Hawke's Bay (implying concerns about the distance or expense of travel etc.).
 - Nothing in Hawke's Bay of interest (implying Hawke's Bay offerings were not in tune with the potential visitor's needs).

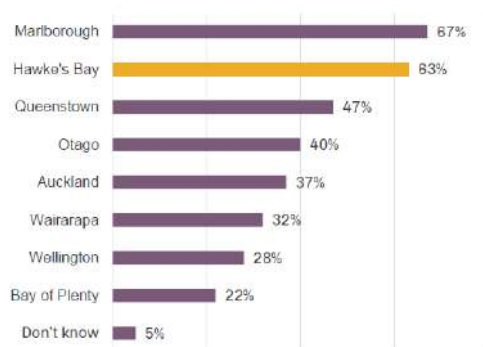
Destination Research

New Zealand travellers associate Hawke's Bay with:



Angus & Associates research:
Hawke's Bay – Market Perceptions Q1 2022

Is a great place to enjoy food and wine experiences:



Angus & Associates research:
Hawke's Bay – Market Perceptions Q4 2021

Visitor profiles

Visitor profile data⁷ suggests a higher percent of people who are over 40 visited Hawke's Bay, compared to the population at large. Those persons aged over 70 were over-represented by 5%. Husband / wife / partner household compositions were over-represented by 8%. By comparison, families with children aged between 5 and 15 were under-represented by 6%.

Seasonality

The summer season accounts for one third of domestic spend followed by autumn (24%), spring (23%) and winter (13%). International visitors favour summer (42% of their spending occurs in summer). This reflects the summertime predominance of the cruise sector.

Comparison of year-on-year data shows visitor spend grew outside summer in the last five years, suggesting Hawke's Bay is becoming more attractive as a year-round destination. This puts weight on the need for HBT to continue to promote Hawke's Bay as a desirable destination to visit in the shoulder and low seasons.

In general terms, visitor profile data weighs toward adults-first, foodies, mid-to-high income earners and those seeking active relaxation / short escape opportunities that provide good value for money.

Contribution to the Hawke's Bay economy

Pre-Covid information compiled by Henley Hutchings from third party data mostly gathered in 2019 / 20⁸ revealed:

- Annual visitor spending, pre-Covid, was \$680 million⁹ - measured via the Monthly Regional Tourism Estimates, which are no longer published. (NB for the same period in the previous year, expenditure was \$652m. This is a year-on-year increase of 4.3%).
- Pre-Covid, Hawke's Bay received about 2.2% of all visitor expenditure in New Zealand¹⁰.
- Domestic tourism is the largest part of the visitor market in Hawke's Bay – pre-Covid was \$513m which equated to 76%. International visitor spending was \$166m¹¹.

⁷ Membership Prospectus, 2020/21, Hawke's Bay Tourism

⁸ Hawke's Bay Visitor Sector Infrastructure, Henley Hutchings, August 2020.

^{9,10,11} Monthly Regional Tourism Estimates, MBIE, December 2019

Information from HBT¹² suggests the Hawke's Bay visitor sector / economy did better over that year than many other comparable regions. Hawke's Bay domestic card transactions in the 12 months to June 2021 was:

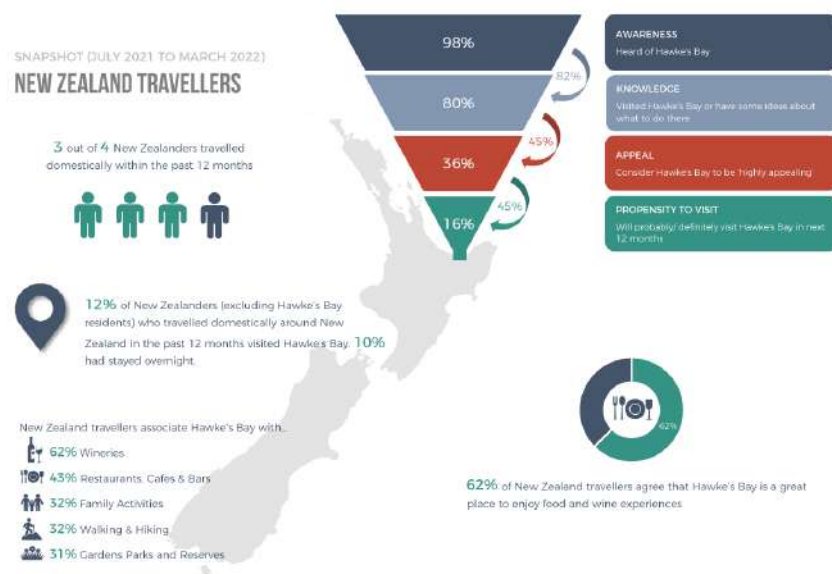
- Up 36.4% on the 12 months to June 2020
- Up 28.0% on the 12 months to June 2019

