

THE TOURISM FUTURES TASKFORCE
INTERIM REPORT: DECEMBER 2020

WE ARE AOTEAROA

HAERE MAI, HOKI MAI
THIS IS OUR REPORT

NGĀ KUPU

MAURI TANGATA

MAURI TUAKIRI

MAURI OHANGA

MAURI AO

MAURI ORA

WHAKATAKI



For the Enrichment of People
For the Enlivenment of Identity
For the Prosperity of the Economy
For the Health of the Planet
For the Wellbeing of all

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TĀNIKO PATTERNS

This is a taskforce and report that from day one has been inspired by the Te Ao Māori perspective. The wisdom and guidance received from Māori leadership has been incredibly significant to the thinking along the journey towards these recommendations. To reflect this, the use of the Tāniko patterns was chosen as an important visual enrichment throughout the report. They symbolise the weaving together of perspectives, priorities, ideas and stories that bind us together as a whole industry and nation. The specific patterns chosen relate to the Future States we are envisioning and working towards with this report. They represent significant actions and consistent focus on key parts of our tourism ecosystem to ensure the change needed is achieved.



PĀTIKI

Future State 1
Industry Thriving



Speaks to **abundance** and the conditions needed for an industry to thrive and transform.



WAHARUA KŌPITO

Future State 2
Te Taiao Regenerating



Speaks to **protection** of Te Taiao, and making tangible commitments to take care of our environment.



NIHO TANIWHA

Future State 3
Empowering Communities



Speaks to **empowerment** and communities' self determination to localise destination management plans.

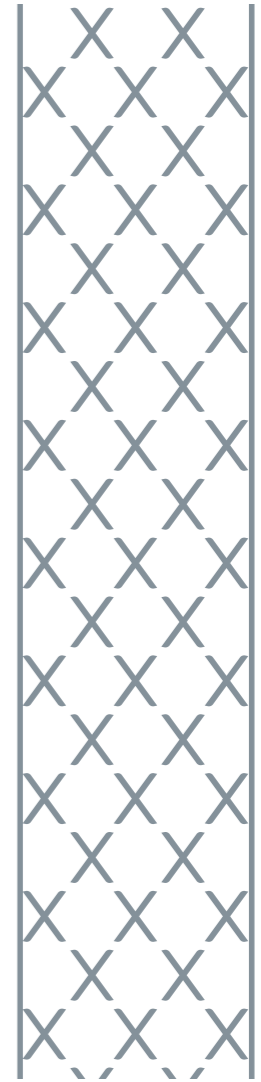


TAKI TORU

Future State 4
Aotearoa Whakapapa



Speaks to **connection** and the affection between people. The three lashings are symbolic of the kaupapa of 'embracing visitors as whānau'.



PURAPURA WHETŪ

Future State 5
Navigating our Future



Speaks to **navigation**, the collection and connection of data and insights to navigate future pathways and strategies.



1 — OUR INTRODUCTORY STATEMENT

BE BOLD,
BE BRAVE,
BE AUTHENTIC

KIA KAHA, KIA TOA, KIA TŪTURU

He ao matatini te ao tāpoi. He whatunga pūnaha hauropi ka pā ki te katoa o Aotearoa. He nui whakaharahara ngā tāpaenga a te ao tāpoi ki te tōnuitanga o tō tātou whenua; me te kitea iho o tētahi ao ki tua e whakarangatira tonuhia e te ao ōhanga te manuhiri o konei tonu, o tāwāhi atu, e kaha ake ai te puāwai o te oranga i ngā hīkoinga katoa ki Aotearoa New Zealand.

Ko te heamana tahi me te ārahi i tēnei Mahi Mahi he hōnore he kawenga nui tēnei. I ahu mai tātou i nga āhuatanga ngāiotanga rereke, aa, he rerekee te tirohanga, kua whakaatuhia mai e te Koromatua o Rotorua (Steve Chadwick), te Tumuaki Whakahaere (Grant Webster) o te kamupene kua whakararangihia e te iwi, me te kaiārahi iwi (Ngahiwi Tomoana).

I whakaaro māua ka tūpono atu māua ki te tōtara-wāhi-rua i te Kāhui Mahi, i te Rōpū Ārahi, otirā i te ahumahi whānui. Heoi, ko tā māua i rokohanga atu ko te kaha, ko te kauuananu, me te haere ngātahi, i runga i te whakapono tūturu, te whakapono whānui kia whāia he huarahi kē. Kua puta te whakaaro whānui, te taupatupatu ki te taipitopito, engari rite ana te whakaaro mā te ahunga

me te whakaaetanga ki ngā putanga e hiahia ana. Kua rite ngā tāngata o Aotearoa New Zealand mā te panonitanga.

I te tuhinga o te pūrongo takawaenga nei, ka whakapuakina e te Kāwanatanga te whawhati tata o te huringa āhuaranga, me tā mātou tautoko i te hiahia kia whāia tēnei āhuatanga inamata. I tēnei whenua, puta noa i te ao, kei te heke haere tonu te hauora o ngā pūnaha hauropi pou i te oranga; waihoki, kei te piki kē atu ngā taumata pāhiwihwi taha pāpori me te pōharatanga. E kore e tika kia mauroa tēnei āhuatanga, me āta panoni. E whakapono ana mātou ka taea tēnei āhua te panoni i Aotearoa New Zealand, ka mutu, mā te ōhanga manuhiri tēnei panonitanga e hautū.

BE BOLD, BE BRAVE, BE AUTHENTIC

Tourism is complex. It is a networked ecosystem that touches the lives of all New Zealanders. Tourism has already contributed so much to our nation's prosperity; we see a future where the domestic and international visitor economy will further enrich wellbeing in all aspects of life in Aotearoa New Zealand.

Co-chairing and guiding this Taskforce is an honour and an immense responsibility. We all come from different professional backgrounds and bring quite separate perspectives, indicated by our roles as the Mayor of Rotorua (Steve Chadwick), the Chief Executive Officer (Grant Webster) of a publicly listed company, and iwi leader (Ngahiwi Tomoana).

We expected to find discord in the Taskforce, the Advisory Group and indeed the broader industry. What we have found is energy, respect and collaboration, with an authentic and common view on the need for something different.

We have had diversity of thinking, dissonance on detail, but consistency in direction and agreement on the desired outcomes. The people of Aotearoa New Zealand are ready for change.

While writing this interim report, our government declared a climate emergency and we support the need to act now. Here, and around the world, the health of life-supporting ecological systems continue to decline; and, at the same time, levels of social inequality and poverty are rising. This situation is not sustainable and has to change. We believe this change can occur in Aotearoa New Zealand and the visitor economy can be a leader of that change.

SEIZING THE OPPORTUNITY

Me mātua whakahou tonu, me pakari anō te ōhanga manuhiri o āpōpō atu. Me whakarato he painga whānui ki ngā āhuatanga oranga* e whā katoa: oranga tangata, tuakiri, taiao, me te ōhanga. Ko te tino tikanga o tēnei, me mātua whai ngā wheako o te ao tāpoi o Aotearoa New Zealand ki tua ki te:

- Whai kia rangatira ake te manuhiri i te Manaakitanga pono e panoni ai te āhua o te noho
- Tāpae atu ki te iho ahurei, ki te ahurea me te hauora o ngā hapori o te rohe me ō rātou wāhi
- Whakarato mahi whai tikanga; me ētahi ara hou mō te hunga o te ahumahi e tipu ai, e rea ai
- Noho rangatira ake i ngā uara o Te Ao Māori
- Whakapiki ake i te hauora o ā tātou pūnaha hauropi māori
- Whai kia mauroa te taha ahumoni me te tautokohia o te whakahounga tonuhia o ngā mahi.

The future visitor economy must be regenerative and resilient. It needs to deliver net benefits across all four wellbeings^{*}: social, cultural, environmental and economic. In real terms, this means that future tourism experiences in Aotearoa New Zealand must:

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

*Tirohia te Wahanga 7, Te Papamuri Mahi me te Whakatata.

*See Section 7, Taskforce Background & Approach.

Kia noho tonu ki te iho o te ōhanga manuhiri ki tua te oranga o ngā hapori. Koia hoki ka whakakanohi i tō tātou ahurea me ō tātou uara, ka tautokona e te Kāwanatanga, ka whakaorangia mai e te hinonga whai hua e whakaatu ana i te kawenga taumata tiketike. Ka noho tonu ā tātou mahuhiri ki te iho tonu o te wheako ki Aotearoa New Zealand, ahakoa tae mai i te taone pātata, i tērā taha o te ao rānei – he manuhiri i te taenga mai ki ō tātou hapori, he whanaunga i te wehenga atu. I tēnei ao o āpōpō atu, ka rangatira ake ā tātou manuhiri i tā rātou i wheako ai; heoi, ka hoki mai anō he uara i a rātou ki Aotearoa New Zealand me ō tātou hapori. Koia nei te āhua o te ōhanga manuhiri hauora e ngākau whakahī ai tātou ki te whakarere iho ki te hunga ka whai mai i a tātou.

Our future visitor economy will have the wellbeing of communities at its heart. It will be representative of our culture and values, supported by government and brought to life by profitable enterprise that shows a high level of responsibility. Our visitors will remain at the core of the Aotearoa New Zealand experience, whether they have travelled from the neighbouring town or halfway around the world – arriving into our communities as visitors and leaving as whānau. In this future, our visitors will be enriched through their experience, yet they will also contribute value back to Aotearoa New Zealand and to our communities. This is the picture of a healthy visitor economy that we can be proud to leave to those who come after us.

EMOTIONS, VIBRATIONS, CONNECTIONS

Kareāroto, Tōiringa, Hononga

Pāorooro ana te manawataki o te whenua i te tangata, he kareāroto hou, he tōiringa hou mō tātou me ā tātou manuhiri

Mā konei e mārāma ake ai a Aotearoa New Zealand

Te Mauri – Ma – uri – rere ana i ngā mea katoa – i ngā uri whakatipu ki te hunga ka tau mai – mō ngā uri whakatipu – he mauri ka whai mana tonu ka pūāwai mō ngā reanga o āpōpō atu

Te Whakapapa o Aotearoa – he whakapaparanga hononga – te wāhi, te tangata, te wheako.

The rhythm of the land resonates through man, gives new emotions, new vibrations, to us and our visitors.

This gives a greater understanding of Aotearoa New Zealand.

The Mauri – ma-uri – flows through everything – from the descendants and into those who come – mō ngā uri whakatipu – a life force that must instil integrity and be enhanced for future generations.

The Aotearoa Whakapapa – a layering of connections – place, people and experiences.

I ngā marama e rima ka hori kua whānui tā mātou whakapāpā haere ki te ahumahi me te hoki mai o te whakaaro i te tangata takitahi me ngā rōpū. Katoa te hunga i tūtaki mātou e kohara ana ki te mahi me te kaingākau anō ki te huarahi e whakaarotia anō ai te āhua o te whaiwhai ake i te ao tāpoi. Hōhonu ana tā mātou whakawhiti whakaaro ki ngā mema o tā mātou Rōpū Ārahi, me tā mātou mihi nui ki a rātou i tō rātou ngākau pūmau, i te tini haora i pau ki te hui whāiti tuihono. He rahi ngā torotoronga a te Kāhui Mahi mō te pūrongo nei i mahia ki ngā hangarau tuihono, i ū ai mātou ki te pākaha waro hāhaka. Mā te hautū i runga i te whakatauiria me te whakarite pae aronui mō āpōpō atu, ka inea e mātou, ka whakaatu anō i te tapuwae waro mō te tukanga katoa i whāia e te Rōpū Ārahi i tā mātou pūrongo whakamutunga.

