HE PAE TUKUTUKU

TOURISM 2050

A BLUEPRINT FOR IMPACT

NOVEMBER 2023

TIA

**TOURISM
INDUSTRY
AOTEAROA**

He mihi

Haere mai rā

E ngā iwi katoa

Ki te karanga a Pae Tukutuku e.

Ka huri aku mihi ki a tātau katoa.

Ki ō tātau mate huhua, tangihia, poroporoakitia.

Hoatu koutou ki te aio o te rangi.

Ahakoa kua ngaro i te tirohanga kanohi

Ka mau tonu i ngā whakaaro.

He aha te mea nui o te ao, ko te whakautu, he tangata, he whenua.
Koia ko te pukahu o ngā kaupapa i ahuru ai te tangata, i tiaki hoki te whenua.

Koia nei te reo mihi ki runga i a tātau,

me te kaupapa e kawe nei tātau.

Kāti, tēnā koutou e hika mā.

Contents | Rārangi Take

Foreword | Pou mua

Tourism 2050 – a Blueprint for Impact has been created by the Aotearoa New Zealand tourism industry to clearly convey our ambitions for the future of tourism and our plan for getting there.

From now until 2050, New Zealand will be cementing it's position as one of the premier visitor destinations globally, and we will operate this industry so it delivers deeply for our environment, our economy and the people of New Zealand.

Having an industry strategy is critical. It allows the industry to coalesce around a shared mission and vision and enables our efforts to be directed to those key actions that will shape the industry that we want and choose.

To assist Tourism Industry Aotearoa with this project to reset industry strategy, the Industry Development Group (IDG) was established and PwC was engaged to provide specialised strategy development expertise.

As we continue to recover from the COVID-19 period, the future of tourism will be different, and we are calling this balanced growth.

This is a key shift that will ensure we can grow as an industry while instilling a regenerative future where people and nature thrive. This is looking beyond economics and includes cultural, social and environmental outcomes – always with emphasis on enriching the experience for our visitors.

At the same time, we want the industry to be healthy and prosperous, and we do not see any contradiction between this and those more holistic objectives. The future of tourism fundamentally lies in being successful across this wide set of objectives.

In the face of strong global growth trends and the various challenges that we face, how we manage the tourism system is critical. This is the essential proposition at the heart of this Blueprint: to grow and flourish in the long term, we must be effective at managing and operating tourism in a proactive, balanced and informed basis.

In order to take these important steps, we have identified a small number of critical areas that need to be actioned. Some of these are about the settings for tourism and how it is organised and funded, and some are actions that all operators in the tourism industry will contribute to.

We have consulted widely with the industry in preparing this Blueprint which has added to the input from both the IDG and the TIA Board. The feedback has been very supportive of the Vision and the Actions established, and the clear ambition and direction that is being set.

Feedback has allowed us to strengthen the vision and sharpen the strategic responses set out in the Blueprint to ensure that they cover the wider perspectives that exist within the tourism industry.

We are very proud of the contribution tourism makes to our economy and society and we are excited by the future of tourism and the growing contribution it will make.

We also look forward to working with all our partners and collaborators in advancing this Blueprint for the future we see for tourism in Aotearoa New Zealand.

The Industry Development Group:

Rebecca Ingram | CEO, Tourism Industry Aotearoa

Scott Tasker | Auckland International Airport Limited

Justin Watson | Christchurch International Airport Limited

Jolanda Cave | Ngāi Tahu Tourism

Leanne Geraghty | Air New Zealand

Grant Webster | Tourism Holdings Limited

Callum Mallett | SkyCity Entertainment Group

John Thorburn | Entrada Travel Group

Kristin Dunne | Miles Partnership

Richard Pollock | New Zealand Māori Tourism

Matt Ammunson-Fyall | New Zealand Māori Tourism

Scott McNab | RealNZ

Bruce Bassett | Tourism Industry Aotearoa

Dame Kerry Prendergast

TIA Chair

"We have the privileged opportunity to ensure that tourism works for us all. Tourism is a star performer in Aotearoa New Zealand and has so much more potential. This Blueprint sets out our ambitious future — that is, to achieve 'balanced growth' where we equally advance economic, community, visitor and environmental objectives. And then the Blueprint sets out our Plan for getting there. There are some things to change, but there's nothing we can't solve. Let's work together on this, and let's really make tourism fly."

Executive summary | Te tara whāiti

Tourism makes a vital contribution to our economy, encourages social connectivity internationally and domestically, and showcases our whenua, our cultural diversity and timeless experiences. Tourism fosters pride and is a catalyst for regional prosperity.

Our vision is for a tourism industry that delivers strongly and positively for Aotearoa New Zealand, our people, our economy, and our environment. This is an exciting future where tourism takes on the challenges ahead while always providing world class visitor experiences and wide benefits for New Zealanders,

The central premise of this Tourism 2050 Blueprint is balanced growth where tourism is a flourishing and growing industry that contributes to people, place and culture.

Getting there will require deliberate action.

In examining the strategic pathway to 2050, it is clear that to navigate the opportunities and challenges we face (including aviation growth, climate change, carbon emissions, destination development, ensuring community support, market competition, and others), we must be better equipped for managing and operating the tourism system and for dealing with issues as they arise.

This will involve having the levers, funding and evidence to enable effective policy making, resource allocation, infrastructure investment, planning, product development, capability-building, destination management, and so on. Getting these fundamentals in place is key for ensuring a prosperous and vibrant future for the industry, and for better enabling us to shape our future.

In developing this Blueprint, it has become increasingly apparent that the current settings for tourism in Aotearoa New Zealand are not adequate for ensuring the type of stewardship that we need, and it identified some key areas where important change is needed.

This Blueprint sets out the tourism industry's plan for driving its future and sets the Vision of the tourism industry to 2050 to: Enrich Aotearoa New Zealand through a flourishing tourism ecosystem.

The Strategic Response to enable the attainment of this Vision is:

1. **Reset System Design and Management.** Actions about the design of the tourism system, how tourism is funded, the insights needed for decision-making and embracing Te Whakarae Maori.

2. **Action on Carbon Emissions and Biodiversity.** Actions about addressing carbon, lifting tourism contributions to predator free and biodiversity restoration, and how tourism works with our conservation lands and waters.

3. **Equip Tourism Businesses.** Actions about increasing the capability of tourism businesses to be prosperous and operate sustainably, growing a sustainable tourism workforce and embedding Tiaki throughout the tourism industry.

These Actions are designed to be a mix of the system-level change and grass-roots actions that everyone in the industry can contribute to. Cumulatively, these Actions will allow us to achieve the desired Outcomes, and the Targets will keep us accountable.

Most of these Actions work interchangeably with the others, meaning that multiple gains will be achieved through their advancement. For instance, Te Whakarae Māori is an all-embracing Action that has linkages across all areas and will shape engagement between the industry and iwi, hapū and whānau as we apply the stewardship that the Blueprint is seeking.

To advance the Actions, support from industry, government and individual businesses is needed. The Government's role will be particularly important in working with industry to enable the necessary system-level changes.

And, a feature of the Actions is that some of them can only be activated by individual businesses themselves, big or small. There is something in the Blueprint for everyone. We are in this together, and we all have a role to play.

Let's boldly take these transformative steps.

Tourism 2050 – a Blueprint for Impact

Outcome 1: Hapori (Community)

Enhance the vibrancy, culture, health and quality of life of local communities.

Outcome 2: Manuhiri (Visitor)

Provide timeless experiences that differentiate Aotearoa New Zealand in the minds of manuhiri (local and international).

HE PAE TUKUTUKU – OUR 2050 VISION

RESET SYSTEM DESIGN AND MANAGEMENT

ACTION ON CARBON AND BIODIVERSITY

ENRICHING AOTEAROA NEW ZEALAND THROUGH A FLOURISHING TOURISM ECOSYSTEM

EQUIP TOURISM BUSINESSES

ACTIONS FOR IMPACT

Hapori (Community)

Manuhiri (Visitor)

Ōhanga (Economic)

Te Taiao (Environment)

Address Industry Funding

Design Tourism Industry Settings for 2050

Power-up Data and Research

Embrace Te Whakarae Māori

Achieve Net Zero Carbon

Champion Predator Free and Biodiversity

Transform Tourism and Conservation

Build Sustainability Capability

Grow the Tourism Workforce

Embed Tiaki

Outcome 3: Ōhanga (Economic)

Support productive and prosperous tourism businesses and the Aotearoa New Zealand economy.

Outcome 4: Te Taiao (Environment)

Invest in the protection, restoration and enhancement of Te Taiao (our natural world).

# Tourism in Aotearoa New Zealand
Tāpoi ki Aotearoa

Tourism plays a vital role in driving a productive, prosperous and flourishing Aotearoa New Zealand. It promotes vibrancy in our communities, encourages social connectivity both internationally and domestically, and creates a sense of pride in the things that make Aotearoa New Zealand unique.

The following analysis sets out indicators for how the tourism industry is doing as a positive contributor against the economic, community, visitor and environment framework, as best we can with the data we currently have.

Economic: Tourism contribution.[1]

Tourism is a major driver of New Zealand's economy and visitor demand supports a multitude of business opportunities and jobs right across regional New Zealand. Tourism has a significant impact on other sectors by creating demand for local products and services, and for creating markets for these goods and services when visitors return home.

Tourism expenditure (YE March 2020)

$41.4b	
INTL	$17.7b
DOM	$23.7b
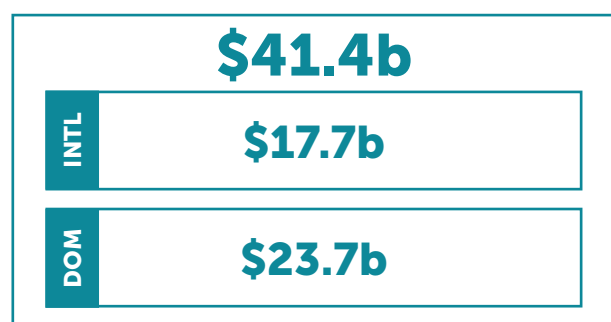
Tourism direct and indirect contribution to GDP (YE March 2020)

9.1%	$27.0b

Tourism contribution to NZ's export earnings (YE March 2020)

19.9%	$17.7b

Note: Complete data for the post-COVID period was not available at the time of publication.

Environment: Carbon emissions attributable to Tourism[2]

Tourism industry carbon emissions are showing tentative signs of reducing, having peaked in 2017 at 6,082 kilotonnes of CO_2 equivalents and fallen back slightly in 2018 and 2019. The COVID-19 pandemic has had a significant, but temporary, impact on tourism emissions.
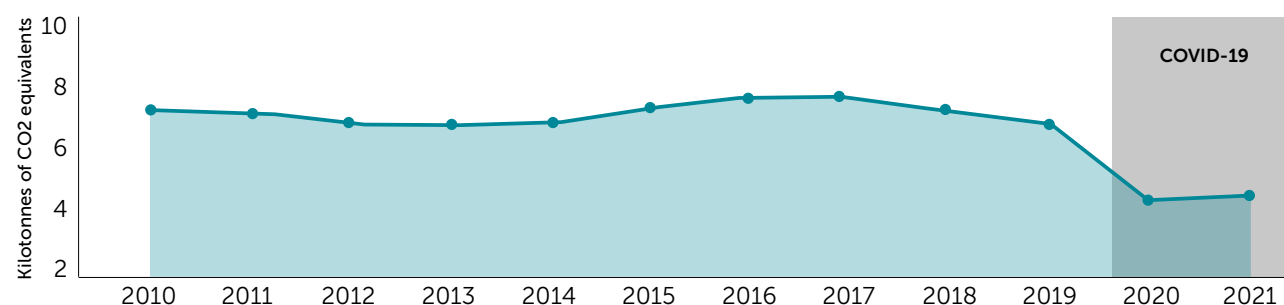
Visitor: Satisfaction

International and domestic visitors travel around Aotearoa New Zealand for enriching experiences. How well we meet these expectations is a powerful indicator of how well we are doing in this key area.

