

**Tourism
Futures**
TASKFORCE

Invitation to Contribute

SUMMARY OF SUBMISSIONS



Contents

Contents	2
Overall findings	4
Stakeholder groups	6
Introduction	7
Purpose.....	7
Overview of the Invitation to Contribute submission process	7
The consultation process.....	7
Approach to analysis	8
How to read this document.....	8
Overview of submissions	8
Strengths of the tourism system	9
Breakdown of top strength themes by stakeholder group	10
Natural Capital.....	11
New Zealand’s global brand/reputation.....	11
Domestic tourism opportunities from border closures	12
Te ao Māori and Cultural Tourism	13
Product offering	14
Economic contribution	14
New Zealand’s friendly attitude.....	14
Sector’s Awareness of Tourism Impacts.....	15
Tourism as an employer	15
Entrepreneurship of tourism businesses.....	16
Collaboration, communication and cooperation across the sector	17
Challenges to the tourism system	18
Breakdown of top challenge themes by stakeholder group	19
Impacts of Volume.....	21
Impacts of COVID-19 and Border Closures	21
Tourism Environment Impacts	21
Workforce Development	22
Alignment and Leadership in the Tourism System	22
Infrastructure Capacity	22
Climate change and emissions.....	23
Investment in Data and Research and Development.....	23
Dispersal (Regional and Seasonal)	24

Freedom Camping.....	24
Funding System	24
Enhancing New Zealand’s Product Offering	25
Social License to Operate.....	25
Involvement of Māori in Tourism.....	26
Reliance on International Tourism	26
The ideal tourism system	27
The ideal tourism system as envisioned by submitters	27
Breakdown of top visions and goals for an ideal system by stakeholder group	29
The Environment, Sustainability and Regenerative Tourism.....	30
Vision for the future of tourism.....	31
Managing visitor numbers and destination demand	32
Governance of the tourism system	32
The Product Mix	33
Te Ao Māori and importance of cultural tourism.....	34
Training and upskilling our workforce	34
Funding	34
Regional and seasonal dispersal	35
Research and Data.....	35
Tourism in the Community.....	36
Appendix one: Additional documents.....	37

Overall findings



The submission process was undertaken in September 2020, at a time when the immediate impacts of COVID-19 had already been experienced by the sector and the likely future impacts of COVID-19 remain unknown. Some submitters expressed that COVID-19 is an opportunity to *'take a look at [sic] ourselves and what we have become, good, bad and the ugly' (accommodation provider)* and others were focussed on the financial impact of COVID-19. Domestic tourism featured in the four most frequently mentioned strengths of the tourism system in an environment where the reliance on domestic tourism has necessarily grown.

Of the most frequently mentioned strengths of our current tourism system, the remaining three of the top four related to the unique features of New Zealand that form an attractive offering – the natural environment, our international reputation (including through the handling of COVID-19) and brand identity, and Māori cultural tourism.

'Rich in culture and history, with diverse landscapes, unique for flora and fauna and packed with adventure, NZ has so much to offer to both international and domestic tourists alike. Due to the positive and widely published media reporting during the pandemic, it has also highlighted the strength of how well NZ has united with our team of 5 million to contain the virus.' Business

However, the top four most frequently mentioned challenges of the tourism system reflected the potential for tourism to negatively impact on those points of strength in the system. Submitters most frequently discussed volume-related pressures, COVID-19 related pressures, the environmental impact of tourism and workforce issues, particularly in a changed economic environment.

The workforce currently supporting the tourism industry is typically low wage and casual. A key challenge is the need for businesses to provide job security and pay fair wages while remaining financially viable' Academic

In order to retain and grow the strength of Māori culture in New Zealand, submitters felt that kaitiaki runaka need to be actively supported to exercise kaitiakitanga, tourism builds and protects manawhenua with tourism strengthening its relationships with iwi in order to respect their desires for the land.

Submitters saw that a cohesive leadership and long term vision that prioritised an environmentally sustainable or regenerative model with well managed visitors was the key positive change they wanted to see embedded in the tourism system in 10-15 years' time. The benefit of achieving this type of system was seen to be one of economic, social and environmental return for New Zealand as well as for visitors to New Zealand.

“Decisions made by the Taskforce will shape the future of Aotearoa beyond tourism. The tourism industry is woven into the fabric of Papatūānuku and affects all those in Aotearoa. The ideal future tourism system will recognise and respect this, and so value the health of the environment and people above all else.” Conservation Group

“The ideal future tourism system of Aotearoa will set an example to the world on how best to provide a symbiotic future between mana whenua in conservation and tourism, providing a welcoming and respectful culture for visitors and communities alike.” Tourism Conservation Board

In 10-15 years, it would be great if we saw the same economic return from tourism for the economy but with fewer visitors (value vs volume).” Individual submitter

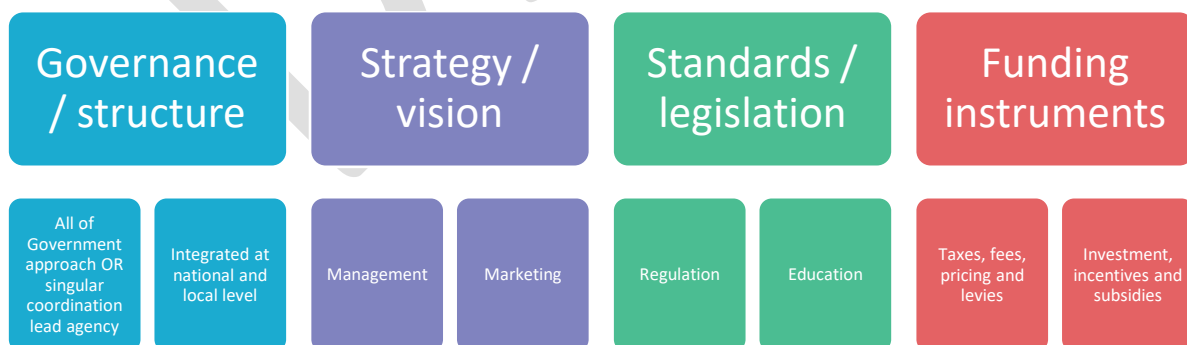
“We have the opportunity and responsibility to ensure that time and spend has visitors leave our shores invigorated and inspired by the way we shared our land and our people, our values and our way of life with them. Ensuring our manaakitanga is warm and embracing. These visitors feel this and are then encouraged to ensure others visit and they hopefully return.” ITO submitter

“100% Pure still resonates – let’s make sure that tourism plays a greater part in helping government achieve this (whether it be through promoting improved farming/transportation and other industry standards)” RTO/EDA submitter

“The Government needs to play a more proactive role to decide on what type of visitors the country wants to have.” Tour Operator submitter

Solutions posed by submitters ranged from limiting the number of international visitor arrivals through a variety of mechanisms to restricting visitors at place.

In relation to how the future tourism system could be achieved responses can broadly be characterised as changing the structure of the leadership of the system, creating strategy that is integrated with other existing strategies and implementation that is integrated with regional strategies, the creation of standards for the tourism system that are either regulated or that the system is educated about and a range of possible financial incentives or disincentives for visitors and tourism businesses.



