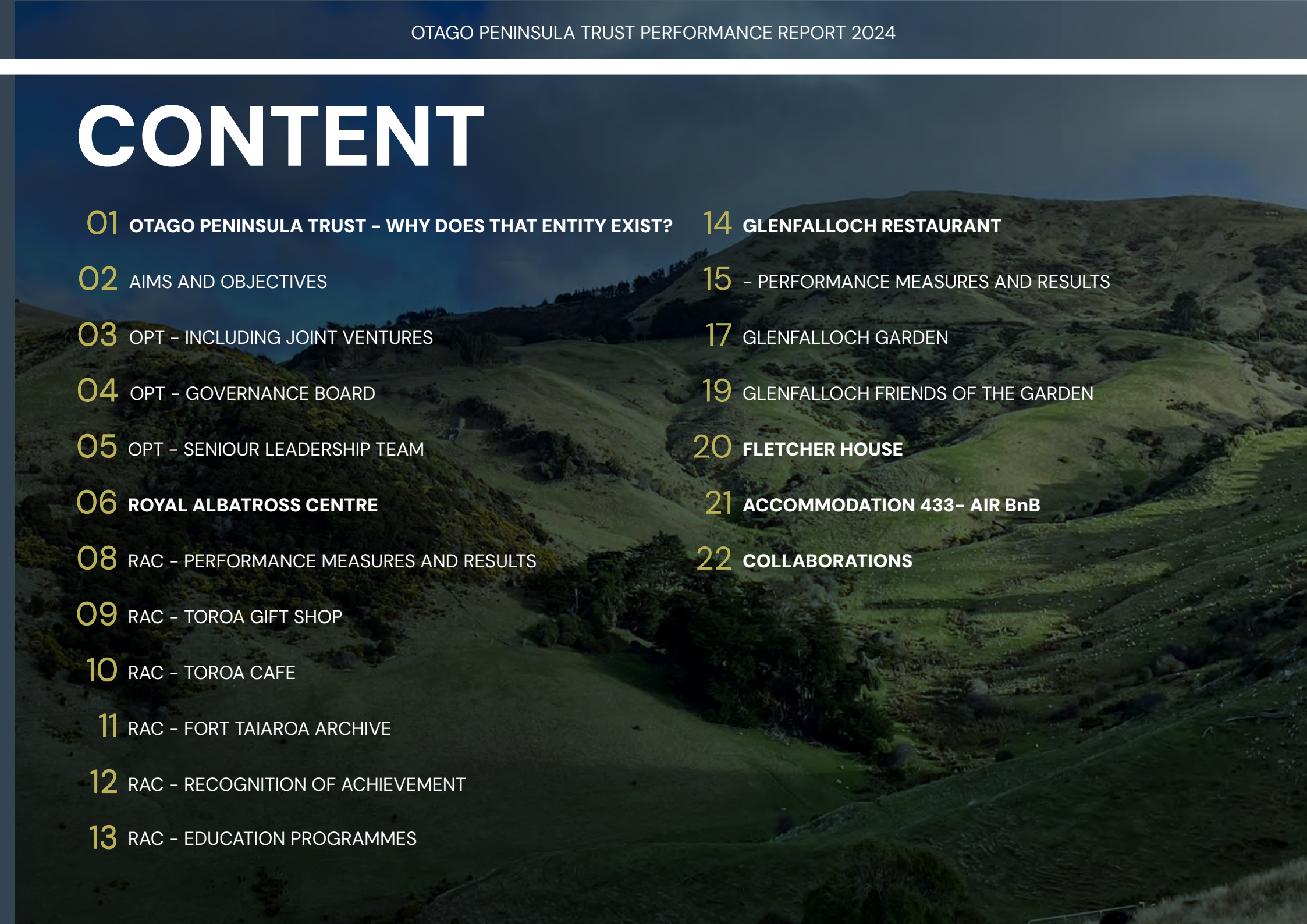


PERFORMANCE REPORT 2024

OTAGO PENINSULA TRUST



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OTAGO PENINSULA TRUST (OPT)

– WHY DOES THAT ENTITY EXIST?

Background records at the time of forming of the Trust (1967) show that a group of Dunedin Jaycees were looking at ways to improve Dunedin's economic future. A survey of local citizens identified three main strength that would help invigorate Dunedin's economy :

Education, Heritage, Tourism.