Domestic visitor satisfaction[3]

86%

International visitor satisfaction[4]

90.9%

International visitor who enjoyed their experience of Māori culture[4]

92.2%

Community: New Zealanders' sentiment of tourism[5]

Tourism in Aotearoa New Zealand provides opportunities for social connectivity with people from both within the country and around the world. How New Zealanders feel about this activity is an important indicator.

| 86% | New Zealanders who think international tourism is good for New Zealand |
| 90% | New Zealanders who think domestic tourism is good for New Zealand |

New Zealanders who think overall tourism is good for New Zealand

89%

Community: Employment[6]

Tourism is one of Aotearoa New Zealand's largest employers with many rewarding opportunities for working in the industry. From main cities to out of the way places, the tourism industry, and the jobs it supports, are an important part of the communities in which it operates.

Total direct and indirect employment in tourism (YE March 2020)

366,282 people

13.2% of total New Zealand employment.

[1] Stats NZ, Tourism Satellite Account, 2022

[2] Stats NZ, Tourism Greenhouse Gas Emissions 2007–2021, May 2023

[3] Angus and Associates, Domestic Visitor Satisfaction, Year Ending March 2023

[4] MBIE, International Visitor Survey, Quarter 2, September 2023

[5] Kantar, New Zealanders' Views of Tourism, May 2023

[6] Stats NZ, Tourism Satellite Account, 2022

Trends and factors influencing tourism
| Whakaaweawe te ao tāpoi

Key global influences

The long-term historic growth trajectory of international tourism has been consistently strong since the advent of modern jet aircraft.

Global international arrivals grew from 166 million in 1970 to 1.46 billion in 2019, a 4.5% compound annual growth rate. New Zealand experienced even stronger growth, with international arrivals growing from 177,580 in 1970 to 3,888,473 in 2019, a 6.5% compound annual growth rate.[7]

This pattern will likely persist over the 2050 horizon set out in this blueprint.

Tourism industry growth is driven by important underlying factors, including global economic growth, a growing middle class in developing nations, the continuing development of the aviation sector (that has increased capacity and lowered the real cost of travel), and the normalisation of travel as a lifestyle.

As a key leading indicator, the aviation industry is pointing to continued expansion of global travel, doubling over the next two decades. International air capacity is expected to grow at a rapid rate, with the International Air Transport Association forecasting that air travel demand will double by 2040.[8] Airbus forecasts the global aircraft fleet will more than double to 46,560 aircraft in 2042,[9] with Boeing forecasting 48,600 aircraft.[10]

While these projections point to an outlook with strong underlying growth, there are counterpoints to consider.

Over the near horizon, the world is experiencing a period of both economic and geopolitical uncertainty in a way that has not been seen for many decades.

The response to carbon emissions and climate change is impacting tourism and this is expected to increase over the 2050 horizon, with evidence that consumer behaviour is changing.

In some markets and jurisdictions, regulations and taxes are being used to disincentivise flying as a means of travel. These policies are particularly evident in Europe. How other countries will adopt such policies is not clear, but a shift towards greater regulation will inevitably occur. in the period to 2050.

Other trends are expected to shape the future of tourism. These include the move to sustainable tourism, digitisation of the industry, shift to experience-based tourism, personalisation of travel, a greater demand for more authentic experiences, social and environmental responsibility, a move to slow travel, and others.

For example, the digitisation of the visitor economy will very likely radically change the industry in many ways, including the nature of work. Many roles will be automated and there will be all sorts of experience-assisting technologies, and yet the people-to-people nature of tourism will remain and likely become a bigger part of the overall experience. This will change tourism jobs, change how we do things, and change all the things that visitors see, do and experience.

---

[7] Statistica, Number of International Tourism Arrivals 1950 to 2022, 2023
[8] IATA, Global Outlook for Air Transport, June 2023
[9] Airbus, Global Market Forecast 2023, June 2023
[10] Boeing, Commercial Market Outlook, June 2023

Implications for Aotearoa New Zealand's tourism industry

How these macro trends play out for tourism in Aotearoa New Zealand is not clear. There are both upsides and downsides. As a long-haul destination, New Zealand is vulnerable to the high carbon emissions of international aviation. This will become an increasing issue until affordable technology solutions are available (which will likely be many years or decades away).

On the other hand, there are macro trends that are positive for Aotearoa New Zealand. We are an experience-based destination, we are striving to lead the world in sustainable tourism, and we have a great track record of innovating within the tourism industry.

As a niche destination in the global context, we have a degree of influence over who our customers are and what they do. There is a wide global visitor market which requires targeting those who can contribute towards achieving our wider objectives.

Aotearoa New Zealand must be deliberate in its response to these macro-forces. We will be subject to forces we cannot control, making it more important that we focus on those things we can control. For instance, with marketing being such an important tool to ensure the match between what we offer and the visitors that arrive here, we must ensure our marketing targets the quality visitors we want. We must manage our destination to a high standard so New Zealand meets and exceeds the expectations of those quality visitors, and we must invest in the industry so we can both address issues and develop the industry for the long term.

Current state of New Zealand tourism

The tourism industry is a national success story that we can all be proud of.

New Zealand is a geographically remote country that has historically faced the 'tyranny of distance'. The time and cost of travel made trade and people movements difficult and expensive which limited our connectivity to the world.

Tourism has been a major agent of change in reducing this isolation to the point where our distance to markets can be seen as an advantage, allowing us to target quality visitors that contribute well and have a low footprint, and build our brand as a destination of choice. Overwhelming mass tourism is something we can avoid.

As we stand in 2023, the tourism industry is poised for the next phase of its evolution. It is important that we understand the various forces or influences within the industry, so we can identify what needs to change.

A feature of the New Zealand tourism system is its informality – there is very little in the way of legislation or regulations to guide its governance or operations. Instead, the industry operates based on a set of conventions that can mean different things to different people.

Furthermore, there is no structured long-term leadership function to assist in dealing with issues and embed long term perspectives in the industry and shape how it develops.

The implication of these informal arrangements is that issues are difficult to fix which inhibits the ability of the industry to grasp opportunities and to resolve issues to a high standard.

Scott Tasker
Auckland International Airport Limited

Airline connectivity allows people from around the world to experience everything Aotearoa New Zealand has to offer. As we look to the future, sustainability will be at the forefront of our thinking and we must operate with a deep sense of responsibility, acting as custodians of our place for generations to come. The ongoing success of tourism requires forward thinking, planning and purposeful investment by industry participants to create a strong and resilient industry for the decades ahead.

Key systemic issues we have identified are:

- **Structural arrangements.** A key driver behind many issues in the tourism industry is an informality and fragmentation of structures, roles and functions across the tourism system, and no clear mandate for parties within the system, other than for Tourism New Zealand. This hampers the industry's ability to make enduring progress on important issues and challenges, and is why many issues recur but don't get resolved. There is a lack of system leadership across the industry, and in a complex interconnected system like tourism, this is a serious deficiency.

- **Funding.** There is a lack of well-founded funding streams within the industry for industry-good and local government activities which impedes the ability to deal with issues and to develop destinations to the scale and depth needed. Currently, the industry is reliant on ad-hoc and time limited external funding sources which do not provide the certainty required for long-term planning and for operating the functions that are needed for a well-functioning tourism system. This means that the tourism industry itself cannot operate on an independent and self-reliant basis which is inadequate for the country's large and mature tourism industry.

- **Data and research.** Tourism is poorly served by the data and research available to inform its development which has been a persistent situation. The research support for the tourism industry is in a worse position, with tourism largely absent from the Government's $1.5b research and science programme. The industry does not have a base research capability from which it can build research programmes and bid for research grants and other funding.

- **Innovation and technology.** The ability of the industry to innovate and adopt new technologies will increasingly play a critical role in ensuring tourism is applying new and better ways of doing things. Currently, the innovation and technology uptake aspects of the industry are not well supported by either programmes or appropriate funding.

- **Destination management.** Over recent years, a major milestone has been achieved with the establishment of Destination Management Plans by all regions across the country. However, there is a big gap between the aspirations of the plans and the allocation of funding to implement these plans. Destinations face many of the costs of ensuring quality visitor and resident experiences, including amenities, attractions, infrastructure, attractions, and such services as recycling and waste management. And yet, councils typically are poorly funded to deliver these mandated functions and activities.

- **Sustainability capability.** In implementing the Tourism Sustainability Commitment since 2017, TIA has found that for tourism businesses, becoming sustainable requires a concerted effort and support. People often do not know where to start or what are the best tools or approaches to use. TIA has established that better outcomes are achieved if businesses are supported by someone who understands their business and can get them going. TIA's programme that takes cohorts of operators through a three-month sustainability programme has demonstrated the effectiveness of this capability-building approach.

- **Tourism and conservation.** The environment is a strong part of the attraction of destination New Zealand, which makes it important that this interface is working well, for both visitors and our natural environment. The Department of Conservation (DOC) has an important role to play as custodian of many of these special places and tourism concessionaires contribute by facilitating safe and high-quality access to these places. The current arrangements are not working well, with difficulties stemming from DOC's complex legislative framework and some of its management, planning and regulatory processes. These arrangements must be configured to increase the ability of tourism to contribute positively to conservation efforts.

- **Workforce.** There are several challenges in ensuring that the industry can attract the people it needs to operate as a high quality and competitive industry. Gains have been achieved with tourism set to become an NCEA Achievement Standard and in ensuring an appropriate flow of overseas workers. Long-term solutions are needed to ensure quality roles for New Zealanders, to allow overseas workers to top up the people needed, especially at places and times of the year where Kiwis are not available, and to ensure that education and training are aligned to the workforce needs of the industry.

- **Small businesses.** The tourism industry is made up of many micro or small businesses that are very diverse across a wide range of sectors and are often geographically spread and need to link with other businesses of all sizes. Yet there are common threads, including that the visitor is common to all, as is the need for them to be offer quality sustainable products and services to their visitors. There is also a need for tourism businesses to be well integrated into their operating channels and through the supply chains that they use. Small businesses are also key for technology uptake and innovation, and for supporting quality jobs. The sense is that there is a lack of support for all tourism businesses, especially micro or small businesses, to lift their ability to contribute to raising standards across the industry.

- **Relationship to NZ Inc.** Tourism is a vital socio-economic contributor to New Zealand. Tourism provides connectivity to the world for leisure, family connections, business and political connections, trade in high value products and services, and ensuring a supply chain of the vital goods that New Zealanders need and use. Visitors who experience Aotearoa New Zealand can and do become customers for our exports, such as our quality wine, food, fashion and others. This wider contribution and reliance on tourism must be factored into how we function as an island nation a great distance from our trade and travel partners.

