

HE PAE TUKUTUKU

TOURISM 2050

A BLUEPRINT FOR IMPACT

DRAFT FOR INDUSTRY CONSULTATION

AUGUST 2023

He mihi

Haere mai rā

E ngā lwi katoa

Ki te karanga a Pae Tukutuku e.

Ka huri āku mihi kia tātau katoa.

Ki ō tātau mate huhua, tangihia, poroporoakitia.

Hoatu koutou ki te aio o te rangi.

Ahakoā 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 kawē nei tātau.

Kati, tēnā koutou e hika mā.

Contents | Rārangi Take

- 4 Foreword** | Pou mua
- 5 Executive summary** | Rārangi take
- 8 Introduction** | Whakatakinga
- 10 Tourism in Aotearoa** | Tāpoi ki Aotearoa
- 12 Trends and factors influencing tourism** | Whakaaweawe te ao tāpoi
- 16 The tourism we want to create in New Zealand** | Te waihanga
- 18 Our 2050 vision – He Pae Tukutuku** | Te matawhānui
- 19 Outcomes and targets** | Whakataunga
- 22 Values** | Ngā pou
- 23 Actions** | Ngā āheinga
- 35 Steps for individual businesses** | Te ara whakatutuki
- 36 Steps for Government** | Te ara kawanatanga
- 37 Enacting the blueprint** | Whakamana tūāpapa
- 39 Appendices** | Kā apithihaka

Foreword | Pou mua

It is vitally important the Aotearoa New Zealand tourism industry has a clear sense of its desired future and the steps we must take to realise that future.

The Industry Development Group (IDG) was established to enable and support this Tourism Industry Aotearoa-led project to reset the tourism industry direction.

As we recover from the COVID-19 period, the future of tourism will be different and we all have a role to play in shaping this future.

A key shift is the increasing movement towards a more holistic or 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 with this and those more holistic objectives.

The future of the tourism industry fundamentally lies in being successful across a wide set of objectives.

In the face of strong global growth trends and challenges such as carbon and climate change adaptation, how we manage the tourism system is critical. As IDG we feel the current settings and levers are not adequate to enable us to navigate to the future we aspire to.

That is why this blueprint for the industry is recommending two key changes around industry roles and responsibilities, and industry funding. Delivering these changes will enable substantive progress on the other actions.

A key shift towards a more holistic or regenerative future is needed, where people and nature thrive. As an important strategic pillar, Te Whakarae Māori integrates and acknowledges the importance of Te Ao Māori perspectives to realise the full potential of the tourism industry. It is a turning point for discussion and sits as a platform for accountability in terms of tangible outcomes for Māori and Aotearoa more broadly.

We are determined to get implementation of this blueprint underway. We will need support from Government on some parts of it, and there are actions that every tourism business can contribute to.

We are proud of the contribution tourism makes to our economy and society and look forward to working with all our partners and collaborators in advancing this blueprint for the future tourism industry.

Industry Development Group



Rebecca Ingram
CEO, Tourism
Industry Aotearoa



Jolanda Cave
Ngāi Tahu
Tourism



Callum Mallett
SkyCity
Entertainment Group



Richard Pollock
New Zealand Māori
Tourism



Bruce Bassett
Tourism Industry
Aotearoa



Scott Tasker
Auckland International
Airport Limited



Leanne Geraghty
Air New Zealand



John Thorburn
Entrada Travel
Group



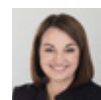
Scott McNab
RealNZ



Justin Watson
Christchurch International
Airport Limited



Grant Webster
Tourism Holdings
Limited (THL)



Kristin Dunne
Miles Partnership



Matt Ammunson-Fyall
New Zealand Māori
Tourism

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.

As an industry, we are committed to enriching our country in ways that will have a lasting positive impact on our people and our environment.

In 2020 tourism contributed a significant 9.1% of GDP, with a total expenditure of \$41.4b. As we look ahead, the industry is striving for value growth. We estimate tourism's total expenditure to reach \$50b per annum by 2030 and we want this value to turn up in positive impacts across Aotearoa New Zealand.

Each time we have reset our industry direction, we have placed increasing emphasis on matters beyond economic value. Now, we are taking the next logical step – to create broad societal benefits through tourism.

Our vision is to enrich Aotearoa New Zealand through a flourishing tourism ecosystem. This blueprint outlines our commitment to a tourism industry that contributes positively to four outcomes:

- **Te Taiao (environment)**
- **Ōhanga (the economy)**
- **Hāpori (community)**
- **Manuhiri (visitor)**, and in giving effect to Te Ao Māori.

The vision comes with challenges and opportunities.

We must address how we reduce carbon emissions and adapt to climate change and changing visitor preferences, which may include a shift towards less long haul and more experience based travel. We must prioritise caring for our people, whether they be our visitors, workforce or communities.

We will not be able to respond in the same ways we have before in the past. For the tourism industry to deliver for New Zealand over the longer term, a paradigm shift is required.

Achieving this vision requires us to focus on ten transformative actions, the significance of which cannot be overstated.

Importantly, some of these actions are about changing the system so we are better equipped to manage tourism in Aotearoa New Zealand. Make progress with these, and we will be better placed to advance the other actions.

This blueprint also sets out some practical actions that all tourism businesses can advance. Only through these actions will the overall aspirations be achieved.

We are in this together, and we all have a role to play. Let's boldly take these transformative steps.

Tourism 2050 – a Blueprint

Outcomes

Outcome 1:

Te Taiao (Environment)

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

Outcome 2:

Ōhanga (Economic)

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

Outcome 3:

