Sustainable Tourism Operators Research

Understanding the incentives and barriers for tourism businesses to make sustainable decisions

Research Report

November 2023

Sustainable Business Network

gravitasOPG

Contents

Background and Approach

OVERARCHING OBJECTIVE

The Ministry of Business, Innovation and Employment (MBIE) contracted GravitasOPG in partnership with The Sustainable Business Network (SBN) to research what incentivises tourism operators to adopt environmentally sustainable and regenerative policies and practices.

A key outcome sought from the research is for the New Zealand tourism industry, government, and stakeholders, to understand what motivates tourism operators to adopt sustainable and/or regenerative practices.

1 Understand operator motivations

What influences, encourages and enables operators to adopt environmentally sustainable and regenerative policies and practices? How do these work, what is their relative effect, and what is the variance in terms of practices to mitigate activities that contribute to climate change, deliver positive ecological outcomes and regenerate the environment?

2 Investigate barriers and enablers

What are the significant barriers and how and to what extent do these tend to be overcome? What enablers have been or could be effective in helping operators overcome these barriers? What is the influence of other operators on behaviour adoption? What future trends are perceived and how might they be influential?

3 Assess the divergence of attitudes, motivations and behaviours

Is there a significant divergence in behaviours between different types of operators - due to size; industry; regions they operate in etc.? Are some motivations and mechanisms likely to have a more universal, system-wide effect than others?

Overview of Research Process

SECONDARY RESEARCH		QUALITATIVE RESEARCH	SURVEY RESEARCH
ABSORB	EXPLORE	UNDERSTAND	SCALE
Review of sector plans and strategies to understand context and intentions. **Interviews with key informants (n=12)** to gather expert perspectives and understanding.	**National and international literature review** to understand existing information, theory and experience and examples of successful practice.	**In-depth interviews** with a range of operator types and sizes **(n=61)**, with an emphasis on SMEs and on those still progressing or at early stages of their response, to understand expressed attitudes, motivations, barriers and needs surrounding environmentally supportive planning and operation. **Workshop** with **11** operators to explore responses.	**Sector Survey** to provide quantification of attitudes, beliefs, behaviours and intentions with **n=309** respondents.

Further detail on the methodology and sample structure is provided in the Annex

Qualitative Interview Participant Profile

61 tourism operators across a range of types, sizes, regions, and sustainability/regeneration dispositions were included in the qualitative research. The tables below outline the participant profile by these variables. Fieldwork was held mainly in late April, May and June 2023.

Region	Number Interview	Number Workshop
Auckland	16	2
Queenstown Lakes	13	4
Marlborough/Nelson	9	1
Multiple/nationwide	8	1
Rotorua	4	
Whanganui/Taranaki	4	1
Taupo	2	
Wellington	2	
Canterbury	1	
Hawkes Bay	1	
Kaikōura	1	

Size	Number Interview	Number Workshop
Small/owner-op	36	7
Medium	16	2
Large/corp.	7	

Disposition*	Number Interview	Number Workshop
Leading	11	1
Progressing	38	8
Considering/waiting	10	
Not considering / rejecting	2	

Type	Number Interview	Number Workshop
Activities & attractions	18	2
Accommodation	14	2
Tour operators	9	1
Allied services/events	7	2
Hospitality/Food & Bev.	6	1
Transport	6	1

12 operators interviewed were **Māori owned and operated** businesses and two of these participated in the workshop.

These 12 operators were across five regions, with one operating nationally. Types included activities & attractions; accommodation; hospitality/food & beverage; and tour operators. They included small/owner-operators, medium sized, and large/corporate organisations.

** Disposition towards sustainable activity was assessed based on screening questions when recruiting those interviewed which were then ratified based on discussions and adjusted where needed.*

Summary

Summary 1

We found a somewhat stalled situation often in terms of operators' approach to environmental support.

The focus and ability to take action on and environmental sustainability and support lost traction during the COVID-19 pandemic and had not yet returned. Discussions with operators reflect that the sector is still in a recovery and rebuilding mode and mindset. A weak economic outlook along with labour shortages have continued to create uncertainty and impacted business confidence.

Expressed commitment to environmental support is common and activity and progress reported, but for some, action has fallen down the priority list, to be addressed once a more stable and prosperous business scenario has been achieved. A sense of being a little stalled is apparent among those less purposeful in their intention to support the environment.

Attitudes about the state of the environment among tourism operators are positive, but there is a lack of urgency around the need to act.

Survey data show that operators are generally more optimistic about the overall state of the natural environment in New Zealand than the general population (see slide 27). They also show only moderate-to-low levels of agreement that tourism to New Zealand negatively impacts the environment. This sets a context of a yet-to-be realised problem, which is fairly disconnected from tourism operations.

At the same time, we recorded strong levels of agreement in the sector survey that, in principle, the tourism sector has an important role in supporting the natural environment, that tourism in New Zealand depends on the natural environment, and that tourism businesses should set out to protect and enhance the environment (see slide 31).

Operator commitment is often expressed, but action can be lagging, or operators may feel comfortable with the progress they've achieved, which isn't yet regenerative. Uncertainty about what is expected of operators feeds reliance on the status quo and can support deferral of action.

The background of the societal level responses to climate effects not seeming urgent or prioritised sets a context that appears material, as operators currently don't feel out of step with society's norms or with expectations of tourism operators, or business in general.

There is a scarcity of data and research into the success or impact of tourism focused initiatives to prompt sustainable action.

To date, there is only a limited literature on the motivations and motivators of organisations in the tourism industry to adopt sustainable operational and planning practices, and little information on evidence-based evaluations of interventions and incentives (see slides 15-20 for a summary of the relevant literature).

There is a significant research gap regarding the potential influence of indigenous world views on tourism and its correlation with environmental sustainability and regeneration.

Summary 2

Intrinsic and extrinsic motivations are clearly identified in the literature.

The literature identifies that motivations towards proactive support of the environment generally and in relation to tourism operations fall into two broad categories: those that are intrinsically *motivated* – based on personal or organisational values relating to connection and feeling for nature and the environment; and those *extrinsically* motivated – that require external stimulation such as financial or operational benefits, support, incentives, and/or compliance pressures.

There are a range of views and orientations towards the role of operators in environmental support and from this a range of activity levels and intentions.

We found that those with stronger intrinsic motivations towards the natural environment are taking the most action on sustainability and particularly on regenerative activities, they gain personal satisfaction from doing so and see this as part of their personal and business purpose.

Those influenced extrinsically, by the behavioural norms they see and hear around them, by initiatives and communications and by incentives, tend to be more pragmatically focused on specific tasks and actions being considered, or that they might achieve, rather than being driven by a purposeful desire to support the environment. We observed a range of connection and enthusiasm levels which influenced activity and intent.

Operator attitudes are generally positive towards sustainability.

Stated orientation to supporting the environment is generally positive with four in ten sector survey respondents indicating strong commitment and good progress; and a further quarter indicating they have made progress on environmental sustainability and intend to do more. Three in ten indicate that it is early days, or that they are yet to begin. All these operators indicate they are open to contributing and may do more in the future. We have categorised the operator market into five types based on their stated motivation levels and actions to date (see Slide 28).

Attitudes and action to date appear attitudinal rather than influenced strongly by scale or industry.

These environmental orientation types aren't strongly correlated to any sector, revenue level or organisation size (based on number of full-time employees). So, though organisation scale is influential in terms of capacity (and impact, of course) attitudes and commitment appear to be more value and organisational culture based (see slides 29 and 30).

A European study provides triangulation of core motives and operator types.

A large study in the literature, categorises tourism enterprises into three groups based on their motivation to be environmentally sustainable: those with **business motivations** (cost reduction, competitiveness) who tended to mainly support initiatives with operational savings (the largest group); those driven by **social legitimisation** who seek marketing and image benefits, from being seen to respond to consumer demand, and being aligned with expected standards and practice; and those driven by **lifestyle and value drivers** (intrinsically motivated). The latter two groups tended to take more meaningful sustainable action, with the intrinsically motivated group the most active (see slide 69).

