

Geraldine

Visitor Marketing Strategy 2015- 2020



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Prepared for Geraldine Community Board

Prepared by TRC Tourism

TABLE OF CONTENTS

1. PURPOSE OF THE MARKETING STRATEGY	3
2 STAKEHOLDERS	3
3. THE GERALDINE REGION	4
3.1. Current Visitors	5
3.2. Value and Contribution of Tourism to the Timaru District Economy	7
4. CONTEXT FOR THE FUTURE	10
4.1. Travel Trends	10
4.2. Challenges for Geraldine	12
5. FUTURE VISITORS/ TARGET MARKETS	13
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6. MARKETING STRATEGY	15
6.1. Goal	15
6.2. Geraldine Destination Brand Values	15
6.3. Marketing Objectives	15
6.4. Marketing Action Plan	18
6.4.1. Advertising and Promotion	18
6.4.2. Product Development and Enhancement	22
6.4.3. Research and Monitoring	26
7. STRATEGY IMPLEMENTATION	27
7.1. Tourism Industry Coordination and Action	27
7.2 Ownership	27
7.3 Funding	28

1. PURPOSE OF THE MARKETING STRATEGY

This marketing strategy is being prepared to provide the Geraldine community with a clear direction on how to maximise tourism marketing for the area.

This strategy includes a comprehensive and actionable marketing plan that is specifically targeted at the following goals:

- Increase visitation to the Geraldine area; and /or
- Increase visitor length of stay in the Geraldine area; and/or
- Increase visitor expenditure in the Geraldine area.

Geraldine is an important town in the Timaru district in the South Canterbury region. It has a population of 2600 as at the last census and is the third largest town in the district. Geraldine occupies a significant position for the travelling public, being at the entrance to the Mackenzie Country and the last significant town when leaving the Canterbury Plains.

Aoraki Development Business and Tourism¹ is one of the key players in the marketing of Geraldine as a visitor destination. In addition Go Geraldine² has a significant interest in the overall promotion of the district as well as promoting the prosperity of the tourism sector in Geraldine.

2. STAKEHOLDERS

The individual businesses, agencies and groups who currently have a stake in the Geraldine visitor industry and its marketing are:

- Individual tourism businesses
- Indirect businesses that benefit from tourism (eg convenience stores, petrol stations, produce suppliers)
- Go Geraldine
- Timaru District Council
- Aoraki Development Business and Tourism

¹ Aoraki Development Business and Tourism is the regional Economic Development Agency. It has the following mission: To enhance the economic well-being of the South Canterbury Aoraki region by sustaining, growing and attracting businesses and visitors.

² Go Geraldine is a member organisation with the objects of:

*Develop and promote the Geraldine district, including the rural communities, as a vibrant place in which to live, work, play and stay. This includes all business, cultural, social, recreational, amenities and attractions available in the Geraldine District and surrounding areas.

*To assist in establishing, building and encouraging a strong and healthy business environment in the wider Geraldine district, where locals support locals for the common good.

Go Geraldine is an active organisation with over 100 current members.

3. THE GERALDINE REGION

Geraldine is the gateway to the Mackenzie country from the north. It is the key town that signals the change from the Canterbury plains to the high country of the Mackenzie basin.

With a population of around 2,600 the town largely fulfils the function of a service town for the surrounding region and its agriculture. The town is also a significant tourism stop/destination for visitors.

At the present time there is significant growth proposed in the Mackenzie country to accommodate forecast tourism growth. Two new hotels and an increased backpacker development have recently been announced at Tekapo. Geraldine will be a beneficiary of this development and increased visitor flows, being the stopover point between Christchurch and Tekapo.

However, Geraldine has not had significant growth in the recent past with a 2.7% increase in population over the last 7 years as recorded by the 2013 census³. Geraldine comprises just over 5% of the Timaru District population which has had a similar growth of 2.5% since 2006. The whole region could therefore be described as stable with no significant local population growth drivers at the current time.

While there is some development in the region, there remain economic growth challenges. With the aggregation of large scale farming, there is increased concentration of processing, reduced farm labour inputs, and more specialised inputs are required to manage the higher level of capital inputs and more sophisticated systems that are being operated.

The trend to online shopping and also increasingly, big box retail and large chains dominating whiteware and household goods purchases, means that there is limited opportunity for growth in the retail sector from demand by the resident and surrounding regional population.

Increasingly it will be the visitor population that will be an important ingredient in supporting a vibrant retail sector within the town. Evidence of this already exists – it is unlikely that 2600 people can support three chocolatiers!

Having been established in the 1840's Geraldine has a comparatively long history and much of that history remains intact today. The long history of settlement and the stable nature of the town population has meant that the town presents a streetscape and structure that continues to be consistent with the scale of the town and is largely fully occupied. It shows a vibrant commercial area to the visitor and provides a wide range of services and retail opportunities to residents and visitors.

Outside the township in the wider region there are many heritage destinations, buildings and experiences that date back to the 1840's. This presents some desirable tourism experiences for visitors.

With the rapid transformation of the Canterbury plains to large scale dairy with irrigation, the nature of the surrounding region of Geraldine stands out as one that retains aspects of a more forested and "English" landscape.

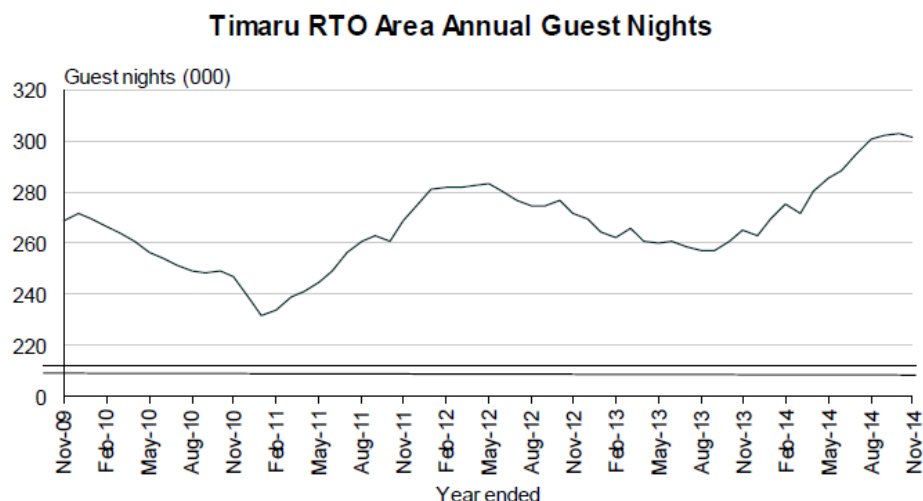
³ http://www.stats.govt.nz/Census/2013-census/profile-and-summary-reports/quickstats-about-a-place.aspx?request_value=14935&parent_id=14926&tabname=

There are a diversity of tourism offerings in the wider region that attract significant visitation as individual activities. These include rafting, mountain biking and horse trekking. The town however, has limited attractions and does not have a single iconic tourism attraction that is synonymous with the town. This lack of an iconic attraction results in the marketing of the destination being more difficult as there is no common “hook” or connection between a readily recognised product and the location.