There are many issues in a complex industry like tourism that need ongoing care and attention, and others will emerge over time. The system itself needs to be set up to enable the right responses to these issues.
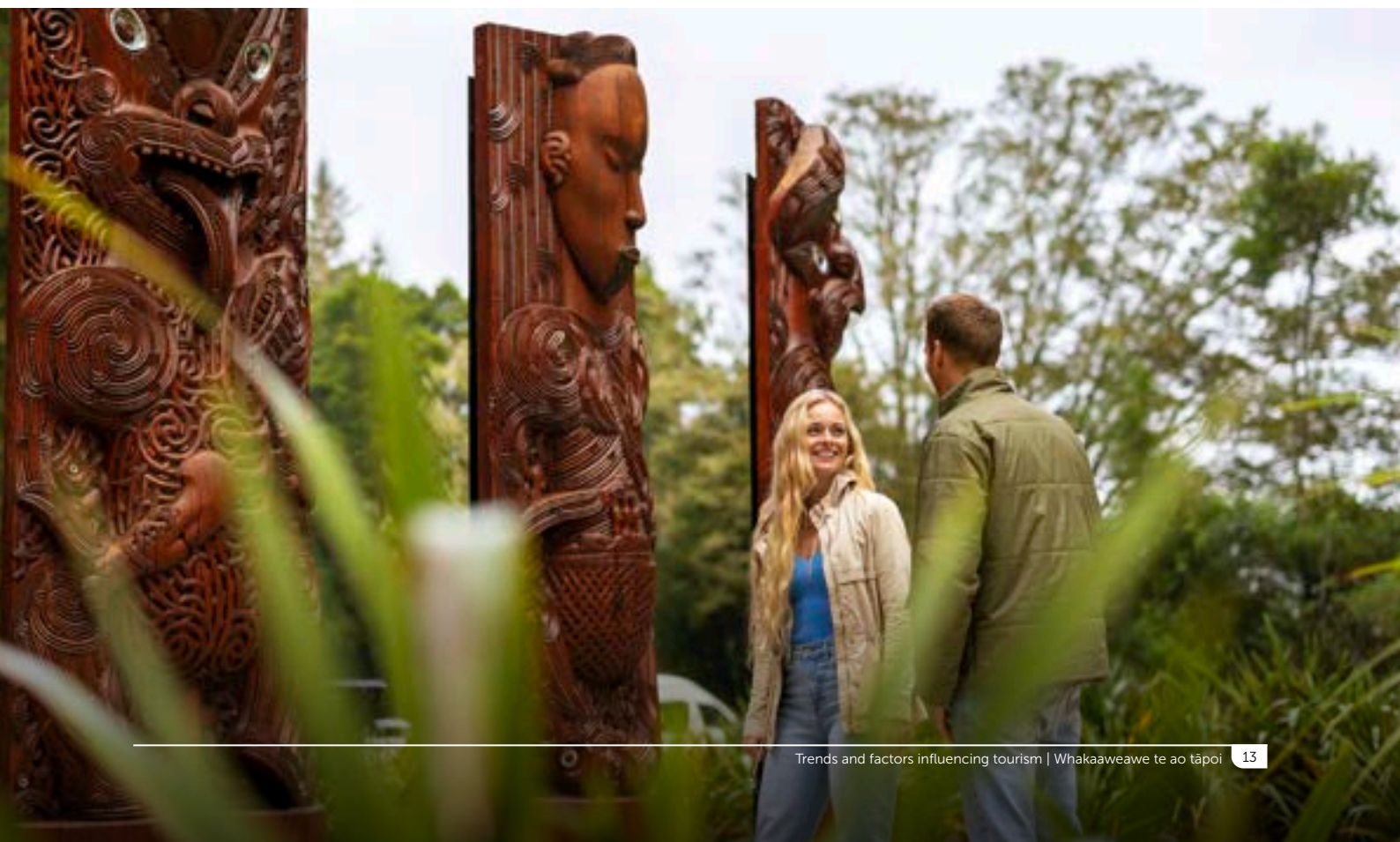
The tourism we want to create in New Zealand | Te waihanga

2050 is a long way off, and yet remarkably close.

If we look back over a similar period, the equivalent is around the year 2000. Since then, much has changed while other aspects have not moved greatly. For instance, while total tourism expenditure more than doubled over the period 2000 to 2020, the contribution to New Zealand export receipts stayed around the same (20.4% in 2000 and 19.9% in 2020), as did the total contribution to GDP (9.8% in 2000 and 9.1% in 2020).[11] Tourism has grown strongly over this period but in proportion to the wider New Zealand economy and society.

So, what will tourism look like in 2050?

The industry has a clear vision of its desired future:

- Tourism businesses will be doing well commercially and returning positively to their shareholders, employees, and the communities in which they operate.

- Nature will be flourishing as the industry seeks to reduce its environmental footprint and implement initiatives to enhance Te Taiao.

- Visitors continue to have world-best experiences with value created from personalised and technology-supported travel options.

- Māori businesses and communities form a broad foundation for the unique Aotearoa New Zealand visitor experience and with Māori culture increasingly recognised as our key point of difference as a visitor destination.

- There will be new ways of travelling with aviation advances which will take carbon out of the travel equation, enabling a net zero carbon tourism industry.

- Domestic travellers will continue to enjoy their own backyard.

- Tourism will be a cohesive industry looking after its own affairs in a constructive partnership with Government.

In short, tourism will be a prosperous and successful industry that is in sync with the people of Aotearoa New Zealand.

We see the following as being key to shaping this future:

1. **Riding the key trends.** We know there are strong growth trends that have been in place for 60 to 70 years and which are likely to continue. We will be dealing with increasing disruption from climate change and our adaptation to it. Accelerating technological change will change parts of the tourism experience. And there are other favourable trends for the niche high quality destination that we are.

2. **Resilience in the face of disruption.** There is always a risk of major events that may shock the future shape of tourism. For instance, major geopolitical shifts, another pandemic, rapid climate change, technological disruptions, earthquakes, volcanos, tsunamis and others that may arise. The key to this is to be aware of such risks and factor them into decision making, even if they may be low likelihood. Following the COVID-19 pandemic, we know that such events can occur at any time.

3. **How we manage tourism.** This is key as it reflects how we look after all parts of the industry (the tourism system) to shape the outcomes we desire. Looking to 2050, there are many unknowns, but at the same time we can work to ensure the fundamentals of the industry are well set. The ability to manage this system effectively is a clear strategic requirement of the industry.

4. **Balanced growth.** The factors above highlight the imperative for the industry to grow in a balanced way. This will include shaping the nature of tourism demand and activity, and the nature and capacity of our country as a destination. Achieving a balance between these two will be key to achieving a sustainable industry for all.

---

[11] Stats NZ, Tourism Satellite Account, 2022

James Dalglish
Go Rentals

"When I look at the tourism industry, it feels like it is a multi-billion dollar industry that cannot reinvest back in itself. Working with government, we must strive to find solutions to how we fund the things we need to do in tourism, and the industry is putting up its hand to be part of the solution. Get this in place, and we'll be better at managing and developing destination Aotearoa New Zealand and this will be hugely beneficial for us all."

Balanced Growth in Tourism

For the tourism industry, balanced growth refers to the even and sustainable development of various tourism-related components within a region or destination. It involves ensuring that different aspects of the tourism industry, including demand characteristics, infrastructure, attractions, accommodation and services, develop in a way that complements each other and benefits the destination as a whole. The goal is to avoid over-reliance on a single aspect of tourism and to create a well-rounded and resilient tourism ecosystem.

To get tourism working well to achieve this balanced growth, there are many parts of the industry that need to be working well, including:

- **System management.** Having the ability to manage the overall tourism system, including having the knowledge and the implementation levers to make changes as and when needed.

- **Leadership.** Having the ability to work cohesively as an industry, with policy and industry functions in place to provide leadership to and for the tourism industry.

- **Long-term perspective.** Having the structures and funding so that long term programmes, strategies and capabilities are in place to address issues as they arise.

- **Structures.** Having clarity around the roles and responsibilities of the many players within the industry, including central and local government, and the industry itself.

- **Industry self-reliance.** Having a tourism industry with the capability to act on an independent and self-reliant basis to address those issues within its influence or control..

- **Destination marketing.** As a niche market a long way from other countries, having the capability to market Aotearoa New Zealand as a high-quality visitor destination is essential for shaping the visitors who travel to New Zealand.

- **Funding.** Having the base of appropriately designed funding sources that are governed, allocated and applied to support this well-managed tourism system.

- **Infrastructure.** Having mechanisms for ensuring tourism has the infrastructure it requires to enable its development in line with the quality growth of the industry. Tourism relies on a wide set of infrastructure, some specific to tourism such as airports and hotels, and much public and mixed-use such as roads and public amenities and facilities..

- **Investment.** Tourism is reliant on an ongoing flow of capital investment to enable capacity growth and to lift quality. A conducive investment environment will ensure the flow of investment that tourism needs over time.

- **Te Tiriti O Waitangi and Te Ao Māori.** Having a tourism industry that understands and supports Te Tiriti o Waitangi and Te Ao Māori and upholds the values of kaitiakitanga (guardianship), manaakitanga (hospitality) and whanaungatanga (a sense of belonging or connection).

- **Māori tourism.** Research indicates an established demand to experience Māori culture and that there is an opportunity to further develop Māori tourism as a key differentiator for the Aotearoa New Zealand visitor experience.

- **Knowledge.** Having the data, research and innovation processes that supports informed management of the industry, measurement of progress and enables investigation of the various risks and opportunities ahead of the industry.

- **Connectivity.** Air routes and capacity are key enablers of the of the tourism, freight and trade industries and these links need to be fostered and retained.

- **National destination management.** With a comprehensive set of regional Destination Management Plans in place, these could be aggregated to build a national plan that guides the national-level stewardship of 'Destination New Zealand.'

- **Community sentiment.** With tourism taking place where New Zealanders live, work and play, it is essential that the industry is in tune with the communities within which it operates and that communities themselves are engaged in processes such as Destination Management Plans that shape the future of tourism in their places.

- **Business and major events.** Delivering events of all types stimulates high value travel to places and at times of the year when demand can be low. This is a lever identified in many Destination Management Plans and New Zealand will soon have three new purpose-built conference facilities (two already open) which will generate considerable tourism activity.

- **Cruise.** Having a cruise industry that delivers to its customers, the wider tourism industry and communities, and which works progressively to advance its sustainability position.

- **Positive contributor.** Having an industry that contributes positively to protecting and restoring nature, reducing its footprint and benefiting communities.

- **Prosperous.** Having a commercially successful, productive, and high-value industry that drives both the visitor economy and its commitments and actions to deploy sustainable practices**.**

- **Destination of choice.** Having an industry that strengthens its standing as a highly desired destination for both international and domestic visitors.

- **Resilient.** As a result of getting these fundamentals right, tourism will be able to withstand shocks and move with market trends. thereby ensuring its success over the long term.

Taken together, the overall requirement is for a well-structured, resourced, and organised industry that can take on the opportunities ahead of us, while actively managing issues that arise in cohesive and systematic ways. In short, this is balanced growth.

This is the key idea that shapes this industry Blueprint: a maturing of the way we do tourism in Aotearoa New Zealand.

About this blueprint
| He Whakamāramatanga

The Blueprint sets the Vision, Strategic Responses, Outcomes and Targets that we are seeking to advance. The following sets out key factors that shaped the approach taken.

Sustainability vs Regenerative

There are several terms for the positive role that tourism can and must deliver, including 'sustainability', 'regenerative', 'positive impact tourism', 'restorative' or 'net positive'. Each has merit.

What is more important is the underlying principle around the sort of industry that we want to be, the essence of which is to be a positive industry, an industry for the good for all those it encounters. Figure 2 sets out the elements of the sustainable/regenerative spectrum.

This spectrum allows us to treat different parts of the industry in line with their level of progress. For instance, in some areas we may be regenerative, or close to it, whereas in other areas we have a way to go.

It is important to recognise these differences and the reasons for them, so we can broadly advance the industry as quickly as possible towards that regenerative position, even if the pace of change will be uneven across the industry.

That said, the Industry Development Group was clear on its long-term aspirations for tourism and as such this Blueprint is designed to drive positive change and to set the bar high, without making disingenuous claims. Integrity in how we take this forward is of utmost importance.