I te pūrongo takawaenga nei e tāpaea ana e mātou tētahi kohinga tūtohunga mō te panonitanga pūnaha ka noho tūāpapa mai ki te takahuri i te ōhanga manuhiri. Kāore e taea te āta kōwhiri ngā tūtohunga, ka noho kohinga mai e waihangatia ai, e ai ki a mātou, ko ētahi Tūnga ki Tua* e rima me mātua whai. Kei te tūāpapa o ēnei ko te nekehanga waiaro hiranga e mātau ana ki tō tātou ao, ina koa te ao tāpoi, hei wāhanga o tētahi pūnaha koiora nui tonu. Ka tāpaea e tā mātou pūrongo ngā tūtohunga tuatahi mō tēnā me tēnā Tūnga ki Tua. I runga i ngā uruparenga a ngā Minita, ka wetewetea tēnā me tēnā tūtohunga, ka whakatakotokia ki tā mātou pūrongo whakamutunga.

Nā runga i te rahi o te panonitanga e hiahiatia ana, me takoto he ture ka pā tahi ki ētahi

wāhanga o te Kāwanatanga me te porihanga mō ētahi o ngā tūtohunga. I tēnei wā kāore he ture motuhake kua āta hoahoatia hei ārahi, hei whakahaere rānei i te ao tāpoi; heoi, e tāpaea ana e ia ētahi momo wero motuhake kāore e tiakina tikahia ana e te ture kua takoto.

E pono ai te mana o te panonitanga i roto i te wā, tae atu ki ngā huringa tōrangapū, kua whakaaro te Kāhui Mahi ki tētahi ture hou - Te Ture mō Ngā Manuhiri o Aotearoa (The New Zealand Visitors). Ko tā tēnei Ture Pāremata hou he titiro ki ngā take katoa kei tētahi kohinga tikanga tūhono ka whakamana i tētahi ara mahi ngātahi ka āta hoahoatia ki te whakamana i ngā panonitanga pūnaha e tūtohu ana mātou.

Ka kitea tonuhia, me te māharahara anō pea o ētahi, i te kore o te pūrongo nei e whai whakaaro tūturu ki te tautuhi i tētahi pironga māketē hou mō te manuhiri o te ao, te tokomaha tika o te manuhiri hei whai atu, te uara rānei ā-tāra ka whāia kia tae mai i ngā manuhiri o te ao.

Kua āta whakarongo te Kāhui Mahi kia marama ai ia ki ngā raruraru o te ao tāpoi e kite ana ētahi atu; ka mutu, kua ruku atu mātou ki aua take e marama pū ai mātou ki ērā. Heoi, kia ki tūturu ake mātou, kāore mātou i whai ki te urupare ki ngā raruraru me ngā take taratahi – ko te tirotiro tohu mate kē tēnei, kua ki tōna pūtakenga mai. I āta hoki kōmuri mātou kia noho marama ai ki te āhua o te huri o te pūnaha ōhanga; ka pēhea te mahi mēnā e whakarato ana i te oranga taha pāpori, taha ahurea, taha ōhanga, taha taiao; kātahi ka aro atu ki ngā panonitanga e hiahiatia ana e tutuki ai te whakawhitinga.

Over the past five months we have consulted widely across the industry and received contributions from many individuals and groups. Everyone we met was passionate about this mahi (work) and treasured the opportunity to rethink how we approach tourism. We engaged deeply with the members of our Advisory Group, to whom we owe deep thanks for their unwavering commitment and the many hours spent in online workshops. Much of the Taskforce's engagement for this report has been done using online technologies, enabling us to maintain a low carbon impact. To lead by example and set a benchmark for the future, we will measure and disclose the carbon footprint for the full Taskforce process in our final report.

In this interim report, we present a set of strategic recommendations for systemic changes that are fundamental to transform the visitor economy. The recommendations cannot be cherry-picked but come as a package to create what we describe as five necessary Future States*. Underpinning these is an important mindset shift that acknowledges our world, and tourism in particular, as part of a larger living system. This report presents preliminary recommendations for each of these Future States. Subject to Ministerial feedback, we will determine the next stage of each recommendation and approach for the Taskforce.

Given the degree of change required, a number of the recommendations will require legislation that cuts across different areas of government

and society. Today there is no dedicated legislation that has been purposely designed to regulate or manage tourism; and yet it presents a range of unique challenges that are not always appropriately covered by existing legislation.

To ensure the integrity of change over time, including through political cycles, the Taskforce proposes a new statute – Ngā Manuhiri o Aotearoa (The New Zealand Visitors) Act. This new Act of Parliament would address all the issues in one set of connected provisions, enabling a more coordinated approach specifically designed to give effect to the system changes we are recommending.

It will be obvious, and potentially a concern to some, that this report does not comment explicitly on defining a new target market for international visitors, the right volume of visitors to target, or the value in dollar terms that we should target to receive from international visitors.

The Taskforce has listened carefully to understand the problems that others see with tourism; and we have dug into those issues to understand them more deeply. However, we emphasise that our approach has not been to respond to problems or isolated issues – which is to address symptoms rather than causes. We have intentionally stepped back to understand how the visitor economy system works; how it would work if it was delivering social, cultural, environmental and economic wellbeing; and then focused on the changes required to achieve that transition.

*Tirohia te Wahanga 5, O Taata Korero Kei te Heke Mai.

*See Section 5, Our Future States.

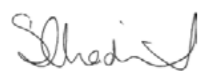
TĀ MĀTOU I RONGO AI	TĀ MĀTOU I WHAKAARO AI
Ko te uara ki mua i te rōrahi, he raru rōrahi tō tātou.	Kei runga noa atu a Aotearoa mō te āhua ki te uara, e tae mai ana tētahi 0.3% o te tokomaha o te ahumahi manuhiri o te ao, e 0.8% o te uara. E whakapono ana mātou ka tutuki tonu te whakapiki ake i te uara me te tokomaha mēnā ka noho tonu ki ngā pou tawhā o tētahi ohanga manuhiri tūturu te whakahou tonu.
Kāore e ea i te manuhiri o te ao ngā utu o ā rātou haerenga.	Kāore i kitea e mātou he taunakitanga tūturu ki te tautoko i tēnei me tā mātou whakahau kia whāia tonuhia te take nei e puta ai he raraunga hei tātari. E whakaae ana mātou he take tonu kei ngā tikanga tautoko ā-pūtea i ngā Kāwanatanga ā-Rohe.
Kei te tangonge te pūnaha hanganga i ngā manuhiri o te ao.	Tērā ētahi wāhi tauwhāiti o te motu e taumaha ai ngā pāpātanga ki te pūnaha hanganga i te hunga tāpoi, tērā anō ētahi wāhi kāore e raru pēnei ana. E hiahia ana ētahi raraunga papai, kia āta takoto ai he mahere me ngā pūtea tika ki te whakahaere i te take nei.
Ko ngā manuhiri o te ao te pūtake o ētahi take pērā i te hōpuni mataraharaha me te taraiwa haumaruru haere.	E tohu ana ngā tatauranga kei te hē tēnei tirohanga. Hāunga anō tērā, e whakapono ana mātou mā te ara o te pūnaha kua whakatakotohia, me te arotahi ki ngā whanonga, ki te pūnaha hanganga me te hangarau e whakatika ngā take nei.
E hāhaka ana te whai hua o te rāngai tāpoi.	I puta inā tata nei te pūrongo a Tāpoi Aotearoa Tourism New Zealand e kiia ana ko Te Ohanga me te whānui ake o tāna titiro ki te kaha o te whai hua o te ao tāpoi. E mea ana ngā kitenga o te pūrongo kei te kaha ake te whai hua o te ao tāpoi i tērā i kiia ai i mua. Kua whakatau mātou kei te hapa te inenga toro whānui mō te uara puta noa i ngā momo oranga katoa, me whaiwhai ake tēnei.
Kia nui atu te pūtea a te Kāwanatanga ki te whakahaere i ngā putanga o te ao tāpoi. I rongo hoki mātou kāore he pūtea a te Kāwanatanga mō te ao tāpoi atu i tāna e tuku ana i tēnei wā.	E whakapono ana mātou, ina whakatinanahia tahitia, ka hua mai i ngā tūtohunga o te pūrongo nei ētahi atu pūtea ki te Kāwanatanga (ā-Rohe, Matua), ka hua mai i ngā painga ka puta i ngā pakihī, ka puta hāngai rānei i ngā manuhiri, me te aha, kua whakahokia atu ki ngā wāhi e hiahia ana.
E hiahia ana tētahi mahere whakarauora i te ao tāpoi. Kei te roa ake te pā tonu mai o ngā pāpātanga o te COVID-19, me whaiwhai ake tēnei e te Kāwanatanga.	Kāore he mana o tēnei Kāhui Mahi ki te tiroiro i ngā pāpātanga o te COVID-19 ki te pakihī, ki te katiā o ngā roherohenga me ētahi atu take e hāngai ana. E mōhio ana mātou kei te raru te taha hautū i tēnei wā, me te rurukutanga i roto i te ahumahi whānui, i te kore mahere hei tautoko i ngā pakihī me ngā rawa māori ka tiakina e rātou. He take tōmua tēnei, me motuhake te āta whaiwhai ake e te Kāwanatanga me te ao tāpoi.

WHAT WE HEARD	WHAT WE THINK
We need value over volume; we have a volume issue.	New Zealand already punches above its weight in terms of value, with 0.3% of the world's visitor industry in numbers and 0.8% of the value. We believe value and volume recovery and growth are both achievable so long as they remain within the limits of a genuinely regenerative visitor economy.
International tourists don't pay their way.	We have found no clear evidence to support this and are suggesting further work to obtain good data for analysis. We agree that there are fundamental issues with local government funding mechanisms.
We have an infrastructure shortfall because of international tourists.	There are particular areas of the country where tourists place a significant user load on infrastructure and others where they do not. We need good data, careful planning and appropriate funding to manage this issue.
International tourists are the cause of issues like freedom camping and driver safety issues.	Statistics suggest this perception is incorrect. Regardless of that, we believe that the systems approach suggested, including a focus on behaviours, infrastructure and technology, will address these issues.
Tourism is a low productivity sector.	Tourism New Zealand has recently released a report, <i>Te Ohanga</i> , which takes a broader view on tourism productivity. The report findings suggest that tourism performs better than has previously been claimed. We have concluded there is a lack of more holistic value measurement across the full range of wellbeings, which needs to be addressed.
Government needs to provide more funding to manage the effects of tourism. We also heard that the Government does not have the means to fund tourism to any greater extent than it already does.	We believe that, implemented together, the recommendations in this report will enable more revenue to government (local and central), derived from better business revenues and directly from visitors, which can then be hypothecated to the industry needs.
We need a new recovery plan for tourism. The issues relating to COVID-19 are lasting longer and the Government needs to respond.	This Taskforce does not have a mandate to address the COVID-19-related business impacts of border closures and other related issues. We do acknowledge that currently there appears to be an absence of leadership and coordination within the broader industry (including government), with no clear pathway forward or a plan in which businesses can be supported and the natural assets they care for. This is a priority and needs to be addressed separately by both government and the industry.

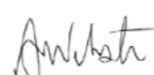
Kua noho mai te Mauri ki te iho o ō mātou whakaaro me ā mātou matapakinga i te mea e rawe ana te hāngai ki te whakaaro o te whakahou tonu. Ko te tikanga o te whakahāngai i te kaupapa o te Mauri, me noho mai he ōhanga manuhiri ki tua ka mauroa taha ōhanga, ka mutu, ka:

- Noho hei wāhanga o ō tātou hapori, kava ki waho atu
- Rangatira te whakahoki ake ki tō tātou taiao, e rangatira nei tāna i homai ai ki a tātou
- Tūhono, ka whakapiki ake i tō tātou mana me ā tātou Manaakitanga
- Whakatō i te ngākau hiamō kia tipu ai, kia tōnui ai
- Mārama, ka tūturu te whakarangatira, te whakakorikori i tō tātou ahurea, i ō tātou hapori me ā tātou mahuhiri
- Whakanui i a tātou, ka whakakaha anō i tō tātou wāhi i te ao
- Noho haepapa tūturu mō te whakarato oranga, kava mō te hua moni anake.

