



## COVERSHEET

|                               |  |                             |              |
|-------------------------------|--|-----------------------------|--------------|
| <b>Minister</b>               | Hon Kelvin Davis                                   | <b>Portfolio</b>            | Tourism      |
| <b>Title of Cabinet paper</b> | New Zealand - Aotearoa Government Tourism Strategy | <b>Date to be published</b> | 25 June 2019 |

### List of documents that have been proactively released

| <b>Date</b> | <b>Title</b>  | <b>Author</b>   |
|-------------|---|---|
| 8 May 2019  | <i>New Zealand - Aotearoa Government Tourism Strategy</i> | <i>Office of the Minister of Tourism<br/>Office of the Minister of Conservation</i> |
| 9 May 2019  | <i>DEV-19-MIN-0100</i>                                    | <i>Cabinet Office</i>   |

### Information redacted

**NO**

Any information redacted in this document is redacted in accordance with MBIE's policy on Proactive Release and is labelled with the reason for redaction. This may include information that would be redacted if this information was requested under Official Information Act 1982.



Office of the Minister of Tourism  
Office of the Minister of Conservation

Chair, Cabinet Economic Development Committee

## **Report back - Consultation on the draft Aotearoa New Zealand Government Tourism Strategy**

### **Proposal**

1. This paper reports back on the outcomes of consultation on the draft Aotearoa New Zealand Government Tourism Strategy (the Strategy) and seeks Cabinet agreement to the updated Strategy.

### **Executive Summary**

2. On 19 September 2018, Cabinet agreed that the Government would take a more deliberate and coordinated approach to the tourism system [DEV-18-MIN-201]. It also agreed for officials to consult on the draft Strategy, which set out how the Government would take a stronger stewardship of the tourism system, more actively partner with regions and local government and better align Government investments to enrich New Zealand through sustainable tourism growth.
3. In response to the Cabinet directive, officials consulted on the draft Strategy with the tourism industry, conservation groups, local government, iwi and Māori and the public from November 2018 - February 2019.
4. The majority of submissions welcomed the Strategy's proposal for the Government to take a more active and deliberate role in the tourism system. Feedback supported the Government taking a leadership role in the tourism system, improving coordination and planning and highlighted long-term sustainable funding challenges.
5. After considering the feedback, the outcomes of the Strategy have been refined to the following five themes, which support its aim and reflect values, issues and challenges across the tourism system:
  - 5.1. The Economy – Tourism sector productivity improves;
  - 5.2. The Environment – Tourism protects, restores and champions Aotearoa New Zealand's natural environment, culture and historic heritage;
  - 5.3. International and Domestic Visitors – Aotearoa New Zealand delivers exceptional visitor experiences;

- 5.4. New Zealanders and their Community – New Zealanders' lives are improved by tourism; and
- 5.5. Regions – Tourism supports thriving and sustainable regions.
6. Officials have made several changes to strengthen how these important issues and themes are reflected in the final Strategy (see Annex One). Key changes include strengthening the way the Government will engage with whanau, iwi, hapū and tangata whenua, identified tikanga values that underpin sustainable tourism growth for Aotearoa New Zealand, and tightened the language.
7. Officials have also developed an implementation plan with work grouped in 17 work streams with 44 actions across the Government and identified priority actions.
8. We are seeking Cabinet agreement to the updated Strategy.

## Background

9. We want tourism growth to be productive, sustainable and inclusive. To make sure of that, the Aotearoa New Zealand Government Tourism Strategy outlines the Government's goals, outcomes and priorities for tourism.
10. On 19 September 2018, Cabinet agreed that the Government would take a more deliberate and coordinated approach to how to invest and intervene in the tourism sector [DEV-18-MIN-201]. Cabinet also agreed that officials initiate targeted consultation on the draft strategy with key tourism, conservation and local government stakeholders prior to the public release of the draft Strategy.
11. The draft Strategy proposed that the Government take a more deliberate and active role in the tourism system to shape future growth and better coordinate tourism-related investment. It set out the Government's aim for tourism – to enrich New Zealand through sustainable tourism growth – and how it would work with Treaty Partners, the tourism sector, local government, communities and other stakeholders to achieve this.
12. The Strategy identified two roles for the Government within the tourism system as a **steward** and an **actor**. As a steward, the Government is aiming to improve coordination, planning and sustainable funding. As an actor it provides public goods used by visitors such as roads, broadband and amenities on public conservation lands. It also regulates a range of activities from management of and access to public conservation lands to international air services and border security to ensure a well-functioning tourism system.
13. The draft Strategy sets out how the Government would:
  - 13.1. Take a stronger role in its stewardship of the system;

- 13.2. More actively partner with regions and local government on tourism development and dispersal; and
  - 13.3. Better align the Government's tourism-related investments.
14. The Ministry of Business, Innovation and Employment (MBIE) and Department of Conservation (DOC) officials held three targeted workshops with tourism and conservation stakeholders to test the Strategy before wider public release. These stakeholders supported the Strategy.

### **Public Consultation and Feedback**

15. On 6 November 2018, we released the draft Strategy for public consultation, which was held from 6 November 2018 to 4 February 2019. There were 254 submissions received from a range of Treaty Partners and sectors, including conservation and tourism stakeholders, local government, community groups and individuals.
16. Officials also undertook targeted consultation with Māori, using the Crown engagement with Māori framework. They held three regional tourism hui with iwi and Māori tourism groups. They also consulted Te Arawhiti, Te Puni Kōkiri and New Zealand Māori Tourism to gather a range of perspectives on strengthening the way Government will engage with whanau, iwi and hapū as we implement the Strategy.
17. The majority of submissions welcomed the Strategy's proposal for Government to take a more active and deliberate role in the tourism system to enrich Aotearoa New Zealand through sustainable tourism growth.
18. Several recurring themes centred on delivering the benefits of tourism for Aotearoa New Zealand and New Zealanders emerged in the submissions. Most of these themes, which were already expressed in the draft Strategy, identified the issues that are of particular interest to New Zealanders and helped in framing the final Strategy.
19. These included:
  - 19.1. Recognising the importance of achieving better outcomes for tourism through effective partnerships with Māori tourism enterprise, whanau, iwi, hapū and tangata whenua and promoting Māori culture and values through tourism;
  - 19.2. Ensuring the Strategy is implemented through partnerships with industry, local government, Māori and communities;
  - 19.3. Developing an environmentally sustainable tourism system and safeguarding public conservation lands;
  - 19.4. Addressing and mitigating the impact of tourism on climate change;

- 19.5. Ensuring the industry is innovative, productive and competitive with a supportive business environment, particularly for small and medium enterprises;
- 19.6. Placing a stronger emphasis on domestic tourism and supporting community wellbeing through tourism;
- 19.7. Focusing on value over volume and limits on visitors;
- 19.8. Acknowledging the importance of all regions, including gateway regions (for example, Auckland, Christchurch and Queenstown);
- 19.9. Increasing transport and visitor infrastructure development;
- 19.10. Improving the availability and accessibility of data;
- 19.11. Increasing regional dispersal and travel outside of peak seasons; and
- 19.12. Building a skilled tourism workforce.