3.1. Current Visitors

There is very limited data about visitors to Geraldine with little detailed information readily available at the Timaru District level or at the more detailed town level. At the broader RTO level the Commercial Accommodation Monitor⁴ is the best source of information about visitation to the region and will apply to a lesser extent to Geraldine.

The most recent edition of the Commercial Accommodation Monitor⁵ for the Timaru RTO shows a general increase in visitation to the region. The table below also shows the effect of the 2010 earthquake on visitation to the region with a significant depression in bed nights over the 2010 and early 2011 period.



Source: Statistics New Zealand

The Commercial Accommodation Monitor also provides a breakdown of the origin of guests for the region, with approximately 21% being international visitors and 79% being domestic. The Timaru region origin of guests has a significantly higher domestic component than the national average. Nationally there is approximately 38% international guest nights and 62% domestic guest nights. The high domestic stay is a reflection of the fact that the Timaru region, including Geraldine, is not an international gateway and is also is not a destination for international visitors.

The Regional Tourism Estimates⁶ provide information at a regional level, which in this

⁴ <http://www.med.govt.nz/sectors-industries/tourism/tourism-research-data/commercial-accommodation-monitor-data>

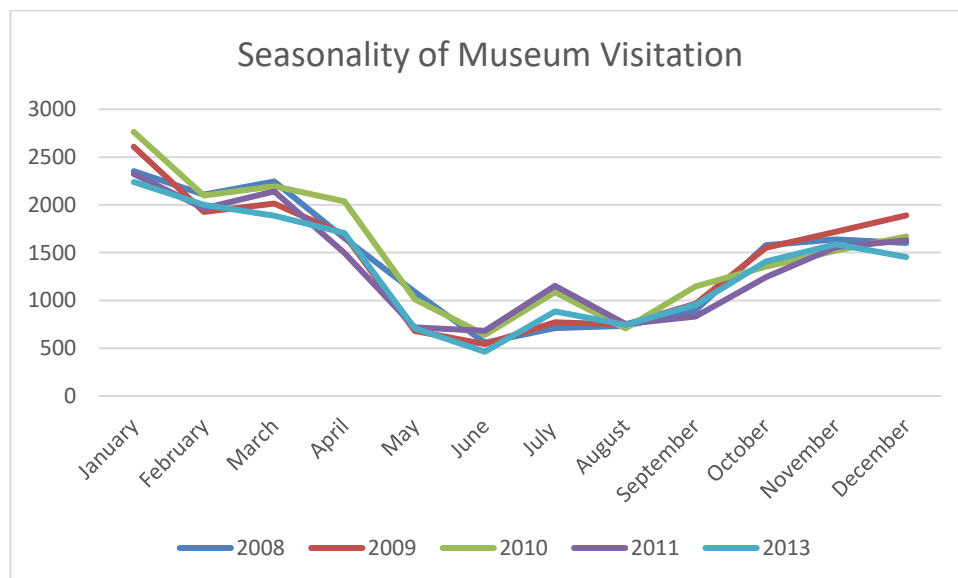
⁵ <http://www.med.govt.nz/sectors-industries/tourism/tourism-research-data/commercial-accommodation-monitor-data/current-month-rto-reports/south-island-regional-reports/timaru.pdf>

⁶ <http://www.med.govt.nz/sectors-industries/tourism/tourism-research-data/regional-tourism->

case is South Canterbury, and is a valuable source of visitor expenditure data. This information is also a good indicator of where the regions visitors are coming from and their relative importance. Canterbury contributes over 60% of visitor expenditure to the region, Otago 15% and the third greatest contributor is Auckland at about 7%. This concentrated expenditure profile emphasises the importance of the neighbouring regions as the greatest source of visitation and therefore they are the key target markets for Geraldine.

Australia is, as expected, the most important international visitor market and the expenditure profile of the region largely reflects the distribution of international visitor spend nationally.

Information is available on the door traffic at the Geraldine Historical Society Museum indicates that there are approximately 12,000 to 17,000 visitors through the museum on an annual basis⁷. Over the last five years visitation to the museum has been constant, ranging between 16,000 and 18,000 visitors per year.



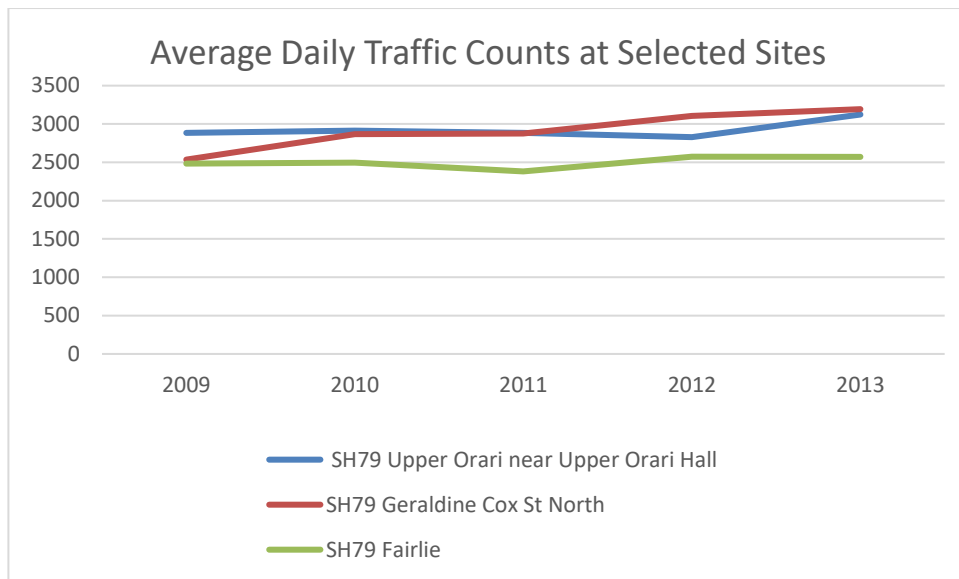
The door counts also demonstrate the seasonal pattern of visitation to Geraldine with strong visitation in the summer months from January to March and a low season of May to September/October.

Traffic counts⁸ indicate that there has been a general uptrend in traffic travelling along State Highway 79 through Geraldine. Given the location of Geraldine, visitors both international and domestic will largely rely on private transport and therefore traffic counts are a useful general indicator of visitation trends and volume of visitation.

estimates/regional-summaries-folder/south-canterbury-rto.pdf

⁷ The Geraldine Historical Society kindly provided door count data for the museum. Prior to 2007 the opening hours of the museum were shorter and consequently visitor counts lower.