Nei rā tā mātou pūrongo hei pānui māu. Ka areare ngā taringa ki ā koutou uruparenga i a mātou ka whakaoti haere i te tūāmahi ka whai ake ki te whakatakoto pūrongo whakamutunga, ko te tūmanako ka whakaputaina i te whā marama o muri mai i te taenga mai o ngā uruparenga a te Minita. Tērā tonu ka whakaputaina tūmatanuihia te pūrongo whakamutunga.



Steve Chadwick
co-Chair
The Taskforce



Grant Webster
co-Chair
The Taskforce



Ngahiwi Tomoana
Pouarahi (Lead Guide)
The Taskforce

The concept of Mauri has frequently come to the centre of our thinking and discussions because it aligns perfectly with a regenerative mindset. Applying this kaupapa (principle) of Mauri means that we must have a future visitor economy that is economically sustainable and:

- Is a part of our communities, not apart from them
- Gives richly back to our environment, which gives so much to us
- Connects and enhances our mana and our manaaki
- Enables our people to get excited, to grow and to thrive
- Clearly and tangibly enriches and enlivens our culture, our communities and our visitors
- Celebrates who we are and strengthens our place in the world
- Ensures accountability for delivering wellbeing, not just financial profit.

We invite you to journey through our report. We will be listening for your feedback as we complete the next stage of our work, which is to prepare a final report that we expect to be published within four months of receiving the Minister's feedback. The final report is likely to be released publicly.

OUR TASKFORCE TEAM



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Special thanks to:

Nick Judd
Taskforce member until August 2020

2 — SUMMARY OF RECOMMENDATIONS



3 —

OUR VISION

SECTION 3 — OUR VISION



TE AO HOU,
THE NEW
WORLD

AOTEAROA NEW ZEALAND DESERVES A WORLD-LEADING, TRANSFORMATIVE VISION FOR TOURISM.

If you don't know where you are going,
any road will take you there.

Without a compelling vision, people tend to focus on fixing problems which are often the symptoms of flawed design. For that reason, we have started by defining the future we want to create – embracing the full potential of what is possible. Only by knowing where we really want to go and then backcasting (looking back from that Future State) can we create the right pathway towards achieving our desired future for Aotearoa New Zealand's visitor economy.

ENRICHING AOTEAROA IS OUR VISION.

Nourishing people
and place. Enlivening
communities and culture.

WE ARE HERE TO NURTURE THIS PLACE,
ENRICHING GENERATIONS WITH
LIVELIHOODS, EXPERIENCES
AND STORIES TO SHARE. WE MUST
OWN THE IMPACT OF OUR ACTIONS
AND ENABLE AOTEAROA NEW ZEALAND
TO THRIVE BY GIVING BACK MORE
THAN WE TAKE.

ENRICHING

AOTEAROA

WE ARE TOURISM

We are all the future visitor economy of Aotearoa New Zealand. We are all hosts. We are all visitors. We are all part of the tapestry of cultures and identities that connect us to each other, to Aotearoa New Zealand and to the world. We are the team of six million storytellers – both those living in Aotearoa New Zealand and the diaspora.

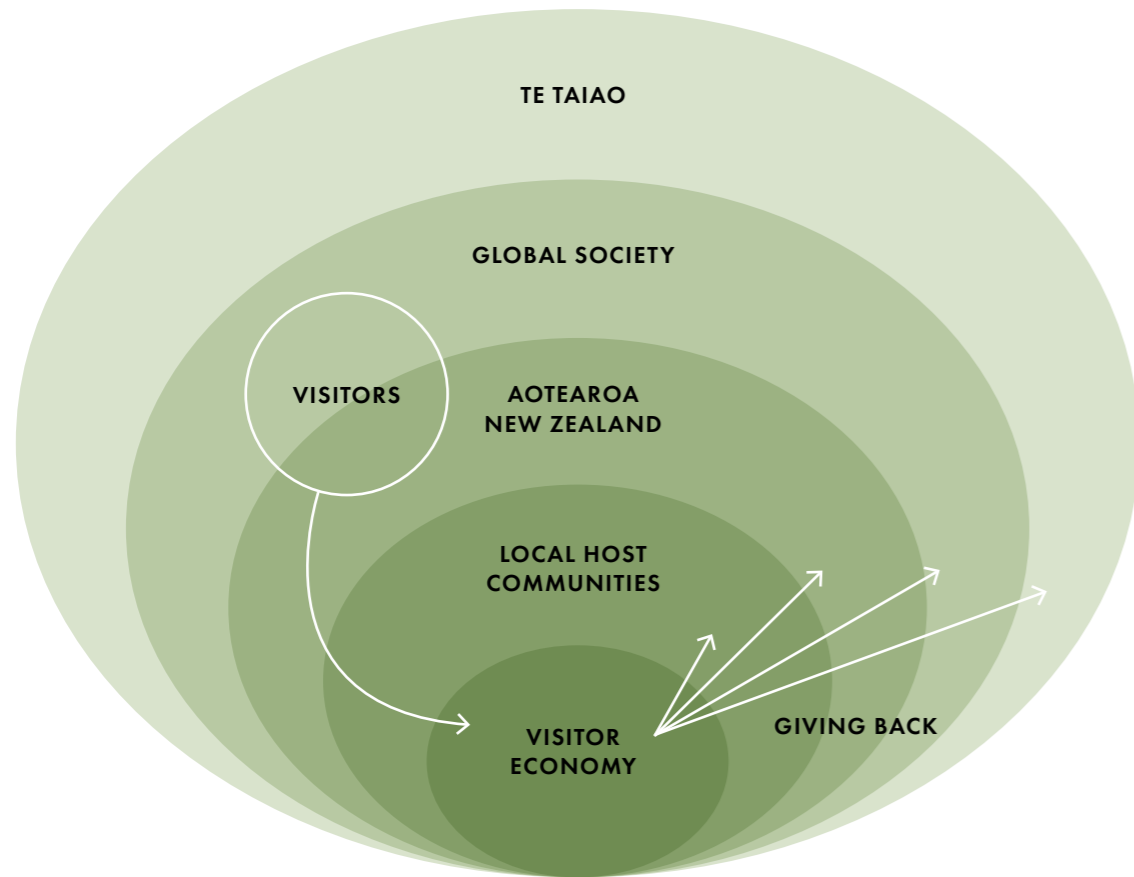
We have Mauri – we carry a life force that connects all living things. Our Mauri is what binds us to the land. We are a visitor economy that contributes to the wellbeing of New Zealanders – socially, culturally, environmentally and financially.

We are the businesses and employees that enrich our visitors and our communities simultaneously through our unique expression of Manaakitanga (hospitality), Whanaungatanga (connecting people to people) while acting as Kaitiaki (guardians and stewards) of our people and places.

WHAT DO WE VALUE?

The vision expresses the values that New Zealanders want to see embedded in the future visitor economy (see Appendix B.1: Unlocking Future Tourism – OnePicture and TNZ Research, October 2020; and Appendix B.2: New Zealand National Values Assessment – Barrett Values Centre, October 2020) and is central to the Future States that frame the Taskforce’s recommendations.

Tourism is the means to something greater, rather than an end in itself. Tourism is more than just an industry; it is an integrated part of a larger system that encompasses a wide range of business sectors, which are all inherently connected to communities and the environment. Tourism can only thrive when all those involved contribute to the long-term health and wellbeing of the larger systems they sit within.



WHAT SUCCESS LOOKS LIKE

We will build a prosperous, competitive visitor economy that enriches the lives of New Zealanders and visitors.

We will contribute to tangible improvements in the physical and mental wellbeing of New Zealanders by offering more opportunities to experience places; participate in recreational activities; and enjoy the diverse forms of hospitality available throughout the country.

We will work to 'decarbonise' tourism, hospitality and recreation, and demonstrate our contribution to the improvement of biodiversity within the next decade.

We will work to create more unity and understanding between people and cultures. As well as bringing the values and practices of Māori and Pākehā closer together, we will celebrate all our diverse heritage and multicultural communities. In this way, we will present Aotearoa New Zealand as a nation that is living in harmony with itself and the natural world.

SUCCESS INDICATORS: AREAS FOR MEASUREMENT

The Taskforce is completing further work on the measurable goals to support the new vision and will present these in our final report. The aspirations above will inform the future goals and measures going forward.

ALIGNING WITH A BIGGER VISION TO TRANSFORM AOTEAROA NEW ZEALAND

During 2019 and 2020, leadership bodies from the finance, primary and conservation sectors, as well as central and local government and Māori tourism have set the future visions for their respective areas. Their visions resonate with the new visitor economy vision presented here. When considered collectively in the context of the Government's Wellbeing Agenda, these provide a strong mandate to make the bold changes recommended by the Taskforce.

THE TASKFORCE WAS INFLUENCED BY THE FOLLOWING REPORTS:

NZ Māori Tourism He Toa Takitini
Building a Visitor Industry That is
"Fit For The Future"

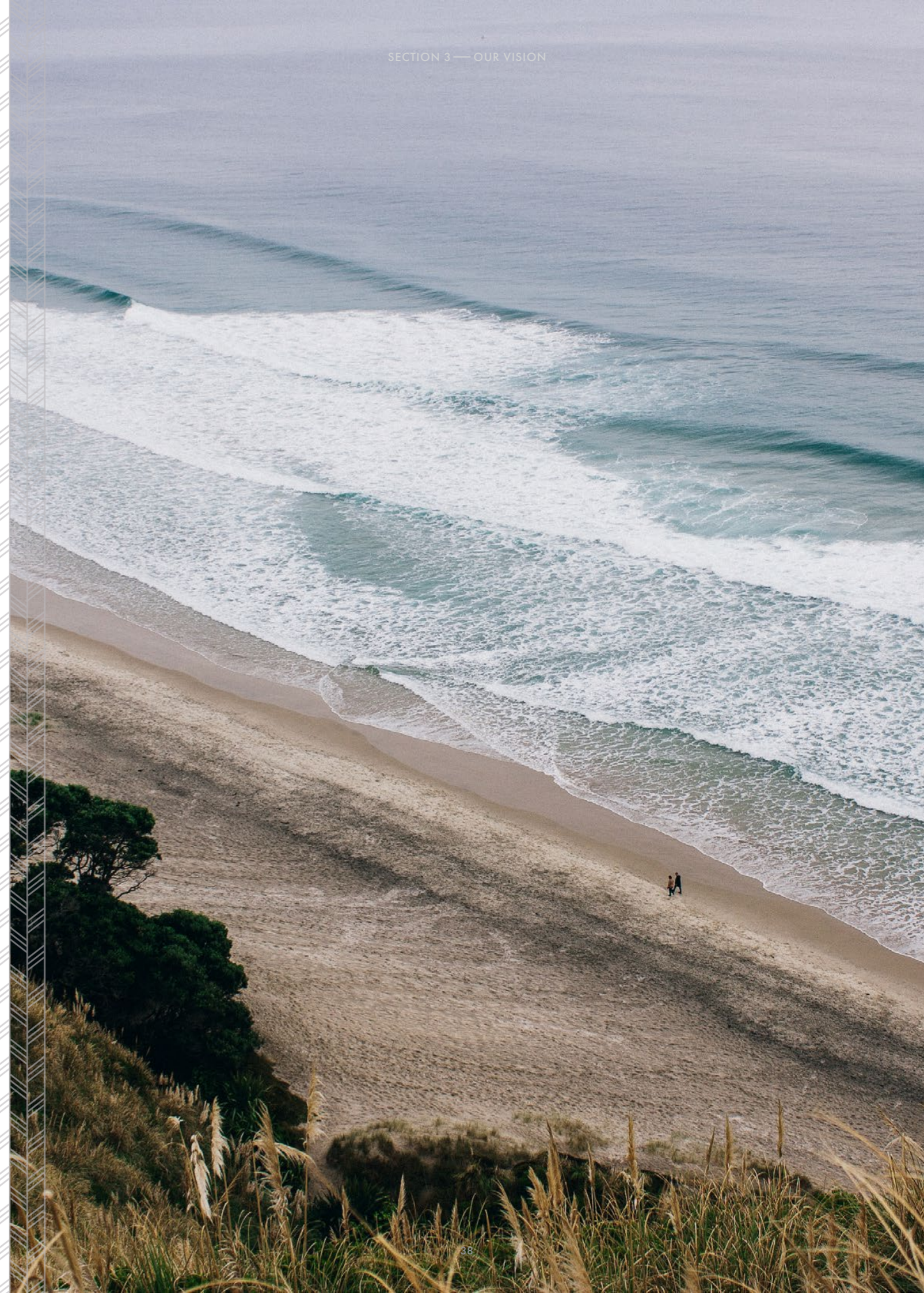
Sustainable Finance Forum
Roadmap for Action
November 2020