Our discussions with operators in New Zealand were broadly consistent with these descriptions. Certainly, there is a large group of operators working with a traditional profit-first business model, where cost and funding are key concerns. There is a group that can perhaps see more readily that the tourism environment is and will need to change and that environmental supportiveness and credentials will become more fundamental. There is also clearly a group of operators for whom environmental support and regeneration are a fundamental element of their purpose.

We have defined a range of motivations and motivators in the research, and it is useful to think of these in relation to these three overarching drivers.

Operators who are not intrinsically motivated often lacked a sense of what was expected of them; where to start or what more to do in terms of environmental sustainability.

Prioritising financial sustainability is a key barrier to speed of progress, security around financial position is often a primary driver. Deferral can also be expressed as waiting - for others; for clarity on what to do; for when there is the resource to tackle the information; or, for supporting infrastructure or technology to become available.

Quite often tourism operators express that the area is confusing, with a lack of clear information and guidance regarding what the expectations are of them in terms of sustainability and regeneration, and how to go about implementing initiatives that would meet these expectations.

Some lack the time and resource to investigate the necessary information and translate this to their business and express a desire for information to be provided in a simple, step-by step package to suit their operation type and size.

Concerns about financial security translate into hesitancy and desire for government investment in the form of funding or support, to encourage and ease significant decisions and accelerate change. Support is also seen as government playing their part and backing their intent with investment, rather than expecting operators to fund significant change alone.

Operators look to their peers for cues and models on what to do and a **motivating sectoral norm context appears to be lacking.**

Motivators

Agreement levels for the potential business benefits of supporting the environment (cost savings, customer appeal, staff retention) are mixed but not yet strong, as are views on te ao Māori as a guiding framework. In the sector survey, just over half of operators agreed that there is effective and easy-to-use information on what to do to support the environment, for their type of organisation.

In terms of expressed needs, operators show support for:

- Accessing more guidance and advice on what to do, that is clear, easy and actionable
- Financial support/incentives to catalyse the next steps
- Access to an advisor or mentor to support and to reinforce achievements and next steps
- Feeling part of an NZ movement that is improving tourism's contribution to the environment
- Compliance models (fairly implemented) – with clear requirements, disclosure and audits

But it's not a one-size-fits-all model and should be tailored to the industry sub-sector and operator size.

Also motivating, over time, will be if operators start to see evidence of customer demand.

A social-norm context will support orientation and action - a large-scale initiative (that defines sectoral norms and leverages sectoral and national pride perhaps), with opportunity to engage and contribute locally. This could be instigated on the ground more locally by groups of operators and RTOs, but a national level context also seems likely to be important in supporting the scale and defining the big goals for the sector, reporting progress and in tying to identity.

Summary 5

Māori-owned businesses consulted feel a sense of responsibility and connection to te taiao through their whakapapa and as kaitiaki (see slides 102-111).

Te ao Māori and traditional Māori values have a significant impact on the behaviour of Māori-owned tourism businesses and are the common thread motivating their actions in caring not only for the wellbeing of te taiao, but also for **tangata whenua** in a continuous relationship of reciprocity.

Operators interviewed exemplify strong practice, often strong community connections and sharing within their communities and approaches founded on kaitiakitanga, manaakitanga, whanaungatanga and kotahitanga.

Māori operators described similar barriers to others:

- The next step requires investment and support – as resources are limited; requiring a greater focus on supporting SMEs to shift to the next level.
- Confusion – operators seeking more guidance and easy access to information, with incremental steps to achieve.
- A lack of local leadership and of opportunities to participate locally in regenerative activities.
- Supply chain limits, in terms of accessing sustainable options e.g., packaging.

Small businesses have less capacity and can be most concerned about potential cost and compliance burdens.

SMEs are, of course, a large part of the operator sector and differ in their capacity to bigger businesses in terms of financial and governance resources and capabilities.

There seems little doubt that the burden of any compliance processes - of developing plans, documenting progress is greater for smaller operators and especially very small enterprises. That said, SMEs are diverse and are found across the range of attitudes to environmental support we observed.

Summary 6

At a high level, to support further environmentally supportive approaches and action there is a framework of three challenges to address (see slides 135-138).

Motivating operators who may currently see supporting the environment as a lower priority, through encouragement and engagement – this is important for regenerative and carbon reduction activity especially.

Facilitating action for operators who are struggling to engage with available information that can translate to an easy, clear map of next steps and usual standards for their business.

Reinforcing to keep sustainability firmly on the agenda to better ensure progress, support new sectoral norms and reward achievements and progress.

Some operators will need a prescribed approach, others more consultative, and some will be more independent in their approach and need for connection.

All will benefit from greater **clarity** on **purpose** and **expectations** – on the types of activity, initiatives and approaches that businesses in various sectors can employ, on **how** to progress ***and*** on the extent to which these are expected to be employed both as a minimum standard and at an ideal level.
Regenerative approaches particularly will need support and external guidance to be implemented as they are often outside operators' operational spheres and experiences. Fostering networks and connections (e.g. through organisations like SBN) to groups or schemes that resonate and can be supported in different ways (financially, materially, with labour) and that can be used in marketing and brand storytelling, will ease accessibility and improve connection, belonging and pride.

There are mixed views both in the literature and in the data collected as to whether some level of compliance will benefit progress on sustainable approaches in the sector. Some advocate a locally generated and supported approach, while others feel that specifying what is required, with measurement and auditing has a role. It is difficult to conclude which approach might be most effective. Though it is likely that action will progress more quickly if some regulation is applied (see slides 75-93).

It is evident that there is a lot of energy and expertise in the sector in relation to the environment. However, for many, environmental support is currently a low priority, for a range of reasons, and considerations should include the timeframes, both desired and available for action.

A **supportive accreditation system** should be an effective way to encourage and enable operators towards desired standards of practice and therefore to develop clearer sectoral norms and expectations. These in turn should drive adherence to minimum levels of action and behaviour. The need for compliance to minimum standards could be re-considered once the pace and extent of adoption and of sector change is assessed.

Literature Review Summary

Overview

The full review can be accessed as a separate document: The Sustainable Business Network in partnership with GravitasOPG (2023) Literature Review: Sustainable Behaviours in Tourism Operations.

- There was a particular **scarcity of data and research into the success or impact of tourism focused initiatives to prompt sustainable action.**
- Notably, there is **a significant research gap regarding the potential influence of indigenous world views on tourism and correlation with sustainability/regeneration.**
- **Cultural stories with intimate links to a community's history and the landscapes** in which it lives, are particularly powerful. **Cultural, social and community norms are also important** shapers of individual behaviour. The more integrated a tourism business is into its locale, the more these influences will operate.
- Cultural, social and community norms are currently shifting towards more sustainable and regenerative approaches. Tourism operators, as with other business people, are likely to be influenced in this direction.
- **Action must follow stated intent**: If what people say they approve or disapprove of does not align with what they do, others are less likely to act in similar ways.
- Multiple factors affect willingness of people and organisations to engage. Particularly interesting is the concept of ***agnogenesis* - the fabrication of uncertainty**. This can be viewed as **an avoidance response to the perceived scale and difficulty of a challenge**, by vested interests and within ourselves. It manifests in underestimation of the threats posed by ecological predicaments. It may also be present alongside entrenched beliefs that technological innovations or market forces will resolve these predicaments, without the need for significant changes in behaviour. It's evident in abdication of agency; passing responsibility over to local authorities, government, or the wider community.
- **Messages about environmental causes framed through appeals to intrinsic and self-transcendent values perform better in strengthening support than messages framed to appeal to extrinsic and self-enhancing values** – such as wealth or success.

Literature – Motivations – Alignment with Findings

Intrinsic and extrinsic values and motivators

(Vuorio et al., 2017) **Intrinsic values** refer to values such as 'broadmindedness', 'equality', 'social justice', 'forgiveness', 'community', 'creativity' and 'responsibility', are understood as being **inherently rewarding** and associated with **greater concern about social and environmental issues**, and greater motivation to act.