Figure 1. The spectrum from conventional to regenerative[12]

---
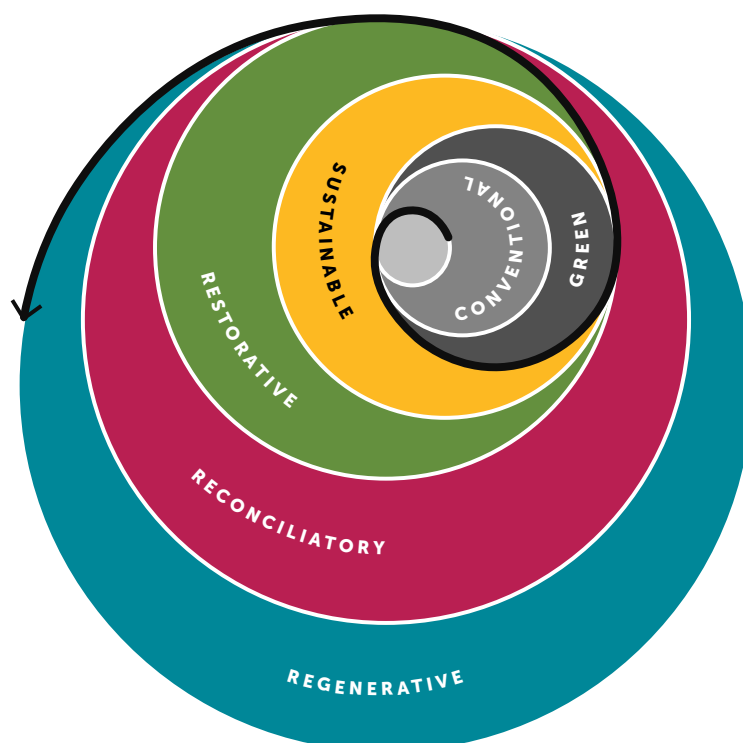
[12] Leah V Gibbons, et al, Regenerative Development as an Integrative Paradigm and Methodology for Landscape Sustainability, Sustainability, 2018, 10(6)

Horizons

This Blueprint has two horizons to characterise the programme out to 2050:

- **Horizon 1: Now to 2030.** This is the period that the actions are focused on. This is about putting the fundamentals in place over the next few years that will drive progress through to 2050.

- **Horizon 2: 2030 to 2050.** This is a more aspirational period with a commercially successful, net zero-carbon industry in a country with vastly improved biodiversity and strong social and cultural connections between visitors and communities.

We must get started on the actions quickly. Setting a strong pace from the start is key to making big progress in the long term.

Alignment

This Blueprint is strongly correlated with other key strategic examinations and an unprecedented level of in-depth explorations of the tourism industry over recent years. These have consistently identified the need to review and change the structures, the mandate and governance of the industry, and the need for sustainable funding arrangements to enable a wide range of actions to be delivered.

Having many voices drawing the same conclusions speaks to both the common themes and action requirements, and to the shared commitment to make things happen. These include:

- We are Aotearoa, Interim Report of the Tourism Futures Taskforce, 2020

- Better Work Action Plan, Industry Transformation Plan, New Zealand Government, 2023

- TŌNUI, A White Paper Examining the Past, Present and Future of Regional Tourism in Aotearoa | New Zealand, Regional Tourism New Zealand, and Miles Partnership, 2023

- Tourism Sector Climate Change Scenarios and Adaptation, The Aotearoa Circle, 2023

- Draft Tourism Environment Action Plan, Industry Transformation Plan, New Zealand Government, 2023

Other relevant documents include the Review into the Future of Local Government (2023), Independent Review of the Conservation Management Planning System, Environmental Defence Society (2023), the two reports of the Parliamentary Commissioner for the Environment, the Air Navigation System Review (2023), a National Tourism Infrastructure Assessment by TIA and Deloitte, and a report by McKinsey on addressing local tourism infrastructure needs. Also important are the Destination Management Plans that set out the community aspirations for tourism across the country.

This Blueprint continues the evolution of the tourism industry's strategic framework that was established by TIA with the original **Tourism 2025 – Growing Value Together in 2014**, and then updated by **Tourism 2025 – Two Years On in 2016** and **Tourism 2025 & Beyond in 2019.**[13]

Values

The Blueprint continues to support the following values that so crisply reflect the ethos of the tourism industry:

Kaitiakitanga
Guardianship and protection of our natural, built and cultural resources for the benefit of current and future generations.

Whanaungatanga
A relationship through shared experiences and working together provides people with a sense of family and belonging.

Manaakitanga
Showing respect, hospitality, generosity, and care for others.

---

[13] Stats NZ, Tourism Satellite Account, 2022

OUR 2050 VISION HE PAE TUKUTUKU:

ENRICHING AOTEAROA NEW ZEALAND THROUGH A FLOURISHING TOURISM ECOSYSTEM

This vision sets the aspiration for the tourism industry to be a prosperous and successful industry over the long term that contributes broadly to the betterment of Aotearoa New Zealand and its people.

It is in step with the Government aspiration for tourism as expressed in the New Zealand Aotearoa Government Tourism Strategy.[14]

He Pae Tukutuku symbolises the evolving relationship between tourism, visitors (manuhiri), and the people and whenua of Aotearoa New Zealand. It embodies the essence of a positive and reciprocal future where tourism seeks to honour and enhance the intricately woven elements that make Aotearoa New Zealand unique.

---

[14] New Zealand-Aotearoa Government Tourism Strategy, MBIE and DOC, May 2019

Strategy | Rautaki

Given the macro factors facing the New Zealand tourism industry (growth, carbon, climate change, market shifts, etc) the opportunity is to purposely create a resilient and sustainable tourism industry that delivers for New Zealand, our people and for the industry itself. To achieve this, we have identified ten key actions across three domains.

Reset System Design and Management

1. **Design Tourism Industry Settings for 2050.** To clearly define and articulate the structures, roles and responsibilities within the tourism industry to specify what all parts of the tourism system need to be doing in a well-functioning future tourism industry.

2. **Address Industry Funding.** To ensure the industry can invest in the infrastructure, capability building, destination management, knowledge, climate change adaptation that the tourism industry needs to secure its future. The mechanisms for providing and allocating the needed funds are the initial focus.

3. **Power-up Data and Research.** To ensure that the tourism industry is equipped with the data, research, analysis and innovation processes that the industry needs so that it can develop on an informed basis across all areas in which it operates.

4. **Embrace Te Whakarae Maori.** To raise the prominence of Te Whakarae Māori that aims to integrate kaupapa Māori (Māori approach) and Mātauranga Māori (Māori knowledge) into the tourism industry, with the challenge to operators to learn about and embrace Māori culture, including te reo and tikanga to elevate the role of Māori voices within the tourism industry.

Action on Carbon Emissions and Biodiversity

5. **Achieve Net Zero Carbon.** To accelerate the rate of decarbonisation of the tourism industry, recognising the practical constraints that do exist, but moving faster where we can as an industry. The parallel piece to eliminating carbon is climate change mitigation and adaptation, and this will have an increasing focus over time.

6. **Champion Predator Free and Biodiversity.** To strengthen the commitment of all tourism operators to protecting and restoring New Zealand's natural environment and biodiversity. There are many ways to do this, with New Zealand's Predator Free 2050 goal providing a focus, alongside other initiative and pathways.

7. **Transform Tourism and Conservation.** To ensure that the interface between the tourism industry and the Department of Conservation is working well for mutual benefit. This is about making the best of the current settings while looking toward the improvements that can be made over the longer term.

Equip Tourism Businesses

8. **Build Sustainability Capability.** To increase the support available for lifting the capacity of tourism businesses to be prosperous and contributing to a sustainable tourism industry. Initially, with a sustainability focus, this capability-building function can evolve to other capability-building activities over time.

9. **Grow the Tourism Workforce.** To establish a concerted focus on ensuring the tourism industry has the people it needs to operate effectively in providing quality experiences to our visitors. Areas of focus include training, education, pipelines into the industry, seasonality, population distribution, and being great employers.

10. **Embed Tiaki.** To deepen the use of Tiaki – Care for New Zealand across the tourism industry. The principle of Kaitiaki (Guardianship) is central to how to look after our place and people. While Tiaki was designed to let visitors know how they can be great visitors, the principle applies equally well for all aspects of tourism businesses.

Outcomes and targets
| Whakataunga

Outcome 1: Hapori (Community)
Enhance the vibrancy, culture, health, and quality of life of local communities.

New Zealanders' perception of tourism	**90%** of New Zealanders think tourism is good for New Zealand over period to 2030.
Seasonality	Proportion of off-peak arrivals to peak season arrivals is **1 to 1.6** or less by 2030.

Outcome 2: Manuhiri (Visitor)
Provide timeless experiences that differentiate Aotearoa New Zealand in the minds of manuhiri (local and international).

Domestic visitor satisfaction	Domestic visitor satisfaction is sustained at **90%** over the period to 2030
International visitor satisfaction	International visitor satisfaction is sustained at **90%** over the period to 2030
Participation in Māori cultural experiences	**70%** of international visitors participated in a Māori cultural experience by 2030.
Tiaki awareness	**30%** of international visitors are aware of, and supported by, the Tiaki Promise by 2030.

Outcome 3: Ōhanga (Economic)
Support productive and prosperous tourism businesses and the Aotearoa New Zealand economy.
TIA expects tourism's total expenditure will reach $55b billion per annum by 2030 (inflation adjusted).

Spend per international visitor	**$6,500** average spend per international visitor by 2030 (inflation adjusted)
Contribution to GDP, Exports and Employment	Tourism contribution to GDP, Exports and Employment is **sustained** over period to 2030.
Visitor mix	Proportion of international and domestic visitor spend is between **55-60%** domestic and between **40-45%** international in 2030.

Outcome 4: Te Taiao (Environment)
Invest in the protection, restoration and enhancement of Te Taiao (our natural world).

Aviation carbon emissions	Aviation sector to be **Net Carbon Zero by 2050**
Non-Aviation carbon emissions	Non-aviation tourism to reduce carbon emissions to **30%** below the 2019 level by 2030.
Carbon reduction	**95%** of TIA members are measuring, managing and reducing their carbon emissions by 2030.
Waste reduction	**95%** of TIA members are managing their waste to minimise negative impacts by 2030.
Predator free and biodiversity	**95%** of TIA Members are actively supporting and championing predator free and/or biodiversity initiatives by 2030.

Actions | Ngā āheinga

The Actions are the game changing advancements the industry will pursue between now and 2030 (Horizon 1) to make strong progress towards addressing issues as they arise and to be ready for the opportunities out to 2050 (Horizon 2).

Each of the following ten Actions will contribute to achieving our 2050 vision, outcomes, and targets.

The Actions are not prioritised as they all contribute to achieving the shifts we are seeking to achieve. Some are actions that cut across and will enable the others, with industry structure, funding and embracing Te Whakarae Māori being examples of this. Others are actions that all businesses can get involved with, so they can make a difference from the ground up.

1. Design Tourism Industry Settings for 2050

1. Industry to engage with the Government to review the structural arrangements of the tourism industry system to establish a National Tourism Policy Statement (NTPS), or similar vehicle.

2. Industry to participate in the review and process to develop the future tourism industry setting, including to articulating those elements it considers are most important for inclusion within the NTPS.

We believe that there are far-reaching gains to be achieved from having well organised and mandated structures set out for the tourism industry.

A persistent challenge for the industry has been the informality of roles and functions within a complex and fragmented tourism system. This is seen as a systemic issue that is a root cause of a number of other shortcomings across the industry. In this, the tourism settings closely associate with the Funding Action that follows.

In the current setting, the role of Tourism New Zealand under the New Zealand Tourism Board Act 1991 is the only key function that is soundly established. By contrast, other key parts of the industry are not mandated or structured, including the role of local government, the functions of regional (and local) tourism bodies, the roles of various government departments, and the roles that the industry itself needs to deliver.

This structural deficit is a well-recognised and documented challenge for the industry.

The NTPS will identify and define key roles and responsibilities across central and local government and within the tourism industry. It will provide direction to:

- Central government agencies on functions including policy, funding, data collection and research, international marketing and destination oversight, as well as the direct roles played such as for border services and access to conservation lands.

- Local government on functions including destination management and stewardship, destination marketing and economic development.

- Industry on functions that relate to the overall operation of the tourism system including leadership, advocacy, industry's role as partner to government and functional roles such as industry capability-building that industry can and should itself deliver

In so doing, the NTPS will set out a mandated structure for the industry that will allow longer term and strategic planning and development to take place.

It is imperative that the tourism industry is a key contributor to the development of the NTPS as well as having its key roles included within the NTPS itself.

Government has vehicles for setting out its broad policy objectives for specific areas and the best vehicle for tourism will need to be determined. It is important the vehicle has the power and the standing to ensure all parties act in accordance with the NTPS or other vehicle over the period in which it is in place.

Timing:

Present to 2025 to develop the NTPS, with implementation out to 2030.