### **Updated Aotearoa New Zealand Government Tourism Strategy**

20. The updated Strategy articulates an all-of-Government approach to the tourism system and the outcomes sought to ensure tourism is well-managed and contributes to the Government's wider economic objective of productive, sustainable and inclusive growth. The Strategy also recognises building better partnerships with Māori tourism enterprise, iwi, hapū and tangata whenua is integral to delivering better tourism outcomes.
21. The key changes to the draft Strategy include:
  - 21.1. Strengthening the way the Government will engage with Māori tourism enterprise, whanau, iwi, hapū and tangata whenua;
  - 21.2. Tikanga values that underpin sustainable tourism growth for Aotearoa New Zealand;
  - 21.3. Refined outcomes and sharper language;
  - 21.4. Grouped the work into 17 work streams across the Government; and
  - 21.5. Identified the priority actions for the Government that will deliver across multiple outcomes.
22. The Strategy draws on tikanga values that underpin sustainable tourism growth in Aotearoa New Zealand, they are:
  - 22.1. kaitiakitanga (guardianship/sustainability);
  - 22.2. ōhanga/whairawa (economic prosperity and wellbeing);
  - 22.3. manaakitanga (shared respect, hospitality, generosity and care for others); and

- 22.4. whanaungatanga (a sense of family and belonging, relationships built on shared experiences and working together).
23. The outcomes of the Strategy are grouped into five themes which support its aim and reflect the values, issues and challenges across the tourism system identified by New Zealanders:
- 23.1. *The Economy – Tourism sector productivity improves*
- This outcome focuses on the type of growth that we want tourism to deliver – with a focus on lifting the productivity of the sector. We want the value to continue to grow faster than volume and lead to higher value jobs in the tourism sector.
- 23.2. *The Environment – Tourism protects, restores and champions Aotearoa New Zealand’s natural environment, culture and historic heritage*
- This outcome signals the importance of restoring and protecting the quality of the natural environment, culture and historic heritage that international visitors come here to experience, and New Zealanders want to protect.
- 23.3. *International and Domestic Visitors – Aotearoa New Zealand delivers exceptional visitor experiences*
- This outcome recognises that to ensure the sustainability of the tourism sector Aotearoa New Zealand needs to develop and promote high-quality, authentic visitor experiences that draw on our unique visitor proposition.
- 23.4. *New Zealanders and their Community – New Zealanders’ lives are improved by tourism*
- This outcome signals the importance of tourism providing benefits beyond the economic to focus on wellbeing. Well managed tourism can provide social and cultural improvements to New Zealanders lives too – together these drive community support.
- 23.5. *Regions – Tourism supports thriving and sustainable regions*
- This outcome focuses on tourism growth being inclusive and ensuring that the benefits of tourism are distributed across regions. An optimal tourism system will have all regions in Aotearoa New Zealand able to grow their tourism industries in a way that enhances the overall wellbeing in their communities – economic, social, cultural and environmental.
24. To support the Government’s role as an actor and contribute towards the outcomes of the Strategy, it endorses the use of the Government’s Investment Framework for Tourism. This will help the Government make decisions about how, when and where it will intervene or invest in the tourism system – both at

a national and a regional level. The framework includes five specific ways to sustainably grow tourism in a region (or the 5As) [DEV-18-MIN-0201]:

- 24.1. visitor **awareness** of a region (i.e. tourism marketing);
- 24.2. regions have the **amenities** and **attractions** visitors want (i.e. infrastructure investment and destination management);
- 24.3. visitors can **access** regions (i.e. transport investment); and
- 24.4. the **attitudes** of the people, in terms of continued community support for tourism.

### **Implementing the Strategy and monitoring**

25. A variety of actors have a role to play in contributing towards these 5As, including central and local government, industry, communities and iwi and hapū. It also requires actors to work in a coordinated way.
26. The Strategy is complemented by a collaborative implementation plan which identifies actions by various actors. This includes new work as well as ongoing work contributing to the Strategy's outcome.
27. To achieve the outcomes sought in the Strategy, the Government will need to work closely with local government and other stakeholders as the pressures are felt at the local level but that is also where the wider benefits of tourism can be felt most strongly.
28. The priority actions for the Government that will deliver across multiple outcomes are:
  - 28.1. Coordination across the tourism system, MBIE and DOC will take a leadership approach to coordinate the Government's tourism efforts across the public sector. We want to improve tourism outcomes by taking an all-of-Government approach to the tourism system and look for opportunities to engage and coordinate with whanau, iwi, hapū, tangata whenua, local government, industry, businesses, regions and communities.
  - 28.2. Long-term Sustainable Funding Mechanisms, including implementing the International Visitor Conservation and Tourism Levy, identifying and responding to the tourism related actions arising for the Productivity Commission Inquiry into local government funding and consider and evaluate options to allow more strategic revenue and pricing decisions by DOC.
  - 28.3. Destination Management and Planning, including working with local government and other regional stakeholders to take a strategic, coherent and consistent approach when deciding how they want to plan, manage, market and develop their destinations and develop integrated long-term solutions through collaborative, landscape-scale spatial planning.

- 28.4. Better Data and Insight, including implementing the Tourism Data Domain Plan, identifying future trends that could impact on the tourism system and coordinate and share data and insight to support the industry.

## **New Work**

29. New priorities identified through the strategy include:

- 29.1. Establish Long-term Sustainable Funding Mechanisms – Officials are working to implement the International Visitor Conservation and Tourism Levy and pass the relevant enabling legislation.
- 29.2. Destination Management Planning – MBIE is developing a set of guidelines on destination management planning to help support Treaty partners, local and central government, regions, communities and the industry in better managing their respective destinations.
- 29.3. Protect Aotearoa New Zealand's natural capital and indigenous biodiversity – DOC is working to prioritise how money raised through the conservation pillar of the International Visitor Conservation and Tourism Levy will be spent to support biodiversity. Other actions identified in the Strategy, such as long-term spatial and destination plans, will support better management of the impacts of tourism, protect natural capital and indigenous biodiversity.
- 29.4. Capability Development and Partnerships – This will involve MBIE building the capability of destination management planning across the sector and regions. Further, it will support the implementation of destination management plans through partnering with regions and enabling access to sustainable funding sources and investment.
- 29.5. Strengthen Tourism Data and Insights – MBIE is working to implement key elements of the Tourism Data Domain Plan, which sets out the priorities for tourism statistics, based on agreement by industry and Government stakeholders.
- 29.6. Transition to a low-emissions and climate resilient Aotearoa New Zealand – This will involve MBIE deepening current understandings of the implications of climate change for the tourism industry and moving towards a low-emissions economy.

## **Ongoing work**

- 29.7. Tiaki Care for New Zealand – In November 2018, an industry and government initiative *Tiaki Care for New Zealand* was launched to encourage visitors to act as *kaitiaki* of New Zealand. The initiative is a result of cross-sector collaboration, including public and private sector tourism organisations who have proactively come together to encourage positive visitor behaviour.