Te Mana o te Taiao
Aotearoa New Zealand
Biodiversity Strategy 2020

**The 2019 Aotearoa
Government Tourism Strategy**

Fit for a Better World
Agriculture, Food and Fibres
Sector Vision and Strategic
Direction Towards 2030

**The Treasury Living
Standards Framework**



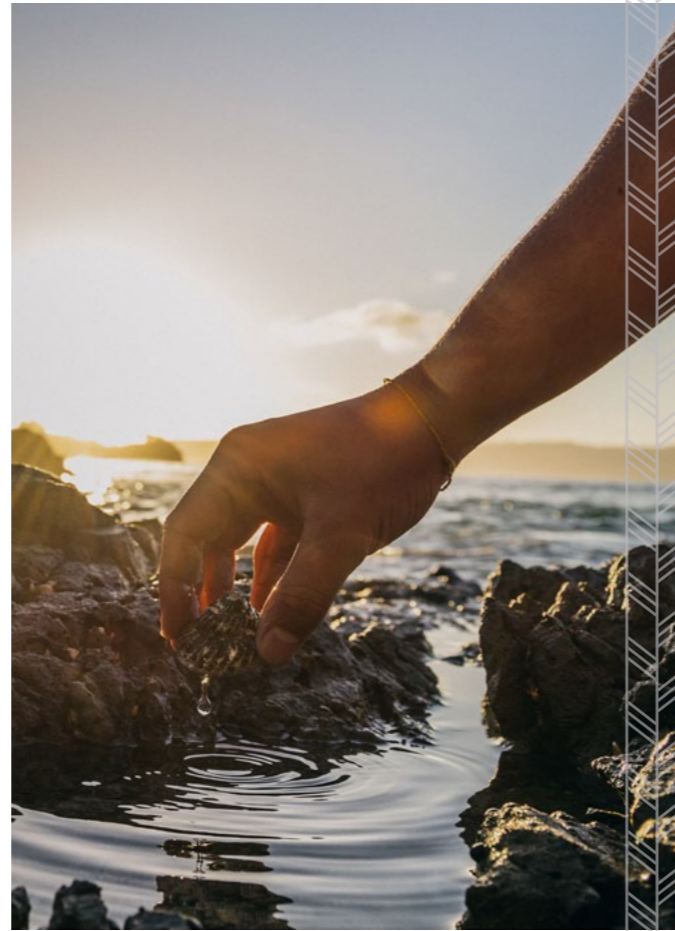
4 — OUR STORY FOR CHANGE

SECTION 4 — OUR STORY FOR CHANGE



To ensure the visitor industry in Aotearoa New Zealand thrives, we must plan and act as one integrated industry. We must understand the industry as a system and see it as part of the whole of Aotearoa New Zealand to grasp the full potential it can contribute.

The Taskforce has identified five Future States which describe the ideal future and will, if pursued together, achieve the future we want. The pursuit of these Future States frames our recommendations for change. The recommendations are set out in more detail later in the report and this section briefly describes the story of change we are envisioning.



LEGISLATIVE FRAMEWORK

The visitor industry needs dedicated and intentional legislation. Currently, much of the industry is largely unregulated and is managed through disparate pieces of legislation that were not designed with the peculiarities of tourism in mind. We have a Minister of Tourism with no legislative levers to manage industry settings. Dedicated legislation would create a framework for long-term change while ensuring the visitor industry system can endure through economic and political cycles. We are contemplating a change that will occur over many years and we need to embed core principles and practices now.

Alongside dedicated legislation for the visitor industry, we need to modernise the Conservation Act. We have identified multiple aspects of the existing legislation which currently hinder a balanced and integrated approach to achieving social, cultural, environmental and economic wellbeing. Among others, pricing control, concession management and public/private partnerships are obvious areas that can enable a balanced approach across the four wellbeings for the benefit of New Zealanders and our international visitors. We can also embed Te Tiriti* principles more holistically, recognising the benefits that will flow from co-governance and iwi managing more of the conservation lands and waters, to reconnect mana whenua with the whenua. The connection between modernised conservation legislation and new dedicated legislation governing tourism will be pivotal.

COMMUNITIES AT THE CENTRE

Communities sit at the centre of the visitor industry, and visitors sit at the heart of our communities. To thrive sustainably, the future visitor economy needs to be led by local communities.

Our recommendations address the engagement, planning and funding mechanisms required to ensure that communities are equipped with what they need to allow the visitor economy to strengthen their local identity, connect them better to their place and drive long-term wellbeing. This is where a regenerative tourism industry begins.

By embracing the concept of Manaakitanga – care and consideration for those around us – we become a more connected, collaborative and richer society of hosts and visitors.

*See Section 4, Our Story for Change.

UNDERPINNED BY A TE AO MĀORI APPROACH

When we have a community-led visitor economy, we will see the essence of Aotearoa New Zealand come to life in ways that continually celebrate and enrich our unique culture. The Future State of Aotearoa Whakapapa summarises this transition and reflects the truth that our ultimate unique proposition globally is our people and our culture. At the heart of that lies an intergenerational approach of Te Ao Māori.

As the Taskforce grappled with what an authentic approach to delivering the four facets of wellbeing entailed, we found there is no better way to explain it than the Māori concept of Mauri – the life force and essence present in all things. Our recommendation is for this concept to be embedded in all aspects of the visitor economy – to enhance the health, wellbeing and life force of our society, our culture, our environment and our economy. Aotearoa Whakapapa is not just about where we have come from, our history and stories, it is also about what others bring to it. By embracing the Māori concept of Whanaungatanga – genuine connection and kinship – throughout our communities, our visitors will contribute valuably to our whakapapa over time, creating a virtuous cycle.

CARING FOR TE TAI AO – OUR ENVIRONMENT

The Taskforce is very aware of the expectation that our recommendations should address environmental issues arising from the visitor industry. We have made recommendations in this area which will create systemic industry change. The visitor industry needs to link up with the many existing broader goals and initiatives already underway across Aotearoa New Zealand locally and nationally, like predator free, clean waterways, climate change adaptation and greenhouse gas emissions reduction initiatives.

The Tiaki Promise must underpin the visitor economy. This is a powerful and uniquely New Zealand programme that has been undervalued and underused. We need to embed Tiaki to guide everything we do domestically and internationally. The Tiaki Promise should be co-owned by the Government and private sector. It can become the internal representation for how we make 100% Pure New Zealand come alive behaviourally and operationally.

By embracing the concept of Kaitiakitanga – our role as caretakers and nurturers of Te Tai ao – we will play a leading part in ensuring a healthy planet for future generations.

INDUSTRY STANDARDS

To complement the social, cultural and environmentally focused recommendations, we need a standards framework for the visitor industry. We have never had one of real depth and meaning before. All the changes we propose have to be based on an incentives and sanctions approach which will reinforce the commitment to drive progress on all four facets of wellbeing. Ultimately, the standards framework will need to be legislated. In the interim, benefits provided to the industry must be linked to businesses committing to and progressing their performance against these standards. The Future-Fit Business Benchmark is one example of a holistic and rounded progress measurement system for businesses that can be drawn upon.

These standards will need to address the way people are treated and cared for within the industry. This will help ensure that universally accepted minimum levels are created across a full range of employment conditions.



BUSINESS PERFORMANCE

The issues of infrastructure, funding and business performance are all intrinsically linked. We need to enable the Government to receive more income, distribute that more locally and enable businesses to generate more income that can be reinvested to achieve social, cultural and environmental wellbeing.

In determining a system-based solution, we need to start by understanding the supply side of visitor economy services, which includes the availability of licences, leases, concessions and other rights of access to the industry. Currently, there appears to be no comprehensive record or management of access rights. Typically, one only needs to fill in a few forms to be a tourism operator in many parts of the industry. We can't achieve what we desire in terms of holistic wellbeing and value creation with multiple operators travelling the same routes at half-full capacity. It is both wasteful and inefficient.

There are many examples of businesses competing their way to the bottom based on price alone. In some areas, we have simply priced poorly by undervaluing the product. This approach makes it impossible to achieve value creation across the four wellbeings. One example is the Department of Conservation (DoC). In many cases, DoC is constrained by legacy decisions and legislative restrictions which have created pricing decisions that simply do not reflect the real value of what is being offered.

We need to manage supply more effectively than we do currently. This does not mean restricting supply, or reducing numbers, it means we need to first understand what we have to offer (a full stocktake) and then manage those resources (in particular, public assets) to achieve appropriate outcomes. We have found that,

as a whole, the industry lacks any comprehensive understanding of these supply issues; and we believe that the market will respond to the right regulated conditions. This will take some time to resolve due to the existing frameworks and permissions; but that is not a reason to leave this critical issue unaddressed.

Some immediate changes can come from using existing Commerce Act provisions more effectively. This Act is designed to promote competition to benefit and protect customers. However, we need to challenge whether we have enabled the customer to benefit financially from competition at the expense of the other wellbeings. Ensuring competitive tension in supermarkets, energy, consumable products and areas of basic needs makes absolute sense; but we believe the situation is different for some visitor industry and tourism products/experiences.

The Commerce Act could, in some circumstances, enable authorisations allowing competitors to work together to manage supply and price where it is demonstrated that a greater public good (i.e. increase in non-financial wellbeing) could be achieved. The Government can provide this policy direction to the Commerce Commission and encourage authorisations of this nature in specific circumstances where a greater good can be proved. These changes would enable businesses to fund better employment standards, give more back to communities, improve biodiversity and climate outcomes, and invest to create more local value through their supply chain.

SEASONALITY

The other major inhibitor to profitability in the industry is seasonality. This has been a long-standing issue and is one area where support and direction from government can enable greater good outcomes. As a generalisation, tourism businesses have traditionally only made a profit in three to four months of the year. This has a significant impact on employment and all aspects of businesses' ability to invest in non-financial wellbeings. It is simply wasteful. We are confident there will be a net-positive return on investment for the Government by supporting the seasonality recommendations in this report.



OTHER GOVERNMENT INTERVENTION

There are some areas of the industry where market failures require government intervention. Because the industry is woven into so many aspects of society, and because it is so fragmented, we lack cohesive direction and leadership across central and local government, as well as, arguably, within the private sector. The industry needs a formal public/private leadership body and an in-depth review of local and district tourism leadership structures.

This level of leadership, combined with a new legislative framework for destination management, will enable more deliberate planning which can underpin the industry’s future success. Destination planning for local areas, districts and across different regions to align with visitor journeys must be a priority. Current approaches and boundaries have, in some instances, resulted in patch protection and inter-regional competition. The status quo needs to be challenged to enable better outcomes for communities and customers. The integration of visitor economy planning in local long-term plans and connecting those to a national planning framework is vital. It is also critical for these destination plans to be co-created with communities and to take a long-term view aligned with regenerative outcomes. To develop these plans properly will require funding support and they will need to be reviewed regularly.

To enable these new ways of operating at the local level, and to improve infrastructure, we need to rethink how we collaborate at scale (public/private and not-for-profit working together) for infrastructure investment, environmental improvement and hero product development. To achieve this, we need to leverage public capital and longer government investment horizons under a new framework that is specifically connected to achieving returns across all four wellbeings.