⁸ <http://www.nzta.govt.nz/network/operating/counting-traffic/traffic-statistics.html>



3.2 Value and Contribution of Tourism to the Timaru District Economy

Globally, tourism is the world's largest industry with a value of over \$US1.4 trillion in 2013 and accounts for 30% of the world's trade in services. International tourism arrivals are expected to grow by 3.3% a year to 2030 to reach 1.8 billion arrivals according to UNWTO forecasts.

New Zealand as an important visitor destination is experiencing some of this significant growth from Asia at the present time with international arrivals growing by 5% in 2014. The total economic contribution of tourism to the New Zealand economy has grown by 5% in the year ended March 2014 to a contribution of \$23.8 billion⁹. The direct contribution of tourism is 4% of New Zealand's total GDP. A further 3.1% is indirectly contributed.

The Timaru District economy has been researched and projections made for the region for the period 2013 to 2015. BERL estimates that the current GDP of the Timaru region is around \$2.1 billion.¹⁰ Using the MBIE data, the tourism economy in the region is estimated at \$115M. Consequently Tourism represents around 5% of the total regional economy. By way of comparison tourism is around half the size of agriculture in the region, slightly smaller than the regional construction industry and around twice the size of the education and training sector, or the engineering industry in the region. The attributes of the tourism industry that are attractive from an economic growth perspective are that it generally has a low capital requirement, it can scale rapidly and also is able to operate within small communities and is labour intensive and does not require highly specialised labour skills.

⁹ <http://www.med.govt.nz/about-us/pdf-library/tourism-publications/KeyTourismStatistics.pdf>

¹⁰

<http://www.southcanterbury.org.nz/PicsHotel/SouthCanterbury2014/Brochure/BERL%20Timaru%20District%20Industry%20Projections.pdf>

While there is limited data on actual visitor numbers to Geraldine and the Timaru region, there is useful information that is sourced from credit card spend data¹¹. Recent modelling by MBIE of the regional visitor spend by both international and domestic visitors shows that the South Canterbury Region has a total visitor expenditure in the region of \$480M in the year ending March 2014. The total expenditure comprises a contribution of \$130M from international visitors and \$350M from domestic visitors to the region.

Over the last 5 years expenditure by international visitors in the region has remained relatively constant with little change over this period. This flat international visitor spend in the region mirrors the national picture with little overall change in total international visitor expenditure nationally. However there has been some regional variation with the main centres benefitting from a change in the international visitor mix. Therefore Timaru, by maintaining expenditure has done better than a number of other regions that have seen a fall in international visitor expenditure.

Domestic expenditure in the region has continued to increase over the last 5 years from an estimated \$405m in 2009 to 480M in 2014. However this headline estimation masks some substantial changes in the expenditure mix that is attributed to tourism in the region. Retail sales, both fuel and other automotive and other retail products accounts for \$66M of the \$75M of increased expenditure within the south Canterbury region. The “other tourism products” which largely describes “true” tourism activities such as attractions and visitor activities, has declined over this period. Accommodation and food and beverage categories show increases that are consistent with inflation and population increases.

On a territorial authority basis, Timaru District has enjoyed only a modest increase in tourism expenditure. Total expenditure is estimated at \$115M in 2014, having increased from \$108M in 2009. This contrasts with recent modelling work by BERL (Economic Development Indicators, Timaru District March 2014) where tourism is estimated to contribute \$55M to the Timaru economy. While there seem to be large difference in values, different modelling approaches will lead to significant variations when small components of the economy or sample sizes in actual data collection are used. We would prefer to use the MBIE information that has, its source, actual credit card data from domestic and international visitors. However it is clear that the contribution to the Timaru District economy is most likely in the range of 3- 5%.

While the economic contribution of tourism to regional economies may be comparatively low, they do provide the marginal expenditure that makes the services enjoyed by many communities viable. Without both domestic and international visitors, Geraldine would not be able to support the current level of retail activity and diversity. In particular the retail spend of visitors on food and beverage and general retail spending for personal consumption is an important contributor to sustaining the retail environment and main street of communities. As the trend to online shopping grows, visitors will be more important in maintaining a vibrant retail offer in the town.

Forecast growth in tourism for the region has been estimated by BERL in its report on the Timaru Industry Projections to 2025¹². While tourism is not recorded as a separate industry, the accommodation and food services sector at a 2.3% annual growth rate and the art and recreation sector at a 3.5% growth rate, are a good

¹¹ <http://www.med.govt.nz/sectors-industries/tourism/tourism-research-data/regional-tourism-estimates/regional-summaries-folder/south-canterbury-rto.pdf>

¹²

<http://www.southcanterbury.org.nz/Pics/Hotel/SouthCanterbury2014/Brochure/BERL%20Timaru%20District%20Industry%20Projections.pdf>

proxy for the tourism sector in the region. A 2-3% growth rate would be consistent with many regional growth expectations where there is no a major influx of international visitors.

4. CONTEXT FOR THE FUTURE

4.1. Travel Trends

New Zealand tourism has shown resilience over the last 10 years as the global economy has experienced considerable uncertainty and dramatic shifts in economic position. After a negative growth rate in 2009/10, international visitors to New Zealand are again growing, with 2.84 million visitors in the year ending November 2014¹³. International visitor spending to September 2014¹⁴ increased by 10% to a total of \$7240M. Free and independent and semi-independent travel in New Zealand has grown over the past ten years and currently makes up approximately 90% of international visitors¹⁰. Visitors to New Zealand are increasingly looking to engage with local people and participate in activities while experiencing New Zealand's unique landscape.

While New Zealand is experiencing an increase in visitor numbers, there is also a significant shift in the origins of our international visitors. China has moved from being No 6 in 2004 to our No 2 visitor market in 2014. China visitors totaled 257,000 in the year ended November 2014. The longer term forecasts for the Asia Pacific region are for continued growth until at least 2030. While until recently China visitors have largely been dual destination visitors (also visiting Australia) that are short stay, focused largely on Auckland, Rotorua and Queenstown, this pattern is changing and New Zealand is receiving more visitors that are staying 7 days or more and are independent travelers.

Our more established markets of Europe, UK and USA have been significantly affected by the GFC and have experienced a significant depreciation of their currency against the \$NZ. This combination of effects has resulted in a reduction in visitors from these source markets over the last 5 years. However, these markets have been in gradual recovery since 2013. The return of these markets is important for destinations such as Geraldine as visitors from these countries are generally long stay and also travel extensively around the regions of New Zealand.