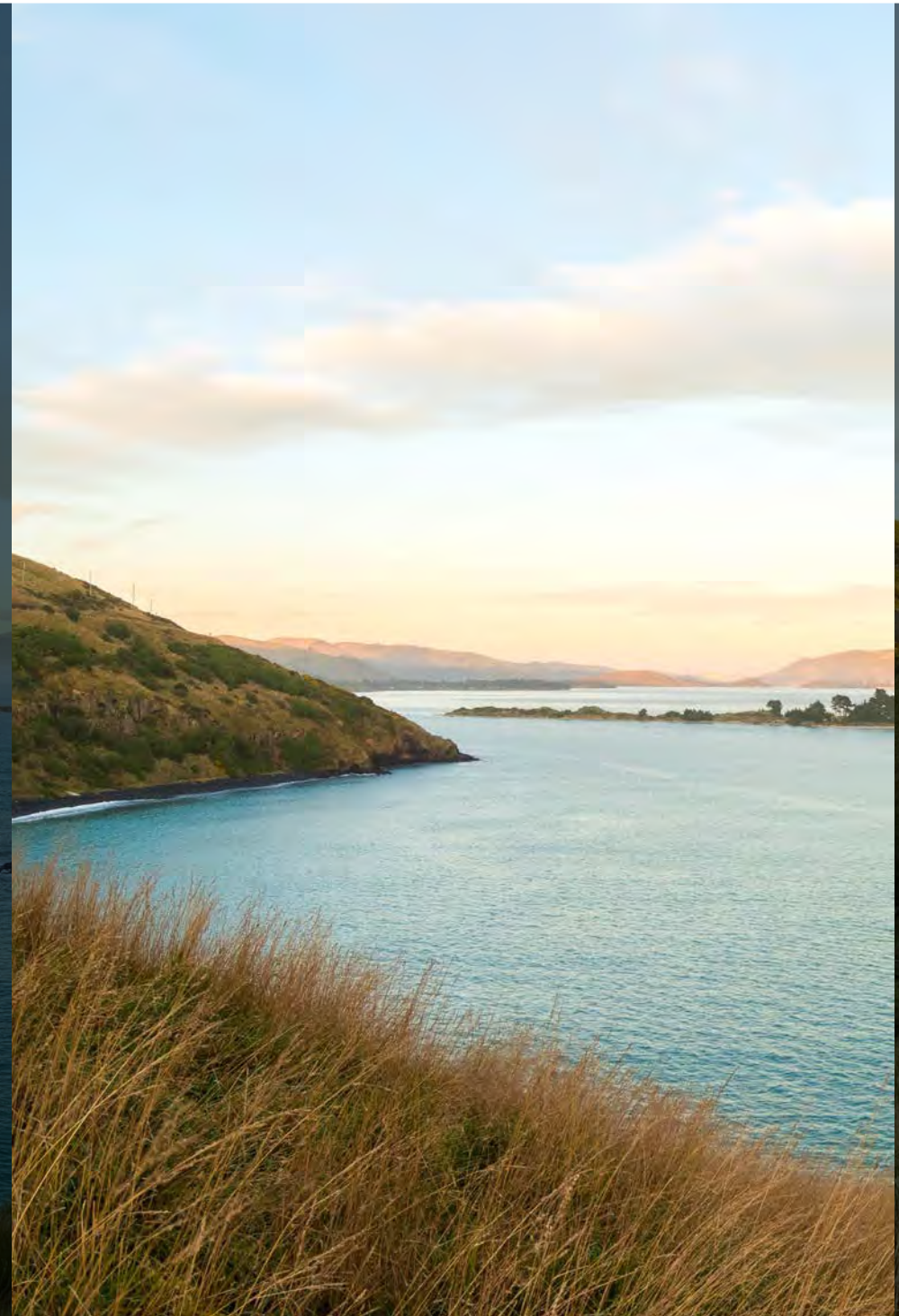
The Otago Peninsula was identified as a place with beautiful scenery, unique wildlife and many other unique attributes. It also had outstanding natural features and historic heritage. The Otago Peninsula Trust was thereby formed to stimulate public interest in the beauty, history and character of the Otago Peninsula, creating a destination for domestic and international tourists.

KEY OBJECTIVES:

Promoting environmental and conservations projects through education and community support.

Acting as an umbrella / resource body to assist organisation in preserving the beauty, history and character of the Peninsula.

Promoting the natural attractions of the Peninsula to the general public.





AIMS AND OBJECTIVES 02

The preservation of the natural attractions of the Otago Peninsula and protection of its flora and fauna.

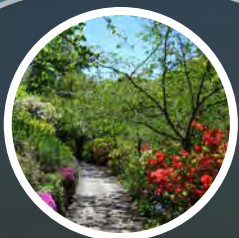
The stimulation of public interest in, and care for, the beauty, history, and character of the Otago Peninsula.

The development of tourist attractions, public and recreational services on the Otago Peninsula so that the public may obtain the maximum use and enjoyment of the area in a way that will not detract from or destroy its beauty or character.

The promotion of knowledge and interest in the objectives of the Trust by means of meetings, exhibitions, lectures, publications, educational courses and all other forms of instruction and publicity.

The maintenance of communication and co-operation with persons or corporate bodies in New Zealand or elsewhere (including membership of other bodies corporate) for the purpose of promoting directly with the objectives of the Trust.

OTAGO PENINSULA TRUST including joint ventures



GLENFALLOCH GARDEN

100% owned and operated.



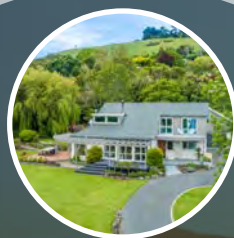
GLENFALLOCH RESTAURANT

100% owned and operated.



FLETCHER HOUSE

Management contract with Fletcher Trust



ACCOMMODATION 433

Property 100% owned and operated, purchased to support the tourism and function business



ROYAL ALBATROSS CENTRE

Buildings and operation owned. Operating on leased land and with concession to allow albatross viewing over wildlife reserve.



FORT TAIAROA

Crown owned structure with agreement from DOC and the Crown to operate tours and the option to conserve the structure. An archive of the history of the fortifications is an additional asset.



LIME KILNS

100% owned, some land leased to a local farmer for grazing at cost.