Stakeholder groups

Some key stakeholder groups most mentioned theme(s) for each section are represented below (multiple themes are provided where they were mentioned the same number of times):

	Strengths	Challenges	Change
Academics	The natural environment	Impacts of volume Investment in research and development and data	Research and data
Accommodation	New Zealand's reputation	Workforce development	The environment, sustainability and regenerative tourism
Conservation boards	The natural environment	Tourism environmental impacts	The environment, sustainability and regenerative tourism Te ao Māori and cultural tourism
Individuals	The natural environment	Impacts of volume Climate / emissions	The environment, sustainability and regenerative tourism
Industry organisations	Sector's awareness of tourism impacts	Impacts of COVID-19 and border closure Infrastructure capacity	The environment, sustainability and regenerative tourism Te ao Māori and cultural tourism
RTOs / EDAs	The economic contribution of tourism	Funding system	The environment, sustainability and regenerative tourism Funding Research and data
Tour operators	The natural environment	Impacts of COVID-19 and border closure	Managing visitor numbers and demand

Introduction

Purpose

This document summarises submissions and feedback received through the New Zealand Tourism Futures Taskforce (the Taskforce) Invitation to Contribute submission process.

Overview of the Invitation to Contribute submission process

The Taskforce asked the tourism industry, central government agencies, members of the Taskforce Advisory Group and other interested parties to contribute to this process as stakeholders in the wider tourism system. Submitters were encouraged to be guided by the four capitals approach that is set out in the Treasury Living Standards Framework, whereby New Zealand-Aotearoa's assets are conceived as four interconnected 'capitals' that each have the ability to increase New Zealanders' wellbeing now and in the future. These are the natural capital (our environment), social capital (our social connections and public institutions), our human capital (the skills, labour and health of New Zealand's workforce) and financial/physical capital (our physical infrastructure, buildings, and finances).

Submitters were also encouraged to consider the tikanga Māori concepts of mauri, manaakitanga, kaitiakitanga, and whanaungatanga.

Submissions gathered through this process will help inform the Taskforce's thinking, as they develop recommendations for a report on the future of New Zealand's tourism system. The Taskforce will provide their initial report to government in December 2020, with final recommendations published in April 2021.

The consultation process

The Invitation to Contribute web form went live on the Ministry of Business, Innovation and Employment (MBIE)'s website on 1 September 2020, and closed on 22 September 2020. In total, 150 submissions were received.

Submitters provided their feedback based on the following topics:

1. Strengths of the current tourism system

- What are the strengths, or emerging strengths of the tourism system (now, or prior to COVID-19)?
- What are important next steps (if any) to preserve or grow these strengths?

2. Challenges the tourism system is facing or will face

- What are the challenges or areas of the tourism system most in need of addressing (now, or prior to COVID-19)? What would your top three areas for focus be?
- For each of your three challenges/areas mentioned above, what actions would you like to see implemented?

3. The ideal tourism system

- What positive change would you like to see embedded into the tourism system in 10 to 15 years (e.g. values, ways of operating)? Please share up to three.
- What needs to happen to enable this positive change (e.g. what changes would be required)? Are there limitations or barriers the Taskforce should consider? Are there existing documents, strategies or processes that would be useful for the Taskforce?

Approach to analysis

Taskforce Secretariat officials have aggregated submission points against common themes, to enable an assessment of the range of views. Not all submissions, or submission points, are addressed individually in this report.

How to read this document

This summary of submissions sets out themes raised by submitters through the Invitation to Contribute process. Themes have been organised under headings that correspond to questions in the web form.

The document summarises views from different sectors. In many cases, officials have made a judgement on which is the most appropriate sector for a submitter. The aim is to give an indicative assessment of the views of different types of stakeholders.

Overview of submissions

This section provides an overview of the submissions, and themes which emerged. In total, we received 150 submissions, representing interests from a range of sectors and perspectives.

The table below represents the number of submissions, by submitter type.

Table 1: Number of submissions, by submitter type

Submitter type	Number of submissions	Percentage of total submitters
Accommodation Sector	22	14.7
Individuals	19	12.7
Businesses	18	12.0
Industry Organisations	15	10.0
Tour Operators	15	10.0
Academia	14	9.3
Regional Tourism Organisations/ Economic Development Agencies	13	8.7
Conservation Board	8	5.3
Government	6	4.0
Arts and Cultural Organisations	4	2.7
Conservation Groups	4	2.7
Inbound Tour Operators	4	2.7
Aviation Industry	3	2.0
Overseas Travel Agents	3	2.0
Non-Industry Organisations	2	1.3
Total	150	100

Strengths of the tourism system

Submitters were asked to identify what they perceive as the strengths, or emerging strengths of the tourism system (now or prior to COVID-19), and the important next steps (if any) that should be taken to preserve or grow these strengths.

The main strengths of New Zealand's tourism system identified by submitters were New Zealand's unique and varied natural environment, positive international reputation, and high-quality visitor activities and amenities.

Specifically, submitters noted that New Zealand's attractiveness is due to its culture and history, diverse landscapes, geographic isolation, unique flora and fauna, and high-quality visitor activities and amenities.

A few submitters noted that New Zealand's appeal is due to its perception amongst visitors as a safe destination, specifically our stable government and robust health system. The positive international media on New Zealand's response to COVID-19 was also referenced as adding to our appeal as a safe destination.

The table below represents the most common strengths noted by submitters.

Table 2: Common strengths of the tourism system, noted by submitters

Strengths of the tourism system	Number of submitters
Natural Capital	41
New Zealand's global brand/reputation	35
Domestic Tourism Opportunities from Border Closure	26
Te ao Māori and Cultural Tourism	26
Product Offering	18
Economic Contribution	17
New Zealand's Friendly Attitude	14
Sector's Awareness of Tourism Impacts	14
Tourism as an Employer	8
Entrepreneurship of Tourism Businesses	7
Collaboration, Communication and Cooperation across the Sector	7

Breakdown of top strength themes by stakeholder group

Themes	Total number of mentions across all stakeholder groups	Stakeholder groups' most frequently mentioned issues and number of mentions											
		Academia (14)	Accommodation (18)	Arts and cultural organisations (4)	Business (18)	Conservation Board (8)	Conservation groups (4)	Government (6)	Individual (19)	Industry organisation (15)	ITOs (4)	RTO/EDAs (13)	Tour Operators (15)
Natural capital	41	● (6)	● (4)		● (5)	● (5)	● (2)		● (9)				● (5)
New Zealand's global brand / reputation	35	● (4)	● (6)		● (6)			● (2)			● (4)	● (3)	● (4)
Domestic tourism opportunities from border closure	26		● (4)										
Te ao Māori and cultural tourism	26	● (3)		● (2)		● (5)			● (3)				
The product offering	18		● (4)						● (3)				
Economic contribution	17								● (3)			● (4)	● (3)
New Zealand's friendly attitude	14												
Sector's awareness of tourism impacts	14									● (5)			
Tourism as an employer	8							● (2)					
Entrepreneurship of tourism businesses	7												
Collaboration, communication and co-operation across the sector	7			● (2)								● (3)	

● = <31% of this stakeholder group ● = 31-60% of this stakeholder group ● = >60% of this stakeholder group

Natural Capital

The most common strength of the tourism system identified by 41 submitters was New Zealand's natural capital/'Papatūānuku'. In particular, submitters noted:

- our premium visitor experience is built on the back of New Zealand's wide variety of natural landscapes.
- the 'remoteness' of our landscapes and national parks is attractive to international visitors.

Steps to preserve natural environment

A few submitters suggested that there is a need for the tourism industry to recognise, in full, their reliance on the natural environment, and the quantum shift required to embed environmentally sustainable strategies into their practice.