Good information and data will also be a critical piece of the puzzle. We need to radically improve our approach to capturing, managing and using good data to inform decision-making and investment. Comprehensive and useful data that makes the best use of available technology can help both public and private sectors to work more effectively in addressing challenges and capture opportunities. Congested locations, dispersal and freedom camping issues can all be addressed simply with data and technology. We see this sort of open data and information management system squarely as a matter of public benefit, so it is appropriate for it to be funded centrally. However, we also believe there is a clear return on investment for the Government that will enable social, cultural, environmental and economic wellbeing benefits.

A SYSTEMIC APPROACH TO FUNDING

How we fund future development is one of the most important discussions. For the medium term, we have proposed a set of core principles* that should apply to any new funding mechanism; however, to start with, we need to have a clear understanding of the current situation. We have an infrastructure gap in Aotearoa New Zealand which needs to be addressed.

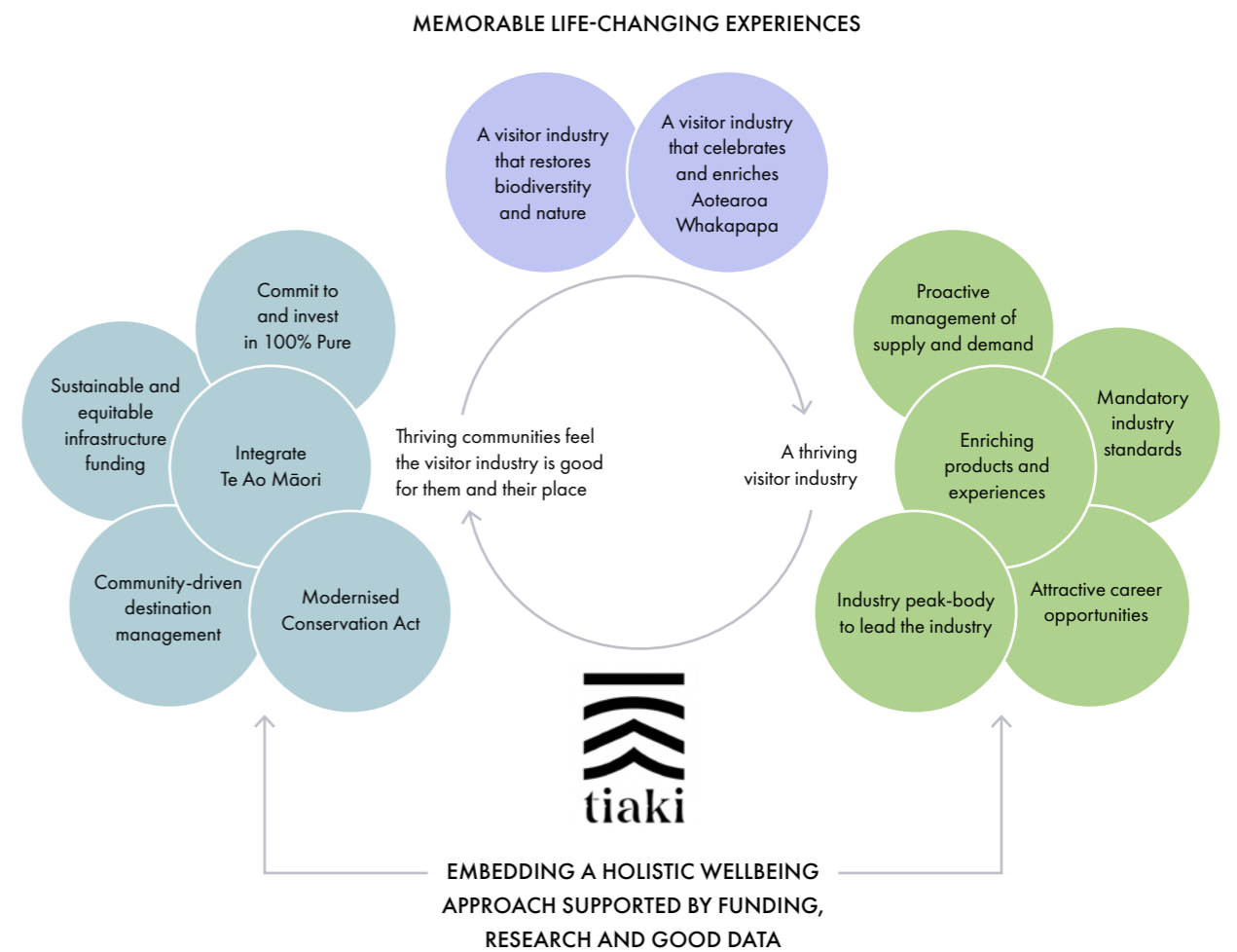
The reality is that the Government cannot support all aspects of improvement without receiving more revenue in return – the books need to be balanced. Visitors do need to pay more, at various points in the customer journey. While there is more work to be done in assessing estimated levels of investment and returns, we believe our recommended approach will more than pay for itself over time – and not just financially. By taking a systemic lens, the visitor economy will deliver benefits across all four wellbeings while addressing issues of productivity and efficient use of capital. At the heart of this solution is removing waste and inefficient pricing, seeding long-term profitable projects and managing the system levers more effectively.

*See Section 5, Our Future States.

VISITORS AND NEW ZEALAND'S BRAND

When we enable this collective system approach for our visitor industry, we will attract the kind of visitors and interactions that match our own values and the aspirations for Aotearoa New Zealand. The infrastructure we enable, the products we offer, the brand we promote and – most importantly – the way we interact with each other will drive the type of non-local visitors we attract, and how we interact with them. At the heart of every visitor experience is an interaction with people: local, national, short haul or long haul. This evolution is what we have called Aotearoa Whakapapa.

The Future States and recommendations which follow deliver to this narrative and are summarised in the graphic below.



5 — OUR FUTURE STATES

TASKFORCE
RECOMMENDATIONS
IN FULL



INDUSTRY THRIVING

THE CONDITIONS FOR BUSINESSES & PEOPLE
TO THRIVE & PROSPER ARE IN PLACE

Fundamental to the future of the visitor economy is the system's capacity to contribute to a positive and sustainable economy, at an individual, local or national level. There are two important areas that need to be addressed to achieve this: industry economics and system leadership.





FUTURE STATE 1 — INDUSTRY ECONOMICS

The visitor industry has a number of structural impediments that create a challenging commercial environment to enable businesses to thrive. The profile of visitors is highly seasonal, skewed to the summer season; however, input costs – both assets and people – are often difficult to scale. There are relatively low barriers to entry and competition too often creates artificial downward pressure on prices despite reasonable levels of demand.

We need to recognise that when a system as large and complex as the visitor economy shifts its direction towards a more balanced approach to achieving the four wellbeings, there will be implications for governance structures, roles and responsibilities, decision-making rights, and protocols. These changes are reflected in our recommendations.

FUTURE STATE 1 — RECOMMENDATIONS

To achieve the desired Future State, we recommend:

1.1

Industry standards — Legislate a tourism business standards framework

We need common industry standards that align industry performance with an integrated approach for delivering the four wellbeings. The standards should be supported by incentives and sanctions; and all other tourism standards should be subordinate to this framework.

We recommend that the Government funds the development of the framework and administers it. Further details will be provided in our final report.

1.2

Supply management — Create a government-led supply management system

The supply of visitor economy services needs to be managed in a coordinated way by a single public body. This approach must incorporate a set of rules that are universally applicable to all public assets and access rights, and aligned with an intention to achieve the four wellbeings. This approach should apply to the allocation and management of concessions, licences, leases and other similar access rights. Legislation will be required to implement these changes at a systemic level and technology solutions can support its implementation. There will be strong engagement with local and district authorities, as well with several government departments to implement this approach.

1.3

Efficient competition — Government endorsement of Commerce Commission authorisations for supplier collaboration

We need to prevent competition that results in wasted surplus capacity and triggers downward competitive pricing. Authorising businesses to coordinate more sustainable pricing and supply through use of Commerce Commission authorisations will enable supplier-led capacity and price management, or government intervention. We recommend that the Government provides a policy direction to the Commission supporting such authorisations with a mechanism to value the public benefits in a consistent manner. The result of authorised collaboration will enable better economic returns on capital assets, more coordinated management of destinations and further investment by businesses in other wellbeings (which would be a clear requirement of the authorisations — for example: better wages, biodiversity, and climate and community outcomes).

1.4

Employment — Raise employment standards and improve career pathways

A government supported industry agreement, with seed funding, needs to be created, together with the development of a credential pathway to support an attractive career structure.

1.5

Seasonality — Target an even spread of visitors throughout the year

The extremes of low to peak seasons severely impact permanent employment opportunities and productivity. The Government needs to create policy positions which support ways of developing a more even spread of visitors. This could include supporting carefully chosen events, targeting specialist non-seasonal markets (domestic and international), and increasing off-season airline capacity to and within Aotearoa New Zealand.

FUTURE STATE 1 — SYSTEM LEADERSHIP

The visitor industry is a complex network made up of tens of thousands of small and large businesses which directly or indirectly serve domestic and international customers. They also interact with numerous government departments and a wide range of government portfolios including: Customs, Foreign Affairs, Immigration, Climate Change, local government, Aviation and Conservation (as identified in the Taskforce Terms of Reference). When this visitor industry enterprise system thrives, it can drive economic prosperity and positive impact across all four wellbeings.



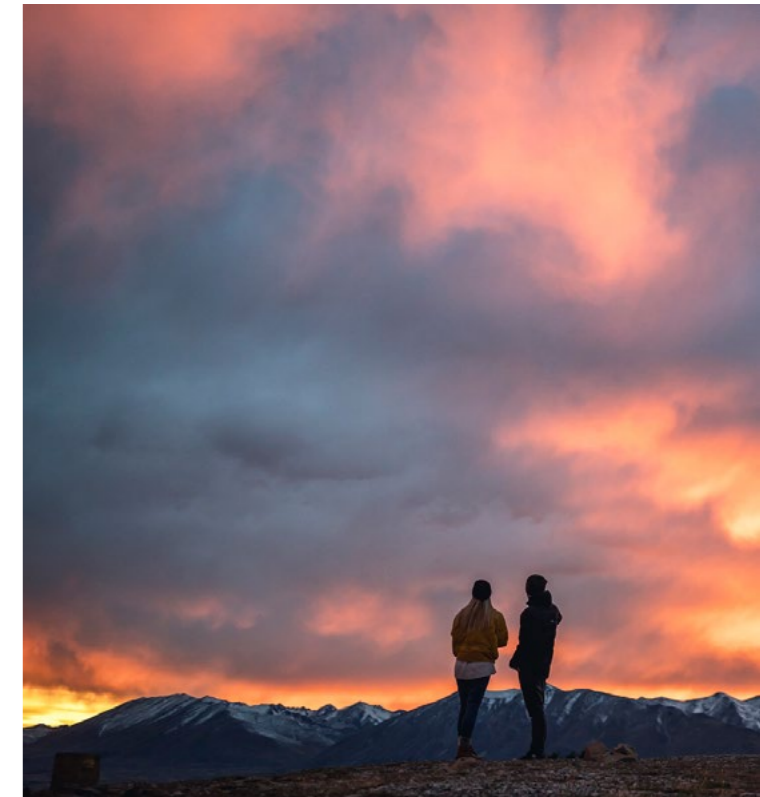
FUTURE STATE 1 — RECOMMENDATIONS

To achieve the desired Future State, we recommend:

1.6

Governance – Create a formally recognised public/ private industry leadership body

An industry leadership body needs to be established with a clear mandate to lead the industry forward. This leadership body would oversee implementation of the Taskforce's recommendations while also working with government and industry to establish the appropriate local and regional industry structure. The principles, structure, responsibilities and accountabilities of the industry leadership body will be expanded on in our final Taskforce report.



TE TAIAO REGENERATING

RECONNECTING WITH, CARING FOR & PROTECTING OUR ENVIRONMENT

There is resounding agreement that the existential global threat to the planet's life-supporting ecosystems must be addressed. The climate crisis is an immediately pressing issue as acknowledged by the Government's declaration of a climate emergency; but other issues such as soil erosion, marine protection, freshwater quality, landfill waste and biodiversity also need to be grappled with.