- 29.8. Responsible Camping – In August 2018, the Government invested \$8.5 million in a pilot to respond to immediate actions recommended by the Responsible Camping Working Group. The pilot has created infrastructure, technology, monitoring and education projects across 27 local councils.
- 29.9. Provincial Growth Fund - Tourism is a key sector benefiting from the Provincial Growth Fund, with approximately \$101 million committed to tourism projects. For example, in November 2018 the Ministers announced an \$87 million investment in West Coast tourism. This included significant funding for key strategic visitor sites in Punakaiki and the Oparara Basin.
- 29.10. Tourism Infrastructure Fund – In February 2019, the Government announced the opening of the third round of the Tourism Infrastructure Fund for applications from local government and not-for-profit community organisations. The fund provides co-funding for visitor related infrastructure to meet existing and future needs. The fund provides up to \$25 million annually.
- 29.11. Great Rides Fund – In February 2019, the Government announced the opening of the tenth round of the Maintaining the Quality of Great Rides Fund. The Maintaining the Quality of Great Rides Fund has a budget of \$2 million each year across two funding rounds to support projects that maintain and improve completed sections of the Great Rides of Ngā Haerenga – the New Zealand Cycle Trail.
30. Officials will monitor the implementation of the Strategy and report back on the progress.

### **Consultation**

31. The following agencies were consulted: Department of Internal Affairs, Ministry of Culture and Heritage, Ministry of Foreign Affairs and Trade, Ministry for Primary Industries, Ministry of Transport, New Zealand Customs Service, New Zealand Māori Tourism, New Zealand Trade and Enterprise, New Zealand Transport Agency, State Services Commission, Te Puni Kōkiri, Te Arawhiti, the Treasury and Tourism New Zealand. The Department of the Prime Minister and Cabinet was informed.

### **Financial Implications**

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32. The resourcing requirements for the Government will be met within baselines and potential investment ideas will be considered through the International Visitor Conservation and Tourism Levy Investment Plan.

### **Legislative Implications**

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33. This proposal has no legislative implications.

## Impact Analysis

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34. An impact analysis is not required as this paper does not include any regulatory options.

## Human Rights

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35. The proposals are consistent with the New Zealand Bill of Rights Act 1990 and the Human Rights Act 1993.

## Gender Implications

36. This proposal has no gender implications.

## Publicity

37. Subject to Cabinet approval, we intend to release the final Strategy at TRENZ in Rotorua on 16 May 2019. TRENZ is New Zealand's largest annual business-to-business travel and trade event.
38. Following the final Strategy's release, MBIE and DOC officials will conduct a roadshow across New Zealand to present the Strategy to relevant stakeholders.

## Proactive Release

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39. We intend to proactively release this paper, subject to the redaction of any material as consistent with the Official Information Act 1982.

## Recommendations

The Minister of Tourism and the Minister of Conservation recommend that the Committee:

### *Background*

1. **note** that in September 2018 Cabinet agreed that the Government needed to take a more deliberate and coordinated approach to how to invest and intervene in the tourism system.
2. **note** that a draft Aotearoa New Zealand Tourism Strategy (the Strategy) was released for public consultation on 6 November 2018 and submissions closed on 4 February 2019.

### *Consultation outcomes*

3. **note** that submissions and feedback from consultation supported the Strategy's proposal for the Government to take a more active and deliberative role in the tourism system.
4. **note** that officials have considered the submissions and updated the Strategy to better reflect the important issues and themes identified by New Zealanders through the consultation process.

*Updated Strategy and implementation*

5. **agree** to the updated Aotearoa New Zealand Government Tourism Strategy (**Annex I**).
6. **note** that officials have developed an implementation plan, which has 17 work streams and 44 actions across the Government, to achieve the Strategy's outcomes.

*Publicity*

7. **note** that the Ministers of Tourism and Conservation, subject to Cabinet agreement, intend to release the final strategy at industry trade event TRENZ in Rotorua in 13-16 May 2019.
8. **note** that this paper will be proactively released, subject to any appropriate redactions.

*Monitoring and report back*

9. **note** officials will monitor the implementation of the Strategy.
10. **Invite** the Ministers of Tourism and Conservation to report back on the implementation of the Strategy after three years of implementation.

Authorised for lodgement

Hon Kelvin Davis  
Minister of Tourism

Hon Eugenie Sage  
Minister of Conservation



MINISTRY OF BUSINESS,  
INNOVATION & EMPLOYMENT  
HĪKINA WHAKATUTUKI



Department of Conservation  
*Te Papa Atawhai*

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# Aotearoa New Zealand Government Tourism Strategy

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Mā te tuputupu i te tāpoi toitū ka whakahaumako a Aotearoa

Enrich Aotearoa New Zealand through sustainable tourism growth

MAY 2019



New Zealand Government



# Aotearoa New Zealand Government Tourism Strategy

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|-------------|---|
| <b>MBIE</b> | Ministry of Business, Innovation and Employment |
| <b>DOC</b>  | Department of Conservation                      |
| <b>TNZ</b>  | Tourism New Zealand                             |
| <b>NZTE</b> | New Zealand Trade and Enterprise                |
| <b>MFAT</b> | Ministry of Foreign Affairs and Trade           |
| <b>NZMT</b> | New Zealand Māori Tourism                       |
| <b>TIA</b>  | Tourism Industry Aotearoa                       |
| <b>NZTA</b> | New Zealand Transport Agency                    |
| <b>RTO</b>  | Regional Tourism Organisations                  |
| <b>MCH</b>  | Ministry of Culture and Heritage                |
| <b>INZ</b>  | Immigration New Zealand                         |
| <b>MPI</b>  | Ministry for Primary Industries                 |
| <b>TPK</b>  | Te Puni Kokiri                                  |
| <b>MOT</b>  | Ministry of Transport                           |
| <b>DIA</b>  | Department of Internal Affairs                  |
| <b>MHUD</b> | Ministry of Housing and Urban Development       |



Photo: Fraser Clements

## Tourism is important to Aotearoa New Zealand

Aotearoa New Zealand is a special place, and more and more visitors want to see our beautiful country. Visitors, both Kiwis exploring their own backyard, as well as visitors from overseas, contribute significantly to the country.

Tourism creates inclusive growth by distributing economic opportunities and bringing social benefits across our regions, cities and communities. It allows us to celebrate our unique Māori culture. International visitors buy our products and services, which contributes to the success of other export sectors and grows our reputation internationally. Tourism provides a pathway for many to enter the workforce, gaining important skills. We also want people working in tourism to transition into high-value jobs and improve the productivity of the sector.