Grant Webster
Tourism Holdings Limited

Sometimes, tourism lacks the ability to address issues as they arise. Yes, we work on them, but we can struggle to really solve them, especially for the most important areas, such as investing in the infrastructure we need, ensuring that we are genuinely sustainable and that we are proactively developing our many destinations across the country. This Blueprint, with its very important actions around industry structure and funding, marks a clear pathway forward to tackling our big issues, and I encourage all parties to play their part in making this happen."

2. Address industry funding

1. Industry to engage with Government on the best approach for undertaking an in-depth investigation into the options for establishing sustainable funding mechanisms for the tourism industry and contribute to this investigation.

2. Industry to define the problems or challenges associated with industry funding, prioritise the issues, identify what the funds would be used for, and set out the amount of funding required.

3. Industry to engage with Government on distribution of the International Visitor Levy that is estimated to collect $450 million over the next five years and which will form an important part of the overall funding system.

4. Industry to develop its position for implementation of the preferred funding mechanisms, including how industry will contribute to, and support, the options that are pursued.

5. Funding for marketing of Aotearoa New Zealand as a visitor destination is established at a competitive level in recognition of marketing as a vital shaper of quality visitor demand.

We believe that tourism is an industry that requires ongoing investment, as all sectors do, and that the various mechanisms for this are important for advancing different aspects of the industry.

The historic and structural lack of sustainable industry funding mechanisms has meant there has been persistent under investment in many aspects of the tourism industry, including infrastructure, destination management and development, data and research, product development, network design, quality improvement, capability building, and others.

Where there is funding, such as the Government investment into infrastructure, innovation and destination management plans, these do not necessarily meet the needs of key partners such as industry and local government. While the industry appreciates these programmes, they do not constitute the needed solution, in terms of both the level and surety of funding, and the mechanism through which the funds are granted.

We are seeking funding mechanisms that establish sustainable and equitable funding streams for the tourism industry, while building self-reliance of the industry itself to manage those parts of the tourism system where there is no need for Government to be involved.

Current central government tourism funding for local government is primarily provided through three contestable funds – the Provincial Growth Fund, Tourism Infrastructure Fund, Responsible Camping Initiative and others that emerge from time to time. While this funding is important, it does not provide long-term certainty for the effective planning and management of tourism.

Central government does very well from tourism. It receives revenue from GST from tourism-related expenditure, other taxes and charges (e.g. PAYE, business taxes, excise tax and border control charges) and the International Visitor Levy (IVL). GST revenue from tourism was $3.9b in the YE March 2020.[15]

This tax revenue is more than sufficient to meet central government costs of tourism, with its funding for Tourism New Zealand, roading and conservation related infrastructure, policy and data functions and the various contestable funding pools, only using a small proportion of the overall revenues. Industry expects Government to increase its own level of investment as these tourism revenues increase.

Local government incurs many of the costs associated with tourism, but typically only has the rating base to fund these costs. There is often a disconnect between where visitors go and where New Zealanders live and pay rates, which means there are regions with small resident populations that have relatively high costs in supporting this tourism activity. For instance, the TŌNUI report found that 91% of Regional Tourism Organisations stated they needed additional funding to meet the expectations of their expanding roles.

---

15 Tourism Satellite Account: Year ended March 2022, Stats NZ, 2022.

Amy Simpkin
Northland Inc

"Funding the tourism system is the top priority for our sector. Tourism brings benefit to the wider economy – not just a bed night or a boat trip ticket. Having a robust funding system for tourism will mean we can invest in those things that will make tourism better and stronger. And this will ensure a tourism legacy for future generations where the benefits of tourism will be felt by many."

Over recent years, all 31 tourism regions have developed comprehensive Destination Management Plans that set out the industry and community aspirations for tourism in these regions and the actions needed to be put in place to implement them. Funding is now needed to implement them, or the value of these DMPs will be seriously undermined.

In light of these serious funding limitations, a number of regions are currently exploring their own bed tax or levy arrangements to generate the funds they need. The industry recognises this need but strongly favours a national approach that will provide the most equitable, efficient, and sustainable solution. The alternative of a number of ad hoc solutions around the country is seen as a highly undesirable way to proceed.

While industry has long signalled the importance of establishing sustainable funding mechanisms, this call is getting stronger, and we want to partner with Government to establish new funding mechanisms that will meet the needs of all key stakeholders.

In the industry's view:

- Funding mechanisms must be established for both industry-good activities and local government tourism activities. This includes supporting actions on the key strategic priorities of industry and local government.

- Existing funding mechanisms such as current central and local government activities should continue to provide the long-term baseline funding for such things as international marketing, data and research, infrastructure and conservation management.

- There is a strong need for a nationally consistent approach, and this needs to be acted on with urgency. We do not support targeted rates, but we are open to the establishment of consistently applied levies on tourism activities so long as they are well set up with appropriate governance and allocation processes in place.

- Mechanisms must deliver material funding streams to address the current resource constraints and should be established in accordance with a set of clearly defined principles, as described in Box 1 overleaf.

- The many funding mechanisms that are potentially available will need to be assessed for their pros and cons to ensure the optimal mix of mechanisms is arrived at. We must be mindful of remaining internationally competitive and not overtaxing tourists.

In 2022, the Minister of Tourism committed to a Sustainable Funding Industry Transformation Plan to begin work in late 2023. The industry advocated for, and supports, this initiative. It also considers it important that the process is conducted in partnership with central government, local government, and industry.

Regardless of the mechanism used, this work must clearly identify sustainable funding mechanisms for the tourism industry and urgently put in place steps towards the implementation of these mechanisms.

Unlike other industries, tourism's ability to address its own issues does not reflect its size and importance. In the primary sector, key sectors have a levy system in place, enabled by the Commodity Levies Act 1990. These levies generate substantial funding for the sectors (dairy, wine, kiwifruit, and many others), allowing them to undertake a wide range of activities that are deemed most important by the sectors themselves.

Importantly, this funding goes directly to the sectors, and not via the government. Government enables the levy through the legislation and then lets the sectors get on with it. Such an enabling role from Government is sought to provide secure base funding for the tourism industry that will negate the need for industry to ask Government for funding support on an ongoing basis.

Timing:

For immediate action, with implementation out to 2030.

Principles for a future tourism funding mechanism

Tourism funding should:

- Be tripartite in nature, in line with international best practice. Central government, local government and industry should all have sustainable funding arrangements in place (currently only central government meets this criteria).

- Be nationally applied for equity, efficiency, and sustainability across regions, while providing sufficient flexibility to allow for the unique characteristics and aspirations of different communities.

- Be designed so all funds gained from tourism revenue streams are used solely for tourism purposes.

- Be derived based on a robust understanding of where the costs and benefits of tourism lie.

- Be of sufficient magnitude to sustainably fund net costs where they are incurred, as well as allowing for system responsiveness and resilience. Enable industry self-sufficiency and self-determination, meaning any industry levy proceeds should be vested with industry and local government directly (with the appropriate accountability and transparency arrangements).

- Be enduring, dedicated, and consistently applied to provide certainty and allow for long-term planning and execution.

- Be accompanied by clear objectives, accountability arrangements and transparency regarding how funds are governed and allocated – particularly important when taxing visitors, many of whom do not vote here in Aotearoa New Zealand and therefore cannot influence the creation or application of taxes.

- Be prioritised to the industry's ongoing strategic journey, including supporting positive contributions across Te Taiao (environment), Hapori (community), Manuhiri (visitor) and Ōhanga (economic).

3. Power-up Data and Research

1. Industry to continue to support the Tourism Data Leadership Group and expect substantive progress from it, including data quality and accessibility, with coverage across the regenerative tourism framework and with better regional data.

2. Industry to advocate for a step-change on tourism's place in the science system, including within the Government's national statement of science investment.

3. Industry to advocate for an ongoing funding base for tourism innovation processes to build capacity and to ensure rapid industry uptake of innovation and technology.

4. Particular attention is paid to ensuring there is quality data to provide insight into Māori aspects of the tourism industry.

We believe that a tourism industry supported by quality data and insight will be much more assured in taking the many strategic, commercial and operational decisions that are essential to it achieving the vision set out in this Blueprint.

As the industry gets ever more sophisticated, the need for the right data and research becomes ever more critical.

An enduring structural constraint on the tourism industry is the lack of comprehensive and trusted data, research and other forms of knowledge to inform industry decisions and processes.

Under this Action, industry will aim to drive a step-change improvement to the knowledge base supporting tourism related decision-making, including data, research, and innovation processes.

For data, there is incomplete data coverage, issues of data quality and difficulty accessing what is available. There is a lack of quality regional level data, sector-specific data and wider non-economic data across the economic, community, visitor and environment framework. As a result, decision making is not well informed, whether by government, local government, tourism businesses, investors, and many other interested parties.

As the strategic aspiration of the industry matures to sustainable and regenerative perspectives, there must be data to track against a comprehensive set of regenerative indicators. These are currently not available with the data we have tied very much to traditional economic and volume indicators, and very little else. A major shift is needed.

The industry is involved with and supports the Tourism Data Leadership Group established by MBIE in 2022 which is well placed to drive a progressive tourism data programme. Industry is looking to the TDLG to drive substantive change for tourism data broadly, and specifically for data about and for Māori tourism demand and supply.

For research, the situation is even worse. There is a very low level of support for tourism-related research from the public science system. Furthermore, there is no industry capability to support and undertake industry-good research which is in sharp variance to New Zealand primary sectors that typically have a base research capability from which they can develop research proposals and collaborative research projects, with reporting of findings back to their industry members.

Prof. Susanne Becken
Griffith University

"Underpinning all decision-making relating to tourism is the data we have available, and we have much to do to put this in place. In the Blueprint, I welcome the widening of what we take into account in tourism, with economic, environmental, community and visitor aspects all needing to be well understood. We must also have meaningful ways of tracking regenerative progress if we are to be a regenerative industry."

Innovation and technology are closely linked areas that are currently not well supported in the tourism system. Innovation and Technology are critically important for enabling the tourism industry to rapidly progress across a wide set of areas. For instance, product development, operational efficiency, productivity, energy efficiency and new technology uptake, reducing waste, for enabling better management of the tourism system. The Government's tourism innovation fund has been established but its funding has been sharply reduced.

Addressing these challenges will mean the industry can move from operating on intuition to operating using facts, figures, and insights. It will mean we can meaningfully track progress against our commitments, improving the quality of decision-making by and in the industry.

Timing:

Present to 2025 and with implementation ongoing to 2030.

4. Embrace Te Whakarae Māori

1. Industry and operators to build relationships with local iwi, hapū and whānau at those places in which they operate.

2. Industry and operators to be actively learning about and embracing Māori culture and te reo me ōna tikanga so they can appropriately engage with Te Whakarae Māori and Te Ao Māori.

3. Industry to support Māori tourism data collection, research, and other insights.

4. Industry and operators to appropriately carry the stories of our people and place, thereby celebrating our unique culture in Aotearoa New Zealand.

We believe there is enormous opportunity for tourism and Māori from building on and deepening the unique role of Māori within tourism as something that differentiates Aotearoa New Zealand in our international markets, for the benefit of both tourism and Māori.

Demand for Ahurei Māori (cultural capital) experiences is evident. However, only 46.9%[16] of manuhiri experience Māori culture. The tourism industry has an opportunity to respond to this demand as a key differentiator to the visitor experience enriching both manuhiri and our local communities.

Te Whakarae Māori reflects and celebrates the concepts of manaaki, tiaki and aroha (hospitality, care, and compassion and love).

'Ko au te whenua, te whenua ko au'

This whakataukī speaks to the inextricable relationship tangata (people) have to whenua (land) through shared whakapapa (genealogy).

Te Whakarae Māori aims to integrate kaupapa Māori (Māori approach) and Mātauranga (Māori knowledge systems) models into the tourism industry as a means of ensuring it is beneficial to all our communities: both people and whenua.

Under this Action, industry will adopt and promote Te Whakarae Māori to elevate the role of Māori voices within the tourism industry and to advance Te Tiriti o Waitangi within tourism and in furthering the nation-building narrative in Aotearoa New Zealand.