By comparison, New Zealand domestic card transactions in the 12 months to June 2021 was:

- Up 29.9% on the 12 months to June 2020; and
- Up 17.9% on the 12 months to June 2019

Cruise sector

Hawke's Bay is a popular destination for 'cruise' travellers. Hawke's Bay had 87 cruise ship scheduled visits in the 2019/20 season. These visits were projected to bring around 135,000 visitors and injected \$32 million into the Hawke's Bay economy (before the season was cut short by Covid restrictions). Napier was voted the best New Zealand stopover in the 2019 Cruise Critic Awards.



¹² HBT Annual Report for the financial year ending June 2021



Spread of visitors throughout Hawke's Bay

Tourism Electronic Card Transactions (TECT) was spread across the region's four districts in the 12 months to June 2022 as follows:

- Central Hawke's Bay \$24 million (6% of total).
- Hastings District \$167 million (41%).
- Napier City \$198m (49%).
- Wairoa District \$14m (4%)

Note, TECT data only represents card transactions, with no allowance for cash and online payments – so is therefore substantially lower than the previous MRTE reporting.

Accommodation

Occupancy of commercial accommodation (all types) in the year to June 2022 was 44.2%, compared to national occupancy rates of 34.6%¹³. As at end June 2022, Hawke's Bay has 97 commercial accommodation premises split across hotels, motels, backpacker facilities and holiday parks and lodges, with 79 considered active. Daily average capacity across these accommodation premises is estimated at close to 3,700 stay units. In addition, Hawke's Bay has approximately 1,400 residential properties offering peer-to-peer rental at different times of the year.

Home location of visitors

Key domestic visitor home-region locations in the 12 months to June 2022, based on spend were Wellington (22% of total), Auckland (19%), Manawatu / Whanganui (13%), Waikato (12%) and Bay of Plenty (10%). Residents of these home locations together accounted for 76% of Hawke's Bay's domestic visitor spending (which excludes 'visitor' spend by Hawke's Bay residents travelling within region).

International visitor spending pre-Covid was strongest by Australians (32%), followed by North Americans (19%), those from the UK (13%), and those from Germany and the remainder of Europe (15%).



¹³ Accommodation Data Programme, Fresh Info & MBIE.

Annex C

Attitudes of Hawke's Bay residents toward tourists

Community attitudes to tourists and the tourism sector

Research commissioned by HBT¹⁴ suggests Hawke's Bay resident's attitudes towards tourism/ visitors are more positive than the sentiment of New Zealand residents generally. Nevertheless, the research suggests there are some matters that worry Hawke's Bay residents.

The research involved drawing a representative (by age and gender) sample of at least 300 Hawke's Bay residents over a five-month period from a leading online research panel. All respondents were aged 18 years or over. The New Zealand sample used as a comparison was collected in the same manner with at least 200 population representative responses per month obtained.

