

Addressing Future Growth of our Region

TIA Discussing Tourism
August 2017

Begin with the end in mind

- **The vision**

Dunedin is one of the world's great small cities. We are renowned as a confident, competitive knowledge centre, a community where enterprise and creativity support a productive and sustainable city.

- **Economic goals**

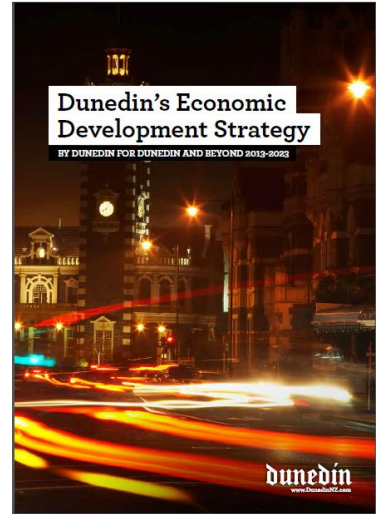
A 2% growth in employment each year
(roughly 10,000 extra jobs over 10 years)

A 2.5% rise in income per capita each year
(an average of \$10,000 per person)

- **Strategic themes**

The Strategy is built on five themes:

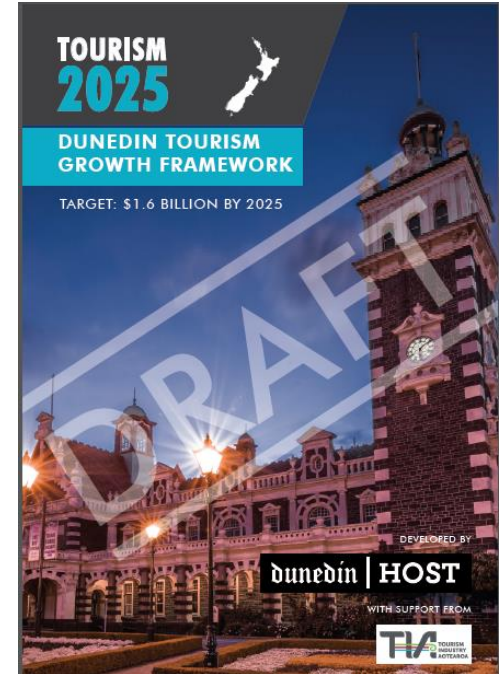
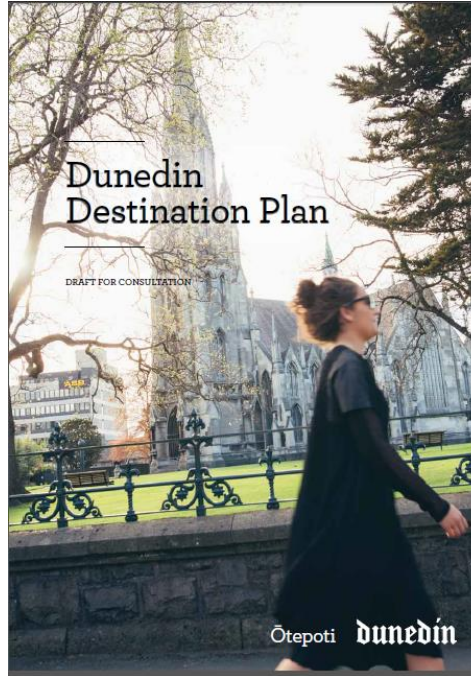
1. Business vitality
2. Alliances for innovation
3. A hub of skills and talent
4. Linkages beyond our borders
5. A compelling destination



Compelling Destination

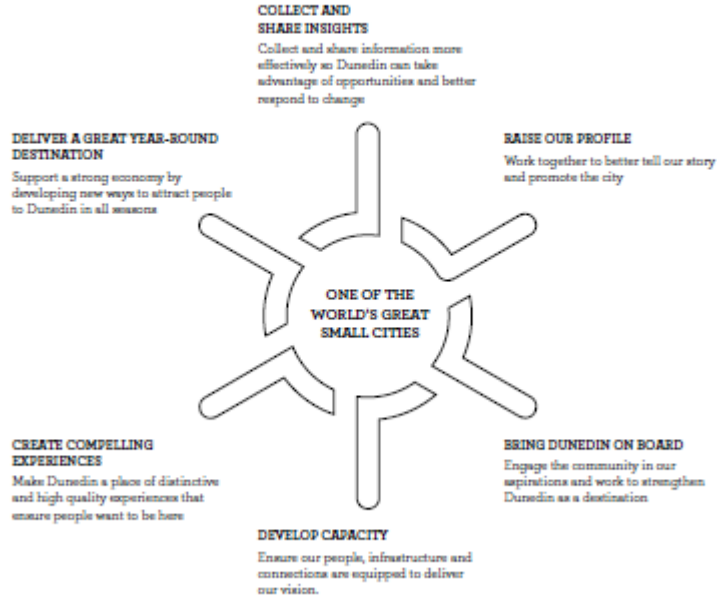
Two Drafts:

- Destination Plan 2023
- Tourism Framework 2025



At a Glance

A draft set of destination actions has been identified and developed from consultation to date. These actions are outlined below and discussed in more depth on the pages that follow.