Extrinsic values refer to values such as 'wealth', 'social recognition', 'social status', 'conformity' and 'ambition'. They **rely on external approval or rewards** to be recognised.

- perceived entrepreneurial desirability is driven by both intrinsic and extrinsic rewards
- but altruism (concern for the well-being of others) enhances attitudes towards sustainability

The research shows that **progressive behaviours (such as sustainability) can be triggered by extrinsic values**. However, are **more spontaneous, consistent, resilient and sustained when based on intrinsic values.**

Small Firm Types

(Font et al., 2016) A large study (survey of n=900) split smaller firms (in European protected) areas into three broad categories, in terms of sustainability motivations:

1. **Business** driven firms focused on **cost reduction competitiveness** and orientated to **implementing eco-savings activities** (efficiency)
2. **Legitimisation** driven firms defined in relation to **the sustainability actions visible or expected by others** that respond to perceived stakeholder pressure **across a broad spectrum of activities**
3. **Lifestyle and values** driven firms are defined in relation to lifestyle-value drivers that report **higher levels of environmental, social and economic activities because of personal values, choice, habits –** with economic gain sometimes not the priority in decision making

Motivators

- A number of initiatives do not require direct participation from tourism operators. They do, however, impact the ecosystems in which the businesses operate i.e., tourist tax, tourist caps. **Government enforced mitigation targets and measures can be seen as a way to 'level the playing field' across the industry** (Gösslingand Scott, 2018).

- Some link the growth of certification schemes to an absence of effective legislative regulations (Gossling and Buckley, 2016), whilst others believe that **effective certification schemes could reduce the need for regulatory interventions** (Haaland and Aas, 2010).

- **Uncertainty is a demotivator for sustainable action in tourism** (OECD, 2017):
  "…uncertainty is one of the worst enemies of the industry. As long as we have clarity, industry can cope" (Interview with global tourism leader in Gössling and Scott, 2018).

- **SMEs tend to be more intrinsically motivated when taking sustainable action**. However, there were also clear business drivers that were recognised, such as financial gain and social legitimisation (Lee, 2021).

- Clayton (2003) noted the **importance of the cultural component of one's environmental identity**:
  "It is important to acknowledge that an environmental identity is also at least in part a social identity… An understanding of oneself in a natural environment cannot be fully separated from the social meanings given to nature and to environmental issues, which will vary according to culture, world view, and religion" .

- Kiefhaberet al. (2018) find that "there is no single sustainability related identity":
  "the development of sustainability-related identities requires shaping and activation", with their study documenting *"how the institutional orders of **family and community primarily enable and facilitate sustainability-related identities, whereas state, market and profession institutional orders were both enabler and constrainers**".*

Barriers

- It is important to note that due to the size of SMEs and the scale of their impact, **sustainability can sometimes be seen as a 'nice to have', especially in times of financial difficulty.**

- There is a persistent **belief that small tourism operators "are sustainable regardless of what they do just due to their size, or that their impact is negligible** and hence does not deserve any formal management schemes" (Margaryan and Stensland, 2017). This is highly relevant to tourism, where "environmental impact is cumulative rather than singular in nature" (Gren and Huijbens, 2015).

- Fineman (2000) identified that while managers and owners tended to believe in the importance of sustainability, their **motivation to integrate sustainability in business was not so strong since there were other easier and cheaper ways to achieve business efficiency and competitiveness** (Hörisch et al., 2014). Many small businesses also face barriers such as feeling unconvinced of the need to adopt sustainability measures or that they feel unable to do so due to a wide range of constraints including resources.

- There is a **reliance on technological breakthrough** to achieve decarbonization in the industry:
  "Emphasis was often placed on the potential of future technologies to enable growth and achieve deep emission reductions; that is, solutions that would only emerge in the longer-term future" (Gössling and Scott, 2018).

- *"There are regions in the world that are already victims of tourism like Barcelona… Tourism can be too much… [As a destination], we raise the question if growth is everything. Or should we think more sustainably, trying to work on a new definition of 'success' in tourism"* (Interview with global tourism leader in Gössling and Scott, 2018).

- There are **diverging views evident on the role of growth** in the tourism industry.

Interventions

A number of different interventions were looked at. However, there is a dearth of monitoring, evaluation, data gathering and follow-up. This precludes the literature review from offering conclusive evaluations of their relative impact.

Certification - Eco-certification schemes are perceived by many to be a tool for competitive advantage via marketing. There were mixed beliefs about whether, or not eco-certification actually achieves this. Seen as a market-based, self-regulating solution to environmental issues within the tourism sector, the number of certifications available has grown significantly and has led some to describe it as a "jungle of labels". This creates challenges for customers and the tourism industry in terms of overall credibility, market values and actual environmental effects and impacts.

Legislation - One study found numerous statements of support for legislation to accelerate sustainable action in the tourism sector: "to rely on industry is a leap of faith", "we cannot let the sector self-regulate". Leaders framed government enforced mitigation targets and measures as a way to 'level the playing field' in the industry. Legislation is often slow to be implemented due to strong opposition but can be effective once in place. Zero emissions legislation in Norway around fjords has created a need for decisive action and innovation if the operators are to survive the incoming legislative changes.

Visitor tax - Throughout the world, local tourist levies are a common way of meeting the costs that tourism creates in local communities. Visitor taxes do not require input or action from tourism operators. However, they can be vocal in their opposition, due to concern over threatening business through increased cost of the destination.

Pledges – These have a low barrier to entry but generally minimal to no requirement to demonstrate action alongside commitment – so generally seen in the literature to be low impact.

Research Findings

Context

The Sector is still in a Recovery and Rebuilding Mindset.

The last few years have been extremely difficult for many businesses, with many tourism operators being significantly impacted by the **border closures due to Covid-19.** **Much of the sector, particularly SMEs were still in, or not long out of, recovery mode and focused on making up lost ground.**

Some feel that the **focus on sustainability/regeneration** by the sector agencies and government **lost traction** during Covid and has not yet returned. A smaller proportion saw this as an opportunity to refocus more on sustainability and there is some disappointment, among some 'leaders', at the sector returning to the high-volume/high-impact model.

Economic instability, rising costs, risk of recession and unclear revenue growth trajectories leads to uncertainty and mean operators are often very much focused on their immediate operational needs, consolidating, and/or waiting to see what the 'new normal' means for their business. These factors all created a context in which any activity or investment not directly linked to core business operations – including progress on sustainability - had received less focus over the last three years.

For many, there is a positioning of environmentally sustainable, or regenerative practices more as **'discretionary' items once the business is thriving**, rather than a basic operational element.

> *If I'm worried about whether or not I can pay my staff week to week… you're not going to be thinking [about] how can we save the planet if we can't save ourselves.*
>
> *[Small activities & attractions; Taupo, Progressing]*

> *If our business was thriving, we probably could donate to some of those [regenerative initiatives] causes.*
>
> *[Small, allied services; Auckland, Progressing]*

Motivations sit in the Context of Societal Level Response to Climate Effects.

Prior to and during the research fieldwork, the sector was experiencing **staff shortages** and a tight labour market, leading to reduced capacity and pressure on existing staff and management as they coped with the international market returning.

The sector has a structure of **80%+ SME's** widely spatially distributed with limited resources. Generally, SMEs have **lower capital access** and a tendency to fund growth and new initiatives from cashflow/profits. Small operators are a diverse group with different approaches and views evident in the data. In particular, the difference between very small operators and businesses with more scale, staff resources and a governance structure are marked – in terms of capacity and, and expertise.

Extreme weather events in early 2023 (not long before fieldwork was conducted) had impacted business planning once again, reinforcing focus on the short-term and increasing wariness and uncertainty. There was also an increased sense of climate change impacts becoming a reality for some.

The response to sustainability, of course, sits in the underpinning and acknowledged psychological challenges of engaging with climate effects; including that the problem is psychologically difficult to face and deal with and easy to avoid. **The wider social context in which the tourism sector sits, could be said to be one of deferment and/or slow response to the threat and effects of climate change.**

We think of ourselves as clean and green but we're not and are in fact years behind various European countries when it comes to recycling and other environmental initiatives.