### STATISTICS

- › 42% growth in the last 5 years
- › 3.9 million annual international visitors
- › 60% tourism spending is by domestic visitors
- › 5.1 million annual visitors by 2024
- › \$16.2 billion or 20% of exports
- › \$15.9 billion direct, \$11.1 billion indirect contribution to GDP
- › 216,000 jobs approx. 8% of total workforce
- › NZ population 4.9 million



Recent visitor growth has increased the benefits of tourism, but it has also highlighted that the challenges need to be more carefully thought through. The costs and benefits from tourism do not always fall in the same place, which can lead to under-investment in the infrastructure required to support visitors and our communities. So visitor growth can create infrastructure pressures, overcrowding, and environmental impacts.

The recent pace and scale of visitor growth has effectively outstripped the capacity of our system to respond in some areas. This means that the economic and other opportunities afforded by this growth are not being fully realised, and the pressures created are not always adequately managed.

We want our tourism growth to be productive, sustainable and inclusive. This is to help us grow Aotearoa New Zealand for all, improve the wellbeing of New Zealanders and to protect and restore our natural environment.

To make sure of that, we're taking a more active, deliberate and coordinated approach to tourism.

### Steering the system in the right direction

Our current tourism system is not set up to make the most of these opportunities. It needs better coordination and planning as well as sustainable funding arrangements that are responsive to visitor growth. A coordinated approach is critical, with different government agencies, industry and local government working together for the best results.

We need to strengthen our stewardship of the tourism system and work more actively with iwi, hapū and tangata whenua, local government, industry, businesses, regions and communities to shape future growth, manage its impact and better coordinate investments.

The Aotearoa New Zealand Government Tourism Strategy sets out how we propose to do this.

### Building meaningful partnerships

To have a well-functioning tourism system we need to build more meaningful partnerships. This will mean working with Treaty Partners to ensure effective engagement with Māori. We will encourage, enable and support partnerships between Māori tourism enterprise, iwi, hapū and tangata whenua and government, industry, businesses, regions as well as communities to engage and collaborate on projects that lead to improved tourism outcomes.

#### TIKANGA VALUES

*This Tourism Strategy draws on tikanga values that underpin sustainable tourism growth in Aotearoa New Zealand, they are:*

- › **ōhanga/whairawa** (economic prosperity and wellbeing),
- › **manaakitanga** (shared respect, hospitality, generosity and care for others),
- › **kaitiakitanga** (guardianship/sustainability),
- › **whanaungatanga** (a sense of family and belonging, relationships built on shared experiences and working together).



## A well-functioning tourism system

We want to make sure the many benefits of tourism are realised, while managing the impacts. This requires a tourism system that is able to create a clear direction, adapt to external changes, and bring communities along with it. The government plays an important role in ensuring the tourism system delivers this. It does this in two main ways:

- › As a **steward**, government looks across the whole tourism system to make sure that it is working effectively, and that the other participants have the incentives, information and capability to play their respective roles. Government has a role to ensure meaningful engagement with Māori and as steward of the tourism system to help shape visitor demand, help ensure the market can respond to that demand, and coordinate, facilitate and regulate activity and outcomes across the system.
- › Government also operates as an **actor** in the tourism system directly through its own investments and interventions – for instance by providing public goods used by visitors such as roads, broadband and amenities on public conservation lands. This requires it to ensure its own interventions are joined up across multiple agencies, and well-aligned with those of industry and regional players.

The government is taking a stronger role as the **steward** of the tourism system to improve coordination, planning and sustainable funding. Government will more actively partner with iwi, hapū and tangata whenua, local government, and other regional stakeholders on tourism development and dispersal, and better align its regional tourism-related investments and interventions. Government is also a regulator of some activities to help ensure the tourism system is functioning well. Tourism intersects with many other government policy levers including the management of and access to public conservation lands and waters, resource management, international air services, border security, biosecurity, and health and safety. All of these provide a framework to help manage tourism activity. Effective government coordination of these roles is important for the long-term performance of the tourism system.

## An All-of-Government approach to the tourism system

The government's tourism outcomes are long-term and aspirational in nature. The cross-cutting nature of tourism means that this Tourism Strategy sits in the context of a range of other intersecting government strategies and work programmes.

The Tourism Strategy is being led by the Ministry of Business, Innovation and Employment with the Department of Conservation. But there are other government agencies that have an important part to play in achieving our tourism outcomes:

There are also other parts of government that sit separately but connect to the tourism system, such as, international education, health and regional economic development. There are also important roles in the tourism system for Treaty Partners, local government, industry, businesses, regions and communities.

A large number of government and non-government actors play interconnected roles to help ensure the tourism system functions effectively.

## Government Investment Framework for Tourism

To support the government's role as a **steward** and **actor**, we have developed a government investment framework for tourism to successfully coordinate activity across the tourism system and enable government to make choices about how, when and where it intervenes or invests to support the outcomes of the strategy – both at a national and a regional level.

At a regional level, there are five key areas to focus on to support well-functioning regional visitor destinations:



**Attractions** – visitors need things to do and see – this influences how long they stay and how much they spend

**Awareness** – visitors need to know what's on offer – this will drive visitor numbers and spend across the year

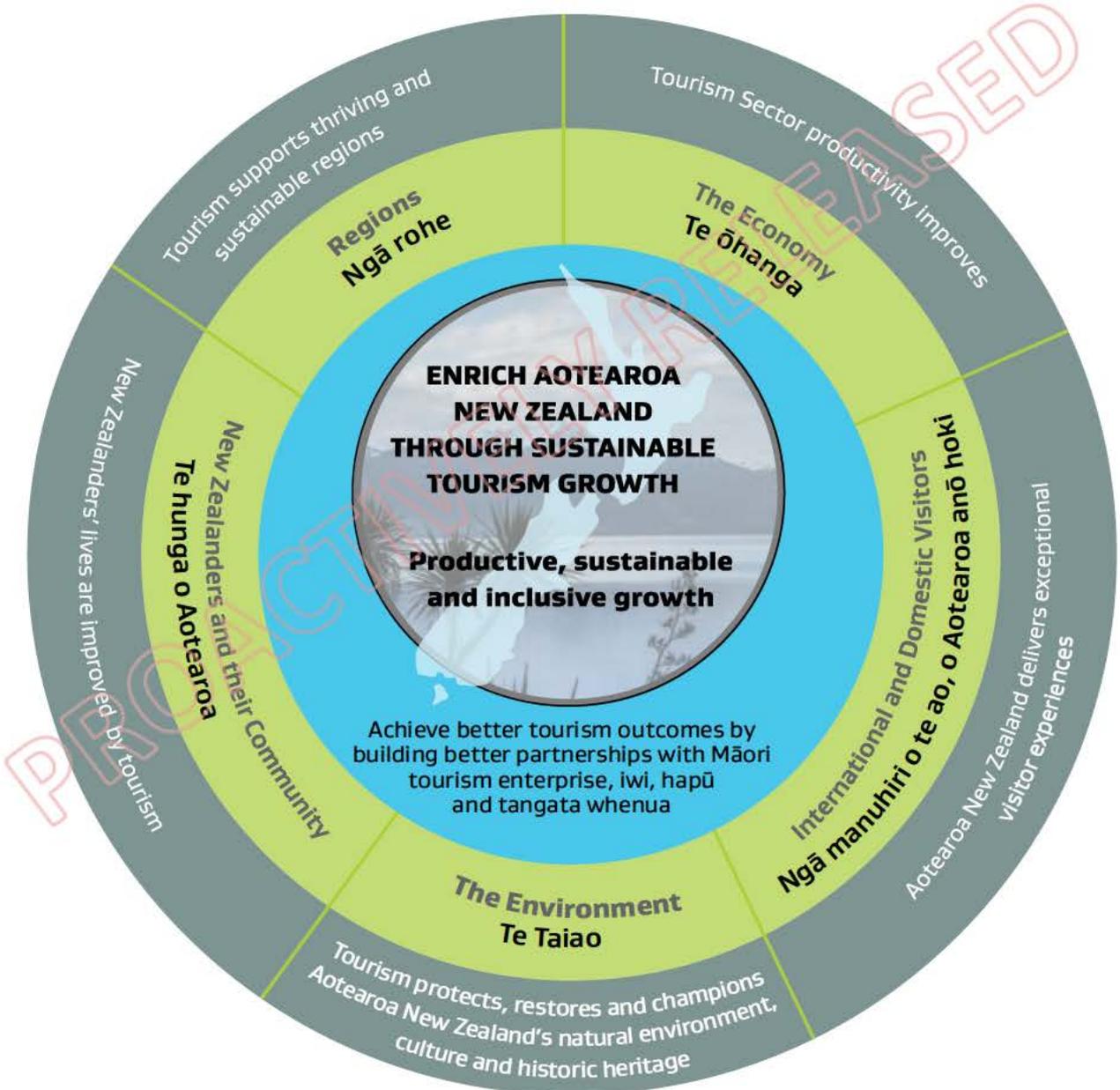
**Access** – visitors need to be able to get to where they want to visit safely in a timely way for an appropriate cost. This includes air, road, rail, sea, trails and cycleways