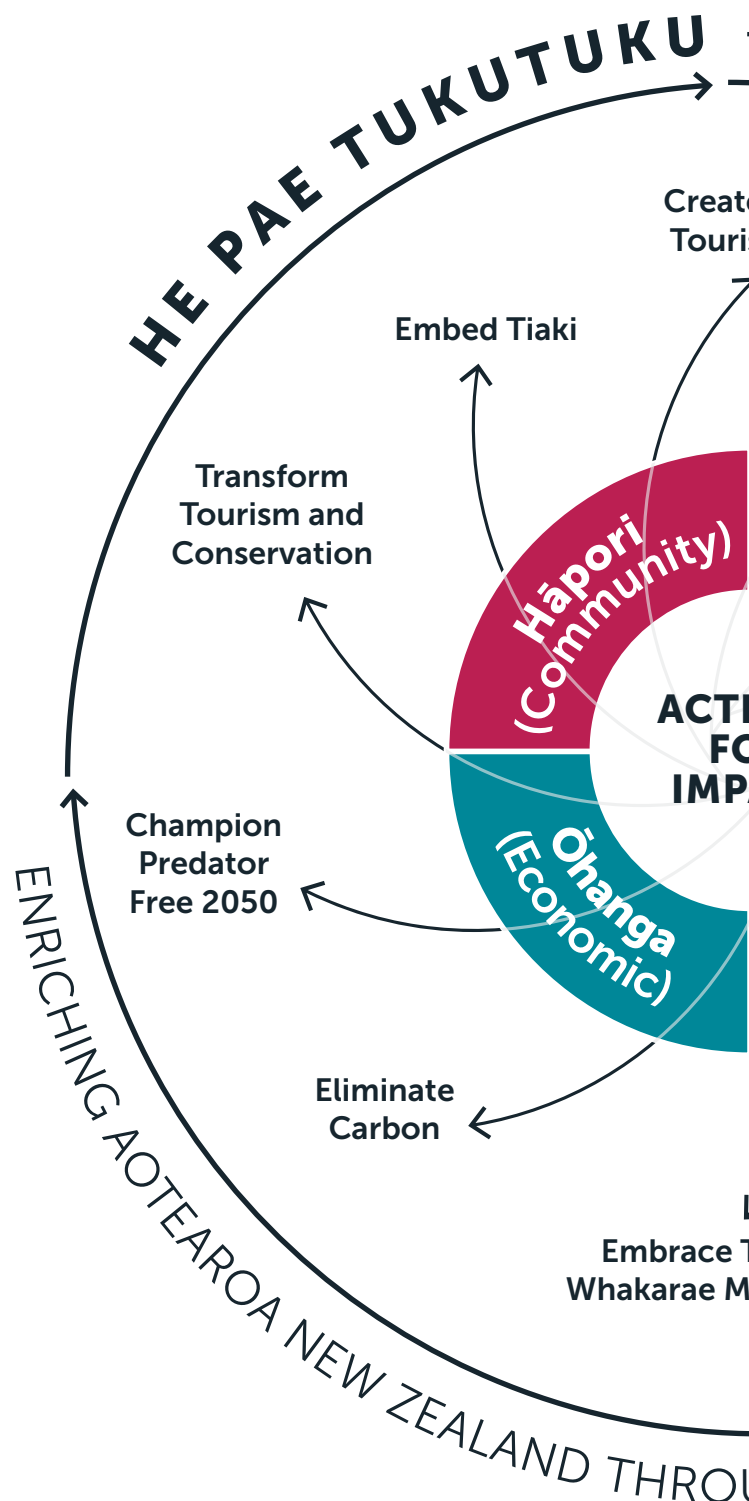
Hāpori (Community)

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

Outcome 4:

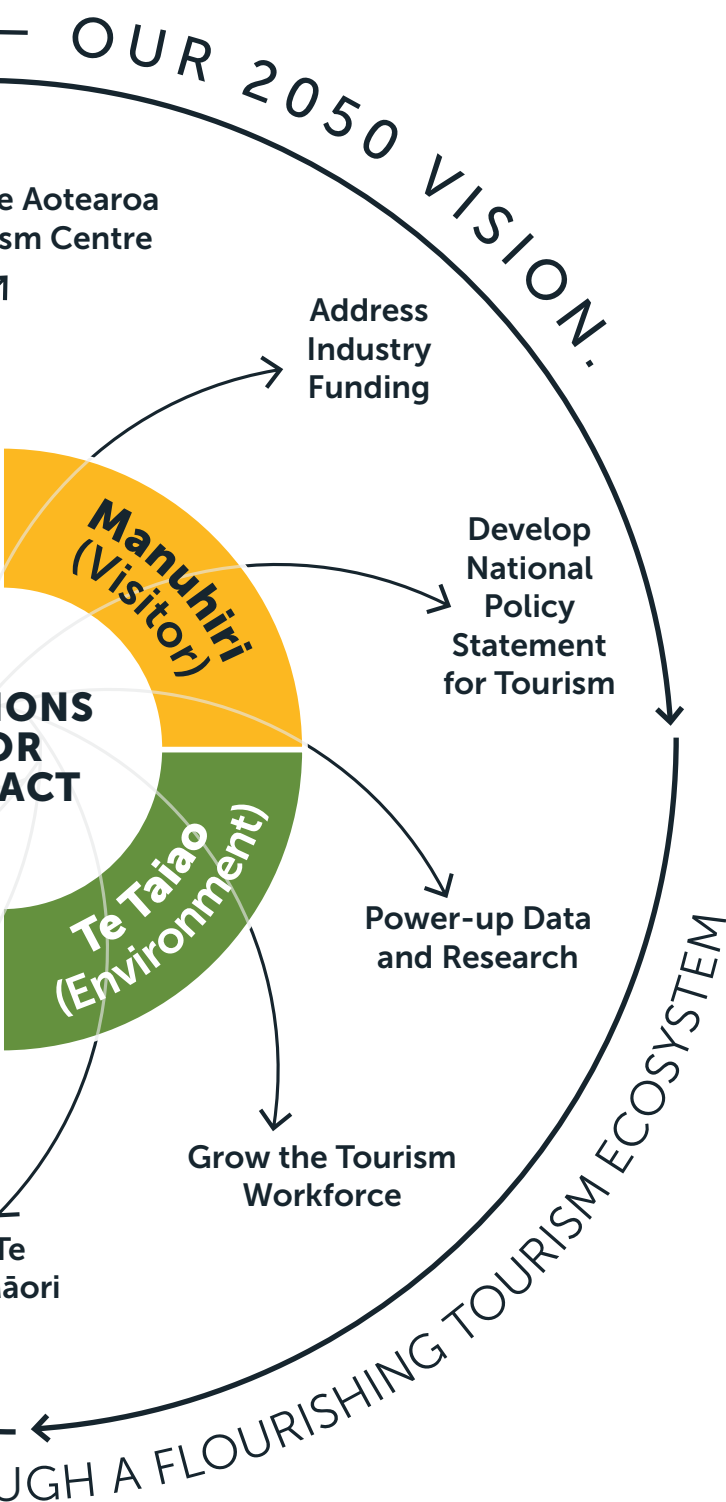
Manuhiri (Visitor)

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



Blueprint for Impact

on a page



Targets

- **Carbon** – Net carbon zero before 2050.
A 2030 interim target will be established for tourism businesses.
- **Environmental footprint** – 95% measuring and minimising footprint by 2030.
- **Predator Free** – 95% actively supporting and championing predator free initiatives by 2030.

- **International visitor spend** – Average per visitor is \$6000 by 2030.
- **Visitor mix** – Domestic visitors between 55% – 60% and International visitors between 40%-45% in 2030.

- **New Zealanders' perception** – 90% of New Zealanders think tourism is good for New Zealand.

- **Visitor satisfaction** – Domestic and international satisfaction is 90% or above.
- **Participation in Māori Culture** – 50% of international visitors participated in a Māori tourism experience.
- **Tiaki awareness** – 30% visitor awareness by 2025.

Introduction | Whakatakinga

This blueprint has been created by Aotearoa New Zealand's tourism industry, to clearly convey our vision for the future, and the practical steps we are taking to get there.

In setting this blueprint, we know that tourism has been the focus of an unprecedented level of in-depth explorations. 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, and the Air Navigation System Review (2023).

Each of these documents has involved thorough investigations that have led to new learnings and, critically, to ideas and recommendations about the things that must be done differently, both to safeguard the industry and enable it to reach its potential.

What we define as 'potential' has changed markedly over the years, shifting from a volume-based, economic focus to a broader focus on wellbeing, which includes environmental, social, and cultural as well as economic goals.