- Preserve the integrity of conservation legislation, policy, and plans, to protect the taonga of wilderness;
- Prioritise Treaty partnerships and relationships as this will be central to further enhancing the platform for iwi and hapū to continue to development tourism pertaining to the whenua, moana, tangata and wairua of our country;
- Correctly resource, prioritise, and adhere to the existing conservation legislation, plans, and strategies, which guide the access to and use of public conservation land,
- Strengthen environmental legislation such as the Climate Change Response (Zero Carbon) Amendment Act
- Acknowledge that the Department of Conservation's primary role is to protect our natural and cultural environment;
- Proactively facilitate a destination management approach to tourism through centralised standards, in order to provide for a strongly represented voice for conservation, tangata whenua, and communities in tourism;
- Invest substantially in biodiversity protection; understanding that nature is a platform that drives social, mental, and physical wellbeing, as well as tourism;
- Encourage existing domestic and short-haul markets. These markets are more resilient to adversity, produce lower carbon emission, provide for good seasonal and regional spread, and, often, domestic and short haul visitors have greater appreciation for the environment and local culture of Aotearoa;
- Develop a more in-depth understanding of the true economic, socio-cultural, and environmental impacts of tourism in Aotearoa. This increased research and modelling will better provide for strategic and conscientious decision making;
- Increase and invest in waste management initiatives;
- Review and create a legislative framework that reinforces a sustainable future;
- Create a visitor management strategy to address managing visitor numbers in a way that protects natural resources from degradation and overconsumption;
- Increase the amount of the International Visitor and Conservation Levy to fund needed infrastructure and regional development;
- Change legislation so that DOC can charge for access to all National Parks.

New Zealand's global brand/reputation

Another strength highlighted by 35 submitters was New Zealand's strong global brand and reputation. In particular, submitters:

- referenced New Zealand's 'clean green image' and perception as a 'bucket list' destination
- acknowledged the efforts of Tourism New Zealand and inbound tour operators (ITOs) in marketing New Zealand to international visitors, and specifically promoting New Zealand as a year-round destination.
- noted that New Zealand has been promoted positively by the numerous 'blockbuster' movies and television series that have produced here in recent years, and that have provided opportunities to showcase landscapes across the country.
- suggested that New Zealand's strong brand is linked to the perception on the part of some visitors that we are a luxury destination, offering luxury choices for accommodation, experiences and wine and food.

Steps to preserve New Zealand's global brand/reputation

In order to preserve New Zealand's global reputation, contributors suggested the following actions:

- continue to invest in protecting natural assets, in efforts to ensure New Zealander's perception of tourism remains positive, and the experience of Māori culture remains authentic.
- Continue to promote New Zealand as a safe and desirable destination to visit
- capitalise on our COVID-19 response.
- continue to work with agents and clients overseas through ITOs.
- amplify the message that there is more to the country than the famous hotspots,
- help would-be entrepreneurs who might wish to develop attractions and experiences in locations experiencing less visitation to capitalise on the opportunities that they present and to make them profitable.
- address the issue of overcrowding particularly in popular sites.
- provide support to grow the more unique and less marketed tourism businesses and locations instead of driving tourism in hotspots that are already overcrowded.
- Commit to protecting the natural environment and habitats
- Increase conservation efforts
- re-evaluate what and who we define as a visitor, or tourist.
- fund an incubator to help people:
 - identify gaps in the market in the tourism sector in emerging locations around the country
 - get secure financing to help them get businesses off the ground and running; and
 - operate for a few years (with some marketing support, ideally) that could help to develop a new cadre of tourism entrepreneurs who could help spearhead this sort of growth around the country.

Domestic tourism opportunities from border closures

Twenty-six contributors noted the domestic tourism opportunities resulting from the border closures as a strength of the tourism system. In particular, contributors:

- noted COVID-19 and the border closure has seen a remarkable movement of New Zealanders travelling in their own country, with stronger off-peak travel with domestic tourism
- noted that this strength is due to:
 - The inability to travel offshore;

- The types of activities that New Zealand offers, as they are suited to recreationists and markets like schools and others (domestic group travel); and
- An engaged populace where there is a growing sense of awareness about the value of domestic tourism opportunities.
- commended the industry adapting to the massive change in its trading situations, and the fact that some businesses offered deals to encourage domestic tourism. A few submitters however, negatively reacted to some tourism operators increasing (or not decreasing) their prices.
- commended MBIE and RTO's for their support through the STAPP fund, and acknowledged the positive impact of the Wage Subsidy, as the support enabled tourism businesses time to reassess and realign to domestic tourism, and RTO's to plan and maintain on-the-ground support to their local tourism operators, as well as to put resources into destination management, domestic marketing, and people capability, ensuring momentum and important regional IP is not lost.

Steps to preserve domestic tourism opportunities

To preserve the momentum of domestic tourism, contributors suggested the following actions:

- continue to promote regionally based tourism opportunities
- use incentives to encourage domestic travel
- implement social tourism initiatives (e.g. travel vouchers for disadvantaged families) to make domestic tourism more inclusive.

Te ao Māori and Cultural Tourism

Twenty-six submitters highlighted the Māori culture experience as a strength of the tourism system. In particular, contributors:

- highlighted that the Māori worldview provides a key point of difference for visitors, and is a distinguishing feature of the New Zealand visitor experience, that creates a competitive advantage.
- highlighted that it is strength that cultural tourism is being led by Māori, and is built on the values of manaakitanga and kaitiakitanga and authentic storytelling
- Noted that Māori will naturally increase their presence in tourism through the Treaty settlement processes and the growing strength of iwi.

Steps to preserve Māori culture experience

Actions to preserve the Māori culture experience suggested by submitters included:

- Strengthen relationships with iwi, in order to respect their desires for the land and give access to all New Zealanders and visitors;
- Assist Māori to increase their presence in tourism
- Ensure that Māori culture remains authentic, and does not become diluted through commercialisation;
- Place more emphasis on people and culture, rather than just places.
- Actively support and enable kaitiaki runaka to exercise kaitiakitanga,
- ensure all tourism protects and builds on manawhenua rights and interests; and
- Make free online and evening courses on Māori legends and culture available to tourism operators in order to increase businesses' knowledge of Māori legends, culture etc, which will add value to visitor experiences; .

Product offering

Eighteen submitters mentioned New Zealand's product offering as a strength of the tourism system. In particular, contributors:

- highlighted that variety of activities available in New Zealand for visitors
- noted that New Zealand offers a range of experiences within different budgets.

Steps to preserve product offering

Actions to preserve New Zealand's product offering suggested by submitters included:

- Continue to service different levels of itineraries based on pricing and budget and to not place all emphasis on high-end exclusive experiences/low-end-low margin itineraries;
- invest more in communicating attractions (e.g. a free app that has information on the geological history, cultural history, social history of landmarks and towns in New Zealand);
- continue to ensure that tourism attractions/activities appeal to a diversified market; and
- ensure that the product offering must make commercial sense, but also should consider how it contributes to social capital (amongst others through individual well-being).

Economic contribution

Another strength of the tourism system that submitters raised was tourism's economic contribution to the New Zealand economy with broad impact from metropolitan centres across regional New Zealand. Specifically submitters noted that tourism is as NZ's largest export earner pre-COVID-19-19, and added valued diversification to the New Zealand economy.