**Amenities** – visitors need accommodation, retail and hospitality, drinking and waste water and other infrastructure

**Attitudes** – communities need to want to welcome visitors to their region

### Government's goals for tourism

We want to mā te tuputupu i te tāpoi toitū ka whakahaumaki a Aotearoa - enrich Aotearoa New Zealand through sustainable tourism growth.



## Enriching Aotearoa

'Enrich' means we want tourism to improve New Zealanders' social, cultural, environmental and economic wellbeing. It links back to the productive, sustainable and inclusive growth objectives of the government's economic strategy.

### 'Sustainable' growth

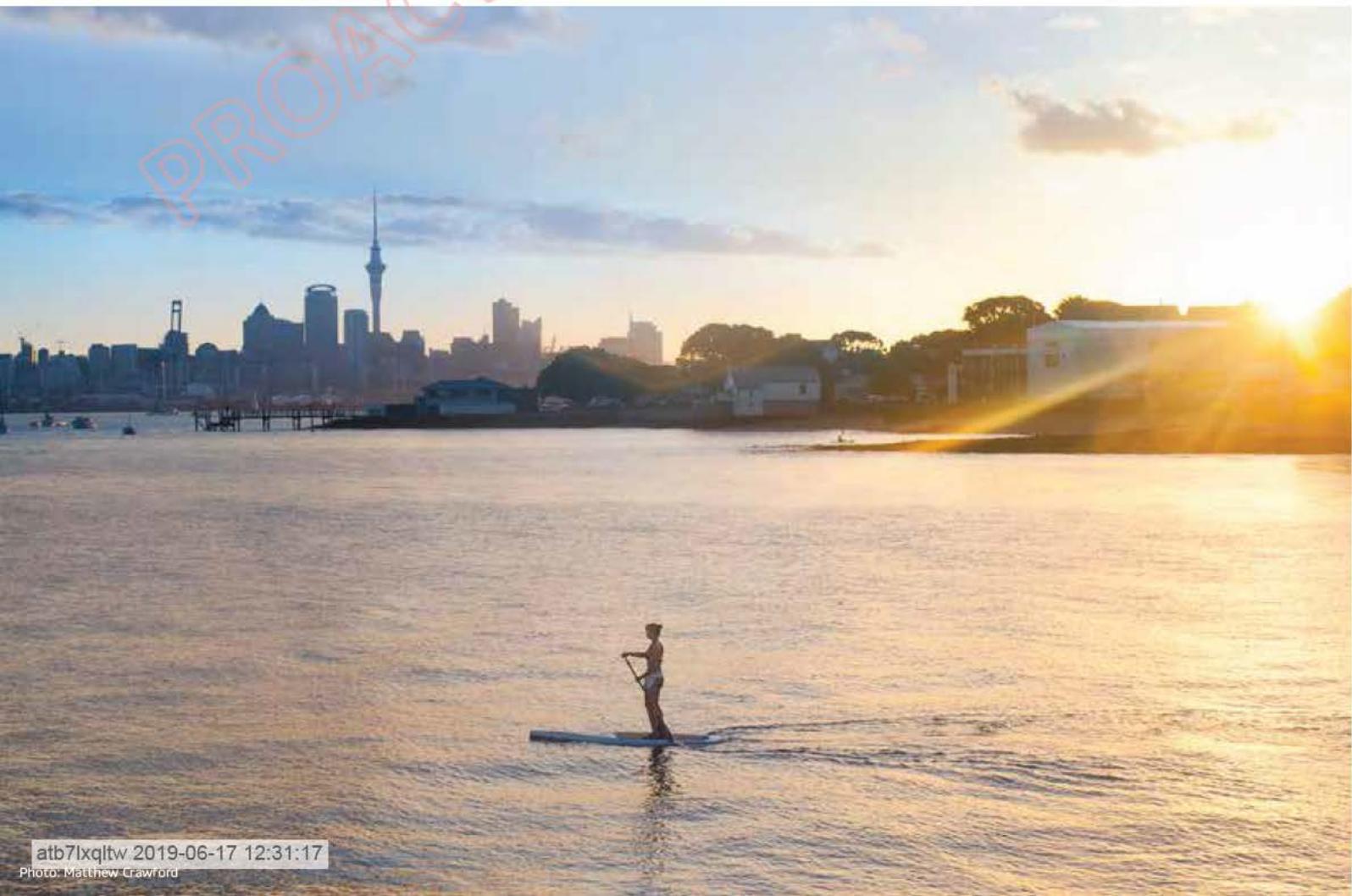
'Sustainable' includes environmental, social and economic sustainability. We need to make sure the natural environment is protected and enhanced, that communities embrace visitors, and that we're economically better off. These are not issues to be traded off against each other – a well-functioning tourism system will see these considerations working together.

This will mean building better partnerships with iwi, hapū and tangata whenua across all outcomes of the strategy.

It recognises the impacts of climate change on the industry, building a low-emissions and climate resilient economy and supports the government's focus for a just transition to a 'clean, green, and carbon neutral Aotearoa New Zealand'. Importantly, it recognises the environment – our natural capital – as the economic foundation of Aotearoa New Zealand and growth will need to be created within ecological limits.