This shift is absolutely where the industry's thinking has evolved to. Indeed, the IDG has a consensus position that the industry must be contributing positively across all areas that it touches.

The IDG saw no inherent conflict with the desire to also be financially prosperous. Businesses that prosper are best positioned to contribute to wider outcomes.

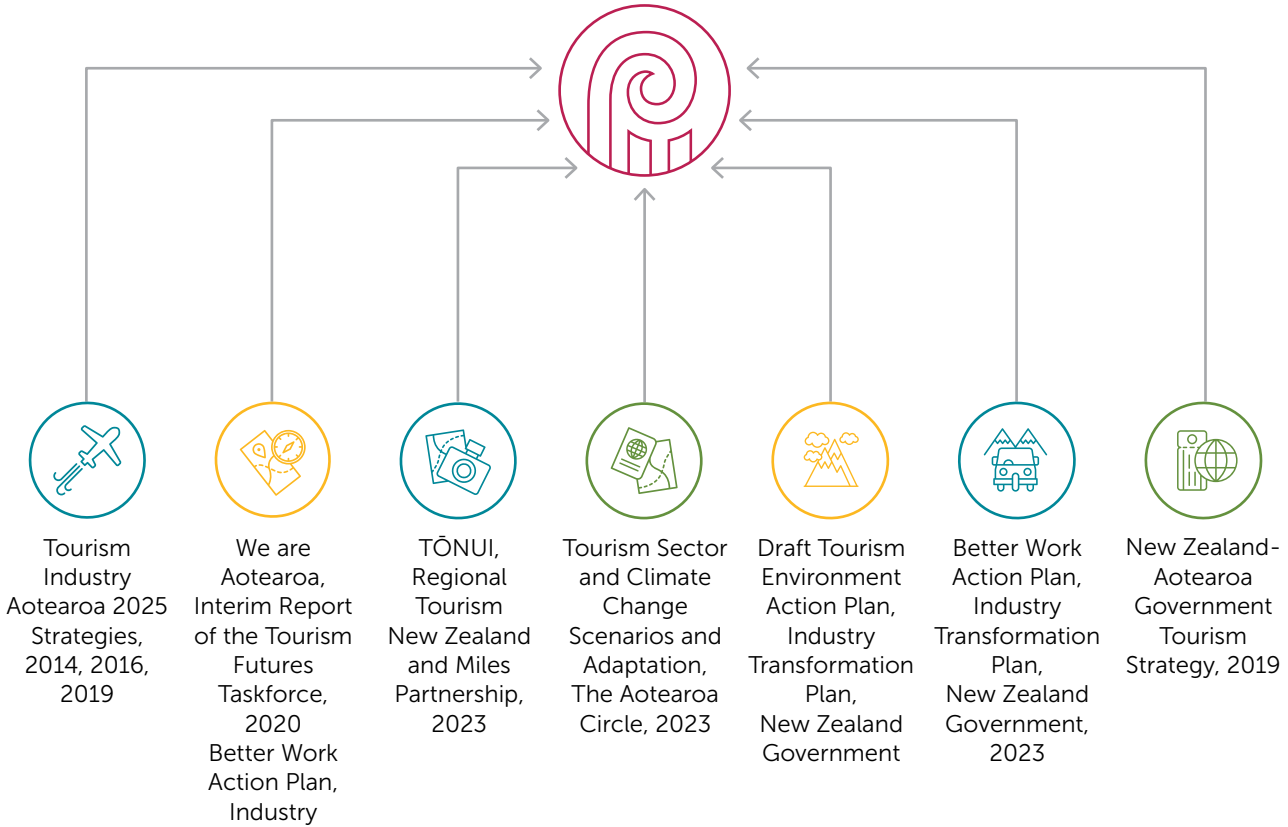
The other key theme from these workstreams has been the need for change in the system design that supports and enables tourism. With better definition of roles and responsibilities, and appropriate funding streams, we will be in a much better position to make step-change progress against our key priorities.

This blueprint continues the evolution of the tourism industry's strategic framework that was initially established by TIA with the original Tourism 2025 in 2014, and followed by Tourism 2025 – Two Years On in 2016 and Tourism 2025 & Beyond in 2019.¹

Now, we are taking the next logical step for the industry to be a strongly positive contributor to Aotearoa New Zealand.

¹ Stats NZ, Tourism Satellite Account, 2022

Figure 1. Key documents informing the development of this blueprint



Tourism in Aotearoa New Zealand

Tāpoi ki Aotearoa

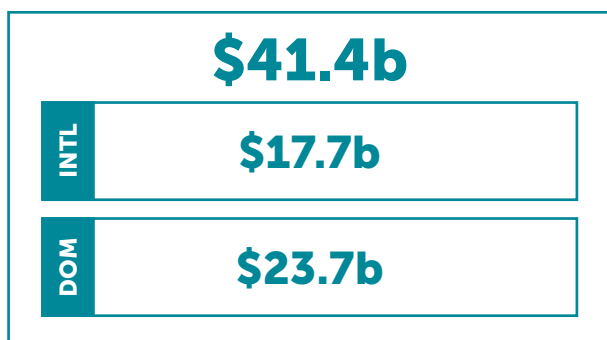
Tourism plays a vital role in driving a productive, prosperous and flourishing Aotearoa New Zealand. It promotes vibrancy in our communities, encourages social connectivity both internationally and domestically, and creates a sense of pride in the things that make, Aotearoa New Zealand, unique.

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's economics (YE March 2020)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 also had 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)



Tourism direct and indirect contribution to GDP (YE March 2020)



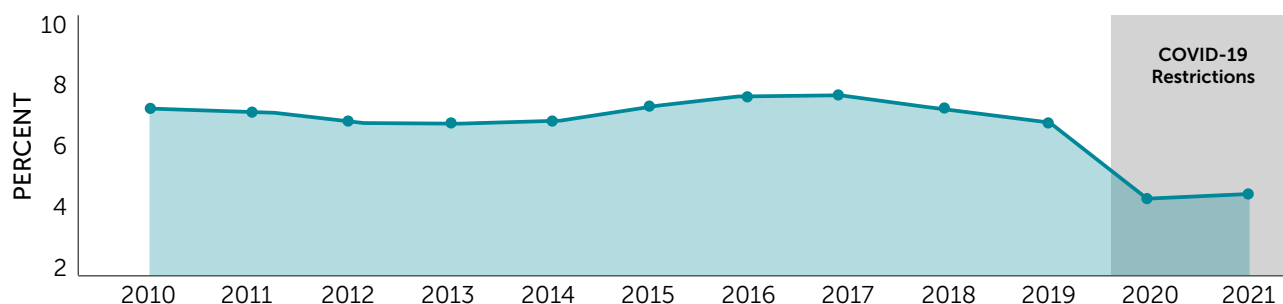
Tourism contribution to NZ's export earnings (YE March 2020)



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

Environment: Carbon emissions²

Tourism industry carbon emissions are showing tentative signs of reducing, having peaked in 2017 at 6,082 kilotonnes of CO₂ equivalents and fallen back slightly in 2018 and 2019. The COVID-19 pandemic had a significant but temporary impact on tourism emissions.