Key findings included:

- Hawke's Bay residents' sentiment towards international and domestic tourism is slightly more positive than the sentiment of New Zealand residents generally.
- 81 percent of Hawke's Bay residents have personally benefitted from tourism activity in their local area.
- The two most commonly felt benefits include more local businesses to open/stay open as a result of tourism activity and opportunities for employment/income. These two benefits are observed by a higher proportion of Hawke's Bay residents compared to the New Zealand benchmark.
- In addition, a third of Hawke's Bay residents are inspired to travel domestically as a result of local tourism activity experience opportunities to get involved with or attend local festivals and cultural events and an enhanced profile or identity of their area.
- 70% of Hawke's Bay residents have been negatively impacted by tourism activity in their local area.
- A third of this group have found that tourism activity leads to more litter and waste generated and more than a quarter have faced greater difficulty finding a car park.
- Compared with the New Zealand benchmark it appears that the adverse impacts of housing affordability and the availability of housing are more commonly experienced by Hawke's Bay residents. Asked whether enough action is being taken to address the negative impacts of tourism an average 73 percent of Hawke's Bay residents that have experienced negative impacts agree that there is.
- Key actions that residents believe will help mitigate the negative impacts of tourism include greater investment in tourism infrastructure, restricting freedom camping activity, reducing the cost of housing, and improving safety in the local area.
- Looking to the future, Hawke's Bay residents would like the local tourism industry to most focus on improving community infrastructure, creating employment for people in the community, attracting more domestic visitors and encouraging visitors to travel outside of the peak season.
- A number of comments regarding the recovery of tourism post COVID-19 suggest that the industry's focus should be on increasing the value for money of tourism offerings and services in the Hawke's Bay. Several acknowledged the importance of balancing tourism's recovery with the risk of COVID-19 transmission.

¹⁴ Angus and Associates, January 2022

Annex D

Hawke's Bay Councils – LTP and other visitor related policies and commitments

Central Hawkes Bay District Council (CHBDC)

The LTP notes that approximately \$10.3 m will be allocated to facilities over the next 10 years that will help benefit tourism as well as the local community. An example of CHBDC commitment to the visitor sector is their investment in Tamatea history as part of Ngā Ara Tipuna and other sites adjacent to the Pukekaihou Pā.

Over the next 10 years, the council has budgeted \$15,720,000 for investment into:

- Campgrounds (three located on the coast and the Waipukurau Holiday Park) - \$803,000
- Community Buildings & Halls = \$1,919,000
- Cycleways & walkways = \$2,319,000
- Open Spaces = \$3,989,000
- Parks & Reserves = \$3,390,000
- Public pools = \$917,000
- Public Toilets = \$1,122,000
- Theatres & museums = \$2,064,000

The 'Central Hawke's Bay Tourism Destination Plan and Needs Assessment' (2020) report outlines key bodies of work requiring attention for the continued promotion of Central Hawke's Bay, with partner organisation HBT.

<https://www.chbdc.govt.nz/assets/Uploads/002509-TourismPlan-aR-web.pdf>

Hastings District Council

'Tourism' is referenced four times in the LTP. Examples include:

- 'Economic & Community Development' – Tourism activity has a wider economic benefit to the community in the form of jobs and visitor spend and as a service to residents.
- Revenue Streams – Assumptions have been made on forecast revenue streams for various tourism facilities such as Splash Planet and the HB Opera House ('Toitōi').

Recent visitor sector investment initiatives in the Hastings District Council have included:

- **Toitōi – Hawke's Bay Arts and Events Centre.**
- **Art Gallery and Library upgrade** – to commence shortly.
- **Museum storage.**
- **'Way-finding' strategy** with help of an App.
- **Waiaroha** – water treatment facility – engineered solutions with open view and real time monitoring – inclusive of the Māori story of water.

Progress on other visitor sector initiatives includes:

- **Te Mata Peak Reserve** – a transport plan has been developed and district plan provisions have been amended to make them more sympathetic to the values associate with Te Mata.
- **Te Mata Peak Reserve upgrades** have included construction of a board walk.
- **The Waimārama cycle trail** is now completed, with interpretation to come.