The government needs to invest knowledge in the residents of NZ so we can all play a part..... We are committed to doing our bit as this is an important issue, but when the majority of our guests do not give a ?!*, then it does not give us or our staff the confidence in trying to bring about change.*

Attitudes of Operators

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Sector Survey - Participant Profile

Years in business	(n)
<1 year	4
1-2 years	11
3-5 years	37
6-10 years	44
11-20 years	73
20 years+	139

Māori owned and operated	(n)
Yes	25
No	273

Provision of nature experience	(n)
Entirely	93
Partly	192
Not really/not at all	125

Sector	(n)
Accommodation	146
Activity/Attraction	89
Tour operator	50
RTO	32
Transport	22
Hospitality	22
Inbound tours	14
Consultant/research	9
Events	7
Association	5
Travel agent	4
Information	4
Environmental	3
Retail	2
Workforce	2
Other	4

Employees >30 hrs/wk	(n)
1	38
2-5	79
6-10	43
11-20	33
21-50	39
51-100	19
101+	16

Employees <30 hrs/wk	(n)
1	34
2-5	99
6-10	42
11-20	26
21-50	14
51-100	7
101+	8
None	5

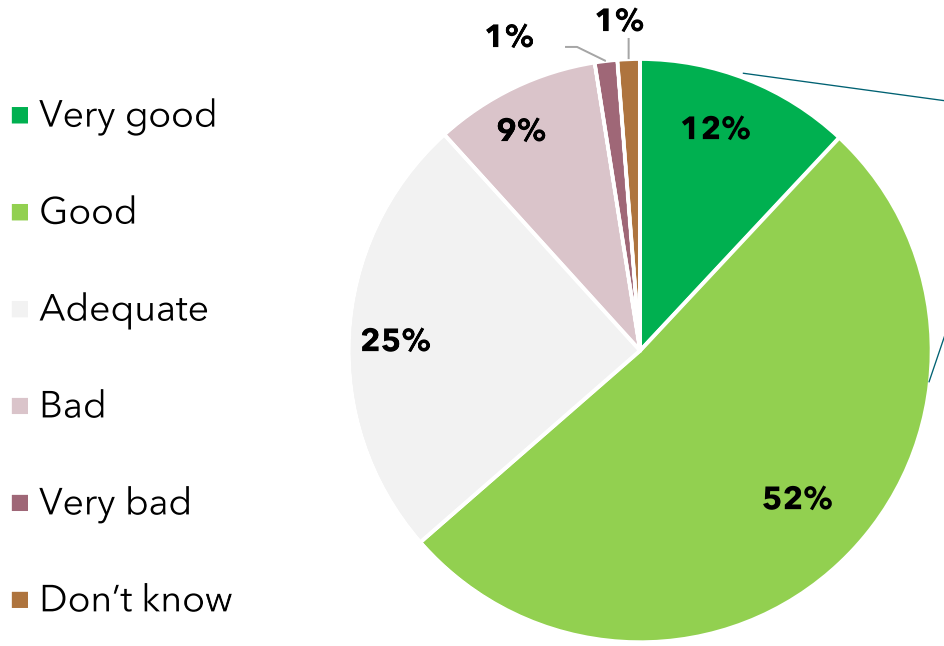
Region	(n)
Otago	74
Bay of Plenty	33
Canterbury	31
Auckland	30
Waikato	26
West Coast	21
Wellington	20
Southland	18
Manawatu-Wang	17
Hawke's Bay	12
Nelson	10
Northland	10
Tasman	7
Marlborough	4
Taranaki	4
Gisborne	1
Nationwide	35

Annual turnover	(n)
Break-even/ loss	17
$1-$99,999	40
$100,000-$999,999	85
$1m-<$5m	84
$5m-<$10m	21
$10m-<$20m	12
$20m-<$50m	11
$50m-<$100m	6
$100m and over	6

Note: Survey participants were invited via sector organisations (NZTEC, TIA, RTNZ) and as shown captured a good mix of organisation types. This is essentially a self-selected sample and therefore cannot be considered to necessarily provide a precise representation of the sector, rather it provides useful broad quantification to support the qualitative findings. For example, given the nature of the questions it may underrepresent those less interested in environmental sustainability.

Tourism operators surveyed are more positive about the overall state of the natural environment in NZ than the general population

Would you say that: **The overall state of the natural environment in New Zealand is…**



64% of operators feel positive compared to **47%** of general population

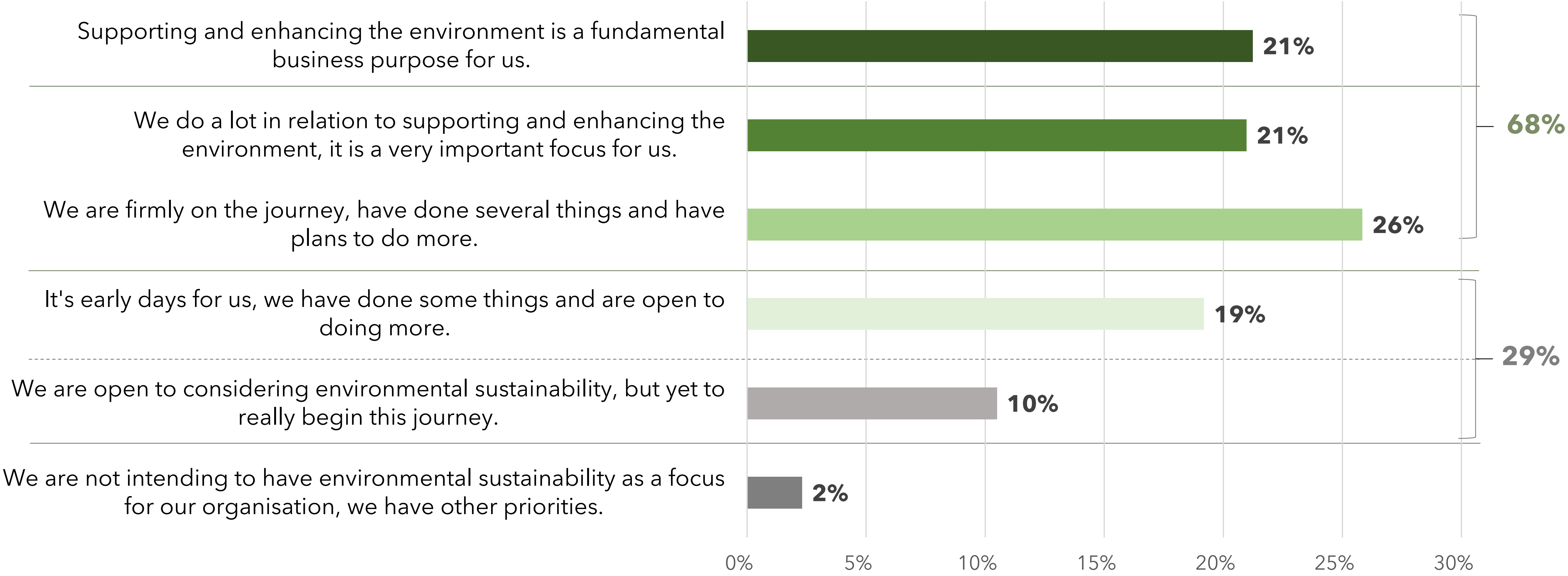
Tourism often viewed by operators as a low environmental impact sector

Only one third of the Sector Survey respondents, agree that *Tourism to NZ negatively impacts the environment* (just 12% Strongly, or Absolutely agree)

This may be because some operators are more likely to live and work in areas close to nature and with beautiful scenery than the general population. Nevertheless, it provides context for assessment of motivations and actions of operators.