A focus on sustainable growth is a natural fit with where the industry is heading, as can be seen by Tourism Industry Aotearoa (TIA) emphasis on sustainability through their Tourism 2025 and Beyond: Sustainable Growth Framework and Tourism Sustainability Commitment.

Sustainable tourism growth has the potential to significantly boost our economy, bring greater prosperity to our regions, protect and support our environment, and improve New Zealanders' quality of life and wellbeing.



## The outcomes

Government cannot achieve these tourism outcomes alone. We need everyone - Treaty Partners, central and local government, the tourism industry and New Zealanders to work together to manage and mitigate the impacts of more visitors. Each actor plays an important role in the tourism system.

To enrich Aotearoa New Zealand through sustainable tourism growth, this Tourism Strategy sets out five integrated outcomes. A productive te ōhanga/economy requires a healthy functioning te taiao/environment to support it. It's the drawcard for ngā mahuhiri o tea o, o Aotearoa anō hoki/ international and domestic visitors seeking quality experiences which we must protect and restore to sustain tourism in Aotearoa New Zealand. Tourism should benefit te hunga o Aotearoa/ New Zealanders and their communities through jobs, education, and growth and spread these benefits across our ngā rohe/regions.



Photo: Graeme Murray



| Theme   | Outcome   | Focus  |
|---|---|--|
| <b>Te ōhanga</b><br>The economy   | Tourism sector productivity improves  | This focuses on the type of growth that we want tourism to deliver – with an emphasis on lifting the productivity of the sector.   |
| <b>Te Taiao</b><br>The environment  | Tourism protects, restores and champions Aotearoa New Zealand’s natural environment, cultural and historic heritage | Our natural environment is the backbone of Aotearoa New Zealand’s economy, culture and wellbeing. To achieve sustainable tourism growth, we must protect the environment and manage activity within its limits so Aotearoa New Zealand will be in great shape for the next generation. |
| <b>Ngā manuhiri o te ao, o Aotearoa anō hoki</b><br>International and domestic visitors | Aotearoa New Zealand delivers exceptional visitor experiences   | To ensure the sustainability of the tourism sector Aotearoa New Zealand needs to develop and promote high-quality, authentic visitor experiences that draw on Aotearoa New Zealand’s unique visitor proposition.   |
| <b>Te hunga o Aotearoa</b><br>New Zealanders and their communities                      | New Zealanders’ lives are improved by tourism   | For Aotearoa New Zealand to achieve sustainable tourism growth we require the support of New Zealanders and their community.   |
| <b>Ngā rohe</b><br>Regions  | Tourism supports thriving and sustainable regions   | We want to make sure that sustainable tourism growth is inclusive and the benefits of tourism are distributed across all regions in Aotearoa New Zealand.  |

## Measuring the implementation of the Tourism Strategy

The strategy signals that government take a more deliberative and active approach to manage the tourism system in Aotearoa New Zealand. This will mean understanding and evaluating how we are doing and will be a key part of implementing the Strategy.

As an all-of-government strategy, progress of its implementation will be monitored by the Government Chief Executives' Tourism Group. This group consists of the heads of the government agencies with key roles within the tourism system: Ministry of Business, Innovation, and Employment, Department of Conservation, Tourism New Zealand, the Department of Internal Affairs, Ministry of Cultural and Heritage, Ministry of Transport, New Zealand Transport Agency, and Department of Prime Minister and Cabinet.

The Strategy will be used to ensure alignment of government activities and investment in tourism. It will inform the development of the international conservation and tourism visitor levy investment planning, guide the development of the regional destination management plans, and other government investment decisions in tourism like local and regional transport planning.

The Tourism Strategy will continue to evolve to the changing needs of communities and the industry. Government will assess its progress towards the outcomes and success indicators. The Strategy identifies the government's current work programme priorities. Agencies will track progress of the work streams and actions on an annual basis. The actions will be reset regularly and new actions to support the strategy's outcomes and work streams will be added as we evaluate progress on the Strategy.

To do this, we will need to improve our ability to measure what matters. To track progress of the Strategy and we will need to develop a full picture of how the tourism system is operating. MBIE is consulting with stakeholders to improve our data and insight and will be implementing the priority actions from the Tourism Data Domain Plan. Government will also undertake evaluations to help assess government interventions and investments and how we are tracking against the outcomes of the Strategy.

MBIE is developing a Sustainability Dashboard that will establish a set of indicators to help measure tourism in Aotearoa New Zealand. The dashboard will be one tool for government and industry to measure change over time across a broad range of sustainability measures.

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# Aotearoa New Zealand Government Tourism Strategy

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## IMPLEMENTING THE TOURISM STRATEGY



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Government has developed a work programme and actions across the five outcomes. We have also prioritised four top actions for Government that will deliver across multiple outcomes.

## TOP PRIORITIES FOR GOVERNMENT FOR 2019/2020

The top priority actions for Government's stewardship role that will deliver across multiple outcomes are:



### Coordination across the tourism system

MBIE and DOC will take a leadership approach to coordinate the Government's tourism efforts across the public sector. We want to improve tourism outcomes by taking an all of Government approach to the tourism system and look for opportunities to engage and coordinate with whanau, iwi, hapū, tangata whenua, local government, industry, businesses, regions and communities.



### Long-term Sustainable Funding Mechanisms

Long-term Sustainable Funding Mechanisms, including implementing the International Visitor Conservation and Tourism Levy and accompanied strategic investment plan, identifying and responding to the tourism related actions arising for the Productivity Commission Inquiry into local government funding and consider and evaluate options to allow more strategic revenue and pricing decisions by DOC.



### Destination Management and Planning

Destination management and planning, including working with local government and other regional stakeholders to take a strategic, coherent and consistent approach when deciding how they want to plan, manage, market and develop their destinations. This includes collaborative spatial planning projects with local government. In the short term, Government will identify priority regions to work with directly and develop guidelines to be shared with other regions.



### Better Data and Insight

Better data and insight, including implementing the Tourism Data Domain Plan, identifying future trends that could impact on the tourism system and coordinate and share data and insight to support the industry.

## TE ŌHANGA THE ECONOMY

### Outcome: Tourism sector productivity improves

This focuses on the type of growth that we want tourism to deliver – with an emphasis on lifting the productivity of the sector. We want the value of tourism to continue to grow faster than volume, with visitor demand spread across the year and across our regions. We want tourism productivity to improve, creating higher value jobs and higher wages. We want to deliver greater value from tourism to New Zealanders. The tikanga principles that provide the foundation for productivity improvement in Aotearoa New Zealand are ōhanga/whairawa (economic prosperity and wellbeing).

Focusing on these areas will help the economic sustainability of tourism, ensure our industry is resilient to shocks and the tourism system is underpinned by secure, responsive funding streams that can be used to maintain and build the quality infrastructure, amenities and attractions our visitors expect.