Te Whakarae Māori acknowledges the enriching potential of incorporating te ao Māori (Māori worldview), mātauranga Māori (Māori knowledge systems) and Pākihi Māori (Māori business) into the fabric of tourism within Aotearoa New Zealand. This is a key differentiator in the global market.

Te Whakarae Māori lays a taki (challenge) to the industry that substantial progress and the building of capability are required to elevate the importance of Māori voices. This Action area cannot be done alone and needs to be reciprocal in nature.

Ensuring the long-term vitality and health of the ecosystem on which industry and business depends requires that business benefits are as widely distributed as possible. Pathways for Māori into the tourism industry diversifies the economy, enriches our communities, and progresses the nation that is grounded in Te Ao Māori, towards economic independence for Māori, whānau, hapū and iwi.

---

[16] MBIE, International Visitor Survey, 2020.

Pania Tyson-Nathan

New Zealand Māori Tourism

"Kua tawhiti kē tō haerenga mai, kia kore e haere tonu. He nui rawa ō mahi, kia kore e mahi tonu."

"This Blueprint aims to highlight the unique role of Māori culture and experiences within our tourism industry as something that differentiates Aotearoa New Zealand, both for international visitors and New Zealanders. It's pleasing to see the specific key action, 'embrace Te Whakarae Māori'. The challenge for all must be to make this is a reality, by building the capability, providing the necessary resources, and strengthening relationships between the tourism industry and Māori tourism operators, whānau, hapū, and iwi, as being critical to the success of this Blueprint."

Relationships and the fostering of whanaungatanga (relationships) with whānau, hapū and iwi are critical to the success of this blueprint. The opportunity for shared resources and a collaborative approach to elevate Māori stories and narratives has both commercial and relational benefits.

Industry considers that mechanisms are needed for providing resources for individual tourism businesses to implement Te Whakarae Māori and for supporting Iwi and other Māori tourism entities to participate.

Te Whakarae Māori does not stand alone, but rather is an enabler across all the other parts of this Blueprint, and beyond. It is a centre-point for activating broad Action and for achieving wide societal benefits.

Timing:

Present to 2025 and with implementation ongoing to 2030 and beyond

5. Achieve Net Zero Carbon

1. All tourism operators to establish business-level carbon emission measurements, invest early in carbon reducing technologies and equipment, and set targets to be net carbon zero as soon as feasible.

2. Industry to engage with processes established to help operators reduce their carbon emissions, including TIA's Tourism Sustainability Commitment, the proposed Aotearoa Tourism Centre (ATC) and the Government's Environment ITP.

3. Industry to engage with wider processes to reduce carbon emissions, including the Ministry of Transport-led Decarbonising Transport Action Plan and Sustainable Aviation Aotearoa.

4. Industry to advocate for an enabling policy framework for aviation decarbonising technologies and sustainable aviation fuels. This includes supporting a SAF mandate coupled with a strategy to increase SAF production and an incentive programme that facilitates innovation, scale-up and affordability.

5. Industry to advocate for suitably sensitive industry and sector-level measurement of tourism carbon emissions.

6. Industry to create a 'Tourism Decarbonisation Roadmap' for forecasting the pathway forward and to highlight milestones achieved and interventions needed. This will include the exploration of a per visitor carbon emission target.

We believe that the way tourism responds to the challenge of carbon reduction will reflect the positive and progressive nature of the industry itself. Acting quickly to overcome difficulties can define the industry for years to come.

Under this Action, industry will actively strive to accelerate progress to being a net carbon zero industry as soon as it can before 2050 as an overall industry target.

Increasingly, there is wide acceptance that human-induced greenhouse gas emissions are leading to global warming and changing weather patterns, with the rate of change expected to speed up over time.

Globally the two response approaches are gaining momentum: to reduce greenhouse gas emissions and to prepare for climate change management and mitigation actions, and New Zealand is engaged in both workstreams.

To reduce carbon emissions in tourism, a concerted effort is required to investigate, develop, and apply new ways of doing things, whether switching to new energy sources, changing what we do and how we do it, and responding to changing consumer demand.

For New Zealand tourism, which is a long-haul destination for most of our markets, we are exposed to changes in consumer behaviour and to policies that may emerge to inhibit long-haul travel. On the other hand, we have an interest in ensuring the wider societal good outcomes from tourism will continue and that the tourism industry itself will continue to prosper.

Research indicates that 47% of visitors say they consider sustainability 'always' or 'most of the time' in their travel decisions.[17] As a long-haul destination, this is a clear strategic risk, making it doubly important that we are doing all we can to reduce the carbon emissions of the tourism industry. This risk is wider than tourism alone, with the value on exports and imports carried by air being $23 billion in 2017/18.[18]

The general approach to reducing carbon emissions in the New Zealand tourism industry has centred on getting individual businesses to act, through large companies that are investigating alternative technologies and the application of a range of cross-economy policies and programmes of Government.

In each area, progress has been achieved but this needs to be sharply accelerated, with aviation being a particular challenge recognising that it currently makes up 63%[19] of tourism-related emissions.

Tim Cuthbertson
Cruise Lake Wanaka Ltd

"There is no doubt that decarbonisation is the greatest challenge facing tourism. As a small to medium business, Cruise Lake Wanaka wants to play our part, but we lack the capital and other resources to take big steps. To make serious progress, small operators must be supported from government programmes, from industry initiatives to get the scale we need, and by incentivising decarbonising investments."

At a national level, New Zealand has committed to reduce emissions by 50% below 2005 levels by 2030 under the Paris Agreement[20] and enshrining into law the target of net zero emissions by 2050.

TIA's Tourism Carbon Challenge, established in 2021, set the mission to 'Act immediately to accurately measure our individual and collective carbon footprint, work together to significantly reduce carbon emissions by 2030 and be net zero carbon before 2050.'

To activate these changes will require a concerted effort, supported by a wide range of additional policy, programme and investment support. This will include capability support to tourism businesses, the rapid acceleration of uptake of electric vehicles and development of EV charging networks, uptake of zero carbon heavy road and sea transport, investing in new sustainable aviation fuels, investing in new carbon-free aviation technologies, eliminating waste across the sector and developing zero-carbon visitor itineraries, and others. As a last resort, developing local carbon offsetting, ideally through planting permanent native forests that will also generate amenity and biodiversity benefits.

Making these changes as quickly as possible will present an opportunity for New Zealand tourism to position itself as a truly clean, green and sustainable visitor destination.

Timing:

Present to 2025 and with implementation ongoing to 2030 and beyond.

[17] MBIE, International Visitor Survey, 2022
[18] Ministry of Transport, Value of Imports and Exports Through Airports, 2017/2018
[19] Stats NZ, Greenhouse gas emissions (industry and household), YE 2019. The Stats NZ tourism greenhouse gas emission series, compiled under the UN System of Environmental-Economic Accounts, covers all emissions attributable to tourism within New Zealand by domestic tourism operators and by New Zealand based international airlines. This means that all of Air New Zealand's emissions are included, but not those of other airlines that fly to and from New Zealand. The emissions of these airlines are the responsibility of the countries in which these airlines are based.
[20] United Nations Framework Convention on Climate Change, 2015

6. Champion Predator Free and Biodiversity

1. Industry to establish a relationship with the partners of Aotearoa New Zealand's Predator Free 2050 Goal to allowshared effort towards achieving this predator free goal.

2. Industry to advocate for capability and resources to be directed towards supporting predator free and biodiversity actions and the work that sits behind it.

3. Operators contribute to Predator Free 2050 and other biodiversity actions and build it into their business processes, ideally as part of their Tourism Sustainability Commitment action plans.

4. Operators to record their predator control and biodiversity successes, with these results to be aggregated and reported at the industry level.

We believe that tourism is uniquely placed to make a major contribution to our national efforts to restore our environment. Nature is a central part of our product and so many tourism businesses operate in our nature. The step to protect and restore Te Taiao has been taken by many businesses and now we are taking this on right across the industry.

Predators kill an estimated 25 million native birds each year. Some 4000 species native to New Zealand are threatened or at risk of extinction – one of the highest proportions in the world.[21] By any account, this is a dire situation that requires determined effort to reverse, including from the tourism industry that has the privilege of operating in, and showcasing to our manuhiri, our wonderful natural places and biodiversity.

Under this Action, the tourism industry will contribute to work and initiatives that will assist in achieving Aotearoa New Zealand's goal to be Predator Free by 2050 and to support our biodiversity and stewardship of our natural places.

This Action is all about adding the significant tourism industry weight to wider predator free and biodiversity programmes to restore our unique and vulnerable ecology in Aotearoa New Zealand. By making this a tourism mission, we will be clearly signalling our intent to take positive actions in an area that means a great deal to many New Zealanders. In so doing, this will form a great story that we can engage and inspire our visitors with, and thereby gaining their support too.

There is a strong alignment with this Action and the values of the tourism industry that relies on the quality of our natural places as a key part of destination Aotearoa New Zealand. This will be a great way for tourism to genuinely contribute as a kaitiaki of our special places and biodiversity. This predator free Action also directly benefits our communities through the restoration of mauri (life force) and through the engagement of communities in the initiatives that tourism operators are involved with.

---
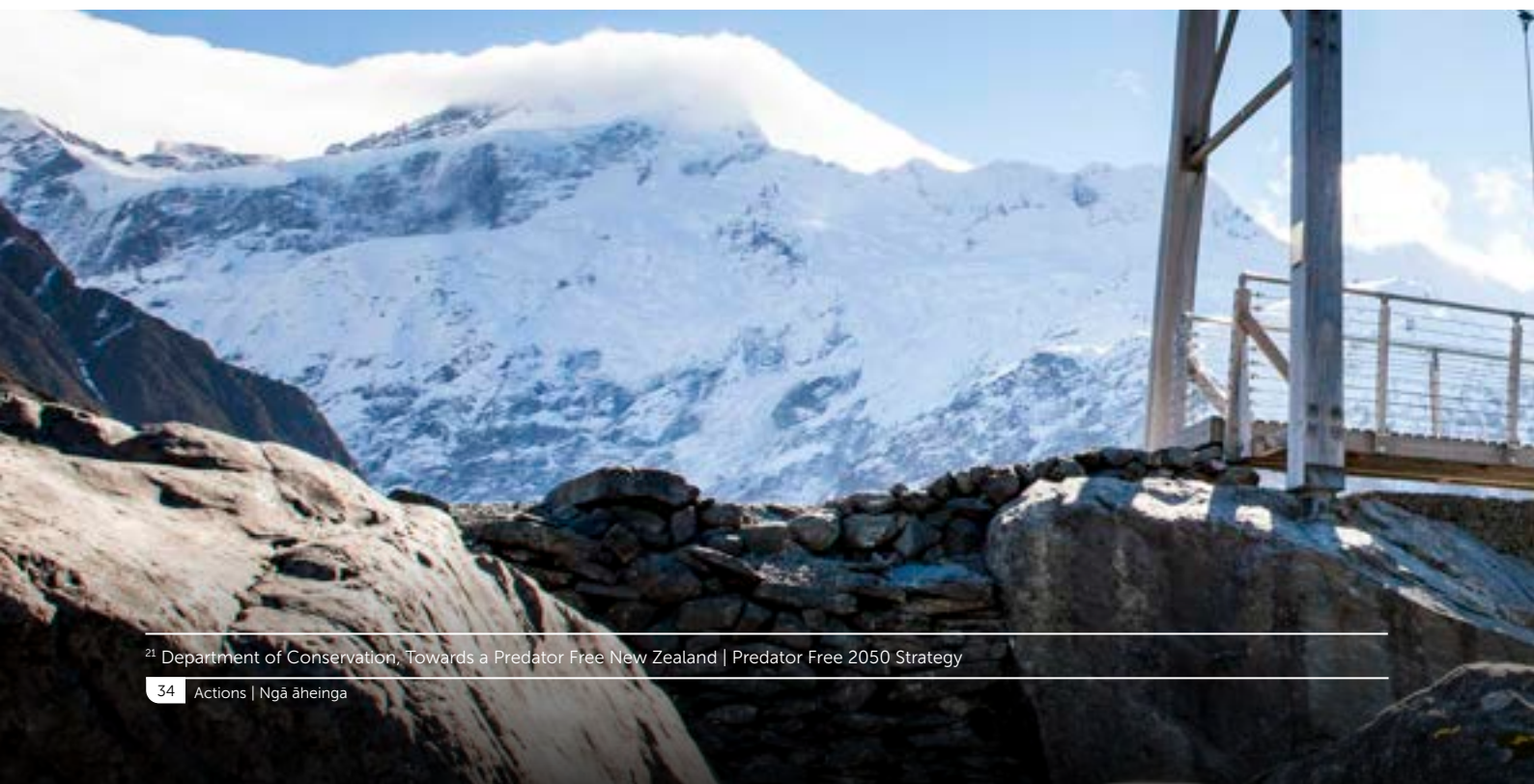
[21] Department of Conservation, Towards a Predator Free New Zealand | Predator Free 2050 Strategy

Scott McNab
RealNZ

"Tourism in Aotearoa can make a positive contribution both here and globally. At RealNZ we're focused on the impact we make on the ground and the global impact our guests can have on nature when they return home. Every tourism operator can play its part for biodiversity and ecological protection and restoration, with this being great for nature, guests, staff, communities, and the businesses themselves. We owe it to our future Tamariki to continue to take steps forward to lift the contribution tourism makes for nature."