Australia, our largest market, has been in growth mode for many years with New Zealand receiving 1.246M visitors in the year to November 2014, which represents a 2.9% increase. The rate of growth is expected to slow as the Australian economy slows and this means that New Zealand cannot expect to have a major increase in visitors from Australia on the coming decade. Much of the growth from Australia has been a result of increased direct flights into Queenstown for skiing. As Christchurch recovers from the earthquake and accommodation in the city is reinstated there is likely to be increase arrivals to Canterbury from Australia. At present the arrivals from Australia have stabilised at around 430,000¹⁵.

The domestic market, while at times, volatile, has shown good growth over the last 10 years. Over the longer term domestic spend and visitation is expected to grow at a level consistent with population growth and increase in overall wealth. While slow during the recent economic crisis, the domestic market in New Zealand is showing positive signs of growth. Domestic visitors are taking approximately 15.1 million

¹³ <http://www.med.govt.nz/sectors-industries/tourism/tourism-research-data/international-travel/international-visitor-arrivals-commentary>

¹⁴ <http://www.med.govt.nz/sectors-industries/tourism/tourism-research-data/international-visitor-survey/ivs-key-data/key-data-tables/ivs-ye-september-2014>

¹⁵

overnight trips per annum. They have an average stay of three nights away, and an average spend per night of \$116.⁸

There is a growing trend towards shorter summer breaks and more spread out use of leave. The historic experience of New Zealanders taking all their annual holidays over the Christmas/summer period has largely gone. With four weeks annual leave now the norm and a more broken school year, families are taking more breaks but shorter breaks. Travel by New Zealanders outbound is growing as well, with competition for many domestic destinations being largely international destinations. For example Christchurch residents are offered flights to Sydney for \$149, whereas a flight to a New Zealand regional destination can cost considerably more.

In our view there are a wide range of factors that need to be taken into account when estimating tourism growth trajectories. We consider that the region has some potential drivers of growth that will be important over the next decade. These are:

- Canterbury rebuild – with over 60% of visitor spend coming from the neighbouring region, the significant rebuild spend estimated at \$40B, and associated GDP growth is expected to generate additional visitor expenditure in the surrounding region.
- Mackenzie country tourism developments – with the increased accommodation offers being proposed there will be increased marketing of Tekapo as a destination. This will drive traffic through Geraldine with some tourism spend spillover benefits to the region.
- Cruise visitation - Timaru may be a beneficiary of increased cruise visitation to NZ.
- Changing international visitor mix - While there has been a very strong growth in the China market in recent years, much of this growth has been from short stay “shopping tour” style tourism. This is expected to change rapidly to a more independent traveler style from China as a result of legislative changes introduced in 2013 and also increased understanding of what NZ has to offer and more sophisticated visitation.
- Recovery of traditional long haul markets – The traditional markets of UK, Europe and USA are long stay visitors who travel extensively around New Zealand. With the recovery of these economies we would expect that there will be a return to growth from these markets. This benefits smaller communities disproportionately.
- Reduced fuel costs. Should energy costs remain low for a significant period, domestic travel will be stimulated with Geraldine and the wider Timaru region being beneficiaries of reduced travel costs and also increased disposable income.

Against these positive drivers are some negative potential risks to the tourism economy in the region:

- Lower airfares and reduced regional services. Declining costs of air travel is encouraging travelers to concentrate their travel to the main trunk services. Reduced regional aviation connections and their high costs are also dissuading a more extensive regional spread of domestic visitors. Reduced airfares also encourages more international travel with fares across the Tasman often being significantly lower than domestic fares.
- Increased living costs as a result of incomes not keeping pace with costs such as housing and other living costs reduce the disposable income available for discretionary activities such as travel and recreation.

- Concentration of tourism investment in the main centres and tourism locations. With international visitors concentrating in a few destinations, investment follows the concentration. This in turn has the effect of increased marketing spend promoting fewer destinations with a spiral of concentration meaning smaller destinations are unable to compete in the tourism marketplace.
- Urban drift northwards. With the dominance of Auckland as an employment and population growth centre, the ability of regional destinations and the South Island as a visitor and events destination is expected to become more challenging.

4.2. Challenges for Geraldine

The current visitor dynamics, both international and domestic, together with the aspirations of the local community, and wider travel and tourism trends, pose a number of challenges for the future marketing and development of Geraldine as a visitor destination. The main issues are as follows:

- Geraldine is often considered a coffee stop with little on offer to encourage visitors to stay
- Lack of trade ready product which leads to lack of marketing in international channels and therefore lack of volume visitation
- A limited number of commissionable tourism products that the wholesale tourism trade will sell.
- Lack of awareness of what Geraldine has to offer, especially prior to the trip. Planning a trip with an end destination in the Mackenzie Country means that Geraldine is considered only as a stop rather than a destination in its own right.
- Competition from other tourism destinations in New Zealand which have achieved a higher level of awareness and may have larger marketing budgets.
- Unclear identity of the town, and also little integration of tourism product with that available in the wider region.
- Funding for coordination, development and promotion of Geraldine as a visitor destination is very limited.
- Seasonality – Geraldine as a limited destination in its own right depends on the seasonality of other destinations. As a result the region and the town are largely summer destinations with a seasonal peak between October and April. While this is quite similar to many destinations, the lack of attractions or activities to draw winter visitation makes occupancy and management of attractions more difficult and less profitable.
- Lack of quality activities for visitors – especially for a younger target market. In particular activities that will draw a regional youth and young families market to generate word of mouth referral and repeat business.

5. FUTURE VISITORS/ TARGET MARKETS

Geraldine is heavily reliant on the surrounding region for the bulk of its visitor market. Canterbury, and to a lesser extent the southern neighbouring regions, provide a solid domestic market base and there is significant potential for further growth in this market over the next decade as the Canterbury economy recovers and grows.

With the ageing of the New Zealand population (and also our international visitors) the domestic visitor market comprises a good potential target of retirees and couples, with or without children who are interested in nature, heritage and activities in a small town and rural environment. The experience that Geraldine can offer is well suited to these markets in particular, and future product development should consider the needs of these market segments.

International visitors, especially independent travelers that are touring New Zealand with plenty of time are also well suited to the experiences that Geraldine can offer. At the present time products that cater to New Zealand's traditional markets of Australia, Europe and USA are likely best suited to the Geraldine products. However considerable thought needs to be given to what products and adaptations of existing products in particular will be attractive to China and other Asia visitors.