Steps to preserve tourism's economic contribution

To preserve tourism's economic contribution, contributors suggested the following actions:

- reopen the borders.
- Use the opportunity of COVID-19 and the border closures to reconsider the net benefits of tourism; specifically, accounting for environment and social costs and assessing how we can achieve economic benefits without sacrificing community wellbeing and natural environment.
- enable regions to grow and develop their stories.
- help unlock the opportunities of smaller regions, and develop stories that can be interwoven into the messaging to visitors and communities.
- concentrate on high-value tourism serving smaller tourist numbers in order to preserve tourism's economic contribution sustainably.
- Focus on quality experiences;
- Encourage visitors to stay longer;
- Encourage visitors to slow down; and
- Encourage upmarket regional accommodation.

New Zealand's friendly attitude

Fourteen submitters mentioned New Zealand's people/he tāngata and friendly attitude as a strength of the tourism system. In particular, contributors:

- noted that the Kiwi welcome is evident everywhere, and that New Zealand is a collective of people of good intent and spirit who understand our values of kaitiakitanga and manaakitanga.
- noted that New Zealand's geographic isolation has encouraged innovation and self-reliance, so visitors are often intrigued by the manifestations of this from engineering to politics to the widespread practice of kaitiakitanga.

Actions to preserve our people

To preserve New Zealand's friendly attitude to visitors, contributors suggested the following actions:

- Ensure that community needs and aspirations are at the forefront of all decision making.
- Support innovative ways for us innovation to host visitors.

Sector's Awareness of Tourism Impacts

Fourteen submitters highlighted the tourism industry's awareness and understanding of the issues that exist in the sector. In particular, contributors:

- noted that the sector understands the concept of value over volume and the negative impacts of tourism on the host communities.
- referenced the industry's direction towards becoming more sustainable, with uptake of the Tourism Sustainability Commitment and the evident desire to see a tourism system that is truly regenerative and gives back more than it takes.

Steps to preserve understanding of tourism issues

Suggestions to preserve tourism's awareness of its impacts, included the following actions:

- Implement an accreditation system;
- support businesses to help them align their goals with a national benchmark and support for them to achieve their sustainability goals.
- Set clear sustainability targets and investing in tools to make these a reality; and
- Provide targeted support for small operators offering quality sustainable products.

Tourism as an employer

Eight submitters said that the employment opportunities (particularly, long term, full-time roles) in tourism are a strength of the system. In particular, contributors:

- noted that (pre-COVID-19) the sector employed a lot of people with a range of skills, which enabled business opportunities for small businesses.
- noted that tourism provides meaningful jobs, and highlighted that some businesses pay the living wage.
- noted that the education sector provides a relevant, robust curriculum that meets the needs of tourism business and organisations while focusing on sustainability of the industry.
- Another submitter noted that students currently enrolled in tourism education are feeling very uncertain, as they are being encouraged to continue on their pathway but are unsure about future career prospects, and that there is a real risk that this resource/investment in training may be lost.

One submitter talked about the experience of COVID-19 on their employees and how important it is for tourism employers to support their staff:

“COVID-19 set new challenges for many, we were an essential business and therefore operated through the entire lockdown under strict restrictions. Going through these experiences with my staff built resilience, strengthened our bonds, challenged our norm and tested our abilities. By identifying our strengths and weaknesses during such a tough time like COVID-19, we were able to adjust our plan to suit what we had and still are experiencing under the highest amount of pressure that we will probably experience in a long time. Our mind-set is, we got through that....the rewards are coming. Positive mind-setting for my staff on a daily basis is very important because our industry is seasonal, there are highs and lows, our roles, tasks and moods change to suit the environment. If we can work on building that mid-stream mind-set that is halfway between our high and lows, then we will create that consistency no matter the weather which is good for productivity and income generation overall. Self-development in the background whilst constantly marketing on a genuine level because we are all human and this is one experience that we can all agree we have in common.”

Steps to preserve workforce

Actions to preserve the tourism workforce included the following:

- enhance secondary education tourism curriculum, where the study of tourism is not only about training a service-delivery workforce but about producing critical, creative and strategic thinkers to address the local and global challenges and opportunities in tourism;
- provide genuine up-skilling opportunities linked to a career pathway will help sustain the stability and purpose required for the workforce for the future; and
- extend working holiday visas for younger long-term visitors able to contribute to the tourism workforce.

Entrepreneurship of tourism businesses

Seven submitters highlighted tourism businesses as a strength of the system. In particular, contributors:

- highlighted that the tourism system is adaptive because it is driven by the private sector, and contains highly skilled mature industry players.
- noted that the tourism sector encourages innovation and entrepreneurialism, and that there are many private enterprises and entrepreneurs who put themselves at risk to drive tourism.
- acknowledged that many tourism operators are resilient, innovative and able to react to changing times.
- highlighted that many tourism operators strive to provide the best product and care for the environment.
- noted that at a commercial level, New Zealand businesses are entrepreneurial and the majority of tourism businesses are well run, inevitably by passionate management and employees. The love of tourism and working within the sector will most often overcome the relatively low wage and salary levels of those employed.
- Another submitter noted that the majority of Tourism SMEs have highly flexible staffing arrangements, a can-do #8 wire attitude, and a genuine, authentic desire to create ‘great service’ to others and themselves.

Steps to preserve entrepreneurship of tourism businesses

Submitters generally suggested to not increase compliance costs to preserve the entrepreneurial attitude of tourism businesses.

Other suggestions included the following actions:

- invest in and provide incentives for businesses to digitalise, learning social media, website, SEO, and email marketing skills is very overwhelming for tourism businesses and that there should be investment in the Pop-Up Business School for tourism businesses to access.
- Provide more cross-government support for tourism workforce development through initiatives such as work holiday visas, seasonal workforce, Go with Tourism, and secondary and tertiary education;
- promote and support small businesses long term rather than during crisis and loss of international tourism;
- support annual tourism business accelerator programmes;
- identify mechanisms to connect investors to tourism start-ups; and
- improve the connection between tech companies and tourism by expanding tech consultancy services and training grants.

Collaboration, communication and cooperation across the sector

Seven submitters highlighted strengths of the tourism system related to the collaboration, communication and cooperation within the sector. In particular, contributors:

- highlighted that the private sector is reasonably well integrated under TIA, and this is useful for the sector to speak with one voice; that TIA and central government objectives are generally well aligned, and that the tourism industry is well represented through engagement with central government.
- acknowledged the role of RTOs, and specifically how COVID-19 has shown the benefit and relevance of regional tourism organisations, and their influence related to destination management, product development and destination marketing.
- highlighted the significant level of collaboration and cross-pollination between the regions through the RTNZ network, working together with a shared purpose to Challenges of the tourism system

Submitters were asked to identify what they perceive as the key challenges or areas of the tourism system that are in most need of addressing (now or prior to COVID-19).

Submitters were also asked what actions they would like to see implemented to address the challenges the tourism system is facing.

Challenges to the tourism system

The main challenge of New Zealand's tourism system identified by submitters was visitor volume. Many submitters referred to the impact of COVID-19, environmental impacts, workforce issues, problems with the tourism system's governance/structure, infrastructure pressures and the risk posed by climate change and emissions as prominent challenges faced in the sector.

A few submitters noted that issues relating to freedom camping and digitalisation as other challenges in the sector.

The table below represents the most common challenges noted by submitters.