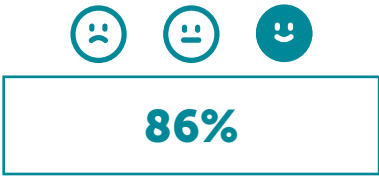
¹ Stats NZ, Tourism Satellite Account, 2022

² Stats NZ, Tourism Greenhouse Gas Emissions 2007-2021, May 2023

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 satisfaction³



International visitor satisfaction⁴



International visitors who enjoyed an experience of Māori culture⁴



Community: New Zealanders' sentiment of tourism⁵

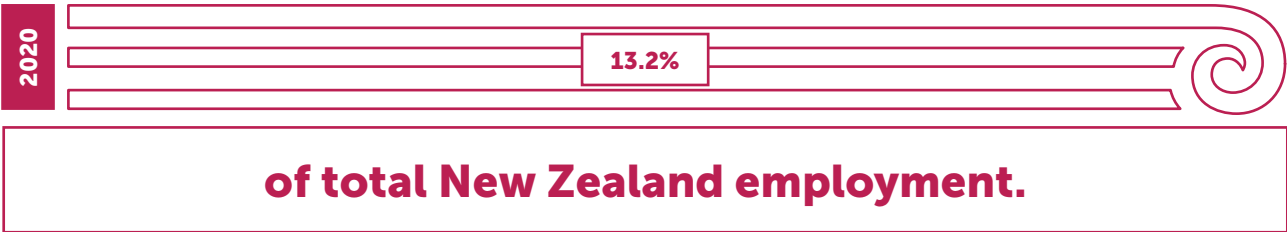
Tourism in Aotearoa New Zealand provides opportunities for social connectivity with people from both within the country and around the world. How New Zealanders feel about this activity is an important indicator.



Community: Employment⁶

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, is an important part of the communities in which it operates.

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



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

⁴ MBIE, International Visitor Survey, Quarter 1 2023, June 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

It is highly likely this pattern will 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 (increasing capacity and lowering 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. By 2042, international air capacity is expected to grow at a rapid rate, with both Airbus and Boeing having robust long-term forecasts. Airbus forecasts the global aircraft fleet will more than double to 46,560 aircraft in 2042,⁸ with Boeing forecasting 48,600 aircraft.⁹

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 it is inevitable a shift towards greater regulation will occur in the period to 2050.

Other trends are expected to shape the future of tourism. These include the shift 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 Statista, Number of International Tourism Arrivals 1950 to 2022, 2023

⁸ Airbus, Global Market Forecast 2023, June 2023

⁹ 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 for most of our international visitors, New Zealand is vulnerable to the high carbon emissions of international aviation. This will become an increasing issue until technology solutions are found (which will likely be many years or decades away).

On the other hand, there are macro trends which 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 towards those who can contribute towards achieving our wider objectives.

Aotearoa New Zealand must be deliberate in its response to these macro-forces by managing the tourism system. We will be subject to forces we cannot control, making it more important that we focus on those things we can control.

Our ambition is to lead the world, not to catch up.

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 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 long-term leadership function in place to both assist in dealing with issues and to embed long term perspectives in the industry and how it develops.

Taken together, 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.

Key systemic issues we have identified are:

- **Structural arrangements.** As mentioned, 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. This has been a long term and persistent situation and so the industry welcomes the establishment of the Tourism Data Leadership Group. A key priority is to address the paucity of reliable indicators to enable tracking of the industry across the economic, community, visitor and environment framework, and with robust regional level data. The research support for the tourism industry is in an even worse position, with tourism functionally 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. Due to the paucity of data and research, the industry is seriously inhibited in its ability to understand and manage the key issues that it faces over time.
- **Innovation and technology.** The ability of the industry to innovate and to adopt all sorts of 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 allocation of funding which will impede the implementation of these plans. Destinations face many of the costs of ensuring quality visitor and resident experiences, including amenities, attractions, and infrastructure attractions, and services such as recycling and waste management. And yet, councils typically are poorly funded to deliver these mandated functions and activities.
- **Sustainability capacity.** In implementing the Tourism Sustainability Commitment since 2017, TIA has found that for a tourism business, 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, and it has been established that better outcomes are achieved if supported by someone who understands their business and can get them going. TIA's regional and sector projects take cohorts of operators through a three-month sustainability programme that combines personalised support and peer group collaboration, demonstrating the effectiveness of this 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. In this, 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 and planning processes. These arrangements must be configured to increase the ability of tourism to contribute positively to conservation efforts.
- **Workforce.** There are a number of systemic challenges in ensuring that the industry can attract the people it needs to operate a high quality and competitive industry. Recent gains have been achieved with tourism becoming an NCEA Achievement Standard, ongoing support of the Go with Tourism programme and in ensuring an appropriate flow of overseas workers. But long-term solutions are needed that create quality roles for New Zealanders, while allowing overseas workers to top up the people needed, especially at places and times of the year where Kiwis are not available.

- **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. Yet there are common threads, including that the visitor is common to all, as is the need for them to be offering 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 businesses, especially micro or small businesses, to ensure they are contributing 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 connection, business and political connections, trade in high value products and services, and for ensuring a supply chain of vital goods such as pharmaceuticals. Visitors who experience Aotearoa New Zealand can become customers for our exports, such as our quality wine, food, fashion and others. It is important that this wider contribution and reliance on tourism is 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 exports receipts stayed around the same (20.4% in 2000 and 19.9% in 2020), as did total contribution to GDP (9.8% in 2000 and 9.1% in 2020).¹⁰ 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 IDG was clear on this future. It aspires to a prosperous industry that is in sync with the people of Aotearoa New Zealand. In this 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. Māori culture is 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. Tourism will be a cohesive industry looking after its own affairs in a constructive partnership with Government. Domestic travellers will continue to enjoy their own backyard.

We see the following as important for 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 the nature 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, catastrophic climate change, technological disruptions and others that may arise. Key to this is to be aware of such risks and factoring them into decision making, even if they may be low likelihood. Following the COVID 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.

¹⁰ Stats NZ, Tourism Satellite Account, 2022

To get tourism working well, there are many parts of the industry that themselves 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 capability 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 a capability for marketing 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.
- **Te Tiriti O Waitangi and Te Ao Māori.** Having a tourism industry that gives effect to 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).
- **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 a key enabler of the tourism, freight and trade industries and these links need to be fostered and retained.
- **Destination management.** Having an embedded destination management ethos in place both nationally and regionally, with appropriate funding and resources to implement the destination management plans.
- **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.
- **Resilience.** 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 better 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.

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

A high-angle, top-down photograph of a man and a woman standing on a narrow wooden walkway or bridge. They are looking down towards the camera. The man is on the left, wearing a white t-shirt and dark shorts, with a black bag slung over his shoulder. The woman is on the right, wearing a white long-sleeved shirt and dark shorts. They are surrounded by a dense, lush green forest with many ferns and trees. The walkway has wooden railings on both sides.