Napier City Council

'Tourism' is referenced in the LTP as follows:

- Marine Parade – the iconic Norfolk pines and tourist and family attractions such as the recently developed reef garden and the National Aquarium of New Zealand.
- Napier is world renowned for its Art Deco architecture - Art Deco was the style at the time the city was rebuilt after the 1931 earthquake and Napier has focused on this for its continued development. It is the base of a vitally important tourism sector.
- Ahuriri (coastal port community) - has been developed from an industrially orientated area into a thriving commercial, tourist, recreational, leisure, and residential area.
- National Aquarium of NZ – provides an all-weather tourism facility for a wide range of audiences including families, domestic, and international tourists alike. 130,000 people visited the existing facility in 2019. (NB more recent information supplied by Napier City Council suggests this level of use has been sustained). This gave rise to a Council proposition that a new - but perhaps down-scaled option (compared to 'Project Shapeshifter'), possibly with a strong education component, remains a worthy project for investment. The Council's LTP includes an intention to spend close to \$8m on the National Aquarium over the next three years.
- MTG Hawke's Bay – The City's museums and galleries are viewed as a mechanism for helping ground people in their history by providing a place to learn and be inspired - showcasing culture to the community and visitors to the area.
- McLean Park – provides outdoor sportsgrounds and stands, and an indoor court facility as well as administration and hospitality areas. The Park also plays host to trade shows, expos, community events, and private functions.
- Reserves – as well as providing recreational areas for the community to meet and play, the se area support many tourism events and local events which boost the local economy. (Expected investment \$12.5m).
- Pettigrew Green Arena in Taradale received a \$19m expansion – with completion in mid-2022 (\$4.6m of this cost was met via a contribution from the Provincial Growth Fund).
- War Memorial Centre - Napier City Council have made provision for an investment of \$1.7m into the War Memorial Centre.
- Other investments: The value of Kennedy Park is well recognised by the Council. Consideration is being given to further investment in this facility. Improvements have also been made to access for trucks to the Port of Napier and for expanded use of rail for transporting logs from Wairoa (as a means of taking off some of the pressure on roads). Significant Napier City and Hawke's Bay Regional Council investment is proposed as part of a regional park at Ahuriri. Incremental implementation of the Ahuriri Harbour Development Plan is adding value.

Hawke's Bay Regional Council

The Hawke's Bay Regional Council supports the region's visitor sector by:

- Considering visitor needs in the preparation of the Regional Transport Plan.
- Providing a significant funding grant to Hawke's Bay Tourism.
- Supporting the development of the Ahuriri area - in partnership with Napier City Council and the Mana Ahuriri Trust.
- Strongly contributing to measures that will improve environmental quality e.g., riparian planting and sustainable land use.
- Implementing a wide array of projects using funding provided as part of the 'Jobs for Nature' and 'Environmental Enhancement' COVID recovery packages.
- Piloting a new style of 'on call' public transport supply system and improved shuttle services to and from the airport.
- Progressing Ngā Paparahi o te Matau-a-Māui – Hawke's Bay Trails, noting:
 - There are now over 200km of trails serving close to 80,000 users per year.
 - Current 'work in progress' or recently completed includes the: Ahuriri Underpass; Waimārama Road Safety; on-going maintenance, surface improvements and gate improvements.
 - Future projects include story boards and planting on the bird corridor part of the Waimārama Road route; the Whirinaki extension; connecting Taradale and Havelock North to Hastings and the Wineries ride – with more of this ride now extending through the vineyards.
 - Progressing the opportunity for E-bike use of all trails.
 - Facilitating enhancements to the Hawke's Bay cycleway network, including improved access to Waimārama via Te Mata, thereby adding value to this 'set-piece' domestic tourism asset.
 - Delivering safety improvements for users - both visitors and the commuting public.
 - Better marketing Hawke's Bay Trails by grouping them into three experiences: wineries, landscapes, and water-connected rides.