Figure 1: Potential Target Markets

Market	Who?	What they need	Growth Potential
Domestic short break – in particular Christchurch and the surrounding townships that are within approximately 2 hours driving distance. Other southern communities within 2 hours travel.	Couples (with and without children), 25-50 Couples 65+ interested in heritage, scenery, gardens, food and wine, and some physical activity,	Range of accommodation options (incl private houses) Family activities B&B's/ motels Range of safe attractions and activities with a moderate physical activity level	High
Domestic longer break (i.e a week) – Auckland, Wellington	Couples and groups of friends Food and wine and often shopping for unique and local goods (which cannot be purchased at home)	Quality accommodation + excellent service Range of dining options Range of activities (all weather, relaxing, some physical)	Low- Med
International – In particular Australia, UK and Europe campervan and rental car travelers In the future, China FIT travelers	FITs Interested in heritage and scenery, local foods, farm experiences and some physical activity	Quality accommodation Range of unique, scenic and historic activities Itinerary examples, especially that include interaction with local people and communities	Med
Adventure seekers	School groups from the surrounding regions Clubs and sports teams International students	Suitable group accommodation Activities/ attractions with a learning element Challenging outdoor and team activities Packaged itineraries and experiences for organisers that make the booking process easy	High
Weddings, reunions/significant birthdays and other family events	Families for whom a central location will facilitate meeting	Suitable venue and a range of accommodation offerings, ideally with group capacity	Med-High
Small corporate groups, special interest groups– NZ, particularly from the South Island	Small conference and corporate gatherings, special interest groups and small-medium size weddings	Suitable venues with on-site high quality catering For some events a combination of off- site visits/experiences and on-site facilities	Med

Notes: Potential Target Markets

- With approximately 600 beds in the region there are around 200,000 bed nights available annually. The growth potential classification used in the table represents an estimated growth opportunity of 2000+ for high growth potential, 500-2000 for medium growth and less than 500 for low growth potential.

6. MARKETING STRATEGY

6.1. Goal

In order for the Geraldine region and township to further develop its economic base, tourism will require a more active and coordinated approach. This could achieve significant improvement in the vibrancy of the region that will lead to enhanced economic, social and environmental benefits through tourism. The tourism goal could be for:

Geraldine to be recognised as one of the most attractive and rewarding visitor experiences in the South Island

It will do this by providing a unique, quality rural New Zealand visitor experience that reflects the values of the local community and offers a diversity of experiences to a wide range of visitors.

To achieve this the destination will need to have a threshold level of high quality tourism product that meets the needs of visitors and can be effectively marketed through both retail and trade channels to the domestic and international markets.

6.2. Geraldine Destination Brand Values

Developing brand values for Geraldine as a visitor destination will help communicate the essence of Geraldine to visitors and differentiate it from other destinations.

These brand values need to be communicated through all activities associated with tourism in the Geraldine region including marketing and promotions (eg images, text, brochures, websites, events) and in the delivery of the visitor experience.

While no work has been done on articulating what the essence of Geraldine is for the visitor, South Canterbury as a region has carried out work on the essence of the region. Use of this set of brand values or a subset for Geraldine can be used as a unifying theme for the region and its products. Until this time the values, attributes and experiences of the individual products and as a proxy for the destination brand values. Developing brand values that incorporate the aspirational, emotional and practical reasons for visitation requires research and a careful consideration of the positioning of the tourism activity in relation to those brand values. Such an exercise to build on the South Canterbury work could be considered in the longer term as a specific project.

Any brand values that are developed should be incorporated into individual business marketing communications, community activities and events activity when Geraldine as a region and town are involved.

6.3. Marketing Objectives

The marketing objectives for Geraldine can be broken down into 3 key areas:

1 *Increase Awareness of Geraldine as a Visitor Destination*

One of the key issues facing Geraldine as a visitor destination is the limited visibility of the town and the wider region as a place to explore and stay. A higher awareness of what Geraldine has to offer both domestic and international visitors is vital for growth.

To increase awareness of Geraldine as a visitor destination, greater investment in all the ways of communicating with the market is required. Both wholesale channels, through tourism trade, wholesale distributors, Tourism New Zealand and its international marketing activity, trade shows such as TRENZ, MEETINGS and Convene South are all important mechanisms to raising awareness to volume visitor markets. In addition, reaching the “retail” market via websites, direct marketing and the visitor centre network needs to be upgraded in terms of the quality of the product offer, the quality of information available to visitors and using the most cost effective ways of reaching the individual traveler.

In the long term it is only through having quality product that is attractive to current and future visitor, that Geraldine will be able to promote itself as a highly desirable visitor destination.

2 *Develop more reasons to stop and stay*

While Geraldine is on a popular tourist route it will continue to attract a high level of visitors that see Geraldine as a convenient stopping point. However this does not support the tourism sector in the broader region and also does not add depth to the products that are on offer in the town. Events and more “Geraldine specific” activities and attractions that can only be experienced in this location would generate a higher level of overnight and day visitation. Off season events and targeted marketing to the closest region that will generate higher numbers of day visitors and overnight visitation will be important first steps in developing Geraldine into a visitor destination where visitors can undertake a wide range of activities that they can then talk about.

3 *Enhance the Geraldine Product Experience*

Geraldine has a small number of visitor attractions and experiences that are of an “export ready” standard. It does not have an iconic visitor experience or event that is synonymous with the destination. It also has a number of attractions that are dependent on high levels of voluntary contributions of labour and materials. In the competitive world of tourism and destination attractions there needs to be a greater emphasis on development of visitor experiences that meet and ideally exceed visitor expectations. Without the resulting word of mouth marketing that quality experiences generate, there is a risk that visitation will be coincidental rather than deliberate. In this situation visitation numbers will largely follow overall travel trends.

There has been some steps towards developing more iconic experiences such as “The Road to Mesopotamia” cruise excursion. This is the type of experience that specific markets are looking for. Additional effort in developing bespoke experience will pay dividends to the wider destination over time. These experiences can be led by a single operator or by a cluster working closely together. The visitor is much

more interested in the overall experience and a coherent experience than how the overall product is developed. Given the small size of many operators, clustering can therefore be a means of reducing the limitations of size which affects many operators.