Te Taiao regenerated itself naturally during COVID-19 lockdown periods when human impacts either reduced or stopped completely. The immediate challenge is to drastically reduce the biophysical footprint of the visitor economy by decarbonising: sequestering, enhancing biodiversity, restoring the quality of rivers, lakes and oceans, and eliminating waste that accumulates as pollution.

People look after what is precious to them – we need the land to be healthy for us to be healthy. By enjoying their connection with nature, people will value and want to protect it. The visitor economy can play an active role in both regenerating and reconnecting more New Zealanders with their natural world to enjoy the physical, psychological, emotional and spiritual benefits that will come from that. These experiences can be enriched further by linking nature with culture and instilling the Māori and Polynesian values of connection to Te Taiao.

This Future State sits at the core of the four wellbeings. It is an essential element of delivering on 100% Pure New Zealand and nurturing the life-supporting capacity of Te Taiao.



FUTURE STATE 2 — RECOMMENDATIONS

To achieve the desired Future State, we recommend:

2.1

Enriching nature – Commit to and invest in the visitor industry being authentically 100% Pure

To achieve this, we need to set ambitious strategic goals to establish Aotearoa New Zealand as having the world's most environmentally sustainable visitor industry.

The visitor industry has the opportunity to lead the world by demonstrating its care for the natural world. In part, this will be achieved by establishing high standards for sustainable practice and incorporating them into any new industry standards (Recommendation 1.1), as well as all funding, accountability and incentive structures. This must include:

- A pathway to address carbon emissions through local offsetting (ideally through planting permanent native forests),

investing in development/provision of new aviation fuels and rapidly accelerating the development of electric vehicles and other sustainable transport infrastructure.

- Advancing projects that restore damaged landscapes, rivers and seas, predator damage, or biodiversity loss.
- Achieving zero-waste and incentivising Aotearoa New Zealand's visitor economy to become known as having the lowest footprint in the world.

More defined recommendations will be provided in our final report as we explore the issues of decarbonisation, biodiversity and regenerative tourism.

2.2

Protection and accessibility – Modernise the Conservation Act

The Conservation Act needs to be amended to embed an approach that integrates the four wellbeings and an enhanced Treaty Partnership as the core guiding principles. The amendments should give DoC the necessary powers to implement changes effectively, and specifically provide for:

- New pricing and supply management tools.
- Enabling investment by the private sector that supports visitor and conservation goals.
- Greater involvement of iwi and co-governance approaches for managing parts of the DoC lands and waters, and delivering visitor experiences there.



EMPOWERING COMMUNITIES

DESTINATION MANAGEMENT IS OWNED
LOCALLY & SUPPORTED NATIONALLY

Long-term plans to manage visitor destinations must be developed locally, supported nationally and managed collaboratively. Communities must have the ability to cope with visitor demand, develop the infrastructure needed, and feel connected with their local culture and place.



FUTURE STATE 3 — RECOMMENDATIONS

To achieve the desired Future State, we recommend:

3.1

Integrated destination management planning – Require destination management plans to be integrated into local planning processes and aligned with a national visitor planning framework

To be developed and implemented effectively, destination management plans need to be co-created by communities and iwi in an integrated manner. This must happen alongside other relevant planning processes and be aligned with a national visitor planning framework. Integrating destination management planning into local, regional and iwi long-term plans is essential because it will enable more efficient use of resources and provide appropriate access to local government funding mechanisms. Aligning destination management with other planning processes – such as DoC’s – is also necessary, and beneficial to ensure coherent and efficient development that aligns with community aspirations. These plans must be well funded and under a constant review cycle to ensure they are delivered and remain relevant.

Mechanisms and incentives for collaboration at scale (for example, public/private and not-for-profit partnerships) should also be developed to encourage investment in

co-design and co-governance arrangements that set, manage and respond to destination management priorities. The possible range of public/private partnership initiatives will be broad but should include public infrastructure development and the creation of new visitor industry experiences designed to deliver positive benefits across all four wellbeings.

There are many locations of particularly special interest in our visitor economy. Milford Sound (Pipiotahi) is a good example. We need a specific approach to manage the unique situations of places like Milford Sound. To achieve this, we must think and plan at a national level to reorganise how we manage these special places to achieve benefits across all four wellbeings. Given the systemic approach, many of the recommendations in this report could be trialled in these kinds of remote locations.

More defined recommendations will be provided in our final report.

3.2

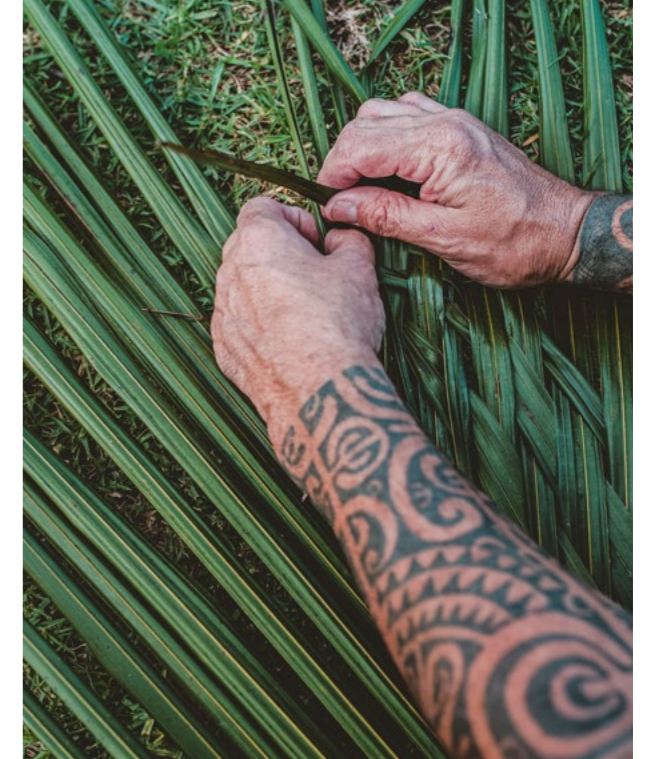
Appropriate destination management structures – Review the organisational structure of local destination management

An independent review is needed to fully understand how best to organise the local and central government structures that currently provide tourism support, economic development and destination management/marketing services.

The scope and principles of this review should include:

- Reviewing how the industry bodies currently perform and, in particular, how they can interact with and guide government most effectively.
- Reviewing all local and regional council tourism entities. This review should determine the best ways for these entities to:

- *Align activities with the visitor industry vision.*
- *Enhance Māori within and beyond their own territorial boundaries.*
- *Create scale efficiencies and leverage assets beyond their own boundaries.*
- *Drive decision-making from a local community level.*
- *Align with destination management plans.*
- *Monitor and understand the journeys that customers take across the country, rather than just within their district.*
- *Monitor and understand the different interest segments that travel to and through their district.*



FUTURE STATE 3 — RECOMMENDATIONS

3.3

Enriching Aotearoa New Zealand – Establish a contestable fund dedicated to achieving the four wellbeings

Incentives will encourage the industry to develop new products and experiences that leverage existing assets, such as Marae, Christchurch red-zone areas or community gardens (illustrative examples only); build new national visitor assets, like the Great Walks or cycleways; or connect with other sectors like regenerative agriculture, food production, healthcare, wellness, education and conservation. These new products can be leveraged from the destination management planning framework. This initiative could include using a matched funding approach, and criteria should specifically ensure that the new visitor products and experiences are:

- Accessible and affordable to New Zealanders.
- Attractive to international visitors as a way to enjoy nature, participate in Aotearoa New Zealand’s culture, and experience wellness.
- Making appropriate use of new technologies.
- Aligned with local destination management strategies and plans (for example, by reducing peak-season concentration or increasing low-season demand).
- Consistent with an intention to deliver net benefits across all four wellbeings.

FUTURE STATE 3 — SYSTEM FUNDING

The visitor economy raises complex questions about who pays for what and when. Visitors interact with most aspects of Aotearoa New Zealand’s society, infrastructure and economy in one way or another. While this means that visitors contribute financially in some shape or form, there is a shortage of agreed data points and philosophies. This needs to be addressed.

What we do know is that, within the visitor economy system, there is a lack of connectivity between the costs of visitors using infrastructure and local services, on the one hand; and the tax revenues received from the visitor economy, on the other. In the absence of any good data, this absence of connection leads to a point of conflict about whether visitors are paying their way or not. This issue needs to be properly understood and clarified to ensure costs are not disproportionately allocated.

Despite this, there is a universally accepted view that there is an infrastructure shortfall in Aotearoa New Zealand. There are areas across the country where the intensity of tourism is absolutely disproportional to the rating base of local councils.

FUTURE STATE 3 — RECOMMENDATIONS

3.4

Funding –
Undertake an independent study about how to develop a sustainable and equitable funding mechanism based on a robust understanding of the costs and benefits of visitors

We need to properly understand the baseline position for how the costs and benefits of visitor activities are derived. We recommend undertaking an independent study to establish this baseline as the foundation for developing a sustainable and equitable funding mechanism.

We also recommend that there should be a mandated hypothecation back to the visitor industry of any new sources of revenue and/or taxes that are derived directly from visitors. The investment of those funds should be based on the following principles:

- Mechanisms are adaptable to adjust revenue to demand, both seasonally and cyclically over time.
- Differential rates for domestic and international visitors are appropriate.
- Revenue is generated as close as possible to the point of use.

- Local government funding is linked to tourism flows and use.
- Implementation follows the transition principles described within this report.
- Technology is funded and used to create effective and efficient collection methods; for example, digital payment capability at the point of use.
- Existing effective technology should be leveraged over creation of new technology.
- Funding should be used to directly incentivise the development of the Mauri of an area.
- Funding should align with destination management plans that take into account the four wellbeing approach.

The Taskforce intends to address this issue further in the period between the release of our interim and final reports.

3.5

Funding –
Continue allocating funding to the visitor industry from the existing Consolidated Fund (the Government's central funding pool)

Funding should be allocated to the visitor industry from the Consolidated Fund in accordance with the following principles:

- Tourism New Zealand should be funded to generate domestic and international demand development in line with the competitive global landscape and in line with Aotearoa New Zealand's visitor industry vision.
- Where market failure occurs, the Government should fund (or seed fund) projects as well as hard and soft infrastructure, but only if an appropriate capital return from that funding is demonstrated.

This dedicated funding should be formally committed to and set within the proposed new Ngā Manuhiri o Aotearoa (New Zealand Visitors) legislation. This will ensure a systemic long-term approach in a similar manner to the way the Brand USA/ESTA legislation works.



AOTEAROA WHAKAPAPA

COMMUNITY, CONNECTION & CULTURE AT THE HEART OF TOURISM

Our future visitor economy must play a key role in binding the tapestry of our diverse cultures together in an authentic way. It must be a platform to showcase and tell all the stories of Aotearoa New Zealand that express our unique identity and values. This is central to community vitality and prosperity – driving social inclusion, social mobility, trust and a sense of belonging

as well as developing the capability of New Zealanders to realise their full potential individually and as communities. This Future State is the step change in our approach to inclusiveness that welcomes everyone in and builds experiences out of the diverse communities that make up Aotearoa New Zealand.



FUTURE STATE 4 — RECOMMENDATIONS

To achieve the desired Future State, we recommend:

4.1

**Connection –
Integrate the history and principles of Te Ao Māori into all visitor economy-related government departments**

The history and principles of Te Ao Māori need to align with government departments such as the Ministry of Education, Ministry of Culture and Heritage, and Sport and Recreation, as well as with the creative arts sector, Māori communities, and media and communications sectors to develop exciting new ways of digitising and sharing Aotearoa New Zealand's wealth of stories and world view that strengthen its unique cultural fusion. By instilling the traditional values of Te Ao Māori and becoming a country of over six million informed and motivated storytellers, Aotearoa New Zealand can better share its unique geographic and genealogic evolution (including Mauri, Manaakitanga, Whanaungatanga Kaitiakitanga) with the world.