Table 3: Common challenges of the tourism system, noted by submitters

Challenges of the tourism system	Number of submitters
Impacts of Volume	43
Impacts of COVID-19 and Border Closures	37
Tourism Environment Impacts	26
Workforce Development	26
Alignment and Leadership in Tourism System	25
Infrastructure Capacity	25
Climate/Emissions	24
Other	23
Investment in Research and Development and Data	17
Dispersal (Regional and Seasonal)	16
Freedom Camping	15
Funding System	14
Enhancing New Zealand's Product Offering	14
Social License to Operate	13
Involvement of Māori in Tourism	6
Reliance on International Tourism	3

Breakdown of top challenge themes by stakeholder group

Themes	# mentions across all stakeholder groups	Stakeholder groups' most frequently mentioned issues and number of mentions														
		Academia (14)	Accommodation (22)	Arts and cultural organisations (4)	Aviation Industry (3)	Business (18)	Conservation Board (8)	Conservation groups (4)	Government (6)	Individual (19)	Industry organisation (15)	ITOs (4)	Non-Industry Organisations	Overseas Travel Agents	RTO/EDAs (13)	Tourism operators (15)
Impacts of Volume	43	● (5)				● (4)	● (4)		● (1)	● (7)		● (4)		● (1)		● (5)
Impacts of COVID-19 and Border Closures	37		● (7)			● (6)				● (4)	● (4)	● (2)	● (1)			● (7)
Tourism Environment Impacts	26					● (4)	● (6)	● (3)	● (1)					● (4)	● (3)	
Workforce Development	26		● (8)						● (1)							
Alignment and Leadership in the Tourism System	25		● (4)		● (2)									● (4)	● (3)	
Infrastructure Capacity	25	● (3)						● (2)	● (1)		● (4)	● (2)		● (4)		
Climate/Emissions	24						● (5)			● (7)						
Investment in Research and Development and Data	17	● (5)							● (1)							
Dispersal (Regional and Seasonal)	16			● (3)	● (2)				● (1)					● (4)	● (3)	
Freedom Camping	15		● (7)													
Funding System	14								● (1)				● (1)	● (6)		
Enhancing New Zealand's Product Offering	14		● (4)						● (1)				● (1)			

Negative Perceptions of Tourism	13						● (4)	● (2)	● (1)							
Involvement of Māori in Tourism	6															
Reliance on International Tourism	3															

● = <31% of this stakeholder group ● = 31-60% of this stakeholder group ● = >60% of this stakeholder group

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Impacts of Volume

The most common challenge of the tourism system identified by 43 submitters (13.1 %) was issues relating to New Zealand's visitor volume.

Generally, submitters felt that New Zealand's iconic places are at risk of being overcrowded, and that impacts had begun to show. Submitters specifically highlighted that there are too many visitors who are negatively impacting our environment. Submitters also pointed to the lack of limits on visitor numbers and resulting overcrowding.

An additional concern raised by submitters was that high visitor volumes creates greater health and safety risks at visitor destinations.

Actions identified by submitters to address volume related challenges include:

- Controls on visitor numbers at iconic places
- Focus on domestic tourism
- Reduce promotion in international visitor markets
- Promote non iconic areas/places

Impacts of COVID-19 and Border Closures

Another challenge addressed by 37 submitters (11.3%) was the impacts of COVID-19 on the tourism sector.

Many submitters were concerned with how to operate under border closures, as well as how to operate once the border is opened.

Key challenges identified by submitters related to the resilience (and the ability to pivot) of the domestic tourism system/operators, as well as the future influx of visitors post-COVID-19 after border restrictions are potentially lifted, and the quality of experience and impacts they will have.

Submitters also generally noted that there was a challenge in ensuring that the tourism system does not return to the pre-COVID-19 context.

Actions identified by submitters to address COVID-19 related challenges included:

- Increased focus on systems thinking and planning for when borders reopen
- Shift to emphasise the domestic market in the current climate and continue this emphasis after borders open
- Ensure the future resilience/sustainability of the industry by reinforcing the Tiaki Promise and the Tourism Industry Aotearoa Sustainability Framework
- Maintain the attractiveness of New Zealand as a destination through promotion and focus on being a high quality destination

Tourism Environment Impacts

Twenty-six submitters (8.0%) identified the environmental impact associated with tourism as a challenge of the tourism system.

Environmental impacts identified by submitters included the need to protect New Zealand's biodiversity, reduce pollution and ease pressure on our environment. There was also some discussion of a lack of appropriate investment in conservation and an inability to regulate activity in protected areas appropriately.

Concerns were also raised about cruise ships and their impact on the maintenance of water quality.

Actions suggested by submitters to address environmental impact challenges include:

- Having clear minimum standards of environment care
- Promoting digital, or virtual, experiences as attractive alternatives
- Hosting less tourists
- Ensuring that the environment is at the heart of everything that the government and tourism industry do
- More investment in conservation
- Increased capacity around environmental monitoring and regulation

Workforce Development

Twenty-six submitters (8.0%) identified challenges around the tourism workforce.

Submitters highlighted that it can be challenging to enable staff-development, retain quality staff, and raise the profile of tourism as an attractive career choice.

Other issues raised by submitters included the pre COVID-19 reliance on international workers, how to retain staff, attract new staff, and to ensure that the tourism workforce will be adequate to service international visitors when borders reopen.

Actions identified by submitters to address these workforce challenges included:

- Adjust employment conditions to suit needs of individuals and make jobs desirable
- Have the ability to encourage staff to upskill
- Support tourist businesses to retain staff

Alignment and Leadership in the Tourism System

Twenty-five submitters (7.6%) identified challenges related to governance and/or the structure of the tourism system.

These challenges include the need for greater central government alignment to reduce the perceived disconnect between different parts of the system. Submitters noted that central government often is not consider responsiveness, agile, or planning for the future.

Other submitters called for knowledgeable leadership within government and clearer national priorities to support the industry.

Actions identified by submitters to address governance/structure challenges:

- Develop and implement a whole-of-government approach to tourism policy
- Have an industry advisory group to provide advice to government
- Maintain the Tourism Recovery Ministers Group
- More flexible and faster with planning from Government supported by robust measurement indicators
- Clear process from Government on implementation of strategy and flow through to marketing and monitoring

Infrastructure Capacity

Twenty-five submitters (7.6%) identified infrastructure capacity as a challenge.

Many submitters mentioned infrastructure as a challenge. The key issues raised included understanding how visitors impact on infrastructure capacity and pressures specific to council-funded infrastructure. Submitters often mentioned the need to balance investment in infrastructure so that there is sufficient capacity at peak times but limited over-capacity or waste in the off-season.

Actions identified by submitters to address infrastructure challenges:

- Adding transport infrastructure (e.g. trains/train tracks)
- Strict laws around self-containing vehicles
- Infrastructure support (physical, people, digital)
- Central government partnerships with the affected local authorities

Climate change and emissions

Twenty-four submitters (7.3%), identified challenges related to climate change and emissions.

Many submitters raised concerns about the long-haul flights necessary for international visitors to reach New Zealand and the emissions costs associated with them. This contributed to a concern that international tourism would be unsustainably. One submitter expressed their concern of “the environmental impact of aviation, and its incompatibility with climate goals”.

Emissions costs for domestic travel and tourism activity (e.g. helicopter scenic flights) were mentioned as an additional challenge with the industry’s emissions profile.

Other challenges noted were ‘flight shaming’, increasing storm and natural events, lack of investment in tourism science research and how to move towards carbon neutrality and a regeneration system.