6.4. Marketing Action Plan

6.4.1. Advertising and Promotion

What	Justification	Target Market	Target
Enhance Websites – Ensure that the websites are mobile friendly Continue to develop links to and from other tourism portals with ; www.gogeraldine.co.nz and www.southcanterbury.org.nz	Key websites do not rank No 1 on search engines at present. All searches should lead to the same quality of detailed information about where Geraldine is, how to get there, where to stay, what to do and how to travel around.	Independent travelers, both domestic and international	Complete revision of website content within 12 months Invest in search engine optimisation.
Develop a plan for tourism content that harmonises all Geraldine content across the different websites	Effective use of resource to create destination awareness and provide basic information on the products and experiences available within the region. Use RTO channels to deliver message in a cost effective way	Tourism operators and the tourism trade.	Within 6 months
Build a contact database, either through Facebook and/or current operator contacts build a database of those with an affinity for the destination	Use of competitions and feedback forms can be used to build databases. This is a cost effective communication channel for updates and providing information about new attractions and events.	Largely a domestic audience with possibly some Australian visitors	Establish the database within 6 months Email updates newsletter or deals on a seasonal basis, targeting winter and spring
Develop Facebook Page and improve YouTube content Encourage operators to maintain pages and content	Increasingly social media and YouTube are channels being used to gather information on destinations. Much of the Geraldine material on YouTube is 5years old and provides a limited picture of the visitor experiences available in the region	Independent travelers, both domestic and international	Ongoing

Partner with other organisations and participate in broader marketing initiatives	Geraldine does not have a defined marketing budget, therefore participating in other campaigns is one mechanism to market to a larger audience.	Tourism operators and the tourism trade Targeting domestic and Australian visitors	
Improve the visibility of the visitor centre be relocation to a street frontage site or improved signage	The current visitor centre is too small for its clientele and is not as visible as it could be to foot traffic in the town. The visitor centre requires sufficient space to promote the opportunities in the region and enable visitors to obtain information on their	Predominantly international but also some domestic	Reconsider location options as other spaces become available
Refresh promotional highway signage	While there is good wayfinding signage for Geraldine, the promotional signage needs refreshing and simplification.	FIT travelers	As budget allows.
Develop a complete event calendar for the region and widely publicise through own websites such as www.southcanterbury.org.nz/events and eventfinder. Target off peak seasons for new events.	Events can be an important driver of visitation, especially on off peak periods. They also provide a mechanism to publicise the destination and build its identity	Principal target is Canterbury residents seeking day experiences and weekend stays	Planning on an annual basis forward with monthly revision and updating of databases
Build tourism trade awareness through developing export ready product and partnering with existing experienced operators	Geraldine has very little trade/export ready product. Other operators need to develop to be in this position.	International Interactive Travelers (Australia, UK/ Europe)	A specific project requiring expertise, budget and support. Use RTO to broker entry to new markets and channels to these markets, such as trade representation and famils

Develop media connections and PR opportunities, especially TV where there is widespread coverage. Use events and people from the region as the hook. Use collective buying power to extract better value from print.	Increase awareness of the destination through news coverage that links to the offer and people of the region	Local, Canterbury TV radio and print media. National broadcast media Target tourism trade media.	At least one editorial/ item per annum
Develop strong destination associations with leading local brands (in particular “Barker’s of Geraldine”)	Link the destination more strongly given their national presence and heritage story.	Domestic and International	
Develop relationships with small professional conference organisers / wedding planners	PCO’s and wedding planners like a range of destinations to meet client needs. They provide the linkages to a broad client base. Target through trade media and professional organisations and support meetings and famils in conjunction with RTO	Conference / wedding planners	

Notes: Advertising and Promotion

- *Websites that promote Geraldine are limited in their ability to reach a large audience. While the sites are good from a functional basis the large traffic sites such as www.newzealand.com have little Geraldine product information. Enhancement of the information about the destination and ensuring current event information will assist in its relevance to visitors.*
- *Facebook and YouTube are web based channels that visitors, both domestic and international, are using on a more frequent basis. The Geraldine material is limited on both sites and much of the material is amateur and old. In particular YouTube material does not show Geraldine in a positive light. There is some individual operator material on these channels that is of high quality and provide good information to potential visitors. There needs to be more visual material and also clips from events and other activities that show a current picture of Geraldine, the region and its visitor offerings.*
- *Visitors are interested in quality content about what is on offer at a destination. Visitors are unconcerned about which organisation is responsible for the website, rather there is a need for consistent and authoritative content. Given the limited resources available and small numbers of websites hosting visitor information, investment in high quality information on attractions, activities and accommodation could be linked to all the websites rather than developing unique content for each site.*
- *Developing a contact database provides the opportunity to communicate with existing visitors and customers. Achieving repeat business is generally easier than continuing to obtain new business.*

- *Partner with other organisations in buying and placing ads. This approach to collective purchasing gives the opportunity to reduce costs and also to achieve greater control over the way the product is advertised and to develop more editorial content. For example, placements in Latitude magazine from Geraldine appear to be distributed through the magazine and do not relate to any of the actual stories facing the advertisements.*
 - *The existing visitor centre is too small to support the visitor traffic during peak seasons. In addition the location has a lower visibility than one with a street presence rather than within the peaks mall. Should there be an opportunity to obtain a larger space with greater street presence relocation should be considered. While Visitor centres do not sustain themselves economically, they do enhance the visitor experience and provide a concentrated outlet for information about the region. Strong support from individual operators would be required should a larger space become available to present a quality presentation of the regions visitor experiences.*
 - *The wayfinding signage for Geraldine is comprehensive from all directions and therefore is valuable given the central location of the town. However the promotional signage appears somewhat dated and also is difficult to actually obtain a specific image of what the town has to offer when passing at 100kph. Commercial signage appears to be prolific travelling from the south (three Barker's billboards, plus other businesses) and sparse when travelling from the north. Rectification of this would assist in providing an identity for the town.*
 - *Events are an important driver of visitation, especially from domestic markets and from surrounding regions. In addition they can provide identity to destinations¹⁶. Ensuring that all the events that are held in Geraldine, are widely marketed through all relevant channels is vitally important to ensure that the vibrancy of the destination is demonstrated as well as providing reasons to visit.*
 - *Build tourism trade awareness. Without strong representation in the tourism trade marketing channels Geraldine will continue to be underrepresented in marketing terms. There needs to be sufficient product that is trade or "export ready" and ideally qualmark accredited to ensure that it has an adequate profile on high volume websites, can be brochured by wholesalers, and ensure that there is a wide distribution of destination information to many markets.*
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¹⁶ Examples of events that define the destination include – Wildfood festival and Hokitika, Bluff oyster festival, Wellington 7's tournament,

6.4.2. Product Development and Enhancement

What	Justification	Target Market	Target
Develop a collective approach to product development, marketing planning and execution.	At present the marketing of the destination is limited and also there appears to be limited collective marketing	All –	To have agreed and comprehensive collateral for the 2016 summer season
Upgrade tourism product by achieving qualmark accreditation for all substantial tourism accommodation, attractions and activities in the region. Redevelop trade brochure once completed	Geraldine tourism product has a very small presence on www.newzealand.com and only four Qualmarked listings. This reduces the reputation and quality perceptions of the tourism location and its product offer.	International visitors and to a lesser extent domestic visitors	Ongoing but within the next 2 years have 10 Geraldine tourism businesses qualmark accredited
Develop further recreation opportunities in the nearby region and especially connecting to Geraldine township and also at Peel Forest. Further publicise the Orari river mountainbike track opportunities on the tourism websites Mountainbiking is the key opportunity in the near future	While there are some recreational opportunities these are not well publicized and do not connect well to the town. Establishing mountain biking trails will encourage overnight stays as well as day visitation	Domestic, in particular youth and family and the Canterbury market	Map and signage guidance by 2016 summer Further trail development dependant upon funding and volunteer contributions