EDUCATION PROGRAMMES

The Trust developed and holds IP for education programmes for primary, intermediate and high school students linked to the NZ curriculum



PUKEKURA TRUST

50% board representation. Blue penguin visitor operation and Kaitiaki work. The operation has a building use contract with OPT.

OPT GOVERNANCE BOARD

All of the Otago Peninsula Trustees volunteer their time and wide range of expertise and talents to provide a Governance structure for the Otago Peninsula Trust. As well as attending the regular monthly meetings, they are available for the management team to call upon for consultation and guidance throughout the year.

The trustees have a vital role in ensuring the Trust has a clear strategy that will work within the aims and objective of the Trust.



Mr. Ross Smith
Chairperson



Mr Howard Broad
Deputy Chair



Mrs. Judy Bell
Trustee



Mr. Greg Verhoef
Trustee



Mr. Warren Moffat
Trustee



Mr William Dawson
Patron

Bill was a founding trustee of Otago Peninsula Trust

SENIOR LEADERSHIP TEAM



Robyn McDonald
Chief Executive Officer (CEO)

Bachelor of Applied Management
(Business transformation and change)



Hoani Langsbury
Eco Tourism Manager, Royal Albatross Centre

Bachelor of Science (major Zoology and Ecology),
Postgraduate Diploma in Science (major Geography), MZNM



Leon Chu
Operations Manager Royal Albatross Centre

Bachelor of Arts, Communications Studies Film & Media
Studies Endorsed in BCom, Dip Grad Information Science



Sandra Walker
Administration Manager

Bachelor of Commerce Accounting



Laura Foley
Restaurant Manager Glenfalloch

Entity Information

05

Date of Incorporation

18th July 1967

Charities registration Number

CC25273

Registered Office

430 Portobello Road Dunedin

Auditors

Crowe Australasia - Dunedin

ROYAL ALBATROSS CENTRE

06

The tour experience at the Royal Albatross Centre (RAC) is the jewel in the Trust's crown. Having a unique opportunity to view the Northern Royal Albatross in the only mainland breeding colony in the world is a bucket list item for many people.

The opportunity certainly attracts visitors to the Otago Peninsula, with a higher proportion of international visitors to domestic visitors by approximately 80/20. The benefits extend beyond the Otago Peninsula Trust's operations, as transport tour operators, accommodation providers, restaurants, and retail outlets also benefit from visitors coming to the peninsula to view the magnificent Northern Royal Albatross. Although the Albatross take top billing, there are approximately 20 other species of sea-birds on the Taiaroa Head headland, which makes the experience extra special. Many aspects of the Trust work at the Royal Albatross Centre meet the Trust's objectives; examples include the promotion of Tourism, Education (school programmes & talks), and Conservation (e.g. talking about plastics in the ocean).

In this financial year, the Trust funded over \$20k towards purchasing tracking devices to be placed on fledging albatross chicks (toroa), allowing real-time updates of the chick's locations and information the Department of Conservation staff will plot to share online.

The Trust donated RAC Tour vouchers valued at \$11,638 for the financial year ending 30 September. These vouchers are typically provided to not-for-profit organizations to support their fundraising initiatives. The 2024 season was the most successful breeding season on record, with 33 chicks successfully fledging.

ROYAL ALBATROSS CENTRE

07

The OPT contributed over 150 hours of support to the Department of Conservation, assisting with the husbandry of the Northern Royal Albatross. Notably, an orphaned chick received 106 feeds, with OPT staff helping for most of these.

Quote from DOC Ranger Julia Reid, **“support from the Royal Albatross Centre staff, was integral to supplementary feeding efforts.”**

The Unique Taiaroa Tour combines the Royal Albatross Tour with a tour of Fort Taiaroa. The tour tells both the military and cultural history of the Headland, ranging from the original settlement by Maori through to the military presence during WW2. The visit includes a visit to the 1886 Armstrong Disappearing Gun, the only gun of its type in the world still in working order in its original gun pit.

The Royal Albatross Centre at Taiaroa Head is open to the public at no charge. However, this incurs costs for the OPT, as all water usage and sewage disposal from the facility are expenses for the RAC. The Trust is dedicated to creating unforgettable experiences. It focuses on getting people on a tour and enjoying the more extensive experience rather than charging everyone at the door, as several tourism businesses do. At the RAC we have continued our commitment to the NZ tourism industry associations Tiaki promise “care for New Zealand”. We have also partnered with the new owners of nearby OPERA (formerly Penguin Place) to collaborate on waste minimisation at the tip of the Otago Peninsula. This year, we have achieved a significant step in minimising our waste stream. We now have all of the glass generated by the RAC crushed at OPERA and beneficially reused within their operations. We have retained our Qualmark EnviroGold endorsement.