#### What would long-term success look like?

- › the value of the industry continues to grow faster than the volume of visitors
- › the regional spread of visitors has grown
- › the seasonal spread of visitors has expanded
- › the costs of managing attractions, access and amenities are being met through sustainable, secure, and equitable funding streams
- › the skill level and capability of the industry’s workforce has grown
- › the industry is using more innovative technologies and systems to create higher quality jobs
- › capital investment in the industry and the utilisation of existing amenities has improved

#### Work streams and actions

|   |   |
|---|---|
| <b>Increase tourism’s value</b>                           | <p>Continue Aotearoa New Zealand’s marketing strategy of targeting for high value visitors to travel to Aotearoa New Zealand during off peak and shoulder seasons (TNZ)</p> <p>Continue Aotearoa New Zealand’s marketing strategy to target and attract a diverse range of markets and high value segments to ensure Aotearoa New Zealand is resilient to shocks (TNZ)</p> <p>Government is joined up through the Tourism Chief Executives’ group to address policy issues such as lifting value and addressing seasonality (MBIE, DOC, TNZ, NZTA, MoT, DIA, MCH)</p> <p>Identify markets where coordinated NZ Inc work is needed (NZ Inc agencies)</p> |
| <b>Establish long term sustainable funding mechanisms</b> | <p>Implement the International Visitor Conservation and Tourism Levy (MBIE, DOC)</p> <p>Enhance compliance systems for concessions high impact sites and activities (DOC)</p> <p>Consider and evaluate options to allow more strategic revenue sites and pricing decisions by DOC (DOC)</p> <p>Support local government and industry to identify and develop reliable funding streams (DIA, MBIE)</p> <p>Identify and implement tourism related actions arising from the Productivity Commission inquiry into local government funding (DIA, MBIE)</p>  |
| <b>Lift tourism system capability</b>                     | <p>Continue to build up the skill levels in the workforce through education and training, addressing skill shortages through immigration settings and labour market policy such as minimum wages and employment laws (MBIE)</p> <p>Work with the industry and education providers to strengthen pathways from education into tourism employment (MBIE)</p> <p>Increase our understanding on support needed for tourism businesses, including Maori tourism operators, to build capability (MBIE)</p>  |
| <b>Strengthen data and insights</b>                       | <p>Implement the Tourism Data Domain Plan (MBIE)</p> <p>Identify future trends and global megatrends that could impact on the Aotearoa New Zealand tourism system (MBIE, TNZ)</p> <p>Coordinate and share data and insights to support the industry (MBIE, TNZ)</p>   |

## TE TAIAO THE ENVIRONMENT

### Outcome: Tourism protects, restores and champions Aotearoa New Zealand's natural environment, cultural and historic heritage

Our natural environment is the backbone of Aotearoa New Zealand's economy, culture and wellbeing. To achieve sustainable tourism growth, we must protect the environment and manage activity within its limits so Aotearoa New Zealand will be in great shape for the next generation. Our guiding tikanga principle for this outcome is kaitiakitanga – guardianship and sustainability.

This outcome signals the importance of restoring and protecting the quality of the natural environment, culture and historic heritage that international visitors come here to experience, and New Zealanders want to protect. This means focusing on tourism as part of the shift to a low emissions and climate resilient economy, the need to protect our natural environment from biosecurity and others risks, and how tourism can contribute the conservation and managing its impacts on public conservation lands.

Tourism can be a champion for the restoration of the natural environment and show other industries and sectors how it can be done successful. Tourism can also encourage international visitors and New Zealanders to better connect to, and value, Aotearoa New Zealand's land, people, heritage and stories, particularly in relation to Māori tourism and culture.

#### What would long-term success look like?

- › the industry is leading the world in environmentally sustainable tourism
- › the industry is playing its role in response to climate change and Aotearoa New Zealand's transition to a low emissions economy
- › visitors and the industry are contributing more to restoring and protecting Aotearoa New Zealand's natural environment, cultural and historic heritage
- › visitors have greater awareness of conservation and biosecurity risks and the importance of following best practice to protect our natural environment, cultural and historic heritage
- › stories about the protection of the land, people and history are at the heart of Aotearoa New Zealand's tourism industry.

#### Work streams and actions

|   |  |
|---|--|
| <b>Protect and restore Aotearoa New Zealand's natural capital and indigenous biodiversity</b> | Build a deeper understanding of the impacts of increased tourism and visitors on the natural environment, culture and historic heritage (DOC, MBIE)<br>Consider and respond to the recommendations from the Parliamentary Commissioner for the Environment's report into tourism (MBIE, DOC)<br>Implement the International Visitor Conservation and Tourism Levy (DOC, MBIE)<br>Build a pathway to enable tourism businesses to easily undertake conservation restoration (DOC) |
| <b>Transition to a low emissions and climate resilient Aotearoa New Zealand</b>               | Deepen understanding of the implications for the tourism industry of climate change and the moving towards a low emissions economy (MBIE)  |
| <b>Encourage visitors to act as guardians of Aotearoa New Zealand</b>                         | Raise visitors' awareness of their role in minimising the risk of introducing and spreading pests and diseases (MPI, DOC)<br>Continue to build Tiaki Care for New Zealand and behaviour change initiatives alongside the industry to promote positive visitor behaviour (MBIE, TNZ, DOC)   |

## NGĀ MANUHIRI O TE AO, O AOTEAROA ANŌ HOKI INTERNATIONAL AND DOMESTIC VISITORS

### Outcome: Aotearoa New Zealand delivers exceptional visitor experiences

To ensure the sustainability of the tourism sector, Aotearoa New Zealand needs to develop and promote high-quality, authentic visitor experiences that draw on Aotearoa New Zealand's unique visitor proposition of our people and our place. The tikanga principles for this outcome are manaakitanga reflecting the importance of our warm welcome and care for all our visitors and ensuring their safety whether hiking in the outdoors or driving in our communities.

This outcome signals the importance of coherent national visitor proposition that links across all of New Zealand regions and supports regions to build their own unique proposition. We want to enable Treaty Partners to tell their stories and share the value of our places. Developing a stronger understanding of the future visitor markets – preference, travel patterns, and behaviour – will be central to delivering high-quality experiences, encouraging innovation in the industry, and ensuring Aotearoa New Zealand remains an attractive destination.