Actions suggested by submitters to address climate change/emissions challenges include:

- Increase value over volume models, resulting in an increase of high quality visitors and less flights
- Invest in the research and development of alternative fuel sources
- More carbon neutral alternatives for domestic travel and activity
- Higher charges or levies for international visitors

Investment in Data and Research and Development

In total, 17 submitters (5.2%) identified challenges related to the theme of data and research and development.

Submitters noted there was a lack of current investment in tourism science and research. Several submitters noted that there is a lack of understanding around current research and data needs and suggested a stocktake of current research and data sources should be undertaken to better inform tourism science.

One further challenge raised was around making sure that quality data and research is readily available for the public. Generally, submitters wished to see an emphasis put on insights, incorporation of community views and global benchmarks.

Actions identified by submitters to address data and research and development challenges:

- Invest in a science and research platform focused on linkages between tourism and the rest of New Zealand's economy and society
- Develop a Tourism Science Roadmap to set out sector research needs
- Identify and invest in making quality research and data available

Dispersal (Regional and Seasonal)

Sixteen submitters (4.9%) identified visitor dispersal – both seasonal and regional – as a key challenge in the tourism system.

Submitters identified a need to understand how to effectively promote domestic tourism to the regions, as well as how to enable regions with low visitor numbers and limited funding to grow and attract interest. The ability to find solutions for reducing seasonality, promoting shoulder seasons and promoting activity outside of peaks was also identified as important by many submitters.

Submitters also noted the importance of dispersing visitors in order to protect our natural environment and the iconic destinations that currently experience high visitor numbers.

Actions identified by submitters to address dispersal challenges include:

- Utilising promotional material to encourage domestic visitors into the regions and to promote shoulder seasons
- Adequately funding and support to smaller regions to encourage growth
- Partnering with local government to plan for and address seasonality

Freedom Camping

Fifteen submitters (4.6%) identified freedom camping as a challenge.

The lack of funding for the regional infrastructure needed to host freedom campers was identified as a key contributor to this challenge. There was also a perception that more needs to be done to encourage visitors to pay for the facilities they use when freedom camping. Several submitters noted the revenue generated should be invested back to ensuring that these facilities are clean and well-maintained.

There was also concern that freedom camping draws away business from commercial accommodation.

Action suggested by submitters to address freedom camping challenges include:

- Ensure that regions were involved their local tourism industries when making decisions about freedom camping
- Encourage freedom camping outside of built up areas
- Promote existing commercial accommodation alternatives (such as local campgrounds and holiday parks)

Funding System

Fourteen submitters (4.3%) identified tourism funding as a challenge.

Many submitters were concerned that funding and planning within the tourism system is reactive instead of proactive. They felt the right decisions are not always being made to ensure quality infrastructure is fully funded. The lack of a sustainable funding model for the tourism system was also highlighted and that planning and funding decisions need to give more consideration to resilience.

Additional issues raised were whether enough funding is available to arts and culture or and sufficient emphasis was given to sharing local success stories.

Actions identified by submitters to address funding challenges include:

- Reviewing the current funding model to support sustainable and resilient activity in the regions
- Providing further support for local and regional businesses
- More investment to promote the arts and culture sector

Enhancing New Zealand's Product Offering

Fourteen submitters (4.3%) identified challenges associated with New Zealand's product offering.

There were two main concerns. The first concern was the quality of the visitor experience is being impacted adversely because of overcrowding at key visitor sites. Secondly, submitters noted the challenges of pricing products so that they reflect the differing price expectations of international and domestic visitors.

The adequacy of funding to ensure quality experiences on cycle trails was also noted.

Multiple submitters were concerned that there is a lack of efficient and effective ways to engage with travellers such as that ensuring activities and locations are findable and bookable online for people outside of New Zealand.

Actions identified by submitters to address product offering challenges:

- Further investment in cycle trails
- Develop an affordable, effective and wide ranging booking platform which supports providers
- Offer domestic rates and prices that will encourage New Zealanders to travel
- Place limits on the number of people that can visit places

Social License to Operate

Thirteen submitters (4.0%) identified the social license for tourism to operate as a challenge.

Some submitters attributed both intentional and unintentional poor behaviour by domestic and international visitors as influencing New Zealanders' perception of tourism and the overall confidence of the tourism sector. This poor behaviour related to disrespect of both environmental and cultural values. It was also felt that the sector struggles to take ownership of this behaviour and effectively deliver effective interventions to discourage unwanted behaviour.

It was also mentioned by submitters of the need to do more to enable the local development of visitor experiences and tourism models.

Actions identified by submitters to address social licence to operate challenges included:

- Enable local development of visitor experiences and tourism models through support, funding and capability development.
- A richer experience run and supported by hapū and local communities

Involvement of Māori in Tourism

Six submitters (1.8%), identified issues associated with embedding Te Ao Māori and cultural tourism in New Zealand's visitor offer.

The key challenge identified under this theme was around tourism not valuing tangata whenua, in particular, the inclusions of their values and ideals within the experiences offered. Submitters also noted that support systems were lacking around kaupapa and whanau-based businesses who struggle as smaller businesses.

Falling out from the challenges above was a feeling that the New Zealand tourism sector struggles to create immersive rich cultural experiences.

Actions identified by submitters to address Te Ao Māori and cultural challenges include:

- Ensuring the tourism system reflects the values of tangata whenua
- Provide planned support systems for kaupapa and whānau businesses
- Improve training in cultural competencies
- Use technology to improve experience

Reliance on International Tourism

Three submitters (0.9%) highlighted a challenge related to New Zealand's reliance on international visitors, and the economic and environmental sustainability of this reliance.

One submitter wrote that "the dependence on international tourism among some parts of the industry has been exposed as a vulnerability amplified by the current health pandemic relying on international tourism".

Actions identified by submitters to address the reliance on international tourism challenge include:

- Establish a dedicated tourism ministry with a focus on long-term strategic direction, cross-sector integration, and greater focus on research and data driven policy.

The ideal tourism system

The ideal tourism system as envisioned by submitters

Submitters were asked what positive change they would like to see embedded in the system in 10 -15 years and were asked to name up to three values or ways of operating.

Some submitters followed the guidance and answered with three suggestions, some skipped this section altogether, and some answered with more than three suggestions.

The number of mentions within each group does not necessarily correspond with the number of submissions, so we have chosen to count the number of mentions.

Submitters were also asked:

- What needs to happen to enable this positive change?
- What changes would be required?
- Are there limitations or barriers the Taskforce should consider?
- Are there existing documents strategies or processes that would be useful for the Taskforce?

The table below represents the most common values or goals that submitters envisioned in the ideal tourism system.