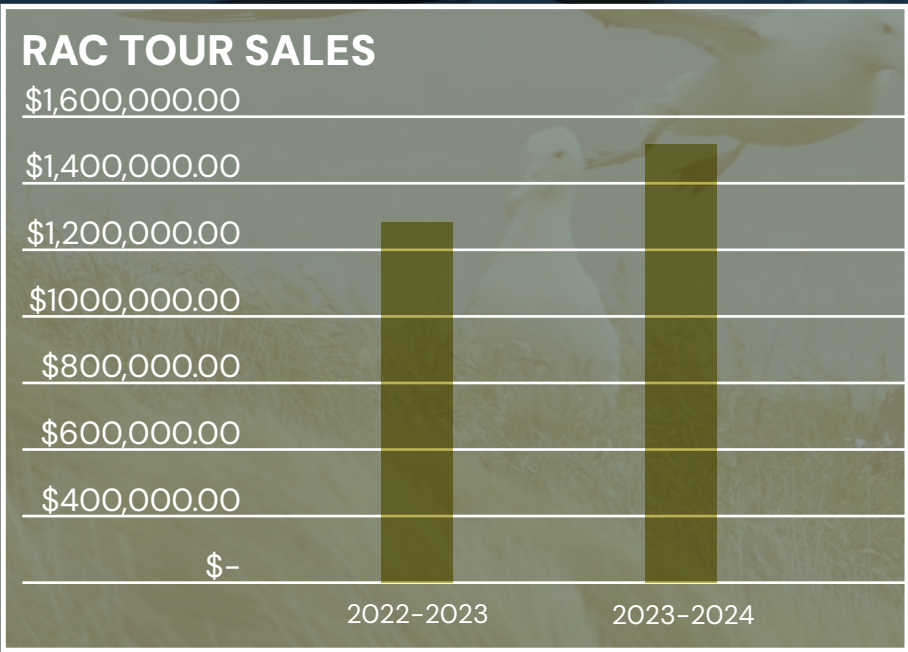
ROYAL ALBATROSS CENTRE

Performance measures and results -Tours

The performance measure for the RAC tours was to increase visitor numbers each month compared to the previous year as part of our recovery from Covid, allowing us the funds to further our Trust objectives. We always consider sustainability when looking at the number of visitors on tour with limits in place to ensure quality for the visitor and protection of the wildlife. Total tour revenue for the year ending 2024 was \$1,529,061 up 17.7% on the 2023 total of \$1,299,668.



The Trust looks at a triple bottom line, not just the profitability of its businesses and ventures.



TOTAL TOUR SALES	
FINANCIAL YEAR	
2022-2023	\$1,299,668
2023-2024	\$1,529,061

ROYAL ALBATROSS CENTRE

TOROA GIFT SHOP

The performance measure of the Royal Albatross Centre Gift Shop is to have a year-on-year increase in sales.

The gift shop at The Royal Albatross Centre has a strong focus on selling high quality gifts and souvenirs that appeal to a wide range of visitors. The retail staff look for products that support local businesses and that are kind to the environment. The gift shop manager supports businesses that give back to the community and conservation projects such as Tumbleweed T-Shirts and Eugy eco toys.

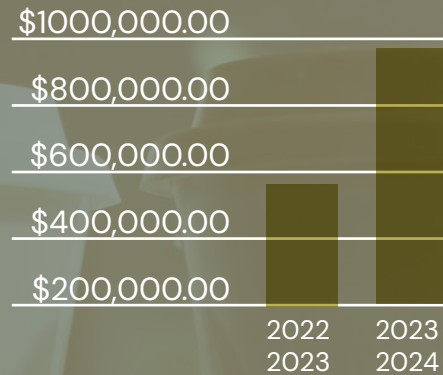
The 2023-2024 year was successful with many visitors commenting on the variety and quality of products in store. The sales revenue target was far exceeded. The budget for the financial year ending was \$696,371 with the actual total coming in an incredible 30.4% higher at \$908,670, giving a surplus of \$293,302 before depreciation. To ensure we achieve our charitable obligations, we have gifted albatross merchandise to businesses around Dunedin such as Campbell and Sons Funeral Home and The University of Otago.

“Hey Mel – I just wanted to say a massive ‘THANK YOU’ for your help and generosity with delivering the cups and all the extras you’ve thrown in! You’ve gone above and beyond and I’m so grateful :)These wee hampers are going to go down very well with the conference attendees. I hope I can generate some business out of it for you with tour bookings!

Thanks again, Jade”

Design Team Campbell & Sons Funeral Services

TOROA GIFT SALES



TOTAL SALES

FINANCIAL YEAR

2022-2023	\$595,325
2023-2024	\$908,670



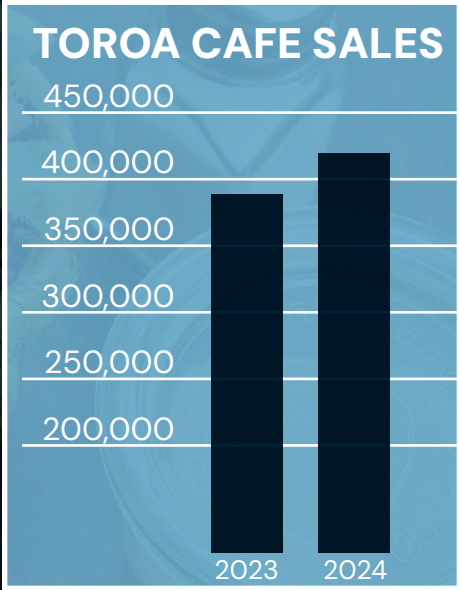
ROYAL ALBATROSS CENTRE

TOROA CAFE

The Royal Albatross Centre Café (Toroa Café) serves the Tourism Operation, with the long-term goal of becoming a profitable and self-sustaining cost center while establishing itself as a destination café. For the 2024 fiscal year, we achieved year-on-year sales growth, with a notable increase of 9.8% compared to the previous year. However, the café reported a loss of \$76,180 for the same period.