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.¹¹

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.

¹¹ New Zealand-Aotearoa Government Tourism Strategy, MBIE and DOC, May 2019

Outcomes and targets

| Whakataunga

Outcome 1: Te Taiao (Environment)

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

Targets

Carbon.

The tourism industry is net carbon zero before 2050. A 2030 interim target will be established to reflect practical near-term ambitions for tourism businesses.

- **Base:** 5,711 Kilotonnes of carbon dioxide equivalent in 2019
- **Source:** StatsNZ, Greenhouse Gas Emissions
- **Rationale:** Reducing carbon emissions is a powerful action for industry to take. The ambition recognises technology gaps, particularly for aviation which makes up 63% of tourism emissions

There is also a long life of existing capital investments in land and sea transport. With transport making up 90% of tourism emissions, the target remains ambitious but one the industry is committed to achieving.¹²

Environmental footprint.

95% of TIA members are measuring, managing, and minimising their environmental footprint by 2030 (including carbon, waste and other relevant indicators).

- **Base:** Not available
- **Source:** TIA, TSC Annual Survey
- **Rationale:** To achieve a reduced footprint for tourism at the industry level, all operators need to be playing their part

This target creates the expectation and requirement that all tourism businesses will act to do their part.

Predator free.

95% of TIA members are actively supporting and championing predator free initiatives by 2030.

- **Base:** Not available
- **Source:** TIA, TSC Annual Survey
- **Rationale:** Having every tourism business contributing in their own ways will add impetus towards Aotearoa New Zealand being Predator

Free by 2050 and thereby protecting and restoring our biodiversity.

¹² Stats NZ, Greenhouse gas emissions (industry and household): YE 2019.

Outcome 2: 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 \$50b billion per annum by 2030.

Targets

Spend per international visitor.

Average spend per international visitor is \$6,000 by 2030.

- **Base:** \$4,837 in YE March 2020
- **Source:** StatsNZ: Tourism Satellite Account
- **Rationale:** The average spend per international visit represents the financial contribution of each visit.

This target seeks to lift visitor spend by providing better experiences to our visitors and longer stay per trip.

Visitor mix.

The proportion of international and domestic visitor spend is between 55-60% domestic and between 40-45% international in 2030.

- **Base:** International 42.7% and Domestic 57.3% in YE March 2020
- **Source:** StatsNZ: Tourism Satellite Account
- **Rationale:** The intention of this target is to maintain a balance between international and domestic tourism.

This is to ensure Kiwis continue to travel around their own country and to ensure the base of demand provided by domestic travellers in the interest of industry resilience (to reduce seasonality and vulnerability to shocks).

Outcome 3: Hāpori (Community)

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

Targets

New Zealanders' perception of tourism.

90% of New Zealanders' think tourism is good for New Zealand

- **Base:** 89% for May 2023 biennial survey
- **Source:** TNZ, TIA, DOC, New Zealanders' Views of Tourism
- **Rationale:** A key indicator of the health of tourism is the views of the host communities towards it.

New Zealand tourism enjoys a high level of support from Kiwis and the target aims to maintain and improve this, and to consider and address regional differences.

Outcome 4: Manuhiri (Visitor)

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

Targets

Domestic visitor satisfaction.

Domestic visitor satisfaction is 90%

- **Base:** 86% for YE May 2023
- **Source:** TIA, Domestic Visitor Satisfaction (Angus and Associates)
- **Rationale:** A key indicator of the health of tourism is the views of the host communities towards it. New Zealand tourism enjoys a high level of support from Kiwis and the target aims to maintain and improve this.

International visitor satisfaction.

International visitor satisfaction is 90%

- **Base:** 90% for Quarter 1, 2023
- **Source:** MBIE, International Visitor Survey
- **Rationale:** A key indicator of the performance of destination New Zealand is its ability to deliver quality experiences to our international visitors. The target aims to maintain and improve on this.

Participation in Māori Cultural Experiences.

50% of international visitors participated in a Māori cultural experience.

- **Base:** 46.9% in YE March 2020
- **Source:** MBIE, International Visitor Survey (Kantar)
- **Rationale:** The intention of this target is to highlight the levels of participation of international visitors with Māori cultural experiences.

Tiaki awareness.

30% of visitors understand and are supported to travel in a culturally and environmentally respectful way, in accordance with the Tiaki Promise.

- **Base:** To be determined
- **Source:** MBIE, International Visitor Survey
- **Rationale:** A key indicator for creating an understanding how visitors can be great visitors within Aotearoa New Zealand.

Values | Ngā pou

Kaitiakitanga

Guardianship and protection of our natural, build 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.



Actions | Ngā āheinga

Action areas 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 ten 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 how we embrace 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.

Summary of actions

Create Aotearoa Tourism Centre

Address Industry Funding

Develop National Policy Statement
for Tourism

Power-up Data and Research

Grow the Tourism Workforce

Embrace Te Whakarae Māori

Eliminate Carbon

Champion Predator Free 2050

Transform Tourism and
Conservation

Embed Tiaki

1. Develop a National Policy Statement (NPS) for tourism

1. Industry to engage with the Government to review industry system arrangements and gain agreement to establish a NPS for Tourism (or similar vehicle).
2. Industry to participate in the process to develop the NPS for Tourism, including to articulate those elements it considers are most important for inclusion within the National Policy Statement.

A persistent challenge for the industry has been the informality of roles and functions within a complex and fragmented system. Tourism's current formal system design is limited to the role of Tourism New Zealand under the New Zealand Tourism Board Act 1991. So, while one functional element is well defined, other key parts of the industry are not mandated or structured to respond to systemic issues facing the industry.

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

The NPS will define key roles and responsibilities across central and local government and the interface with the tourism industry. It will provide direction as to the roles of government agencies, policy, data collection, research, roles of local government and destination management, and other areas that would benefit from being clearly defined.

The tourism industry itself would be a key contributor to the development of the NPS as well as having its key roles included within the NPS itself.

Government has vehicles for setting out its objectives for specific areas. It has NPS for areas such as freshwater management, highly productive land, renewable electricity generation, electricity transmission and urban development. And, it has Government Policy Statements in place or underway including for land transport, immigration and health. The best vehicle for tourism will need to be determined.

Both the Tourism Futures Taskforce and TŌNUI recommend a legislative approach as the means to address the widely agreed need for change in the tourism system. We will strongly support the legislative approach if this is adopted while recommending a NPS of tourism (or similar vehicle) that may be a more attainable way to provide for a better functioning tourism system and able to be established in the near term.

Timing: Present to 2025 to develop the NPS, with implementation out to 2030.

2. Address industry funding

1. Industry to engage with Government on the best approach for undertaking an in-depth investigation into the options for funding mechanisms for the tourism industry and contribute to this investigation.
2. 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.

Tourism needs to advocate for new solutions to the key structural weakness of the funding arrangements that support and enable important industry functions.

We are seeking to put in place mechanisms that establish sustainable and equitable funding streams for the tourism industry.