Table Four: Common values or goals envisioned in the ideal tourism system, noted by submitters

Values or goals in the ideal tourism system	Number of submitters
The Environment, Sustainability and Regenerative Tourism	45
Future vision for the industry	27
Managing volume and demand	26
Governance of the tourism system	24
The product mix	19
Te Ao Māori and cultural tourism	19
Training and upskilling our workforce	18
Funding	17
Regional and seasonal dispersal	12
Research and Data	12
Tourism in the Community	9
Freedom camping	5
Climate and emissions	4
Making tourism equitable and accessible	4
Increased economic contribution to New Zealand	4

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Breakdown of top visions and goals for an ideal system by stakeholder group

Themes	Total number of mentions across all stakeholder groups	Stakeholder groups' top issues and number of mentions											
		Academia (14)	Accommodation (18)	Arts and cultural organisations (4)	Business (18)	Conservation Board (8)	Conservation groups (4)	Government (6)	Individual (19)	Industry organisation (15)	ITOs (4)	RTO/EDAs (13)	Tourism operators (15)
The environment, sustainability and regenerative tourism	45		● (6)		● (4)	● (6)	● (2)	● (2)	● (9)	● (4)	● (2)	● (4)	● (3)
Future vision for the industry	27	● (3)			● (2)	● (2)	● (2)						
Managing visitor numbers and demand	26		● (5)			● (2)			● (6)				● (4)
Governance of the tourism system	24	● (3)		● (2)	● (2)	● (2)				● (4)			● (3)
The product offering	19			● (2)	● (3)								
Te ao Māori and cultural tourism	19					● (6)							
Training and upskilling our workforce	18		● (5)										
Funding	17											● (4)	● (3)
Regional and seasonal dispersal	12												
Research and data	12	● (4)										● (4)	
Tourism in the community	9												

● = <31% of this stakeholder group ● = 31-60% of this stakeholder group ● = >60% of this stakeholder group

The Environment, Sustainability and Regenerative Tourism

Submitters would like to see tourism moving towards a no-harm approach and net restorative impact.

Generally, submitters would like to see sustainability embedded into New Zealand's collective psyche and reflected in our marketing proposition.

Submitters envisaged New Zealand perceived as a sustainable tourism destination and a global leader in environmental practice, where there are more eco-tourism businesses and sustainability is embedded in everyday business practice.

A few submitters highlighted that an ideal tourism system would be one where visitors realise their impact on the environment and can take tangible steps to mitigate it.

How could this be achieved?

Strategy

- Adopt a regenerative tourism model
- Adopt Te Mana o te Taiao – the New Zealand Biodiversity Strategy as a guiding document for the tourism sector and its relationship with/dependence on nature
- Support the National Policy Statement for Freshwater Management
- Support the National Policy Statement for Indigenous Biodiversity
- Acknowledge and support Ko Aotearoa Tenei Report on the Wai 262 Claim

Management

- Better management of the Conservation Estate

Standards

- Develop environmental standards for operators
- Make the NZ Sustainable Tourism Commitment towards environmental outcomes a mandatory requirement for tourism businesses, with auditing and compliance to ensure these commitments are real and not a mere “throw away” box ticking exercise.
- Make Qualmark compulsory

Regulation

- Include international aviation emissions into Emissions Trading Scheme
- Ensure that international aviation becomes part of our Paris agreed emission reductions, recognise the full environmental cost of flying, and remove subsidies.
- Increase marine protected areas

Taxes, fees, pricing and levies

- Place levies on cruise ships and airlines to incentivise reducing emissions
- Differential charges for Great Walks should be discontinued; potential perverse consequences include agency/brokerage, illegal camping, a skew towards privilege within the international visitor group, and demand for increasingly lavish facilities

Investment, incentives and subsidies

- Mandate the Government to only invest/support tourism businesses that meet sustainability targets

- Ongoing investment in nature-based tourism is essential, together with diversification into products which emphasise people and culture
- With smaller budgets as a result of COVID the industry will need some support/funding to address Sustainable practices as a matter of priority
- Explore Government incentives and subsidies to promote the switch to renewable energy

Education

- Widespread education and incentive / encouragement for businesses to adopt sustainable tourism products and practices (socially, economically, environmentally and politically sustainable)

Marketing

- Stop using national parks as advertising

Other

- A low carbon national public transport policy needs to be developed and implemented to alleviate congestion and road safety issues.
- Undertake an inventory of tourism hotspots and establish a nationwide reservation system to manage those destinations.
- Collaboration between Councils, DOC and the tourism industry to achieve common objectives and shared responsibility for managing the impacts of tourism on our environment.
- Public transport capacity fast-tracked to reduce tourism's carbon emissions

Vision for the future of tourism

Submitters envisage a future tourism system that has a clearly defined purpose and function. Specifically, submitters noted that a future tourism system would be connected in with other industries and its growth would align with net benefits across the four capitals.

Other submitters envisaged a future tourism system to continue to be a significant contributor to the economy, society and nature. Submitters would like the benefits of tourism distributed across all regions, and visitors to stay longer and travel more slowly.

One submitter specifically said:

“There will be an adoption of longer-term timeframes in decision making, and a shift away from short-term focus. A more proactive approach will be taken to establish desired visitor arrival numbers and manage mitigation of their effects.” Conservation Group

“Tourism focuses on value not volume, visitors get to experience Aotearoa New Zealand’s wilderness areas without being affected by pollution and over-crowding”. Government Agency

How could this be achieved?

Strategy + action plan/implementation

- New Zealand’s Tourism Strategy shouldn’t stand alone, it should be integrated into regional and national strategies. Economic Development and Tourism need to be integrated, so that tourism is seen and recognised as an integrated part of developing Aotearoa and our regional economies, not as a ‘nice to have’ on the side

or a marketing led sector. The New Zealand Aotearoa Tourism Strategy needs to filter right through to policy, decision making and activity and scope of our lead organisations in tourism.

- A robust implementation plan for the national tourism strategy
- We need all regions to be looking at developing the capability of the sector to ensure business continuity planning is done, and capability developed to lessen the reliance on purely the international market.
- Aligning the national tourism strategy with the National Biodiversity Strategy
- Engage with the arts community through its sector leadership organisations in the regions - Creative Kapiti, Creative Bay of Plenty, Creative Waikato, Creative Northland

Capability building

- Funding for social media and digital marketing coaching, and incentivise operators to adopt digital platforms

Managing visitor numbers and destination demand

Many submitters would like to see destination management at place, less congestion, and overall less visitors but more high value visitors.

How could this be achieved?

- We should not be afraid to cap visitor numbers through visa conditions, limiting incoming flights, visitor levies, narrower targeting of promotions and increasing wages of workers.
- Implement a quota system for international arrivals
- Increase the International Visitors Levy
- Implement a 'lottery' system / ballot system / variable fee for entry to New Zealand
- Limit the number of planes that fly here

Restrictions at place

- Create and enforce permits or control access (via public transport only) to hotspots
- Legislation, controls on numbers at iconic places
- Issue permits for congested areas site like Milford, Tongariro Crossing, Hot Water Beach, Abel Tasman, with limited number of permits issued each day during peak season
- Charge for access to National Parks

Other

- Regional Tour Operators to work with Inbound Tour Operators to encourage regional dispersal
- Implement Destination Management schemes
- Stagger school holidays based on regions so to not overlap with one another
- Levy tourists that stay less than seven days

Governance of the tourism system

Submitters envisaged a future tourism system where the governance and management of the industry is more aligned. Submitters would like to see a whole-of-system approach that is supported by international and domestic marketing emphasising the benefits of tourism.

There were some conflicting views in this category. Some mentioned a centralised approach, recommending a single all of government agency with a view on where and how tourism fits into our society and development objectives.

Conversely, some submitters suggested that there be less concentration of decision-making power among a few big players and spread amongst the smaller businesses in the tourism system with local and regional tourism committees deciding on infrastructure and grant funding.

Some mentioned a dedicated Minister of Tourism, others mentioned splitting the tourism portfolio over several Ministers.

How could this be achieved?