One of the key challenges we face in this highly seasonal business is maintaining optimal staff cost percentages. To address this, the Trust is currently seeking an Executive Chef to collaborate with both hospitality ventures under its management. The focus will be on developing a strategic plan to enhance their potential and profitability.

The café continues to work toward its plastic-free initiative. It does not use takeaway cups and instead offers ceramic cups on site or filling reusable cup for visitors, the use of Sprout milk from kegs reduces the reliance on plastic bottles and cardboard containers. Food scraps are taken for animals or composting, and glass bottles are sent to a local business to be crushed and used for paths. Staff also car pool where possible.



TOTAL SALES	
FINANCIAL YEAR	
2022-2023	\$383,432
2023-2024	\$420,825



FORT TAIAROA ARCHIVE

For many years a group of volunteers calling themselves the Fort Taiaroa Education and Resource Group spent 2 1/2 days a week archiving items relating to the heritage of Taiaroa Head. In addition to the collecting and preserving of historical records, members of the committee have been involved with upgrading and maintaining the Fort Displays and helped with providing both historic and education resources on the historical Pukekura (Taiaroa Head). They have digitised a significant number of Dr. Lance Richdale's photos of his original work with the Royal Albatross and Yellow-Eyed Penguins.

The Trust now holds the archive material at Glenfalloch. It can be accessed by arrangement. A copy of the significant information is held at the Hocken. The archives fit with the Trust's objectives around the promotion of knowledge, stimulation of interest in history, and preservation of assets.



11

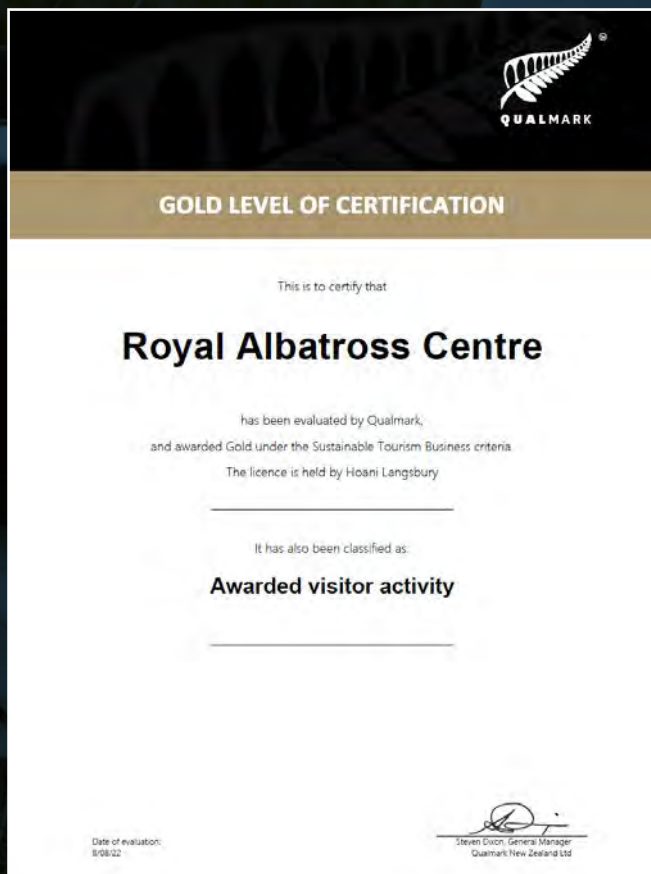


ROYAL ALBATROSS CENTRE

RECOGNITION OF ACHIEVEMENT

These awards received by the Royal Albatross Centre are not just accolades; they are a clear reflection of our unwavering commitment to providing a world-class tourism experience. Our dedicated and passionate staff are at the heart of what we do, ensuring that every visitor leaves with cherished memories and during the challenging Covid period, we strategically chose to retain our skilled team, preserving our extensive knowledge base and maintaining our high standards. This foresight meant that when tourism began to bounce back as borders reopened, RAC was fully prepared to seize the opportunity. These achievements help show the Trust is delivering on its objective to offer a world class Tourism experience at the Royal Albatross Centre.

12



ROYAL ALBATROSS CENTRE

EDUCATION PROGRAMMES

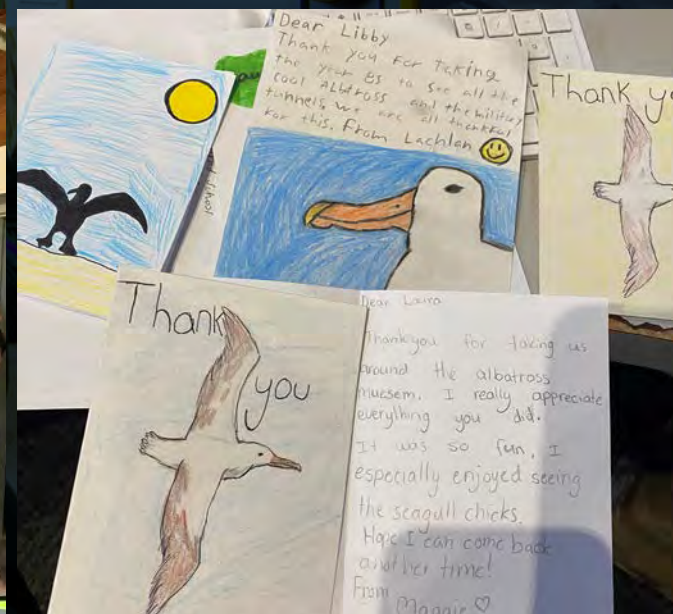
The development of educational programmes and resources aligns well with the charitable objectives of the Otago Peninsula Trust. During the 2023/24 financial year, approximately 700 students from 17 different schools participated in our on-site education programs. Additionally, we welcomed over 100 students and teachers from the University of Otago, Otago Polytechnic, and the Institute for Study Abroad, who engaged in educational and teaching-focused experiences during our Albatross Classic and Unique Taiaroa Tours.