<p>Cross market at each tourism touch point of accommodation and activity.</p> <p>Support local producers by using their products and services where practicable</p>	<p>With little information on activities and experiences every opportunity needs to be taken to expose the visitor to the choices available</p>	<p>All.</p>	<p>Using local produce by accommodation could be achieved now.</p>
<p>Develop commercial opportunities that build on the current business activities in the region. Are there heritage/industrial/food experiences that can connect local producers with visitors?</p>	<p>Diversification of activities and products that are “only available in Geraldine”</p>	<p>Active visitors and small groups and special interest groups</p>	<p>Commercial operators are required.</p>
<p>Develop integrated packages of accommodation and activities that can be marketed to key target markets, e.g Peel Forest outdoor activities,</p>	<p>Create “ready to book” package options that make the process easy for small groups and families</p>	<p>Active visitors and small groups and special interest groups</p>	<p>Collective of operators.</p>
<p>Establish Garden tours (guided and non-guided)</p>	<p>Add on product for general visitors to the area and B&B guests</p>	<p>Domestic 65 years + and special interest groups</p>	<p>At least one new activity by end 2010</p>
<p>Establish Farm tours (guided). In particular as there is a growth in visitors from Asia a high quality interactive farm experience could be a significant drawcard</p>	<p>Add on product for general visitors</p>	<p>International visitors, especially Asia visitors</p>	<p>Support a tourism operator that develops such a product</p>
<p>Continue to develop new events that showcase the uniqueness of the area</p> <p>Priority should be given to events in the shoulder season and winter</p>	<p>Establish a reason to visit and also contribute to establishing and promoting the character of the Geraldine region awareness for</p>	<p>families)</p>	<p>of outside visitors to relevant events</p>

Develop and prioritise support for events that are in the shoulder seasons	Geraldine has good occupancy in summer and needs to improve its visitor occupancy and activity in the off season.	Wider regional event attendees	
Develop a signature or iconic attraction for the destination. It could be an attraction, an activity or an event – but something that aligns with the destination.	Geraldine is missing a “one thing” tourism product that is linked to the destination. It enables synergy between marketing the attraction and the destination	All markets	If in the short term one attraction is not strongly identified with the destination, marketing effort will need to focus on the longer term in promoting a single strong attractor of visitors

Notes: Product development and Enhancement

- *Much of the product offer in Geraldine is comparatively small scale, both in terms of visitor numbers as well as revenue. Cooperation is one means of establishing scale and increased bargaining power with suppliers. A collective approach will enable greater reach from each marketing \$ and also the ability to present a more comprehensive picture of what Geraldine has to offer the visitor.*
- *The limited number of Qualmark accredited tourism products severely limits the presence Geraldine has as a destination on www.NewZealand.com. With over 7 million unique visits to this site it is the largest tourism website for New Zealand visitors. With Qualmark accreditation businesses get a higher profile and much more support from Tourism New Zealand to market their product to an international audience. Without a reasonable number of offers from an individual destination, it implies that the destination is not worth an overnight to the prospective international visitor. Without Qualmark accreditation TNZ will not feature the product in its promotion material or support it in overseas markets.*
- *The secondary benefit from Qualmark accreditation is the assessment process that provides a review of the business as advice about how to improve the business to better meet the expectations of visitors.*
- *The collateral, including some website material, that is developed, should focus on the visitor experience rather than business information. The target market for marketing is the consumer of the product and as such the experience being offered should be the focus of the communication. In addition maps to find the offer, hours and pricing are important components that visitors require to make purchase decisions.*
- *With the strategic location of Geraldine and a comparatively high number of FIT travelers passing through the town, the opportunities for Geraldine to increase its visitor experience with more recreational opportunities is significant. Mountain biking is experiencing a major increase in popularity and the NZ Cycle trails will both increase the opportunities and the demand for biking experiences. The opportunities for forest rides and a variety of terrain close to accommodation is an attractive option for many families. More leisurely rides of grade 1 and 2 terrain will attract a higher number of users. Through family experiences and an increased youth exposure to Geraldine product, a broader visitor mix for the region will result. There is also the opportunity*

with Peel forest to offer integrated packages that include accommodation and a diversity of experiences for families including horse treks, rafting and mountain biking.

- *Cross marketing within the tourism sector in Geraldine benefits all the operators over the long run. With often limited time, visitors are seeking to learn about accommodation options, food and beverage and activities quickly and efficiently. While there may be a sense of competition between some activities etc, over the longer term visitors will make choices about what they select and it is better that the visitor is offered the choice rather than not know about what is available in a region. In addition, initiatives such as having Barker's products in accommodation and other local products reinforce the uniqueness and authenticity of the destination.*
- *While there are some nationally recognised brands, and in particular Barker's of Geraldine which appears on every supermarket shelf in the country, but also Heartland potato chips and Talbot Forest cheese, there appears to be very limited opportunities for visitors to interact with these products/businesses in a more specific and experiential way. One of the drivers of visitation and word of mouth commentary afterwards is unique experiences. There do not appear to be any seasonal specific or Geraldine-specific products or experiences that enable the visitor to have some "brag value" about going to visit and stay in Geraldine.*
- *The development and support of packages for groups is an activity that could be carried out in conjunction with ADT staff to enable better marketing and more efficient interaction with the domestic groups market. Most groups are reliant on volunteers to organise travel and assistance by offering ready developed itineraries and packages enables the booking process to be completed in a more efficient manner. Having packages also enables the destination to market collectively to a wider set of potential visitors.*
- *Garden tours, Farm tours, heritage tours are all potential products that draw on existing infrastructure and resources in the region. The opportunity that exists is for self-drive and guided experiences to these attractions. Marketing needs to be targeted and the offer would not draw a mass market. However combined with other activities it could be an attractive adjunct to other business activities. In addition, these types of tours could be readily combined with food and beverage experiences such as lunches at homesteads to create full day experiences in the region.*
- *Events are an important part of attracting visitors to destinations. They create a reason to visit. Geraldine already has a number of successful events that attract a significant visitation. The challenge is to develop new events and grow existing events to a size that is compatible with the scale of the region and town infrastructure. While growing the arts and plants event might be relatively easy, if the town cannot provide accommodation or food services to cope with the numbers then the quality of the experience will be diminished. A more attractive option is to duplicate or create a new event at a different time¹⁷. Seasonality is an important factor in Geraldine tourism as well with the summer visitation being significantly higher than winter visitation. While it might be challenging to establish a winter event, extending the shoulder season by promoting events that can be held in autumn and spring means the town has capacity to host additional visitors over these periods.*

¹⁷ Examples of this approach include the Martinborough fair, two duplicate events held four weeks apart in the summer. Another example is the Hawkes Bay food and wine event FAWC which now has a summer and a winter event run along the same lines. Both spread the demand while growing the visitation.