4.2

**Shifting mindsets –
Expand the Tiaki Promise to cover expected behaviours and standards of everyone in Aotearoa New Zealand**

A universal approach to the Tiaki Promise should be integrated into all industry connection points to guide and direct all actors and stakeholders. Over time, this may develop into a universal standard, perhaps enabled by appropriate technology solutions.

4.3

**Social Tourism –
Make tourism more accessible and inclusive to all New Zealanders**

The Government and visitor industry should assess and implement mechanisms for developing commercially viable ways of making tourism more accessible and affordable for disadvantaged people within New Zealand to explore their own backyard. The positive social and economic benefits of increasing inclusivity of travel and tourism have been proven in other countries with specific examples of using government incentives, off-season capacity and reduced rates to low socio-economic groups. This will lead to significant increases in employment and improve low season revenues.



NAVIGATING OUR FUTURE

**THE VISITOR ECONOMY IS UNDERPINNED
BY THE DATA, TECHNOLOGY & SCIENCE
NEEDED TO ENABLE TRANSFORMATION**

Research, data and technology are critical enablers of an optimised networked system. Data allows us to identify and respond to issues quickly; monitor and maximise performance outcomes within the framework of the four wellbeings, and enhance the visitor experience. It is critical both locally for destination management and planning; and centrally for decisions relating to funding, marketing, policy development and planning.

Data must be a public good asset as well as being useful for commercial enterprise, which

generates a private benefit. Taking a research-based and science-led approach improves engagement and efficiency, and adds credibility to decision-making and investment.

We must collaborate with other related sectors to leverage their knowledge and investments. Innovation must not only support new product development in the sector; it must also support all aspects of the four wellbeings and help find solutions to achieve zero emissions, address negative environmental impacts, and improve the efficiency and productivity of the system.



FUTURE STATE 5 — RECOMMENDATIONS

As well as the Government implementing the recommendations that were established through The Tourism Information and Data Hui (2019), to enable this desired Future State, we recommend:

5.1

Information –
Ensure the Government invests in data collection to properly understand the use of public infrastructure and assets

There is a compelling public interest in having accurate information and understanding about visitor behaviours, and their use of public infrastructure and assets. This information should be shared in an open and collaborative manner so that it can be used for the betterment of the visitor economy; for example, by addressing issues of congestion, driver behaviour, and climate change impacts. Ways of gathering this data should include using new technologies, a national app and/or nodal monitoring.

5.2

Data framework –
Develop a system-wide shared data framework led by government

The creation of an interoperable open-access framework is needed to enable broad use of data within and across the visitor industry system. This could include a centralised data warehouse which can be accessed and used by all actors in the visitor economy system. This type of open-access data framework might, for example, be used to develop an understanding of the full value of visitor activities. This data framework should be co-governed by government and industry and be accessible to all, and because of its public-good nature, should be funded by government.

5.3

Innovation –
Create an investment fund to drive science-based innovation

The development of a framework and investment fund is needed to drive innovation that supports efficiency and science-driven decision-making. This framework and fund could work in a similar way to Callaghan Innovation and enable access to research grants; research and development tax credits; and innovation funding to address issues such as emissions reduction and research including sustainable aviation fuels, local Aotearoa New Zealand carbon offset schemes, and new visitor industry product development.

5.4

Research –
Include tourism within the Government's national statement of science investment

The right conditions and environment need to be provided to ensure Aotearoa New Zealand's academic talent can deliver science and research services to the local visitor industry. This would enable better decision-making and allow tourism research to be integrated with scientific work to develop other local industry sectors. As a first step, a tourism research road map should be created to identify a set of clear research priorities and opportunities.



6 —

MANAGING THE TRANSITION

SECTION 6 — MANAGING THE TRANSITION



The following principles are put forward to guide the visitor economy's transition towards the desired Future State. Embracing these principles will ensure greater acceptance of the change process, while also supporting momentum and maintaining a realistic pace of change. Balancing urgency with inclusion may be a challenge and having clear guiding principles can make an equitable approach is followed.

GUIDING THE TRANSITION PROCESS

- *Te Tiriti o Waitangi*/Treaty of Waitangi should become a guiding document for us. Recognising Māori values and principles and how they relate to both *Te Tiriti* and our Future States is important. Previous economic transformations have not been holistic, and have disproportionately affected different groups, especially Māori.
- Neither government nor industry can do this alone. We are reminded of the African proverb: "If you want to go fast, go alone. If you want to go far, go together." To successfully navigate the changes we are recommending, it is important that we take an inclusive and collaborative approach.
- Institutions and regulatory settings need to support transformational change. In a complex system, such as the visitor economy, this will require constant monitoring across a wide proportion of the economy and society.
- We need to focus on the people and businesses of tomorrow, as well as on those in existence today.
- We must consider how the transition can deliver long-term benefits to address immediate challenges, such as the climate crisis.

To realise the full potential of the transformation that the Taskforce is advocating for, it is essential that the following principles are embedded into the design and implementation of the future structure and modus operandi of the industry.

TRANSITION PROCESS PRINCIPLES

- Clear communication under a unified government/industry brand will be important to support the mindset change required to support the transformation.
- Community, culture and Te Taiao are taonga that underpin our way of life. These must be supported throughout the transition to help them to adapt and regenerate.
- Te Ao Māori values of guardianship and being caretakers of people and place are ideals that need to be embraced by all to effect wholesale change in the ways we think and act.
- Private investment underpins large parts of the industry system which distributes benefits throughout Aotearoa New Zealand. Government must think broadly about facilitating change through regulatory practices and investment by:
 - *Giving early signals about change. For pricing impacts this means giving a minimum of 20 months' notice of any proposed changes which affect advertised prices.*
 - *Considering the quantum of capital deployed by any industry segment that may be adversely affected by change.*
- Continuing investment in technology, infrastructure and systems that will not serve us in the future must be confronted and addressed early on.
- Spending decisions should be made sooner rather than later regarding those investments that we know will be needed for the future.
- Technology solutions present exciting possibilities as well as the potential to accelerate change. Industry support needs to be organised to stimulate investment and adoption of these technologies.
- Future infrastructure must be sustainable, adaptable and resilient.
- Because tourism is connected with all aspects of society, the industry will need to present a unified and coherent voice for change that takes account of other government decisions which will influence the transition pathway.

7 — TASKFORCE BACKGROUND & APPROACH



NEXT STEPS

Following delivery of our interim report to the Minister of Tourism, and as directed by him, the Taskforce will review our approach for the next phase of work in order to flesh out further details of our recommendations. These will be reflected in our final report, expected to be distributed within four months of receiving the Minister's feedback.



OUR MANDATE

The outbreak of COVID-19 in early 2020 and the resulting restrictions on people movement completely changed the landscape of tourism and the visitor economy. It is still uncertain when international travel will recover, or if in fact it will ever return to its pre-COVID-19 levels.

Against this backdrop, discussions with various industry stakeholders confirmed that the 2019 New Zealand Aotearoa Government Tourism Strategy remains relevant, including the Strategy's goals of:

- Targeting tourism sector productivity improvement.
- Aotearoa New Zealand needing to deliver exceptional visitor experiences.
- Tourism protecting, restoring and championing Aotearoa New Zealand's natural environment, culture and historic heritage.
- New Zealanders' lives improving through tourism.
- Tourism supporting thriving and sustainable districts – ensuring regional dispersal of visitors and enabling visitor flows.

The 2019 Strategy identified that tourism has costs and benefits across all four capitals and that it can enrich New Zealand. It envisaged this would be a tourism system that must deliver more than financial benefits and that it must deliver for all New Zealanders.

While these discussions reconfirmed the validity of the Strategy, many within the government, industry and the public sector voiced concerns that unless a deliberate approach were taken to implementing the changes needed to support the Strategy, the sector would revert to its pre-COVID-19 practices and models when international travel does reopen. This was considered a lost opportunity for using the pause to redesign the visitor economy in a way that would better serve Aotearoa New Zealand into the future.

In July 2020, the Government established a public-private Taskforce to identify the changes needed to create a more sustainable, productive and inclusive tourism sector.

The primary purpose of this Taskforce was to:

- Advise on the broad options that will enable the sector “to contribute more than it consumes” against the four capitals: society, culture, environment and economy
- Make recommendations to address the long-standing productivity, inclusivity and sustainability (social, environmental and economic) issues present in some parts of the sector.

The Ministerially-appointed Taskforce was supplemented by a 38-member Advisory Group. Members of this Group were appointed by the Taskforce co-Chairs to represent a full cross-section of the tourism and visitor industry (see Appendix C for a list of the Advisory Group members).

The Taskforce agreed to provide an interim report to Ministers in December 2020. The report is not a strategic plan for the industry, but details the changes needed to support the existing New Zealand Aotearoa Government Tourism Strategy and to deliver a different future for Aotearoa New Zealand's visitor economy.

In the first half of 2021 the Taskforce is expecting to publish its final report which will provide more detail on the recommended implementation plan, including how to transition from the current arrangements to the desired Future State. The timing for the final report will depend on when the Taskforce receives feedback from Ministers, as well as others that it needs to engage with.

OUR APPROACH

The tourism industry is a complex, broad and multidimensional network that is deeply connected to and integrated with all aspects of Aotearoa New Zealand society. To really understand how the system works, we have cast the net wide in terms of the materials we have reviewed and the people we have engaged with.

We have worked closely with the Advisory Group members to learn from their perspectives and gather their input; and we have usefully drawn upon them to test our thinking.

Our approach has been based on systems thinking and the four wellbeings: social, cultural, environmental and economic.

Taking a systems approach has enabled us to stand back and understand the dynamic connections of cause and effect between the many and varied actors in the visitor economy. As a result, our recommendations do not seek to address adverse symptoms of previous practices, but instead to address the causes of those symptoms and, in effect, reprogramme the system to produce desired outcomes.

The four wellbeings have provided us with a clear anchor for envisioning a future, one where the visitor economy delivers net benefits across all four wellbeings.

We have followed a coherent process to understand the issues, gather our thinking and form recommendations by:

- Confirming the current state, issues and successes.
- Defining the core problems to be solved.
- Understanding New Zealanders' desired Future State for Aotearoa New Zealand.
- Identifying a vision for the future.
- Defining the Future States.
- Defining the four wellbeings within these states.
- Backcasting from the Future States to identify the system changes required to enable the new future.

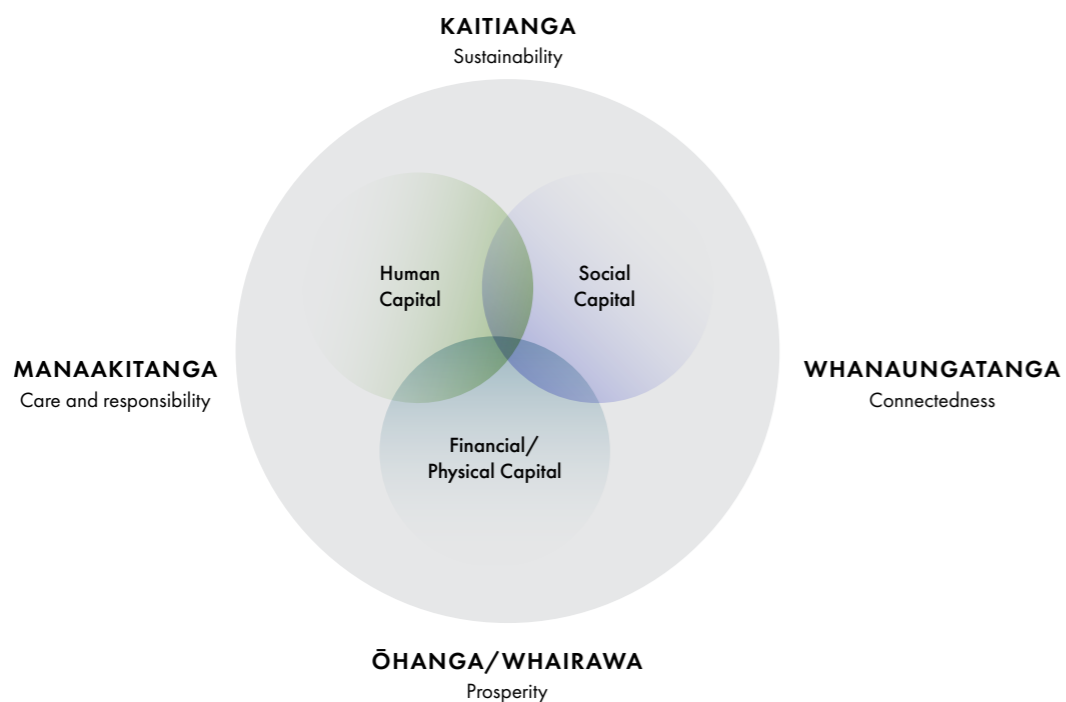
Initially, the Taskforce began by working with the four capitals in Treasury's Living Standards Framework (as stipulated in the Terms of Reference) and mapped them across to the Māori values of Kaitiakitanga (sustainability), Manaakitanga (care and responsibility); Ōhanga/Whairawa (prosperity) and Whanaungatanga (kinship and connectedness).