As a special event for World Albatross Day on June 19, 2024, we offered all guided tours free of charge to celebrate and educate as many visitors as possible. The day was a tremendous success, highlighted by a life-size cake resembling a Northern Royal Albatross for everyone to enjoy.

Although we no longer receive Government LEOTC (Learning Outside the Classroom) funding, we are pleased to offer our programs at a significantly reduced cost of \$4 per person. This enables us to provide affordable visits to schools across the country.

Most of the schools that visit us have specific learning objectives aligned with their curriculum, and we can cover a wide range of topics, thanks to the diverse marine species in the area and the extensive historical significance of the headland. Towards the end of the year, many schools visit as part of their school camps, and both students and teachers enjoy concluding the year with a more engaging experience.

Regardless of their reasons for visiting the Royal Albatross Centre—whether it's their first visit or their tenth—educational groups always leave having learned something new or having experienced something special. As a delightful bonus, our guiding and teaching staff frequently receive personalized cards, letters, and drawings from students throughout Aotearoa.



GLENFALLOCH RESTAURANT

14



Glenfalloch Restaurant is nestled within the picturesque Glenfalloch Gardens. The Chalet Restaurant is the perfect spot whether you're looking for a relaxed casual meal, planning a romantic wedding, or hosting a vibrant event. Live music on Friday evenings has become very popular and helps cultivate our desire for a more community-focused atmosphere. The 'Gnaughty Gnome Hunt' is a popular activity we host during school holidays, where children transform the garden into a vibrant wonderland. With each gnome discovery, laughter and excitement fill the air as imaginations run wild, making for unforgettable moments that truly bring our garden to life!

Our team continues to cultivate fresh produce on-site while also making a concerted effort to source as much food as possible from local growers. For our stunning floral arrangements, we take pride in using flowers grown in our own garden or foraging from the surrounding area. Each arrangement is thoughtfully crafted by one of our talented in-house staff members.

The performance objectives for Glenfalloch Restaurant focus on fostering growth across all business areas, with particular emphasis on functions and events, which are our most profitable segments. This strategy allows us to keep the restaurant and café open on less profitable days, catering to garden visitors and the local community while providing more consistent employment opportunities for our staff. We are committed to attracting more visitors to the Otago Peninsula and to establishing ourselves as a destination for Dunedin residents and the wider Otago community.

GLENFALLOCH RESTAURANT

Performance measures and results

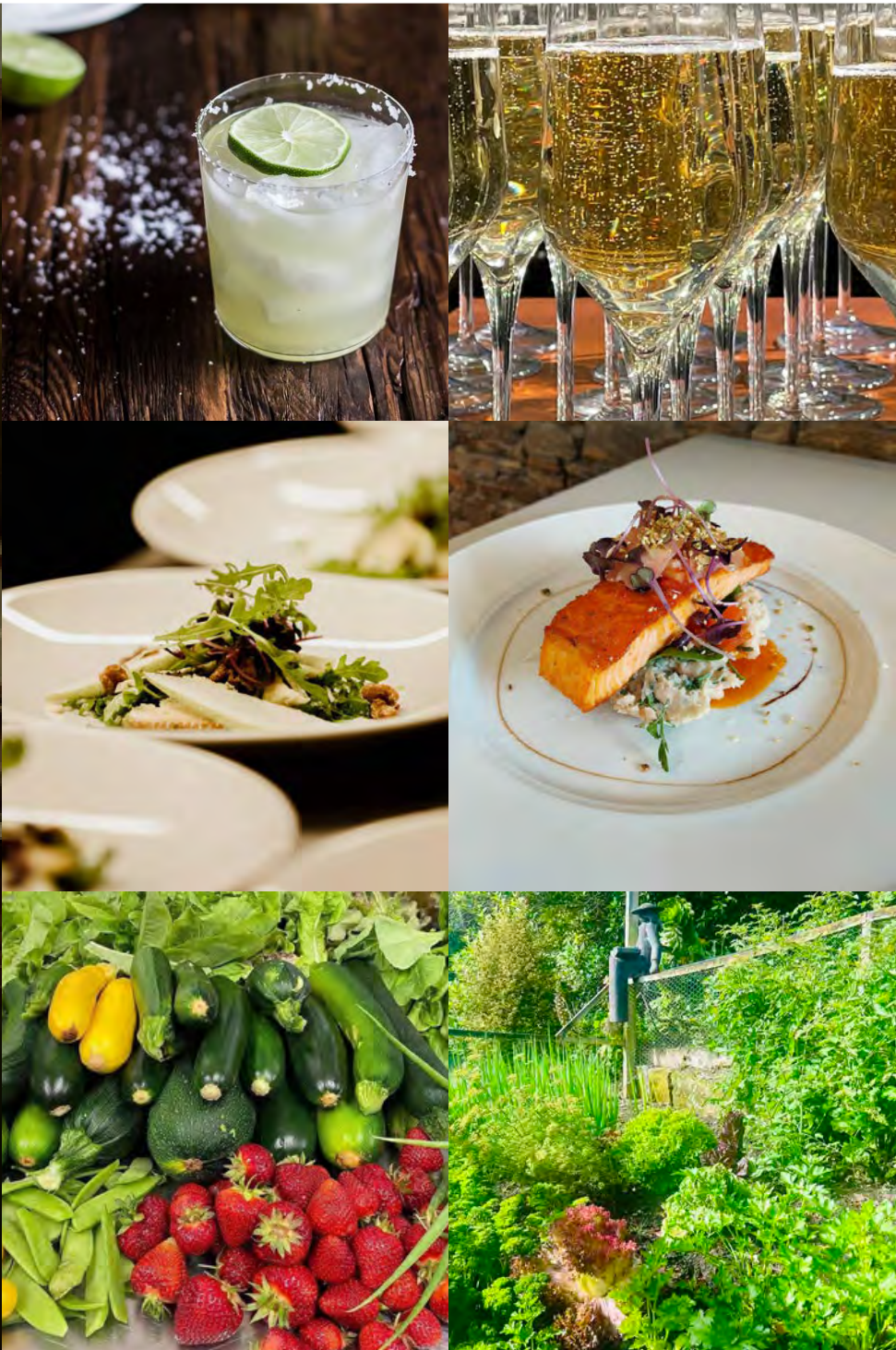
We've also added a small retail space where you can find a delightful selection of chutneys and jams made on-site, local pottery, honey, dog treats, and house plants. It's been a real hit with our locals and out-of-town visitors. Restaurant sales for the year ending 2024 reached \$1,054,746 , a significant increase from \$892,572 the previous year.