Wairoa District Council

Wairoa has a strong primary industry and low dependency on tourism. Tourism is specifically mentioned in the LTP as follows:

- Rocket Lab will generate tourism for the district.
- An objective is for Wairoa to be perceived as a destination for tourists and not a drive through town / district.
- Rail between Gisborne and Napier may be reinstated. This will provide more economic opportunities, including rail tourism.
- Visitors to the Māhia Peninsula have increased three-fold in the last two years. The population of Māhia fluctuates from less than 1,000 permanent residents living on the Peninsula to over 15,000 people during peak periods.
- Treaty settlements will continue to be finalised over the duration of the LTP. It is likely these will include iwi-led tourism initiatives, particularly as it is anticipated that State Highway 38 from Lake Waikaremoana will be sealed.
- Implementation of an expanded Māhia Eastern Walkway with funding support from of \$450,000 from PGF (announced on 24 August 2020) has been secured for a 45km loop track from Māhia Beach – with a longer-term 3–4-day option also on the cards.

Annex E

Recent progress to resolve infrastructure constraints

Good progress has been made over the last 24 months on a range of infrastructure relevant to the Hawke's Bay visitor economy.

Roads

The most salient of the plans to resolve infrastructure constraints affecting Hawke's Bay tourism is the incremental upgrade of the State Highway One and Two routes connecting Wellington to Hawke's Bay.

- The Mckay's to Pekapeka Expressway was completed more than two years ago.
- The Pekapeka to Otaki expressway is set to be completed in late 2022.
- Transmission Gully is now open.
- Construction of the Manawatu Gorge replacement road 'Te Ahu a Turanga' is advancing well. Completion is expected by 2024.
- Construction of the 'Otaki to North of Levin' expressway will commence in 2025.

These improvements have already made Hawke's Bay a more attractive destination for the residents of the southern half of the North Island. When completed, the net effect of these road upgrades is a likely saving on the drive-time between Wellington and Hawke's Bay of between thirty minutes and one hour, with a likely consequent lift in Hawke's Bay visitor numbers. These road improvements will make Hawke's Bay a more comfortable and achievable journey for Wellingtonians.

Improvements to the safety of State Highway 5 between Tarukenga to Ngongotahā, and to congestion at the existing SH5/State Highway 36 roundabout, commenced on 18 January 2021. These projects total \$14 million. They were funded as part of the 'regional package' part of the NZ Upgrade Programme announced by Government in 2020. Speed restrictions on parts of the Highway have also been applied.

Hawke's Bay Airport

A \$20m expansion upgrade to the Hawke's Bay Airport terminal is now complete. This project involved the construction of new departure and arrival areas, and a centralised hospitality and retail area for passengers.

Napier Port

The upgrade of the Port's Wharf Six, primarily for log exports, has been completed. This should assist with wharf use logistics now that cruise ships have returned. The key benefit for the tourism sector was viewed as enabling the Port to better cater for visits by enabling more than one cruise ship at any time to be catered for. It was also envisaged as providing the option for up to 120 cruise ships to visit the region per annum.



Shovel ready infrastructure projects

The recently funded 'shovel ready' projects of strong interest to the tourism / visitor sector include the following:

- **Expansion of the Pettigrew Green Arena in Taradale.** This is a \$19m expansion completed in mid-2022 (\$4.6m of this cost was met via a contribution from the Provincial Growth Fund).
- **Waitangi Regional Park (Clive / Awatoto):** This site has been developed to better cater for large cultural events, including developments for car parking, hangi pit, toilet, walkways, and significant native planting.
- **Mokotahi Regional Park (Māhia):** In collaboration with mana whenua and in partnership with the QEII Trust, better recognition will be provided for the cultural and historical significance of the Mokotahi landform by enhancing the existing site to create a Regional Park and by constructing more walkways, signage, and planting.
- **Hawea Regional Park (Whakatu):** Development of walkways is underway through the park, including provision of a north-south connection into a wider cycle network, and construction of a swing bridge over the Clive River. Extensive native planting is planned across the park to provide ecological benefit and for cultural harvesting.
- **Tutira Regional Park:** Improvements are and have been made to the walking tracks, including resurfacing, and upgrading of wayfinding and interpretative signage and reversion of a grazing area to a wetland. In addition, Napier City Council and Hastings

District Council have identified a package of pedestrian and cycleway enhancements ready for immediate construction. The total package will improve amenity values for pedestrians and residents in targeted areas.