New or changed structure

- (Re)establish a Ministry of Tourism
- Create a tourism agency focussed solely on domestic marketing.
- Separate the Department of Conservation from tourism and resource it only for conservation purposes.
- Ensure there is a strong central government agency at the centre of the tourism system, inclusive of representation from iwi, communities, conservation, business and research sectors
- A fixed strategic body that is always looking towards the horizon. A body that doesn't get bogged down with today's problems but focused on the strategic issues and investments required to make the industry and its contribution to New Zealand better 20, 30 and 50 years from now.

All of Government approach

- An all of Government commitment to tourism.
- Commitment from all government agencies to consider their role in the tourism system in different locations and to consider this in planning and implementation of services

Other

- Establish a Technical Advisory Group to test the Taskforce recommendations
- Reduce the cost and time of consenting processes
- A strategic overhaul of the sector should be led by DOC as this would place our natural capital and our rich culture at the heart of our future decisions.

The Product Mix

Some submitters said that changes could be made to improve the products we have on offer, tech adoption and digital strategies.

Other submitters said it is important for operators to maintain standards and quality, and to ensure that there are New Zealand owned and operated high-level, responsible tourism products.

How could this be achieved?

- Create an app or platform for all visitors to use when travelling the country that allows them to enjoy New Zealand instead of spending too much time researching and planning.

- Continue to develop regional Destination Management Plans at a regional level
- Upskilling for Tour Operator in how to market themselves digitally and train operators on how to develop a marketing plan for their own businesses and develop online presence
- Explore subsidies for domestic tourism to encourage New Zealanders to holiday at home.

Te Ao Māori and importance of cultural tourism

Submitters also envisaged a future tourism system where there are stronger partnerships with Māori, and tourism gives back to Māori and Māori culture. One submitter said that it is important there is a commitment to tourism research that includes mātauranga Māori.

How could this be achieved?

- More integration of Te Ao Māori into the tourism system.
- Active partnership is needed to embed cultural values into the tourism system, not only between iwi and the Crown but also between local operators and kaitiaki runaka

Training and upskilling our workforce

Operator business' reputation productivity, welfare and wages. Includes tourism training and education

Tourism staff are well trained, and the service standards and visitor experiences will be second to none. Tourism jobs are recognised as meaningful occupations, with a long-term career path and workers are paid accordingly.

How could this be achieved?

- Adjust employment conditions to suit the individual and business
- Encourage and implement health and safety protocols
- Investing in training and grants for staff development
- Promote pathways to tourism, mentoring programmes, and promotion of the sector by senior industry figures
- Teach tourism as a case study not as a course (as the industry is diverse and relates to a number of different subjects)
- Invest in tourism education in schools;
- Instead of paying the minimum wage, giving employees shares in the company they work for
- More training like the Certificate in Ecotourism run by Tai Poutini Polytechnic
- Develop Tourism Achievement Standards and review of existing Tourism Unit Standards in collaboration with Secondary Tourism Teachers (TTA-NZ) Tourism Educators (TEFA), TIA, Tourism New Zealand, representatives of the tourism industry, Service IQ and the Ministry of Education to grow tourism as a valued course of study and ensure the study of tourism becomes seen throughout our society as a desirable and respected career pathway.
- Invest in real, well paid jobs, not dependent on low wages or exploitation of temporary work visa holders or backpackers.

Funding

Ensuring sustainable funding and investment with efficient, effective and equitable distribution. This covers levies, taxes infrastructure funding and investment.

Funding for community and regional tourism initiatives that support local people and products, and align with the tourism system principles of inclusion, regeneration and decarbonisation. The tourism sector isn't afraid of charging appropriately for the infrastructure that taxpayers and rate payers provide. We have confidence and quality in our products which justifies sustainable pricing.

How could this be achieved?

- Financial support from central government beyond the life of the Tourism Recovery Fund is confirmed for operators to incentivise sustainable operation and regions to support infrastructure and RTO activity
- Investment is needed by central and local government, landowners and the public in actions to address environmental issues including water quality, pests and weeds, and biodiversity loss. Without more investment, there will no longer be the same drawcard to attract domestic and international visitors.
- Look at establishing a bonding system for operators modelled on the TAANZ / IATA bonding arrangements.
- Recognition by the Government of what tourism contributes to New Zealand's GDP (pre-covid). Stronger support from Government.
- Consider how central government can support local government to fund tourism related activity.

Regional and seasonal dispersal

Addressing the issues of seasonality and spreading the season longer. Making sure that tourism benefits the regions by highlighting unique selling points and events.

How could this be achieved?

- A NZ owned and operated seamless booking operation that supports the tourism industry and provides insight to the government and regional councils.
- A tool for travellers to utilise while travelling for easy information and booking.
- Regional marketing campaigns.
- Focus on winter and low season arts and cultural activities.

Research and Data

Coordination between industry, academia and the government to provide better insights for future planning, understanding consumer behaviour and environmental impacts.

We have science and research that informs strategy and evidence-based decision-making and resource allocation. We know more about the New Zealand tourism system and there is a long-term commitment to tourism science and research. There is greater collaboration with tertiary institutions and the private sector on research initiatives.

How could this be achieved?

- Establish a Tourism Science Roadmap (as has been done for other sectors) to set out sector (industry and government) research needs, funding pathways, and collective actions to provide the necessary evidence to inform policy and practice.
- Research could include:
 - carrying capacity
 - social licence/community acceptance to operate
 - tourism in a carbon constrained environment
 - measuring tourism ecological footprints by business or sector

Tourism in the Community

Building a positive relationship with local communities. Covers the importance of place, community identity and connection to place.

There is a perception that tourism is an industry that every New Zealander can benefit from, New Zealanders understand the value and contribution of tourism to the New Zealand economy. Tourism gains the confidence of the communities it operates within, and that New Zealanders actively want to share their community with visitors. There is more community engagement and involvement in tourism, and that tourism is community-driven; “locals feel like visitors and visitors feel like locals”; and tourism supports the wellbeing of New Zealanders.

How could this be achieved?

- Manage destinations carefully so the benefits of tourism are widely shared. Shift from destination marketing to destination management planning to adequately care for the total population at a place, both permanent and temporary.
- Develop, resource and implement integrated destination management plans, co-designed with communities.
- Engage with local communities to shape policy and strategy

Appendix one: Additional documents

Submitters suggested the following documents for the Taskforce to review and consider:

- Abel Tasman National Park Plan
- Aotearoa NZ Biodiversity Strategy 2020
- Catlins Community Tourism Strategy 2016-2026
- Clutha Destination Strategy
- Conservation Management Strategies
- Creative New Zealand's submission to the Tourism New Zealand Strategy in 2019
- Department of Conservation's Heritage and Visitor Strategy
- Handbook on Social Tourism (pp. 256-266) In Diekmann, A. and McCabe, S. (Eds)
- Kahurangi National Park Plan
- National Park Management Plans
- Nelson Lakes National Park Plan.
- New Zealand-Aotearoa Government Tourism Strategy
- New Zealand Biodiversity Strategy Te Mana o te Taiao
- Parliamentary Commissioner for the Environment Report, December 2019
- Predator Free 2050 Strategy - Towards a Predator Free New Zealand
- Social tourism in New Zealand: Uncovering 'hidden' needs Carr, N. & Schänzel, H. (2020)
- Southland Destination Management Strategy
- Taranaki's Tapuae Roa and Taranaki 2050
- The Tourism Industry Aotearoa Sustainability Framework
- Tiakina Ngā Manu
- Touchpoints by Adam Stoker
- Tourism Industry Aotearoa Strategic Plan