However, the notion of capitals did not resonate well with many of those we were engaging with, but the concept of the areas of wellbeings did. While understanding the idea of capitals in the Living Standards Framework as stocks of value, the Taskforce decided to use the language of wellbeings, which is the same language used by local government and, therefore, communities. The four wellbeings also explicitly recognise

a cultural wellbeing, which the Taskforce feels is a critical element of a thriving visitor economy.

The Terms of Reference (see [Appendix D](#)) ask the Taskforce to advise on options that will enable the sector "to contribute more than it consumes" against the four capitals/wellbeings. We have interpreted that to mean the same as the emerging term 'regenerative tourism'. This means that in the desired future, the visitor economy will deliver net benefits and positive impacts for our people, our communities, our culture, our environment and our economy.

We've set out briefly below how the capitals from the Living Standards Framework align with the four wellbeings, and how this connects with the visitor economy.



NATURAL CAPITAL – Environmental Wellbeing

Tourism depends on a healthy, flourishing natural environment as its primary appeal is Aotearoa New Zealand's unique and diverse landscape and ecology. But tourism activities can, without careful management and in some cases restraint, also harm those ecosystems and subject them to overuse and degradation. Regenerative tourism, however, requires stakeholders in the system to repair damage, and work with nature to enhance its capability to thrive and evolve naturally.

HUMAN CAPITAL – Social Wellbeing

The success of tourism businesses depends on their access to a sufficient supply of well-developed human capital (a workforce possessing the right knowledge, skills and attitude to welcome and serve visitors). While tourism has sometimes relied on temporary and low-paid labour, it has the potential (by applying different operating models, investing in education and training, greater internal collaboration and the judicious use of technology) to create sustainable livelihoods and offer a diversity of longer-term career choices. The visitor economy can expand the opportunities for New Zealanders to also improve their physical and mental health and fitness via diverse ways of accessing and enjoying Aotearoa New Zealand's nature and diverse culture.

SOCIAL CAPITAL – Social and Cultural Wellbeing

Social cohesion is based on three pillars: social inclusion – the extent to which people can participate on an equal footing in all aspects of living in Aotearoa New Zealand; social capital – the trust that exists between people and their sense of belonging and engagement; and social mobility – equality of opportunity and the capacity to thrive and realise their full potential.

The success of a visitor economy clearly depends on all three aspects of social cohesion within Aotearoa New Zealand, especially now that the domestic market has become, for the near to mid-term, the primary source of visitors. As the value generated by tourism stems from positive encounters between guests and hosts, that value can be greatly enhanced if Aotearoa New Zealand's cultural capital can be enriched and celebrated.

The uniqueness of Aotearoa New Zealand comes from our people and their identity. The New Zealand culture and the essence of Te Ao Māori are taonga which should be celebrated so that those experiencing the Aotearoa New Zealand way of life can enjoy our warmth and genuine nature. In tandem with celebration, there is a need for protectionism to ensure the authenticity of

who we are and to continue to enrich society with our ideals and guiding principles.

The kind of visitor economy envisioned by the Taskforce is one that embraces traditional Māori values by embedding them throughout the system and makes significant contributions to social cohesion by making sure that all New Zealanders (regardless of income, physical ability, age or gender) can access a wide range of leisure-recreational opportunities, contribute to shaping the way they wish to welcome visitors into their communities, and develop a stronger sense of belonging and identity by so doing. We can build a more cohesive society by having a visitor economy where sharing our stories and heritage is embodied in all aspects of the industry and society in general.

FINANCIAL-PHYSICAL CAPITAL – Economic Wellbeing

The visitor economy is dependent on the diverse supply of a well-maintained physical infrastructure (including airports, roads, accommodation, parks and trails); access to investment and working capital; and collective agreement on appropriate levels of taxation and regulation. Tourism is also a major provider of income to businesses; tax revenue to various levels of government; and jobs for Aotearoa New Zealand's citizens.

STAKEHOLDER LENS – Taking a Stakeholder Perspective

A more humanised, and sometimes easier, approach to understand the capitals and wellbeings is to match them with the real people and stakeholders who stand to lose or gain depending on how the visitor economy performs. The Taskforce was grateful to draw on the insightful work of Carol Sanford*. Carol's work describes a reciprocal and symbiotic approach to regenerative commerce based on relationships which are adding value for, and in partnership with, each of five stakeholders through good and mindful design.

Co-creators are all the diverse hosts, employees, suppliers and facilitators of the tourism system who bring their own unique contribution to attracting and welcoming guests. Their purpose is to enrich the lives of their customers and they thrive by working with other co-creators who share the same purpose.

Customers are all the visitors to Aotearoa New Zealand's varied communities,

regardless of their origin or purpose of visit. What matters is that their experience rejuvenates and fills them with vitality. By experiencing how they and the places they visit in Aotearoa New Zealand are cared for, they return with an intent to care for their own places.

Earth provides the Mauri – life force – that makes human activity possible. It is part of the co-creators' role to protect, nourish and steward it, because their capability to thrive depends on it.

Communities are the places and people who live there. Story of place informs their culture and gives them a strong collective ownership of where they live. Communities are where people come together to discover their unique identity and culture, so that they can express and extend hospitality in their own distinct way.

Investors provide the financial energy and guidance that ensures business and commerce are vital and healthy, which sustains the tourism system through the provision of capital and financial accountability.



*Adapted from Carol Sanford's stakeholder pentad model introduced in her book, *The Responsible Business: Reimagining Sustainability and Success* (2011).

CONTEXT & CHALLENGE

Like all other industries, tourism needs to evolve so that short-term financial benefits do not come at the expense of the planet or the cultural or community well-being over the longer term.

As a global society, we stand at a crossroads. Regardless of the interruption from COVID-19, a new pathway is needed. Economic growth has lifted standards of living for many; but the environmental and social trade-offs of short-termism are reaching crisis point on many fronts. Recent research shows that we are not on track to achieve the United Nations Sustainable Development Goals without a significant shift of mindset, behaviour and economic transformation.

In Aotearoa New Zealand and around the world, ecological life-supporting systems are in decline, while levels of social inequality and poverty are rising. The climate crisis is the most immediate and pressing symptom of these externalised economic costs, but there are others on the horizon which are being accelerated and aggravated by climate change; namely, biodiversity loss and species extinction, water scarcity and quality, degradation of coastal ecosystems and oceans, soil erosion, poverty, obesity and deteriorating levels of mental health. These are among a litany of systemic problems that we are leaving to our children as a legacy of short-sighted success.

THE LOCAL CONTEXT

The Taskforce, along with the Advisory Group, spent time exploring past and current challenges associated with the tourism and visitor industry. There is little doubt that in some areas of Aotearoa New Zealand, the growth and intensity of tourism activities was undermining community goodwill for the industry with an increasing proportion of New Zealanders feeling that the increase in the number of international visitors was too high. In hindsight, the rapid growth of tourism has exposed a range of challenges which can be grouped under the following themes:

- Mismatch and inadequacy of funding and investment mechanisms for infrastructure at local and national level.
- Negative impacts on the environment and the health of Aotearoa New Zealand's natural assets.
- Ineffective, fragmented and siloed industry structure, governance and management arrangements.
- Limited career opportunities and the wellbeing of those working within the industry.
- Haphazard relationship with local communities and community engagement.
- Limited product development, innovation and uptake of technology.

HOW WE RESPOND

Increasingly, society expects businesses to show corporate responsibility and play their part in creating a thriving future for tomorrow's children. Sustainability is no longer seen by many as radical, but as a necessary evolution for which the business case is already well established*.

For Aotearoa New Zealand to reach its full potential as a nation, our natural environment and ecological systems must thrive, our people and communities must thrive, and our economy must thrive. The tourism and visitor industry (along with other industries) has a very important role to play and can be an effective means of achieving these goals.

The tourism industry is perfectly poised to seize this opportunity for Aotearoa New Zealand. Tourism is the business of welcoming, healing and sharing. The very nature of the visitor-host relationship provides connection, learning and wellbeing that have a profound impact on people's lives.

The potential for Aotearoa New Zealand's tourism industry to enrich the lives of visitors, while simultaneously enriching the lives of New Zealanders and Te Taiao, is a logical, possible and necessary evolution.

*Friede et al (2015), Esg And Financial Performance: Aggregated Evidence From More Than 2000 Empirical Studies www.tandfonline.com/doi/full/10.1080/20430795.2015.1118917?mod=article_inline&

Both domestic and international visitors travelling within Aotearoa New Zealand come to experience and be inspired by our spectacular biodiversity, amazing ecology and unique cultural heritage. By protecting and enhancing those treasures through the way the industry operates, we will realise the potential for an industry that creates more value and thrives over the long term.

What is regenerative tourism?

A regenerative tourism sector is one that enhances the capability of all stakeholders to thrive and evolve by creating net benefits across social, cultural, environmental and economic wellbeings; that is, tangible material and non-material benefits after all costs have been taken into account. In real terms, this means that tourism experiences will:

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

APPENDICES & BIBLIOGRAPHY



APPENDICES

The following appendices are available online;
please click on the underlined link below.

Appendix A	<u>Invitation to Contribute – Summary of Submissions Report</u>
Appendix B.1	<u>Unlocking Future Tourism – OnePicture and TNZ Research, October 2020</u>
Appendix B.2	<u>New Zealand National Values Assessment – Barrett Values Centre, October 2020</u>
Appendix C	<u>Advisory Group Members</u>
Appendix D	<u>Taskforce Terms of Reference</u>

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ACKNOWLEDGEMENTS

WE WOULD LIKE TO FORMALLY ACKNOWLEDGE AND SINCERELY THANK ALL THOSE WHO HAVE CONTRIBUTED SO MUCH TIME AND WISDOM TOWARDS THIS INTERIM REPORT. THIS INCLUDES THE MEMBERS OF THE NEW ZEALAND TOURISM FUTURES TASKFORCE (TASKFORCE), THE MEMBERS OF THE NEW ZEALAND TOURISM FUTURES ADVISORY GROUP (ADVISORY GROUP), THE MINISTRY OF BUSINESS, INNOVATION AND EMPLOYMENT (MBIE), TOURISM NEW ZEALAND (TNZ), THE DEPARTMENT OF CONSERVATION (DOC), NEW ZEALAND MĀORI TOURISM, TOURISM INDUSTRY AOTEAROA (TIA), THE COUNCIL OF TRADE UNIONS (CTU), THE 150 PEOPLE [SEE APPENDIX A] WHO TOOK THE TIME TO PROVIDE WRITTEN CONTRIBUTIONS, AND ALL THOSE WHO HAVE ASSISTED AND SUPPORTED ALONG THE WAY. WE THANK YOU FOR YOUR COMMITMENT, ENERGY AND PARTICIPATION IN HELPING TO DEVELOP OUR FUTURE TOURISM PATHWAY.

NGĀ MIHI NUI KI A KOUTOU KATOA.