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

Central government receives funding from tourism 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 2020.¹³

This funding is more than sufficient to meet central government costs of tourism, including funding for Tourism New Zealand, roading and conservation-related infrastructure, policy and data functions and the various contestable funding pools.

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. Again, there is a structural underfunding of most local government roles in tourism which is being highlighted by the highly constrained ability to implement the destination management plans that regions have prepared over recent years.

The TŌNUI white paper by Regional Tourism New Zealand and Miles Partnership found that 91% of Regional Tourism Organisations stated they needed additional funding to meet the expectations of their expanding roles.

Destination Management Plans for each region have now been developed, setting out best practice in destination management and providing a clear regional perspective on changes required. Funding is now needed to implement them, or the value of the plans will be seriously undermined.

Some regions are currently exploring their own bed-tax or levy arrangements. Rather than ad-hoc solutions across the country, the industry favours a national approach that will provide the most equitable, efficient, and sustainable solution.

While the industry has long signalled the importance of establishing such mechanisms, this call is getting stronger, and we want to partner with Government to establish new funding mechanisms.

In the industry's view:

- Funding mechanisms must be established for both industry-good activities and local government tourism activities. Existing funding mechanisms such as current central and local government activities should continue.
- There is an immediate need for a nationally consistent approach. We do not support targeted rates as an approach, but we are open to consistently applied levies (such as a national industry levy) being applied if 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.

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

¹³ Tourism Satellite Account: Year ended March 2022, Stats NZ, 2022.

The Sustainable Funding ITP 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 that is enabled by the Commodity Levies Act. These levies generate substantial funding for the sectors and allow 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.

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 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 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.
- Prioritise the industry's ongoing strategic journey, including supporting positive contributor across te taiao, hāpori, manuhiri and ōhanga.

3. Establish Aotearoa Tourism Centre

1. Industry to seek long-term funding to enable the establishment of the Aotearoa Tourism Centre (ATC) as the sustainability capability-building mechanism for the tourism industry.
2. Industry to work with accreditation agencies on the most effective ways to validate progress by participants.

The tourism industry can only become a positively contributing industry if all the businesses within it are themselves sustainable – a bottom-up approach.

Under this action, the industry will establish a series of sustainability capability-building initiatives nested under the banner of the (ATC).

The ATC will be an industry-led and operated programme that would 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.

Building this capability within businesses is key for advancing several of the 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.

Over time, the ATC will generate a body of expertise that will be a resource for the wider industry to drive and enable overall industry sustainability progress. And we see the ATC as playing other roles, such as in supporting innovation and technology uptake by operators.

The ATC will be established with sufficient scale to ensure whole-of-industry impacts based on direct business-level support and mentorship, backed up by a comprehensive set of tools and resources to assist the participants in the programmes.

The ATC will operate in cooperation and collaboration with other partners, including accreditation providers, regions, and sectors.

Timing: Present to 2025 for establishment and then to 2030 for full implementation.

4.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.

Tourism operators have an important role in enabling visitation to conservation places in safe and managed ways. This supports the objectives of DOC to get New Zealanders engaged with nature.

Many tourism operators play important roles by conducting pest control, supporting community conservation initiatives, and supporting the activities of DOC itself, with no other objective than doing the right thing.

Creating concessions that incentivise operators to restore Te Taiao will generate widespread positive outcomes for nature.

From an industry perspective, the current settings are not working well with issues around concession tenure and the lack of recognition for operators that

are contributing positively for nature in the concession process. Shorter term concessions and slow processing times are widely cited concerns.

Under this action, the industry would advocate for a specific work programme with DOC, other agencies, and the industry to optimise the tourism and conservation settings on public conservation lands and waters.

The action would have two parts, firstly to explore how the settings under the current legislation can be improved and secondly to support processes to update the complex legislation framework that DOC operates to.

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

5. 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.

We can only manage what we measure.

A lack of comprehensive and trusted data, research and other forms of knowledge has been an enduring feature of the New Zealand tourism industry. 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, 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.

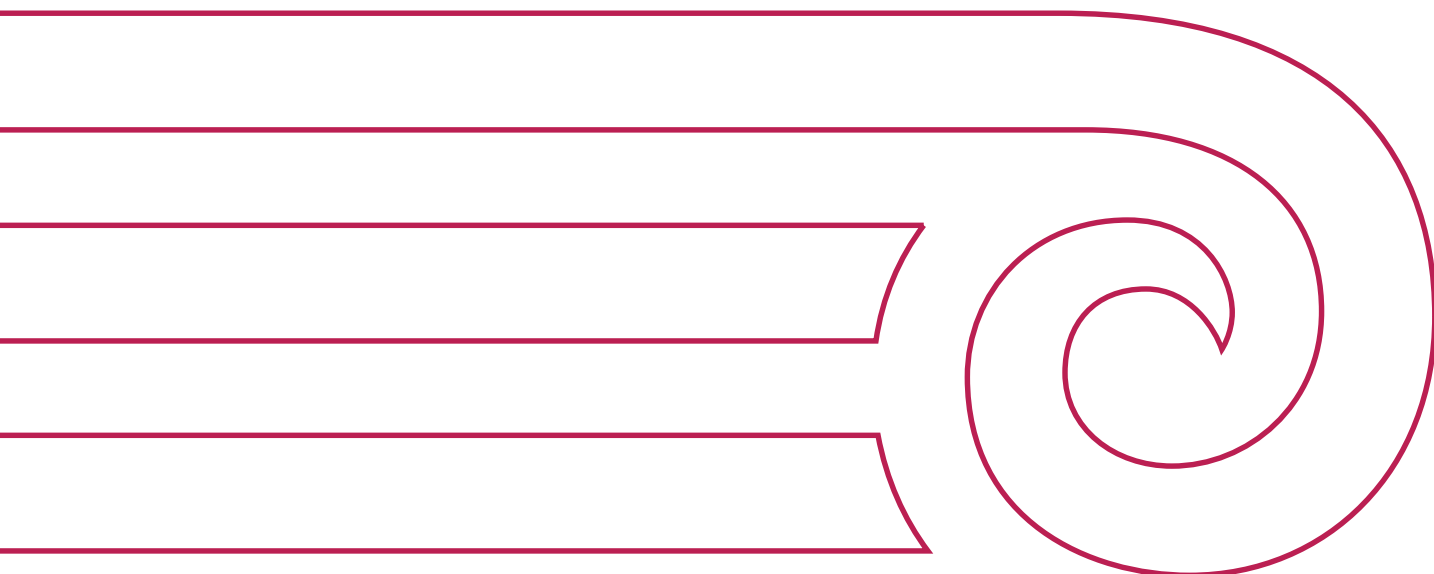
For research, the situation is even worse. There is no provision for tourism-related research from the public science system and there is no industry capability to support and undertake industry-good research.

Innovation and technology are closely linked areas that are not well supported but are vitally important components of product development, operational efficiency, productivity, and to enable better management of the tourism system. The Government's tourism innovation fund has been established, but it is still unclear if this is an ongoing fund.

Industry has supported the initiatives in place, such as the establishment of the Tourism Data Leadership Group and the two Lightning Lab innovation programmes run by Creative HQ.