This Action is one that all tourism operators can find things to do that will suit them best. If you operate directly in nature, running a trapline might be your action. For others, it might be sponsoring research or technology development, submitting on policy processes, providing funding or other support for predator control or biodiversity projects or participating in urban trapping initiatives. All and any of these actions taken by individual tourism operators will add up to a lot at the industry level.

Our visitors' experiences will be enhanced if they are exposed to healthy ecosystems where our own unique species are free to thrive for them to see, experience and enjoy.

Timing:

Present to 2025 and with implementation ongoing to 2030 and beyond.

7. Transform Tourism and Conservation

1. Industry and Department of Conservation (DOC) to establish a process for optimising tourism and conservation settings and outcomes for Te Taiao, visitors and operators under the current legislative framework.

2. Industry to engage with DOC on how it can support the modernisation of complex conservation legislation that specifies much of the tourism and conservation settings.

We believe that tourism has a profound ability to contribute to the wellbeing and restoration of our conservation lands and places and that getting operators well lined up with the Department of Conservation will result in important gains for nature and more streamlined processes for both operators and DOC.

The interface between tourism and our natural places, many of which are managed by the Department of Conservation provides much of what makes Aotearoa New Zealand an attractive visitor destination for both international and domestic visitors. Nature is central to who we are as a destination.

Tourism operators have an important role in enabling visitation to our conservation places in safe and managed ways which supports the objectives of DOC to get New Zealanders engaged with nature. Operators can, and do, play an important role in caring for the places in which they operate, including supporting a wide range of conservation and biodiversity initiatives.

The concession system is the key mechanism for enabling tourism operators to operate on conservation lands and waters. As such, how the concession process works is of direct interest to operators.

DOC operates in a complex environment in terms of the unclear and outdated legislation framework it works to, the out-of-date nature of many of its planning instruments and its evolving response to giving effect to Te Tiriti o Waitangi. DOC also plays multiple roles that it is required to deliver, including planning, regulator, protector of biodiversity and environments and as manager of place, while working to make its regulatory functions operate as efficiently as possible in a changing world.

The industry recognised these challenges, but at the same time, it is clear that the current settings are not working well. For instance, there are issues around slow concession processes, the lack of recognition in concessions applications for operators that are contributing positively to nature and what seems to be shorter and less secure concession tenure.

Each of these points is a concern for operators whose business operations are often reliant on the concessions that they hold. Streamlined and more transparent concession processes are needed to ensure an efficient and equitable concession system.

Under this Action, the industry will advocate for a two-tiered work programme with DOC, that will seek to optimise the operation of the concession system in the current setting and then support DOC's work to reform its underlying legislative framework that DOC operates.

Making progress in this area will be key to strengthening and incentivising the role and contribution of tourism operators to the well-being and restoration of Te Taiao which is an important aspect of this industry Blueprint for the future, including its Predator Free and Biodiversity Actions.

Timing:

Present to 2025 for improvements under the current setting, and ongoing for legislative change.

8. Build Sustainability Capability

1. Industry to seek long-term support to establish a programme to lift the sustainability capability of tourism businesses. This could be along the lines of an Aotearoa Tourism Centre that would be dedicated to sustainability capability-building and other such functions over time.

2. Industry to work with accreditation agencies on the most effective ways to validate progress by participants.

We believe that the essential step to making a wide range of gains around areas like carbon reduction, waste reduction, supply-chain improvement, and others, is to assist those tourism businesses to get really good at doing these things within their operations. Providing this assistance will have a multitude of downstream benefits.

The tourism industry can only become a positively contributing industry if all the businesses within it are themselves sustainable – a bottom-up approach. This will involve all tourism operators, whether big, small or micro. All need to be playing their part.

Under this Action, the industry will establish a programme of capability-building initiatives for the tourism industry that can be undertaken under what will be called the Aotearoa Tourism Centre. The intention is to develop the ability to undertake this work, with the best way of doing this to be explored, whether as a separate body or established within an existing organisation. What is critical is having the scale to make a substantive difference right across the tourism industry.

The Aotearoa Tourism Centre will be an industry-led programme that will have an initial focus on supporting and enabling tourism businesses to integrate the Tourism Sustainability Commitment into their operations.

The assistance provided to these businesses and other entities is critical, given that businesses typically don't know where to start with their sustainability work or what to prioritise. Evaluations show that being provided with good information and a clear action plan by a trusted expert is a key trigger for getting operators on board and making substantive progress.

This Action reflects the key strategic imperative of the Tourism Sustainability Commitment which is to move from 'Commitment to Action', and that specific and well-designed support is the critical factor for making this happen broadly across the industry.

Also, building this capability within businesses is key for advancing other Actions in this Blueprint, including transitioning to carbon neutral, supporting Predator Free 2050, being an employer of choice, embedding Tiaki, contributing to community sustainability initiatives and others.

Hazel Rigler
ASURE Accommodation Group

"ASURE Accommodation Group has a high focus on responsible tourism and dedicates itself to the principles of environmental and social sustainability. Through our commitment to a detailed action plan, we strive to safeguard the pristine beauty of our surroundings, fostering a sense of responsibility for the benefit of generations to come, by enhancing environmental awareness among our team, suppliers, and customers. Together as an industry we must acknowledge the importance of sustainability and the need for commitment and support nationally to make an impact."

The Aotearoa Tourism Centre will become that repository of the expertise and resources that will enable industry-wide sustainability progress. This will include direct business-level support and mentorship, and a comprehensive set of tools and resources to assist the participants in the programmes.

Over time, it is anticipated the Aotearoa Tourism Centre will take on other industry-good roles, such as supporting innovation and technology uptake by operators, building a tourism research capacity, and other such roles.

The Aotearoa Tourism Centre will operate in cooperation and collaboration with other partners, including accreditation providers (for example Qualmark), regions and sectors.

Also, building this capability within businesses is key for advancing other Actions in this Blueprint, including transitioning to carbon neutral, supporting Predator Free 2050, being an employer of choice, embedding Tiaki, contributing to community sustainability initiatives and others.

Timing:

Present to 2025 for establishment and then to 2030 for full implementation.
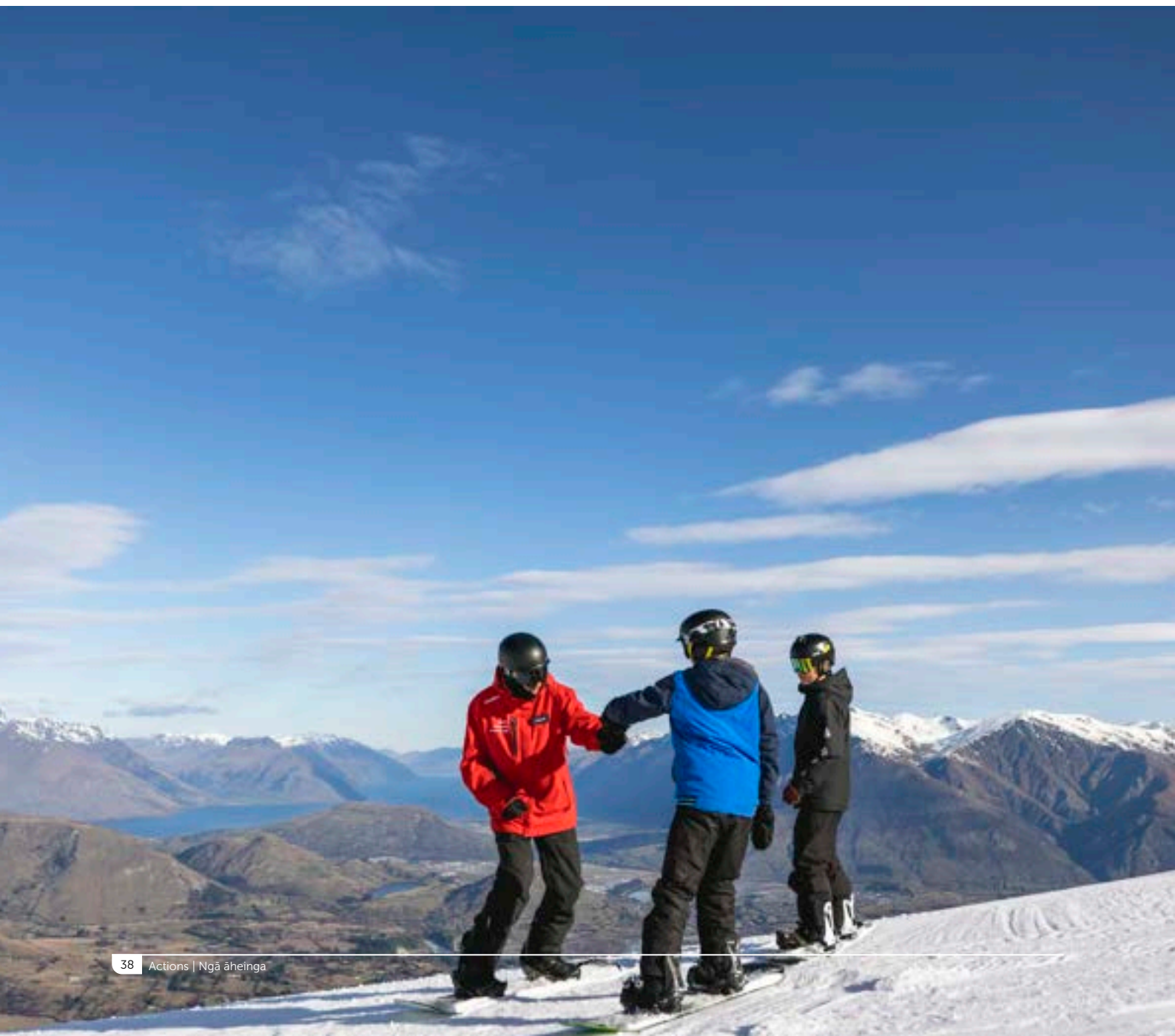
9. Grow the Tourism Workforce

1. Industry and operators to engage with Government programmes that are designed to improve the flow of talent into quality tourism jobs, including through the implementation of the Better Work Industry Transformation Plan.

2. Operators to act to ensure they are an Employer of Choice as part of TIA's Tourism Sustainability Commitment 7: Employer of Choice.

3. Industry to advocate for a process to forecast future workforce needs so we can plan for and train the future tourism workforce.

4. Industry to advocate for a strong education system for tourism, from schools to private training organisations and through to universities, to support the flow of well-educated talent into the industry

5. Industry to continue to raise employment standards and improve career pathways.

We believe that getting the right people working in tourism is key for elevating the quality of the industry in providing world-class visitor experiences and for the way we operate and care for our place.