State of Play - Year ended May 2017

CAM - Year ended May 2017 (vs. YE May 2016)

Decrease in VOLUME

Dunedin Total guest nights -2.4%

Domestic guest nights -6.6%

International guest nights rose +5.2%.

NZ's total CAM guest nights for YE May 2017 +3.8%.

MRTEs - Year ended May 2017 (vs. YE May 2016)

Increase in VALUE

Dunedin Total visitor spend +5.8%

Domestic visitor spend up +2.5%

International visitor spend up +13.6%

NZ's total MRTE visitor spend for YE May 2017 +5.6%.

Overall Trend - Year ended May 2017

- With the exception of the CAM dataset trends in the Dunedin visitor market appear to be positive.
- Although CAM volume may be down MRTes in the accommodation sector for the year ended May 2017 indicate a +12.3% increase in visitor spend.
- Dunedin Airport passenger arrival stats till April 2017 indicate on going increases in activity through the airport. This is driven by domestic passenger growth. April 2017 was 5.6% higher than April 2016.
- Conference Activity Survey (CAS) figures year ended March 2017 indicate an increase of 7.6% over the prior year (ending March 2016).

CAS Figures that include May will be available in late August, however the clear trend here is of increasing activity.

Forecast Growth

- Dunedin Host T2025 Framework proposes as aspirational goal of 10%pa growth in tourism revenues between 2017-2025
- More than doubling revenues over 9 years from \$694m in 2016 to \$1.6b by 2025
- It is helpful to triangulate results from a variety of data sources. Different datasets can be influenced by structural market aspects that are changing very quickly.

Tourism Measurement Tools

- MBIE Tourism Dashboard
- MRTEs
- CAM
- CAS
- Cruise NZ
- Qrious Voyager

- Forecasting - DGiT predictive tool for Domestic Travel

Forecasting the unknown

What we don't know is greater than what we do know

A key first action in the draft Destination Plan is to

Collect and share insights

Working together to understand our diverse and rapidly changing markets better

Challenges

- Similar to those faced nationally and in other regions
- Uneven growth & seasonality
- Regional Dispersal
- Infrastructure
- People & Skills
- Social license
- Funding

Trends - Micro Moments in Travel

- Mobile is changing the travelling consumers journey



Mobile & Travel

from Travel Trends: 4 Mobile Moments Changing the Consumer Journey



Source: Luth Research ZQ Intelligence™ - Cross Platform Digital Behavior Measurement, Nov-Dec 2014.

think with Google

thinkwithgoogle.com

dunedin

Collaborative Consumption

The “sharing economy” now gives travellers the opportunity to stay at a destination longer, immerse with locals and gain inside information within their budget.

Taleb Rifai, Secretary-General, UNWTO

Accentuating the positive

Investment

- Port Otago
- Emersons
- Cadburys
- Speights
- Hotel
- Air NZ additional services
- Cycleways & toilets

Celebration

- Larnach & Otago Peninsula Trust- 50years
- Test Cricket
- Lions & Bledisloe Cup
- Ed Sheerhan
- TRENZ 2018
- Otago Uni 150yrs 2019

Change the narrative

Creating added value by combining resources

Collective Tactics

- Partnerships - Strength in unity
- Develop model with key partners to achieve mutually agreed goals
- Combine an agreed % of budgets to work together
- Negotiate media partners contribution leveraging additional collective buying power

Local Heroes

- Champion each other
- Champion your region
- Champion the brand
- Share your stories digitally on social media with Dunedin NZ & submit them to Insiders Dunedin

Evolution of the tourism brand

Cities must have a global identity that reaches across different markets and customers and tells a unifying story about the value the city can add to the activity that is looking for a home.

We cannot tell one story to the students and another to the business people because the students will become business people and the business people sometimes also study.

Just as the tourists might start a business or come to a convention. We need an organising story for the world not just a sales campaign for one market.

We need both.

Destination branding



dunedin

Welcome to Dunedin, New Zealand

A nighttime panoramic view of Dunedin, New Zealand, showing the city lights and the harbor. The image is divided into three sections by vertical lines, each with a different activity label.

Visit

Business

Study