Addressing these challenges will mean the industry can move from operating on intuition and 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 on the industry.

Timing: Present to 2025 and with implementation ongoing to 2030.



6. 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 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
4. Industry and operators to appropriately carry the stories of our people and place, thereby celebrating our unique culture in Aotearoa New Zealand.

Te Whakarae Māori reflects and celebrates the concepts of manaaki, tiaki and aroha (exchange, reciprocity, and consideration).

‘Ko au te whenua, te whenua ko au’

This whakatauki 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 as a whole that substantial progress and the building of capability is 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.

Relationships and the fostering of whanaungatanga (relationships) with whānau, hapū and iwi is 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.

Finally, the demand for Ahurei Māori (cultural capital) experiences is evident. However, only 46.9%¹⁴ 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 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.

¹⁴ MBIE, International Visitor Survey, Quarter 1, 2023.

7. Grow the tourism workforce

1. Industry and operators to engage with implementation of the Better Work Industry Transformation Plan, including by joining the Tourism and Hospitality Accord once this is established.
2. Operators 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 continue to raise employment standards and improve career pathways.

Tourism is fundamentally a people business, meaning our workforce is key to how we can grow and develop people as an industry. Quality experiences rely on great engagement between our visitors and people working in the industry, and this is something the industry must support and foster.

Under this action, industry will act to ensure that the tourism industry is an employer of choice for its skilled and valued workforce.

Action in this area includes supporting several workforce-related activities, including implementation of the Better Work Industry Transformation Plan, and business uptake of TIA's Tourism Sustainability Commitment.

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 will change significantly over time.

Progress can be achieved on three key fronts.

Firstly, by engaging with the industry-level processes that are in place including the development of delivery of new NCEA Tourism Achievement Standards. Secondly, from the work all tourism businesses do to foster and develop their workforce. Thirdly, from Ringa Hora, the Workforce Development Council, and its work to look at future workforce needs and training requirements.

For instance, all tourism employers can advance this action within their own businesses. They can be professional in their HR practices, pay well, create interesting roles, have pathways for their staff to grow and develop, and provide training. They can 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.

8. Eliminate carbon

1. Industry to engage with processes established to help operators reduce their carbon emissions, including the Government's Environment ITP and a Tourism Decarbonisation Roadmap.
2. Industry to engage with wider processes to reduce carbon emissions, including the Ministry of Transport-led Decarbonising Transport Action Plan and Sustainable Aviation Aotearoa.
3. Industry to ensure there is suitably sensitive industry and sector-level measurement of tourism carbon emissions.
4. All tourism operators to establish business-level carbon emission measurement, invest early in carbon reducing technologies and equipment, and set targets to be net carbon zero as soon as feasible.

Under this action, industry will actively strive to accelerate progress to being a net carbon zero industry as soon as it can before 2050. The industry will undertake modelling to determine a 2030 ambition for operators that are not part of the aviation industry, recognising that aviation which currently makes up 63%¹⁵ of tourism related emissions.

For tourism, consumer concern regarding the carbon-intensity of travel, particularly to remote destinations like Aotearoa New Zealand, has the potential to reduce visitors. Research indicates that 47% of visitors say they consider sustainability 'always' or 'most of the time'.¹⁶ As a long-haul destination, this is a clear strategic risk, making it doubly important that the industry is doing all it can to reduce its carbon emissions.

While there is a lot of work to do, transitioning to a low emissions economy also presents an opportunity. Carbon neutrality will support a truly clean, green, sustainable, and inclusive Aotearoa New Zealand, bringing benefits to the sector and to present and future generations.

New Zealand has undertaken to reduce emissions by 50% below 2005 levels by 2030 under the Paris Agreement¹⁷ and enshrining in law a 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.'

Like the Tourism Futures Taskforce, we believe carbon neutrality in tourism will involve action across many activities. For instance, by rapidly accelerating the development and uptake of electric vehicles and other sustainable infrastructure, investing in new sustainable aviation fuels, eliminating waste across the sector, developing zero-carbon visitor itineraries and, as a last resort, using local carbon offsetting. Ideally carbon offsets would be done through planting permanent native forests that will also generate amenity and biodiversity benefits.

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

¹⁵ 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.

¹⁶ MBIE, International Visitor Survey, 2022

¹⁷ United Nations Framework Convention on Climate Change, 2015

9. Champion Predator Free 2050

1. Industry to establish an industry partnership with Predator Free Limited to allow shared effort towards achieving the national predator-free goal.
2. Industry to advocate for capability and resources to be directed towards supporting predator free action and the work that sits behind it.
3. Operators contribute to Predator Free 2050 and build it into their business processes, ideally as part of their Tourism Sustainability Commitment action plans.
4. Operators to record their predator control successes, with these results to be aggregated and reported at the industry level.

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.

Under this action, the tourism industry will contribute to actions and initiatives that will assist in achieving Aotearoa New Zealand's goal to be Predator Free by 2050.

This action is all about adding the significant tourism industry weight to a wider predator free programme to restore our unique and vulnerable biodiversity in Aotearoa New Zealand. By making Predator-free a tourism mission, we will strongly signal our intent to do something that means a great deal to many New Zealanders, and it will form a great story that we can engage and inspire our visitors with, and thereby gaining their support too.

In this, there is a strong alignment of the interests and values of the tourism industry that relies on the quality of our natural places and a key part of

destination New Zealand. This will be a great way to genuinely contribute to kaitiakitanga of our special places and species. Predator free action also directly benefits our communities through the restoration of mauri (life force).

This is also an action that all tourism businesses and entities can find things to do that will suit them best. If you operate directly in nature, running a trap-line might be your action. For others, it might be sponsoring research or technology development, or submitting on policy processes, or providing funding or support for predator control projects, or participating in backyard trapping initiatives. All and any of these actions taken individually 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 species are free to thrive.

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.

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.

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 which has become embedded into our ethos as an industry, bringing to life values which 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 engage 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.

Timing: Present to 2030, and beyond.

Steps for individual businesses

| Te ara whakatutuki

A number of the ten actions lend themselves to be directly picked up and applied by individual businesses, whether big or small. With this, every tourism business can play a direct role in implementing this industry blueprint.

Outcome 1: Te Taiao (Environment)

- Measure carbon emissions, establish your plan towards eliminating carbon with targets and timelines, and invest early to implement your plan. (Action 8)
 - Identify the actions you can take, build it into your business plan, and actively support your Predator Free 2050 projects, including quantifying and recording your successes. (Action 9)
 - Measure your waste, establish a plan to eliminate waste through circular systems, and implement. Record the waste reductions you have achieved. (Action 3)
-

Outcome 2: Ōhanga (Economic)

- Operate your business to be successful, prosperous and resilient, and invest for your sustainable and regenerative future. (Action 3)
-

Outcome 3: Hāpori (Community)

Build relationships with local iwi, hapū and whānau to encourage mutual understanding and respect. (Action 6)

- Ensure you are an employer of choice by creating a great environment to grow and develop your people for the benefit of your business, your workers and your visitors. (Action 7)
-

Outcome 4: Manuhiri (Visitor)

- Embed Tiaki Care of New Zealand into your organisations' culture and ethos so that your visitors understand how to be great visitors in Aotearoa New Zealand and to integrate Tiaki thinking within your business. (Action 10)
- Engage with local iwi, hapū, whānau and other holders of stories, to carry the stories of our people and place, celebrating our unique culture to add to and deepen the experiences of your visitors. (Action 6)

Steps for Government

| Te ara kawanatanga

Within the blueprint are some key enabling actions that will need Government support and action in order to implement. We see each of these as one-off steps that will reduce the need for hands-on Government intervention over the longer term.