#### What would long-term success look like?

- › Aotearoa New Zealand has a coherent visitor proposition that reflects the strengths of its regions
- › Aotearoa New Zealand's tourism offering is delivering on its brand promise
- › Māori culture is at the heart of Aotearoa New Zealand's tourism offering
- › Tangata whenua are supported to tell their stories and share the value of our places
- › Visitors enjoy world-class, authentic and safe experiences that showcase Aotearoa New Zealand's nature, culture and history
- › Aotearoa New Zealand welcomes visitors from a diverse range of overseas markets
- › The industry is generating 'game-changing' new ideas and initiatives
- › Aotearoa New Zealand delivers safe experiences for visitors

#### Work streams and actions

|  |  |
|--|--|
| <b>Build and maintain Aotearoa New Zealand's brand proposition</b> | <p>Maintain and invest in New Zealand's brand visitor proposition and marketing (TNZ)</p> <p>Incorporate people and culture into the destination brand (TNZ)</p> <p>Encourage clear regional brand propositions through Destination Management planning (MBIE)</p>   |
| <b>Deliver high quality, authentic visitor experiences</b>         | <p>Enable and support iwi, hapū and tangata whenua to tell their stories and share the value of places (MBIE, DOC, TNZ, TPK, and MCH)</p> <p>Work with others to increase the awareness of the opportunities for Māori tourism and ways to deliver authentic experience that reflect tikanga (MBIE and others)</p> <p>Continue to develop experiences on public conservation land including, opening the Paparoa Track and Pike29 Memorial Track Great Walk, and identify at least one new Great Walk (DOC)</p> <p>Improve the quality of Tohu Whenua (MCH, Heritage NZ, DOC and MBIE)</p> |
| <b>Visitor market monitoring and forecasting data</b>              | <p>Visitor analysis, insights and forecasting (MBIE, TNZ, DOC)</p>   |
| <b>Encourage safe experiences</b>                                  | <p>Continue work to improve visiting driver safety (NZTA, TNZ)</p> <p>Enhance coordination and collaboration among agencies and the industry on visitor safety in the outdoors (MOT New Zealand Search and Rescue Council, DOC, TNZ)</p> <p>Continue work on appropriate risk tolerances for visitor experiences on public conservation land (DOC)</p>   |

## TE HUNGA O AOTEAROA NEW ZEALANDERS AND THEIR COMMUNITY

### Outcome: New Zealanders' lives are improved by tourism

For Aotearoa New Zealand to achieve sustainable tourism growth, we require the support of New Zealanders and their community. We need to address the system pressures in our communities to build the social sustainability and resilience of the industry. Our tikanga principle for this outcome is whanaungatanga (a sense of family and belonging, relationships built on shared experiences and working together) which characterises the connections between New Zealanders and visitors. Government must ensure meaningful engagement and involvement for tangata whenua.

This outcome signals the importance of tourism providing benefits beyond the economic, to focus on wellbeing. Well managed tourism can provide social and cultural improvements to New Zealanders' lives too – together these drive community support. It will mean better understanding of tangata whenua and community aspirations from tourism and enable meaningful involvement to manage tourism growth in their rohe and community. It also needs to enable New Zealanders to continue exploring Aotearoa New Zealand, to be willing to showcase the best of their communities to visitors and to be confident to join the industry because it will provide a long-term career pathway.

### What would long-term success look like?

- › the experiences of New Zealanders in their own country are enhanced and tourism is helping create vibrant communities and connected places to live
- › New Zealanders are enjoying hosting visitors within their communities and manaakitanga is at the centre of the experience
- › employment within the industry is a valued career pathway and more New Zealanders are employed within the industry
- › Tangata whenua are supported to engage in the tourism decision-making and planning processes
- › New Zealanders are able to be involved in the planning and decision-making about tourism within their communities

### Work streams and actions

|  |   |
|--|---|
| Opportunities for Māori, iwi and mana whenua           | Work with tangata whenua, iwi, and hapū to support effective engagement in tourism Destination Management and planning at place (MBIE, DOC)   |
| Value New Zealanders' experiences'                     | <p>Implement recommendations of the Responsible Camping Working Group (MBIE, DIA, DOC)</p> <p>Continue TNZ's destination readiness work programmes, including support the industry (TNZ)</p> <p>Enhance coordination between agencies to communicate the success of the strategy (MBIE, TNZ, DOC)</p> |
| Contribute to vibrant Aotearoa New Zealand communities | Visitor analysis, insights and forecasting (MBIE, TNZ, DOC)   |
| Encourage safe experiences                             | <p>Work with the industry and education provides to strengthen pathways from education into tourism employment (MBIE)</p> <p>Community amenities and infrastructure in place Tourism Infrastructure Fund (MBIE)</p> <p>Immigration Settings (MBIE)</p>  |

## NGĀ ROHE REGIONS

### Outcome: Tourism supports thriving and sustainable regions

We want to make sure that sustainable tourism growth is inclusive and the benefits of tourism are distributed across all regions in Aotearoa New Zealand. An optimal tourism system will have all regions in Aotearoa New Zealand able to grow their tourism industries in a way that enhances the overall wellbeing of their communities – economic, social and environmental. This is based drawing together all the tikanga principles of ōhanga/whairawa, manaakitanga, kaitiakitanga, and whanaungatanga.

This will mean working with local government and other regional stakeholders to support them to take a strategic and coherent approach when deciding how they want to plan, manage and develop their region, through supporting the development of destination management plans. To be successful, these plans need to be locally led and have clear roles and responsibilities for implementation. Government will prioritise capability development and partnerships with Treaty Partners and stakeholders such as local government, businesses and communities to ensure destination plans are in place and implemented. Government will use the Government's Investment Framework to guide intervention and investment through a more coherent and deliberate use of its levers, including links with local and regional transport plans. We will encourage regions to use the framework to support their own decision making. We need to improve our understanding of the challenges and opportunities of domestic and international visitors in our regions, so we can strengthen our regional propositions and the connection between regions as our visitors' journey across Aotearoa New Zealand.

#### What would long-term success look like?

- › destination management plans are in place to support regions to sustainably manage and realise their tourism offering
- › Regional visitor propositions are strengthened increasing regional dispersal, new experience development and investment
- › established visitor destinations are able to successful plan and absorb future visitor growth
- › new visitor destinations are being developed
- › embryonic visitor destinations are benefiting from more tourism jobs and growth
- › leadership structures are in place to facilitate the implementation of destination management plans with appropriate resources and capability

#### Work streams and actions

|  |  |
|--|--|
| <b>Destination Management planning</b>         | <p>Improve understanding of Destination Management practices and planning through best practice guidelines and support (MBIE)</p> <p>Work with regions to take a strategic, coherent and consistent approach when deciding how they want to plan, manage, market and develop their destinations (use 5 As framework) (MBIE, NZTA)</p> <p>Establish appropriate structures to support the development and implementation of Destination Management plans (MBIE, DOC)</p>  |
| <b>Capability development and partnerships</b> | <p>Build capability of Destination Management planning across the sector and regions (MBIE)</p> <p>Support implementation of Destination Management plans through partnering with regions and enabling access to sustainable funding sources and investment (IVL MBIE, DOC)</p> <p>Support collaborative spatial planning projects with local government to develop integrated solutions to plan and manage future growth (MBIE, DOC, LINZ, NZTA, DIA, MHUD)</p> <p>Ensure that land transport investment supports safe and resilient transport connections in regional Aotearoa New Zealand (MOT, NZTA)</p> |
| <b>Regional data</b>                           | <p>Investigate/Commission new data to deepen understanding of regional visitation, flows, motivations and satisfaction (international and domestic markets) (MBIE)</p> <p>Improve the understanding of tourism's impact on regional economies, productivity, employment and environment (MBIE)</p>   |



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