Source: Survey of tourism sector (Jul/Aug 2023), question base: n = 401; compared to results from 2022 Landcare-NZ Environment Perceptions Survey

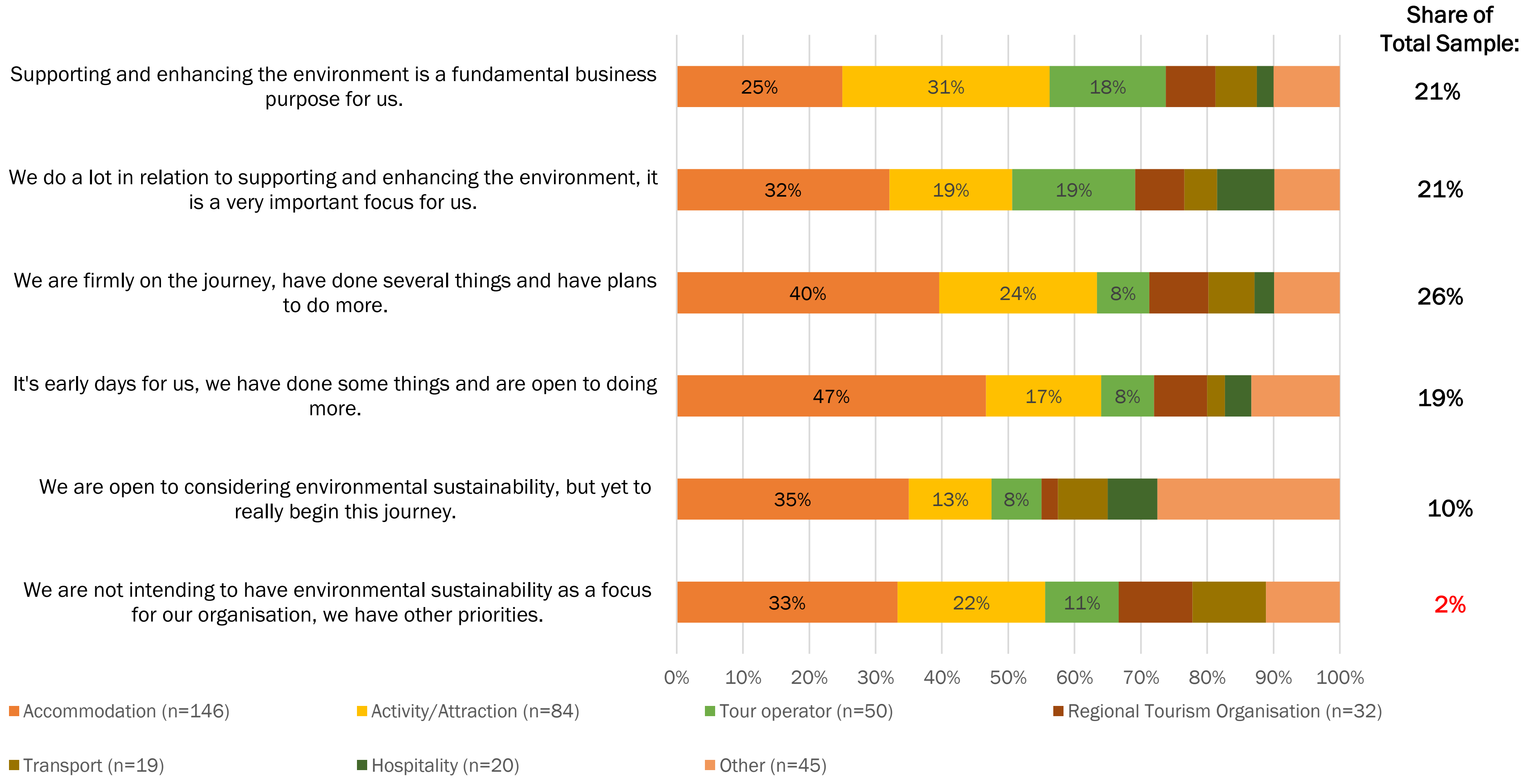
Orientation to environmental action (self-selected) of those surveyed is positive, with two-thirds indicating both intent and progress