We also consider it important that Government continues its current tourism-related initiatives, including those in policy and data, and in the essential marketing undertaken by Tourism New Zealand.

Four Actions that will require specific Government support and action. These are:

- **Action 1:** Develop a NPS for Tourism. This will require a policy process to investigate the nature and content of the NPS for Tourism and to consult on the draft approach.
- **Action 2:** Address Industry Funding. This will require support for putting in place a funding system that delivers to industry aspirations as set out in this Blueprint.

- **Action 4:** Transform Tourism and Conservation. This will require support from DOC and other agencies to enhance the current settings for better tourism and conservation outcomes.
- **Action 5:** Power up Data and Research. This will require support from the Ministry of Employment, Business and Innovation and other agencies, across the data, research and innovation aspects.

In addition, Government support will be needed around several of the other actions, for instance to develop a comprehensive tourism decarbonising programme, or to contribute funding for the Aotearoa Tourism Centre.

In all of these areas, industry will be a willing participant in, and supporter of, the processes undertaken by Government to progress the work that only it can advance.

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.

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 progress enacting this plan will be critical to drive momentum and accountability.

Dynamic and adaptive

As we make progress towards our vision, our operating environment changes or new information becomes available, this blueprint will need to evolve. Our north star – that is our vision and outcomes – will not change. However, it will be necessary to refine our action areas every few years to ensure we are doing the best we can to drive 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 90 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.

We want to hear your thoughts and feedback on this Tourism 2050 blueprint.

Consultation with TIA members is open until Friday 8 September. We need your views to guide our thinking and decision making.

Submissions

We want to make it as easy as possible for you to provide us with feedback. You are welcome to provide your views on any aspect of the proposed blueprint. This can be as long or as short as you want and we are just as interested in what you are supportive of along with concerns or questions that you have.

You might want to respond to some of the following questions:

- Have we effectively captured the challenges facing our industry and are there other factors that we haven't considered?
- Are the other considerations as a member that need to be included?
- Do the ten actions adequately address the strategic issues we are facing and will they have an impact on the outcomes we are seeking to achieve?
- What is your view on the targets we are seeking to achieve?
- Are there any other options that should be considered?
- What aspects of this blueprint are you supportive of?

Please send us your submission to tourism2050@tia.org.nz as soon as possible and no later than Friday 8 September.

Your submission will not be published and TIA will only ever circulate summarised, aggregated feedback to its members.

Questions and further information

To find out more information please don't hesitate to contact us via email at tourism2050@tia.org.nz

We will also schedule a webinar and some drop in presentations so keep an eye out on your email for those details.

Digital copies of this document are on the TIA website at www.tia.org.nz/tourism_2050

Process

At the end of the feedback period on Friday 8 September, all feedback will be summarised and considered. Changes will be made to the blueprint where required. Depending on the amount of feedback received, TIA will then release the final blueprint a few weeks later. TIA will let members know in summary what feedback was received, how it was considered, what was updated and why.

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.

Appendices | Kā apithihaka

About this blueprint

The nature of the tourism industry and the trends affecting it tell us that the future of tourism in Aotearoa New Zealand lies in the provision of rich and authentic experiences, carried out in a manner that gives back more than is taken. An industry that is actively managed to ensure strong overall positive outcomes.

Terminology

There are several terms for this positive role, 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.

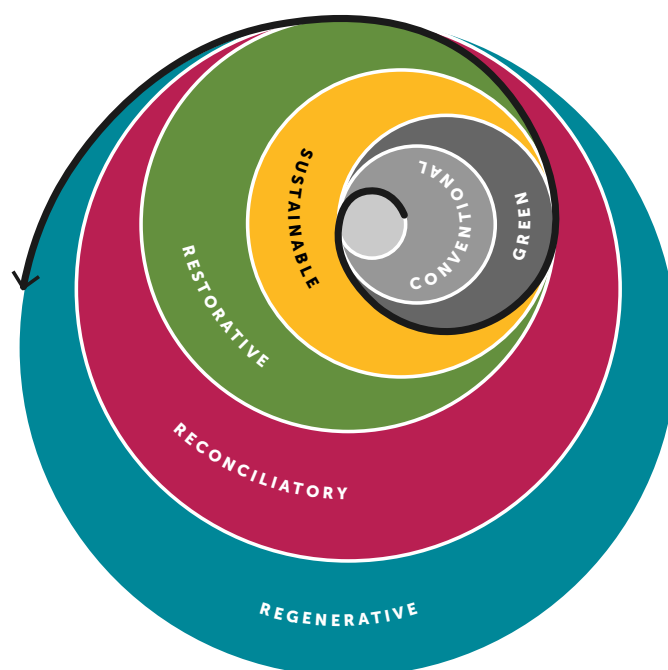
Figure 2 sets out the elements of the sustainable/regenerative spectrum.

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 IDG 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 2. The spectrum from conventional to regenerative¹⁸



¹⁸ 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 critical 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, carbon-neutral industry in a country with vastly improved biodiversity and strong social and cultural connections between visitors and communities.

It is important that we get started on the actions quickly. Setting a strong pace from the start is the key to making big progress in the long term.

Goals

The original Tourism 2025 Strategy has a single goal of \$41b by 2025, an audacious measurable goal that was achieved in 2020. With this blueprint having a broader set of desired outcomes, there is no single measurable goal that can be put in place. Instead, the measurement of progress of this blueprint will be against the four outcome areas of economy, community, visitor and environment, and the targets we set.

Actions

The actions are the most important part of this blueprint. We are setting out just ten actions, and each has the potential to drive substantive change in their own ways. Some speak to the parts of the tourism system that need to be changed, whereas other actions can be progressed within existing system settings.

The system-changing actions relate to the structure of the tourism industry model and the provision of funding to enable functions to be effectively undertaken.

Get these structural fundamentals right, and we will be more confident that the other actions can be implemented at the scale and depth needed.

Alignment

This blueprint is strongly correlated with other key strategic examinations 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. The interim report of the Tourism Futures Taskforce and the TÖNUl report prepared by Regional Tourism New Zealand and Miles Partnership make their strongest recommendations in this area.

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. This is the opportunity before us as we take this blueprint forward.







P 0800 TIA HELP (0800 842 4357) | **E** info@tia.org.nz
Level 2, Inspire House, 125 Featherston St,
PO Box 1697, Wellington 6140, New Zealand

WWW.TIA.ORG.NZ | WWW.SUSTAINABLETOURISM.NZ