Tourism is fundamentally a social industry where the interrelationship between our visitors and the people working in the industry is a core part of the visitor experience itself. This establishes the criticality of the tourism workforce to the success of the industry as a whole.

The reality of tourism is that it needs people with a wide range of skills operating in places throughout the country, often outside of normal working hours and on a seasonal basis. Each of these factors create a challenge for tourism businesses, especially through periods of high employment.

In practice, there will be shortages of New Zealanders to cover all the jobs that need filling across the tourism industry, signifying the need for overseas workers to take some of these jobs.

This dynamic means that the tourism industry needs to purposely foster the pipeline of people coming into the industry and to keep engagement with the people that will come and go from the industry over time.

The pipeline requires awareness of the great jobs and careers in tourism, the availability of tourism as a serious NCEA subject at school, the availability of entry-level jobs in the industry that lead to on-the-job training and university-level courses to ensure the availability of well-educated talent in industry. All aspects of this pipeline must be supported by the tourism industry on an ongoing basis.

TIA's Tourism Sustainability Commitment has its Employer of Choice commitment that requires 'Businesses attract, support and develop the workforce they need to flourish and succeed'. The intent behind this is that businesses take a proactive approach to recruiting, training, rewarding, and retaining the skilled people they need in their operations.

The Government's Better Work Industry Transformation Plan was released in 2023 and its implementation programme will establish initiatives that the industry and operators will be able to engage with.

Education and training for tourism is in place and forms key parts of the pipeline. For instance, the new NCEA Tourism Achievement Standards, industry training through Ringa Hora and the Workforce Development Council and its work to look at future workforce needs and training requirements. Every effort is needed to ensure the success of these education and training pathways.

Universities offer a wide range of degree and post-graduate programmes that provide tourism-specific courses, often with other subject disciplines.

This Action recognises that the nature of tourism jobs will change enormously in coming years as technology plays an increasing role in replacing many current jobs. Tourism is an activity where personal contact is essential, so there will always be tourism jobs, but the nature of these roles may change significantly over time.

For all tourism employers, there are actions to advance within their own businesses. For instance, to be professional in their HR practices, pay well, create interesting roles, provide accommodation where needed, have pathways for their staff to grow and develop, provide training, recognise people for going the extra mile and encourage staff to be the best ambassadors for their businesses.

Timing:

Present to 2025 and with implementation ongoing to 2030 and beyond.

10.   Embed Tiaki

1. Industry to promote Tiaki to guide and direct all participants and stakeholders within the tourism industry.

2. Operators to utilise Tiaki internally, and with their visitors and communities, to convey the essence of Tiaki and the values that sit behind it.

We believe that Tiaki has enormous scope for changing the way we care for our place with the Māori values providing a way of ensuring our care of place, people and manuhiri in a way that is much more than the original intent of Tiaki to inform how visitors should act while here in Aotearoa New Zealand.

The Tiaki Promise was developed in 2018 by a group of government and industry parties, and it is owned and managed so all in the industry can use it, promote it and incorporate it into operators' communications with their visitors.

Tiaki includes a set of guiding principles for visitors to follow to keep everyone safe, protect our environment, respect our culture, and build a sense of connectedness. It is a powerful programme that has become embedded into our ethos as an industry, bringing to life values that are special to New Zealanders.

Tiaki supports community outcomes because it sets an expectation for visitors and operators alike to experience our country with manaakitanga (hospitality, kindness, respect, generosity). In acting in line with Tiaki, visitors and our industry are more likely to act to care for and protect our environment, and to engage with and enrich the communities they visit and interact with.

Under this Action, the industry is committing to ensure Tiaki Care for New Zealand serves to deepen visitors' connections and understanding of the natural environment, while inspiring and helping them to travel safely and conscientiously within Aotearoa New Zealand.

Tiaki also encourages tourism operators to demonstrate their support for the principles of kaitiakitanga, including through activities that give back to the environment and their local community.

As an Action, this signals to all tourism operators that it is both important and desirable that they incorporate Tiaki into how they operate their business. The impact of Tiaki will be greatest when it is universally applied in tourism and thereby becomes infused in how we operate as an industry and destination.

Timing:

Present to 2030, and beyond.

Enacting the blueprint
| Whakamana tūāpapa

Having identified the key Actions for the industry to progress, getting these underway is the next step. This will involve many people and partners and will need a plan of delivery in which TIA will play a lead role.

Who needs to act

The Blueprint is designed to be activated by a number of mechanisms, including:

- **Industry.** TIA and other industry groups will need to take on key Actions. This includes the industry settings and funding Actions, building the sustainability capability, advancing conservation and tourism, and in advocating for and supporting each other in taking on the ten Actions.

- **Government.** There are some Actions that necessarily will need Government involvement and active support. This includes the key industry structure and funding Actions and others like data and research, tourism conservation interface and net zero carbon.

- **Individual Businesses.** A feature of the Blueprint is that there are Actions that all tourism businesses must get involved with, whether big, small or micro. This includes Embedding Tiaki, being Employers of Choice, acting on carbon, embracing Te Whakarae Māori and getting on board with Predator Free.

Partnering

With tourism being a complex and interconnected system, industry will need to work closely with central and local government, iwi, hapū, whānau, communities and other organisations as it acts on this blueprint.

Governance

Oversight by the TIA Board on the progress of enacting this plan will be critical to drive momentum and accountability.

Dynamic and adaptive

As we make progress towards our Vision or as our operating environment changes, this Blueprint will need to evolve. Our north star – that is our Vision, Strategy and Outcomes – will not change. However, we will refine our Action areas every few years to ensure we are doing the best we can to drive ongoing change.

Progress reporting

We are committed to measuring, monitoring, and transparently reporting on progress towards enacting this Blueprint.

As an industry, we are keen to make real gains towards the achievement of our Vision and Outcomes as quickly as possible. We will put supporting plans in place within the first 180 days of this Blueprint being published.

Want to stay in touch on our journey?

Visit www.tia.org.nz to find out more and be a part of the kōrero.

Appendices | Kā apithihaka

Bibliography

Department of Conservation. (2020). Towards a Predator Free New Zealand | Predator Free 2050 Strategy.

KANTAR. (2022). New Zealanders Views of Tourism.

New Zealand Government. (2023). Better Work Action Plan, Industry Transformation Plan.

New Zealand Government. (Currently in preparation). Tourism Environment Action Plan, Industry Transformation Plan.

New Zealand-Aotearoa Government. (2019). New Zealand-Aotearoa Government Tourism Strategy.

Regional Tourism New Zealand and Miles Partnership. (2023). TŌNUI.

The Aotearoa Circle. (2023). Tourism Sector and Climate Change Scenarios and Adaptation.

Tourism Futures Taskforce. (2020). We are Aotearoa, Interim Report.

Tourism Industry Aotearoa. (2014). Tourism 2025.

Tourism Industry Aotearoa. (2016). Tourism 2025 – Two Years On.

Tourism Industry Aotearoa. (2017). New Zealand Tourism Sustainability Commitment.

Tourism Industry Aotearoa. (2019). Tourism 2025 and Beyond.

Tourism Industry Aotearoa. (2021). Tourism Carbon Challenge.

Tourism Industry Aotearoa. (2022). Tourism leaders put 'green' aspirations into action.

United Nations. (2015). Paris Agreement.

Outcomes and targets | Wakataunga

Outcome 1: Hapori (Community)

Enhance the vibrancy, culture, health, and quality of life of local communities.

Area	Data source	Base	Rationale	Target
New Zealanders' perception of tourism	TNZ, TIA, DOC, New Zealanders' Views of Tourism	89% (YE May 2023)	A key indicator of the health of tourism is the views of the host communities towards it	90% of New Zealanders' think tourism is good for New Zealand and will be sustained over the period to 2030
Seasonality	Stats NZ, International Visitor Arrivals	The proportion of off-peak arrivals to peak season arrivals is 1 to 1.64 (2019)	The ratio between peak and off-peak international arrivals indicates if travel activity is getting more or less concentrated across the year. Balanced arrivals across the year supports industry productivity	Proportion of off-peak arrivals to peak season arrivals in 1 to 1.6 or less by 2030

Outcome 2: Manuhiri (Visitor)

Provide timeless experiences that differentiate Aotearoa New Zealand in the minds of manuhiri (local and international).

Area	Data source	Base	Rationale	Target
Domestic visitor satisfaction	TIA, Domestic Visitor Satisfaction	86% (YE May 2023)	To maintain and improve the performance of tourism in meeting the needs of domestic visitors	Domestic visitor satisfaction is sustained at 90% over the period to 2030
International visitor satisfaction	MBIE, International Visitor Survey	90% (Quarter 1, 2023)	To maintain and improve the performance of tourism in meeting the needs of international visitors	International visitor satisfaction is sustained at 90% over the period to 2030
Participation in Māori cultural experiences	MBIE, International Visitor Survey	46.9% (YE March 2020)	To substantially increase the numbers of international visitors participating in Māori cultural experiences. The intention is to build stronger indicators and targets for Māori tourism supply and demand over time	70% of international visitors participated in a Māori cultural experience by 2030
Tiaki awareness	MBIE, International Visitor Survey	14% (Quarter 1, 2023)	To establish an indicator for understanding how international visitors can be great visitors within Aotearoa New Zealand through their awareness of Tiaki	30% of international visitors are aware of, and supported by, the Tiaki Promise by 2030.

Outcome 3: Ōhanga (Economic)

Support productive and prosperous tourism businesses and the Aotearoa New Zealand economy.

The industry is striving for value growth. By increasing the average spend per visitor, coupled with the visitor mix, increased length of stay and modest volume growth, TIA expects tourism's total expenditure will reach $55b billion per annum by 2030 (inflation adjusted).

Area	Data source	Base	Rationale	Target
Spend per international visitor	StatsNZ: Tourism Satellite Account	$4,837 (YE March 2020)	The average spend per international visit represents the financial contribution of each visit	$6,500 average spend per international visitor by 2030 (inflation adjusted)
Contribution to GDP, Exports and Employment	StatsNZ: Tourism Satellite Account	9.1% of GDP 19.9% of Exports 13.2% of employment (YE Mar 2020)	To ensure that tourism is sustaining its contribution to the wider economy	Tourism contribution to GDP, Exports and Employment is sustained over the period to 2030
Visitor mix	StatsNZ: Tourism Satellite Account	42.7% International 57.3% Domestic (YE Mar 2020)	To signal the importance of maintaining a balance between international and domestic tourism	Proportion of international and domestic visitor spend is between 55-60% domestic and between 40-45% international in 2030

Outcome 4: Te Taiao (Environment)

Invest in the protection, restoration and enhancement of Te Taiao (our natural world).

Area	Data source	Base	Rationale	Target
Aviation carbon emissions	StatsNZ, Greenhouse Gas Emissions	3,587 kilotonnes of carbon dioxide equivalent (2019)	Aviation carbon emissions make up 63% of tourism's total emissions making it a key area to focus on over the longer term, even though it is a hard to abate sector	Aviation sector to be Net Carbon Zero by 2050
Non-Aviation carbon emissions	StatsNZ, Greenhouse Gas Emissions	2,244 kilotonnes of carbon dioxide equivalent in (2019)	The industry has more control over the non-aviation emissions that make up 37% of tourism emissions. Mostly land transport and other sectors like accommodation	Non-aviation tourism to reduce carbon emissions by to 30% below the 2019 level by 2030
Carbon reduction	TIA, TSC Annual Survey	41.3% of TIA members act to reduce their carbon emissions	Reducing tourism industry carbon emissions requires action from all tourism businesses	95% of TIA members are measuring, managing and reducing their carbon emissions by 2030
Waste reduction	TIA, TSC Annual Survey	87.8% of TIA members act to reduce their waste	Reducing tourism industry waste requires action from all tourism businesses	95% of TIA members are managing their waste to minimise negative impacts by 2030
Predator free and biodiversity	TIA, TSC Annual Survey	68.6% of TIA members act to restore nature	Having every tourism business contributing will add impetus towards protecting and restoring our biodiversity	95% of TIA Members are actively supporting and championing predator free and/or biodiversity initiatives by 2030