This reflects an 18% growth and surpasses the budget target of \$950,288 by 11%. However, the profit before depreciation was \$46,237 , a decline of 21% compared to last year's profit of \$58,633.

The primary reason for this decrease in profit was the rise in wage costs across the board.



TOTAL SALES	
FINANCIAL YEAR	
2022-2023	\$ 892,572
2023-2024	\$1,054,746



GLENFALLOCH RESTAURANT



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Dunedin

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Restaurants

Flights

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Cruises

Car Hire

Forums

South Pacific > New Zealand > South Island > Otago Region > Dunedin > Dunedin Restaurants > Glenfalloch Gardens Cafe and Restaurant

Glenfalloch Gardens Cafe and Restaurant Claimed

331 reviews

#4 of 298 Restaurants in Dunedin

International, European, \$\$ - \$\$\$

Glenfalloch Gardens Cafe & Restaurant

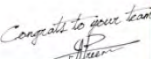


RECOMMENDED
ON RESTAURANT GURU
2024



restaurantguru.com

Congrats to your team



Andrew Priest, Executive Director

Children venture out in garden-wide hunt for gnomes

By Tim Scott

347

0

0

News > Dunedin



Sofia Wilson, 5, of Sawyers Bay School, finds Ramon the gnome while taking part in the Gnaughty Gnome Hunt at Glenfalloch Gardens yesterday. PHOTO: LINDA ROBERTSON



GLENFALLOCH GARDEN

Glenfalloch Garden, acquired by the Trust in 1967, functions as a charitable space that welcomes visitors year-round. While admission is free, guests are encouraged to make donations to support the maintenance and preservation of this picturesque garden. Glenfalloch exemplifies the beauty of all four seasons, each presenting distinct, vibrant colours and delightful fragrances. This garden benefits from its unique microclimate, allowing for a diverse collection of both native and exotic trees and plants, including rare varieties of fuchsia and native orchids.

A significant highlight of the upper garden is the ancient Matia Tree, estimated to be around 1,000 years old, which serves as a captivating focal point. The sheltered valley promotes the thriving growth of Kawakawa, which is often harvested by members of the Dunedin community for various medicinal uses, including skin care, spice blends, teas, and tonics.

Furthermore, Glenfalloch is notable for being one of the few dog-friendly public gardens in Dunedin, providing a great opportunity for dog owners to enjoy the space with their pets. The Chalet Restaurant, located within the garden, is a popular venue for weddings and events, enhancing the garden's appeal to visitors. The dedicated garden team works diligently to maintain the garden's beauty, and recent efforts in predator control, specifically targeting possums and rabbits, have resulted in a promising increase in native birdsong.

A noteworthy addition for 2024 is the Tui sculpture created by local artist Brun Jones, funded by the Fletcher Trust.



GLENFALLOCH GARDEN

This sculpture complements the existing Fantail sculpture, both of which are part of ongoing initiatives aimed at fostering community engagement with the garden. Glenfalloch Garden is fully funded by the proceeds from the Otago Peninsula Trust Enterprises, with expenses amounting to approximately \$182,000 for the financial year ending September 2024.



FRIENDS OF THE GARDEN

19

The dedicated Friends of Glenfalloch Garden have a routine of volunteering monthly, with many members enthusiastically opting to lend a hand even more often.

Working side by side, together, with our gardeners, they cultivate not just the garden but also lasting friendships and a strong sense of camaraderie.