- **Mitre 10 Hawke's Bay Sports Park:** A new \$32m regional aquatic centre has been completed.
- **Local Roads:** Targeted projects are planned. These include sealing selected metal roads in Central Hawke's Bay and putting in place dust suppression measures in Wairoa District.

Other project-specific comments

The following additional 'infrastructure needs' were identified by some informants in the development of this HBVIS:

- **Ōtātara Pā site** – the site was noted as being close to centres of population with clear heritage and cultural learning opportunities. Consideration was sought for its further development.
- **Multi-day Mohaka Pathway** – this was viewed as a longer-horizon opportunity with potential for development in partnership with iwi.
- **Te Angiangi Marine Reserve** – this reserve was noted as providing protection to a piece of the central Hawke's Bay coast, between Aramoana and Blackhead. The site was viewed as unique and relatively under appreciated. More / expanded areas / awareness was called for.
- **Space Discovery Centre at Wairoa** – the relocation of the i-SITE in association with the development of a space learning and discovery centre was viewed as potentially providing a needed catalyst for further unlocking visitor potential in Wairoa.
- **Rocket launch viewing** – informants suggested this may be developed in association with the proposed Space Discovery Centre.
- **Sports Park** – some informants noted that the importance of intra and inter-regional sports events should not be undernourished. They called for on-going investment.
- **Aviation access expansion** – several informants noted the need to work with Air New Zealand or third tier airlines to expand air connections between Hawke's Bay and other regional centres such as Dunedin.
- **Matariki** – several informants wanted Matariki to be more actively celebrated – particularly given the importance of Te Matau-a-Māui and the celestial navigation guidance provided at Waitangi Park.
- **Accommodation and conference facilities** – the region could expand its range of quality accommodation and increase its capacity to host larger scale conferences.
- **Splash Planet** – some informants noted the importance of sustaining the value of Hawke's Bay as a destination for families. They therefore supported this popular family attraction as deserving of further investment.
- **Smart technology:** Many of our informants noted the recent growth in the availability of traveller-friendly apps such as Campermate. On a more general front, they also noted the 'add-value' benefits from provision of QR-code story boards and other means of sharing information about heritage, cultural and conservation values, and other site-specific features.

Annex F

Cross-check against MBIE Destination Management Plan (DMP) guidelines

DMP Component		Reference / Comment
1.	Define the destination	The destination is Hawke's Bay.
2.	Define the vision	See Section 3.
3.	Data research and analysis	This is contained mainly in Annexes A-D, and also in Section 2.
4.	Strategic fit	<ul style="list-style-type: none"> Analysis underpinning this HBVIS considered the how the Hawke's Bay destination proposition meets the objectives and service needs defined in local, regional, national, and international policies and directions. It also considered the fit between what Hawke's Bay has to offer visitors compared to what visitors want. In summary the analysis found strong alignment and no issues for concern. This analysis has not been included in the strategy to aid brevity.
5.	Brand positioning	See Section 2.
6.	Target markets	See Section 2.
7.	Experience and product development	See Strategic Priority 2.
8.	Access	See Section 2 and Strategic Priority 4.
9.	Attitudes	See Annex B.
10.	Marketing and promotion	See Annex A.
11.	Amenities, services, and infrastructure	See Section 2.
12.	Environmental stewardship	See Strategic Priority 2, Actions 6 and 7.
13.	Capability and development	HBT runs workshops for members where there is a gap in business advisory services and will continue to do so as resources allow. Hawke's Bay as a region is, however, well serviced by a host of networked organisations who work through the Hawke's Bay Business Hub (a key piece of economic development infrastructure in Hawke's Bay). This means HBT's role is more often focused in connecting members to the relevant and fit-for-purpose services.
14.	Leadership and structures	See Section 5.
15.	Risk and crisis management	Hawke's Bay has a strong existing Civil Defense structure. The response to COVID and the first lockdown resulted in very effective support being provided to visitors (including important RSE workers) and the tourism economy. A key reflection is that it was relatively straight forward to bring the sector together to quickly establish needs and the support that was required. This was in no small part due to a strongly networked sector and effective relationships with local government.
16.	Measuring success	See Strategic Priority tables