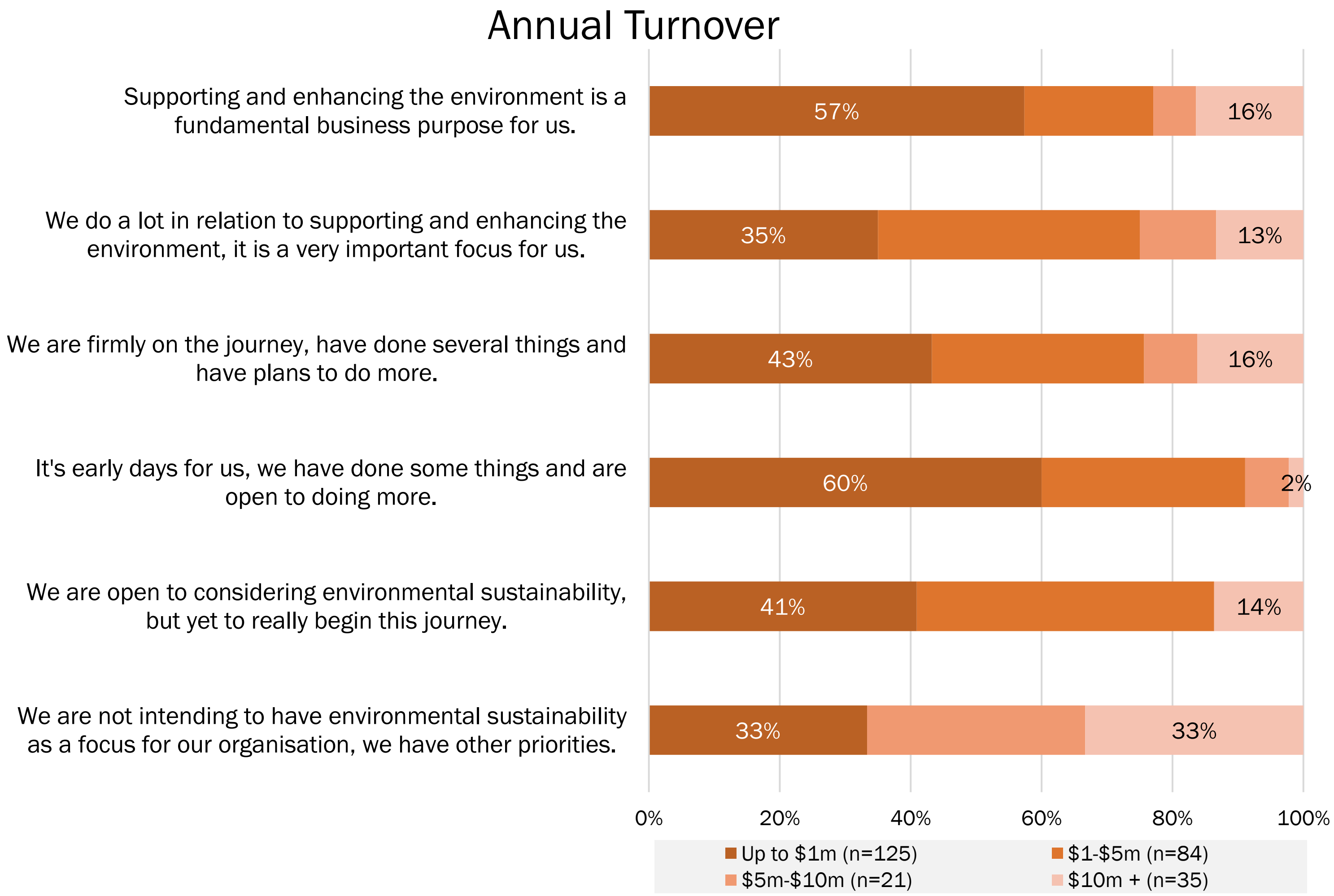
Survey of sector Jul-Aug 2023, n=391

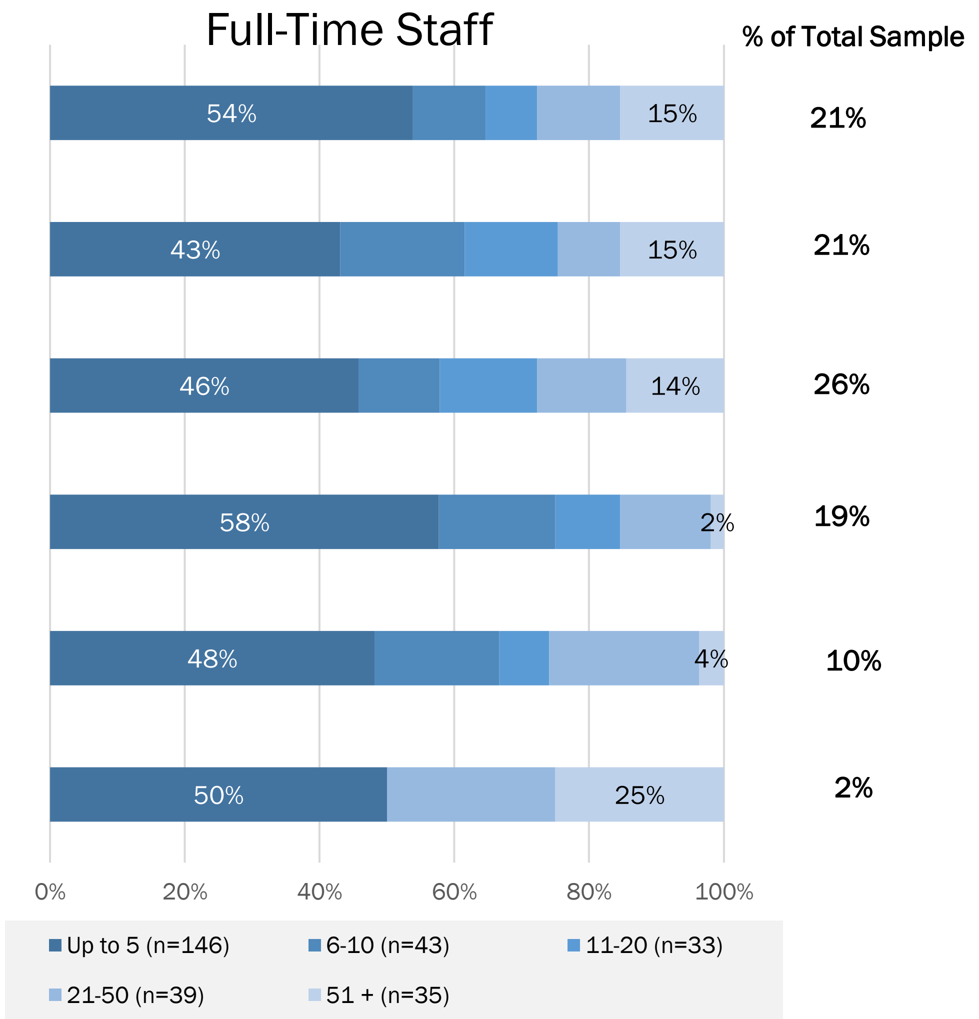
Note: the survey is likely to understate those with lower intentions towards environmental support and over-represent those with higher intentions

Environmental orientation type isn't strongly aligned to any sector...



…nor to revenue level, or number of full-time employees – it appears to be value driven. So, though scale matters, mindset is fundamental

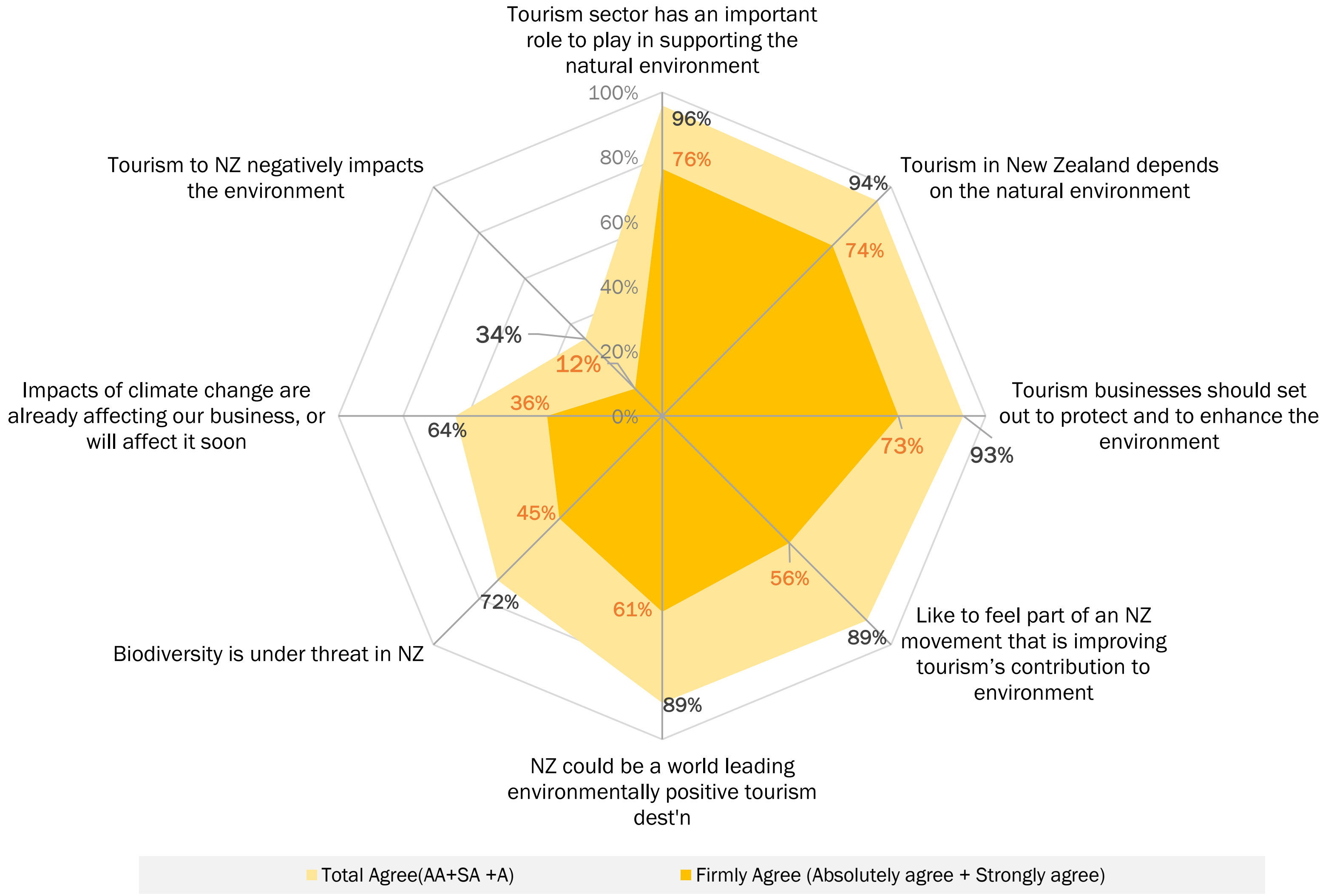




General Beliefs

- Agreement levels are high for the important role of tourism in supporting the natural environment (96%).
- High agreement (89%) that NZ could be a world leading env. positive tourism destination, with 61% showing firm agreement.
- Softer agreement that NZ biodiversity is under threat (72%).
- 64% agree that climate change is already or will soon affect their business (36% show firm agreement).
- There is *much lower* agreement that tourism negatively affects the environment (34% agree, 12% firmly), with 31% disagreeing.