The extra hands are truly appreciated by the garden team. Glenfalloch Garden is a 30-acre garden freely open to the public 365 days a year and a good example of the Trust's objective to preserve and enhance the Otago Peninsula. The garden is pet-friendly, and dogs are welcome to be off-leash in the upper areas. We estimate this group volunteered an average of approximately 40 hours per month, which has been a significant help in the garden and is much appreciated.



FLETCHER HOUSE

The Otago Peninsula Trust oversees the visitor operations, and the care and maintenance the historic 1909 Edwardian villa 'Fletcher House' located at Broad Bay on behalf of the Fletcher Trust. This is an example of how we can promote heritage on the stunning Otago Peninsula while aligning with Trust's objectives. During the 2023/2024 financial year, the Otago Peninsula Trust also helped facilitate the sale of Fletcher House Carpark to the Dunedin City Council.

The performance objective for the year ending 2023/2024 was to increase the number of visitors to the house and continue developing the garden, embracing a more authentic Edwardian style. We are happy to report that both objectives were achieved.



THE FLETCHER TRUST



ACCOMMODATION 433

– AIR BnB

21

In 2019, the OPT purchased the property located at 433 Portobello Road, adjacent to Glenfalloch Gardens. Acquiring this accommodation was a strategic decision, as the limited availability of accommodation options on or near the Otago Peninsula was impacting the amount of time visitors spent in the area. Staff at Glenfalloch frequently received inquiries from individuals seeking accommodation nearby.

Purchasing the property was viewed as the initial step toward offering accommodation options. Looking ahead, there are discussions about potential expansion, with hopes of creating more opportunities on the peninsula. The performance objective for the year ending in 2024 was to continue increasing the occupancy rate and to promote the venue for accommodating wedding parties and guests attending weddings at Glenfalloch. Both objectives were successfully achieved, resulting in a 36.6% increase in revenue. Wedding parties, in particular, appreciated the proximity to Glenfalloch, making it an ideal location for them to stay, prepare, and even take wedding photos on the property. Occasionally, the Trust has also utilized the property for meetings and small events related to the organization.



Peggy

9 years on Airbnb

★★★★★ · April 2024

We had the most wonderful stay! The house was one of the best we have stayed in and had everything we needed and more. The rooms were large and comfortable. There were multiple places to sit and lounge both indoors and outdoors. The view from the second floor was gorgeous and first floor was open, spacious, and had lovely views of the beautiful garden. Again, it was absolutely wonderful and we are already in discussions about when we can return!



Chivonne

2 years on Airbnb

★★★★★ · October 2024

Thank you so much for your proactive responses! Such a beautiful home and has everything we needed! Got ready with my friends for my wedding next door at Glenfalloch! Beautiful.

About the Host



Otago Peninsula Trust

Superhost

88

Reviews

4.94★

Rating

5

Years hosting

COLLABORATIONS²²



The Otago Peninsula Trust actively collaborates with like-minded organisations in Dunedin, demonstrating our commitment to environmental stewardship. As founding members of Predatory Free Dunedin and the Wild Dunedin Festival, both of which align with our mission of protecting and enhancing the Otago Peninsula. Additionally, we hold 50% governance representation on the Pukekura Trust, operating as Blue Penguins Pukekura. This entity proudly leads informative evening penguin tours and undertakes kaitiaki work at Pilots Beach (Takiharuru).

The OPT has a long-term management contract with the Fletcher Trust to handle the daily operations of the historic villa known as 'Fletcher House' in Broad Bay.

The current reporting period marks the Trust's largest contribution ever to the Department of Conservation and to the husbandry of the Toroa (Albatross) at Pukekura (Taiaroa Head). This contribution included 150 hours of staff time and a donation of over \$20,000 towards the provision of tracking devices for fledging chicks. The information obtained from tracking these albatross chicks is helping to enhance the understanding of their dispersal patterns. Additionally, it assists the Department of Conservation's seabird threats team to better quantify interactions with global fishing fleets. The total contribution which also includes the provision of water for irrigating birds, fish and consumables used for husbandry, amounts to over \$40,000 for the year.

COLLABORATIONS

This year, the Otago Peninsula Trust has proudly extended its support to the Dunedin Wildlife Hospital by making a generous donation of over \$5,000. This substantial contribution has enabled the hospital to acquire a state-of-the-art incubator, specifically designed to facilitate the delicate hatching process of Hoiho penguins, a critically endangered species native to New Zealand.

The Otago Peninsula Trust has partnered with the Ōtākou Rūnaka and the Otago Peninsula Biodiversity Group to launch an initiative aimed at establishing the Otago Peninsula as a Sustainable Community. We have agreed to dedicate the services of our Ecotourism Manager, Hoani Langsbury, to this project for one day each week to prepare the initial report and facilitate community engagement.

This important initiative is led by Te Rūnaka o Ōtākou, and the OPT is excited to be one of the founding organizations involved. The initiative aligns perfectly with the OPT's mission to "Maintain and Enhance the Otago Peninsula."

The Otago Peninsula Trust's support of other organisations not only directly supported the successful fledging of 33 Toroa chicks, a number equal to the previous best season on record but now supports species survival beyond the Otago Peninsula. This essential support highlights the Trust's commitment to wildlife conservation and the preservation of our unique natural heritage.



“The judgements that had the most significant effect on the non-financial information presented related to the depth of information disclosed with respect to our operations and the selection of information about what the Trust has done during the period. These decisions were made in consultation between management and Trustees.”