6.4.3. Research and Monitoring

What	Justification	Target Market	Target
Add a door counter at the visitor centre to measure total visitor numbers and continue to survey inquires to assess origin of visitors and their interests	To identify where visitors are coming from and link to their information requirements to enable targeting of promotions and material.	Visitors who make inquiries at the visitor centre Operators will benefit from better information.	80% of tourism operator participation Quarterly or 6 monthly reporting back to local tourism industry.
Continue to monitor Web Analytics and collect any operator web statistics	To establish effectiveness of marketing initiatives and establish an understanding of which channels are most effective	A useful tool to assess website investments and ensure that the website is performing	Set up reporting by end of 2015 Quarterly or 6 monthly reporting.
Report back to operators on information about visitors and their characteristics.	Feedback on visitor characteristics and volumes should assist operators to understand the dynamics of visitation and visitor preferences		Quarterly or 6 monthly reporting.

Notes: Research and Monitoring

- *A door counter at the visitor centre will provide a broad measure of visitors to the town. It is unlikely that national collection of data will ever provide detailed information at the smaller community level. As a result the community will need to collect its own information in a cost effect manner.*
- *As a complement to the physical visitation information, website traffic data provides a picture of those who have considered Geraldine as a destination and/or gathered information from websites. This is increasingly the way visitors decide and select their tourism purchases. Once a picture has been built up comparisons should be made and benchmarked against the performance of any similar sites and larger south Canterbury sites to ensure that the Geraldine information is capturing its market share of visitor research.*
- *Having quality information about the overall performance of Geraldine in attracting visitors will enable private operators to assess their performance and also make sound investment decisions. Without good information it is difficult to make good decisions about development of additional tourism product or improvements to existing product.*

7. STRATEGY IMPLEMENTATION

7.1. Tourism Industry Coordination and Action

For the strategy to be implemented, and to ensure that Geraldine is maximising the tourism opportunities, the industry needs to work more closely together. Without a collaborative approach individual operators will need to each explore opportunities in isolation and without the ability to share information and learn from each other. A collective approach, perhaps facilitated by Go Geraldine could develop a regular programme of information sharing and learning from others. This is one approach that would enable operators from the whole region to network with one another and also learn about business development tools, tourism industry schemes (eg Qualmark, Sustainable programmes, marketing tips) and approaches to marketing.

In the longer term, and as a separate project, applying the brand values of the region needs to be activated. Adoption of a clear identity for the region by the industry would ensure that a coherent and consistent message was clearly marketed to both the domestic and international visitor. The existing activity by ADBT which has resulted in a brand and logo for South Canterbury provides the basis for this brand activation.

The industry in Geraldine needs to take greater advantage of the skills and resources that already exist within the region, and in particular those that are available within ADBT and the regional tourism organisation. It is through connecting with this organisation that there will be cost effective means of interacting with education training and also marketing to wider international and domestic markets.

7.2. Ownership

This strategy will require support from all the stakeholder in the region. In particular, ADBT, the Geraldine Community Board and Go Geraldine will be important catalysts to its implementation. However it is the tourism businesses that will ultimately determine the success of the strategy by adopting the strategy and investing in its implementation in the businesses in the region.

While there is potential for competition between individual businesses, there needs to be a greater level of coordination and cooperation by all businesses to grow the overall visitation to the town and the wider region. Cross selling and a good understanding of what the region has to offer is vital to ensuring visitor that stay are exposed to all the activity and experience options within the region.

Additional investment in the website is warranted as this is the most cost effective pathway to reaching current and future visitors. Developing common brand values project that warrants consideration as a separate project. A future location for the visitor centre SITE that is more visible and larger would also pay some dividends.

7.3. Funding

Allocation of funding to support the promotion of Geraldine can only come from a limited number of sources. As a result there needs to be efficient use of scarce marketing funds.

At present there is a fundamental shift in the marketing of tourism to visitors. There is a rapid shift to on line marketing and away from print media. Similarly the move from web based information to users accessing data on mobile platforms has been rapid.

In addition there is a challenge to get cut through in a crowded market. Concentration of high quality information is increasingly the key to getting cut through. While previously having a quality website was paramount, now there is demand for quality content and content being kept up to date, and ideally constantly changing. The greatest risk is to disaggregate effort and to have many small pieces of information in the marketplace.

Spending significant funds is beyond the reach of the Geraldine community. However there already exists a viable platform for tourism in the district with the Go Geraldine website and the South Canterbury website (developed by ADBT). The challenge is to maintain their currency, make the links efficient and accessible. In addition there is a need to ensure that the sites remains mobile friendly.

The current visitor centre is challenging with its visibility and small size which limits its ability to effectively market the destination. While the current location is cost effective, it does appear to be far too small for its purpose. In addition signage is limited. A street frontage for the visitor centre and improved signage would enhance its accessibility.

Visitor centres are not a panacea to increasing visitation. They are expensive to run and require low costs and high foot traffic volume to be commercially viable.

The two functions of the visitor centre mean that there is generally additional community funding required to sustain them in small communities. This may take the form of concessionary rental costs, volunteers to staff the visitor centre, direct funding, possibly by way of grant to the community, and other mechanisms to support a higher level of activity that can be supported by direct sales revenue.

Visitor centres are well patronised by the travelling visitor, and in particular independent travelers who are here for some time. Geraldine has the advantage of being well beyond the gateways for international visitors and therefore those that do enter the visitor centre will have had previous experience elsewhere.

Sales of merchandise and travel bookings that attract a commission are the two main revenue sources for visitor centres. In addition many also generate some income by charging for brochure displays and in store advertising (although this is a declining share of income for most). In the longer term and/or when the opportunity arises consideration of the best location for the visitor centre and its funding should be considered. It needs to be recognised that over the longer term visitor centres fulfil two functions – a commercial one of achieving sales and receiving income, but also enhancing the visitor experience by providing quality information about the destination.

Further development and incorporation of the brand values of the region into al

tourism marketing is a specific project that is important over the longer term and in particular ensuring a coherent presentation of the tourism product of the whole region. There is a lot of tourism product in the region that does not have a presence or linkage with the main visitor traffic through Geraldine and a more integrated approach to marketing through a common approach, common branding that reflects an agreed set of brand values would improve the performance of the overall region.

The proposal outlined in this strategy are largely those that can be achieved through the use of existing resources as activities, websites and infrastructure is renewed. It is therefore intended that there be a progressive implementation over 2 -3 years as the resources of the tourism organisations and businesses in the region become available.