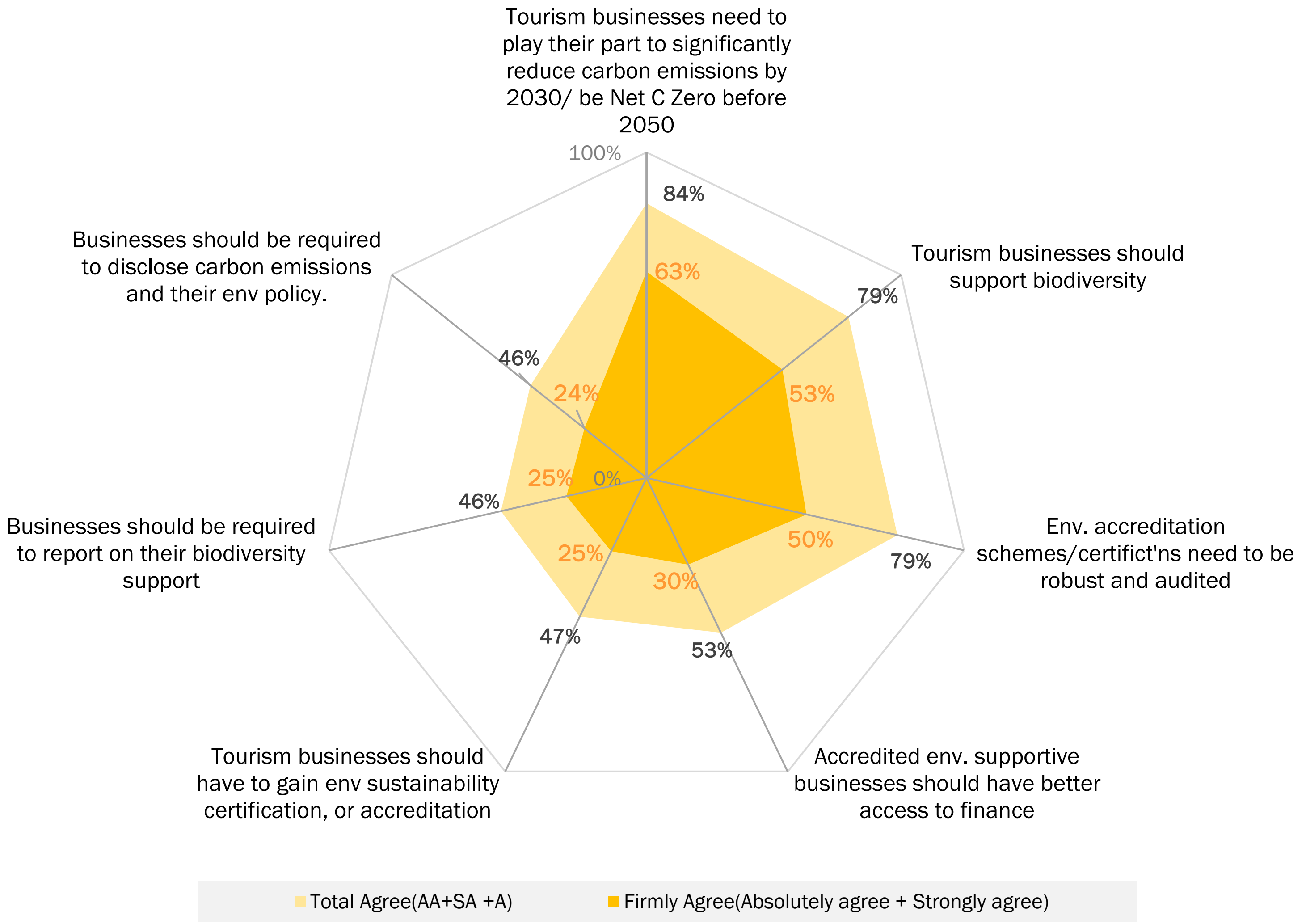
Operators generally agree that tourism has a role to play, and many see climate impacts as a business threat.... but most don't strongly believe NZ tourism activity negatively impacts the environment.



Compliance and Action Agreement

- Agreement levels are reasonably high for the need for tourism businesses to play their part in reducing carbon emissions and supporting biodiversity (84%, 79%, respectively total agree).
- There is also agreement that accreditation schemes/certifications should be robust and audited.
- But total agreement is lower, at under 50% agree and around 25% firmly agree, for the 'compliance' statements - i.e., requirements for businesses to gain certification/accreditation, to report on their biodiversity support and to disclose carbon emissions and their environmental policy.

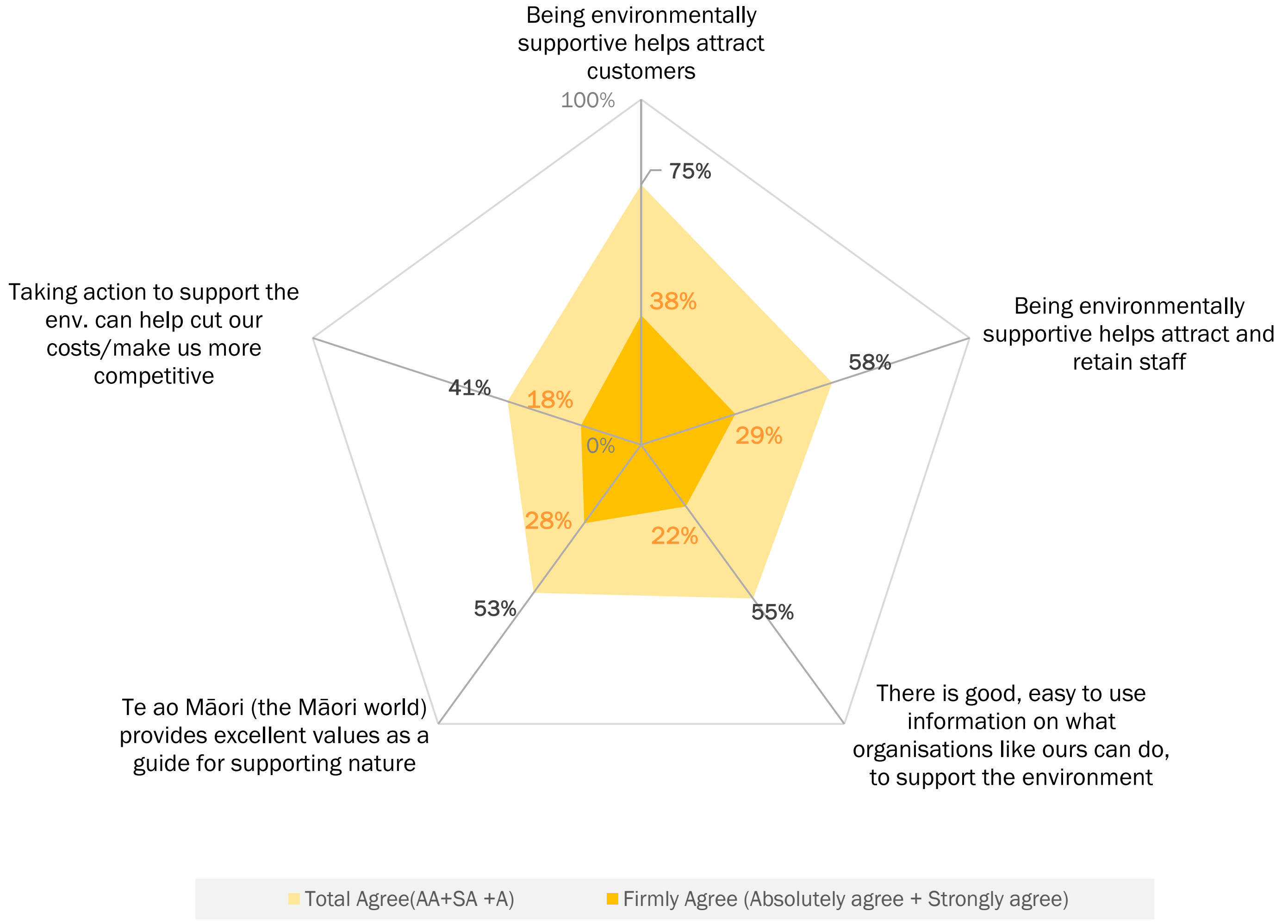
Operators agree on the need for action and for all accreditation systems to be robust and audited, but hold much more mixed opinions on the role of compliance and mandatory reporting.



Benefits/Frameworks

- Total agreement levels are reasonably high for the perceived benefits of being actively environmentally supportive, at 75% for helps attract customers and a more moderate 58% for helps attract and retain staff. Firm agreement levels on these are lower (38% and 29%), reflecting that these are not yet seen as significant benefits by most.
- Two in five agree taking action can help cut costs or improve competitiveness, with around 1 in 5 (18%) firmly agreeing.
- Just over half (53%) agree that te ao Māori provides excellent values as a guide for supporting nature, with over a quarter (28%) firmly agreeing.
- Notably, *only* just over half also agree that there is good, easy to use information on what organisations like theirs can do to support the environment (55% agree, 22% firmly agree).

Agreement with potential business benefits are broad but not yet strong, views on te ao Māori as a guiding framework are mixed, as is agreement that there is effective and easy-to-use information for their type of organisation.



Operator Types

Development of Operator Typologies

Five organisation types, described in the following slides, were identified from the qualitative discussions. These are based on participant's approaches to running or contributing to their operation and their orientation and motivations towards environmentally sustainable operation and regenerative approaches, including their journey to date and intentions.

Descriptive statements were then developed and used in the survey to provide broad quantification of the mindsets and behaviours observed.

An operator typology was derived from the following question included in the online survey of operators:

Which one of these statements best describes your organisation, at this point:

Survey question	Qualitative types developed:
Supporting and enhancing the environment is a fundamental business purpose for us	**Leaders**
We do a lot in relation to supporting and enhancing the environment, it is a very important focus for us	**Progressing**
We are firmly on the journey, have done several things and have plans to do more	**Positive followers**
It's early days for us, we have done some things and are open to doing more	**Ambivalent followers**
We are open to considering environmental sustainability, but yet to really begin this journey	
We are not intending to have environmental sustainability as a focus for our organisation, we have other priorities	**Low interest/rejectors**

Summary of Typologies

Intrinsically motivated	Extrinsically motivated			No/Low motivation
Leaders	**Progressing**	**Positive Followers**	**Ambivalent Followers**	**Low Interest/Rejector**
• Passionate nature lovers • Strong connection to whenua and mauri • Personal values prioritise natural environment / planet • Kaitiakitanga may be core motivation • Desire to share Aotearoa's natural assets • Desire to protect and contribute to regeneration • Tend to be free-thinkers • Do not need external mechanisms, but will value support to do more • Motivated by purpose	• Value the natural environment and want to be part of the solution • Pragmatic and/ strategic • Profitability, growth and/or operational efficiency are priorities • Want to be seen as 'leading' rather than following • Mindful of what competitors are doing • Can see sustainability/ regeneration becoming a requirement and potential for customer demand • Will need support to progress further	• Aware of the need to do more and keen to be involved • More focused on the barriers than on the way forward • Some may have businesses based on products that are inherently unsustainable • Often waiting for new technology, but will not be early adopters • Keen not to be left behind but will need strong incentives/motivators • Cautious about funding and resourcing	• May believe tourism to be low impact sector • Adopting sustainable/regenerative initiatives will be more out of a business imperative than concern for the environment • Will need strong social pressure and/or incentivization • May have resource and funding constraints and concerns • Unlikely to seek out information independently and will need clear, step-by-step guidance targeted at business type	• May be climate change sceptic, or believe impacts are being overstated, still uncertain • May be undertaking basic 'hygiene factors' to avoid seeming completely out of step with social expectations • Will be slow to adopt any other initiatives and may try to avoid for as long as possible • Likely to only ever do what is required by regulation or market conditions (i.e., customer demand) • Strongly independent, cynical about the wisdom of authority

Broad Estimate of Scale of Operator Types

*Indications * of proportions from survey:*

Motivation	Operator type	Proportion	Survey self-classification	Description
Intrinsically motivated	**Leaders**	21%	*Supporting and enhancing the environment is fundamental business purpose for us*	Passionate about the planet; feel the responsibility and have desire to protect, contribute, and share with others, for the future; free thinkers.
Extrinsically motivated	**Progressors**	21%	*We do a lot in relation to supporting and enhancing the environment, it's a very important focus for us*	Aware of the need to play their part; engaged but pragmatic; will implement sustainable initiatives as and when it makes business sense.
Extrinsically motivated	**Positive followers**	26%	*We are firmly on the journey, have done several things and have plans to do more*	Aware of the need to do more and keen to be involved; but may be held up by the barriers/other priorities.
Extrinsically motivated / No/Low motivation	**Ambivalent followers**	29%	*It's early days for us , we have done some things and are open to doing more (19%)* **+** *We are open to considering environmental sustainability, but yet to really begin this journey (10%)*	Don't fully connect with relevance to their operation yet; may need significant enablement and some strong pressure or incentivisation.
No/Low motivation	**Low interest / rejectors**	2%	*We are not intending to have environmental sustainability as a focus for our organisation, we have other priorities*	Sustainability/regeneration are very low priorities; may deny the need completely, will need compliance model.

** These are broad indications feom the self-classification question asked in the survey (Slide 26) and quite likely understate the low interest/rejector group, and potentially overstate those with high interest/motivation - we include as useful for considering broad relativities of the first 4 groups*

Leaders

Passionate about the planet; feel the responsibility and have desire to protect, contribute, and share with others, for the future; free thinkers.

- Intrinsically motivated; will act sustainably/regeneratively in life and business regardless of what others in the sector are doing.
- These sustainability values are intrinsic and often deeply connected to how and where they were raised, their culture with typically lots of physical connection to the outdoors/nature. Kaitiakitanga may be core motivation. Connection to the whenua and the mauri.
- More likely to operate tourism businesses in scenically beautiful locations and/or delivering nature-related activities/experiences (though not exclusively).
- Environmental sustainability/regeneration are key personal drivers and form a key element (or ultimate purpose for some) of their business. Financial sustainability is also a priority for survival, but not at a cost to the environment..
- A range business types and sizes, some smaller with fewer resources others more scaled. Some delivering sustainable nature-based experiences, others building elements of sustainability and having it as core business purpose.
- Will be earlier movers on sustainable approaches and technologies, where they have the scale and wherewithal to fund and less likely to assess benefits from a cost reduction perspective.
- May feel some frustration / disappointment about the attitudes of others – tourists and operators.
- Are generally open to and interested in working collaboratively and communally. Often have strong local connections to place and people.

We share what we're about and our vision at the same time [of doing the activities], With the zipline we are planting, the goal is to plant 60 thousand native trees by 2025. So every person who goes out onto the zipline will actually plant a tree onto the zipline. So it's actually giving back to the experience that you're taking from it at the same time. [Māori owned medium-sized, activities & attractions, Rotorua, Leader)

Progressors

Aware of the need to play their part; engaged and sympathetic but also pragmatic; will implement sustainable initiatives when it makes business sense.

- Progressors have sustainable/regenerative initiatives in place and are often aware of and/or planning additional actions.
- Profitability, growth and/or operational efficiency are priorities – at least for now, while rebuilding post Covid.
- Motivations can be intrinsic, but often also strategic and tempered with pragmatism. Want to do the best they can, but action needs to make pragmatic and financial sense also.
- Value the natural environment and feel uncomfortable about contributing to its degradation – want to be 'part of the solution'.
- Likely to view sustainability as something that is a prudent business focus going forward as customer demand develops and to attract and retain staff.
- Can be quite independent and strategic thinkers - working on their business as well as in it. Can be in organisations with stronger forward planning and governance capacity.
- Often affiliative, happy to be engaged with their peers and collaborate, if valuable and sensible.
- Anticipate the need to be sustainable as a sector requirement ands support this.
- Mindful of what competitors are doing and don't want to be left behind. Prefer to be seen as in the leading group rather than a following.

> *"The lighting made sense because not only did it reduce the consumption, but it also had a longer lifespan so therefore there were cost savings. It's a no brainer to ultimately replace something that's going to last five years rather than a portion of that and in the meantime consume less energy in the process."*
>
> *[Small accommodation operator, Marlborough/Nelson, Progressing]*

Positive Followers

Acknowledge the need and want to contribute, but action is a lower priority, barriers of time and money and lack of clear easy path lead to deferral/slow progress.

- Extrinsically motivated in relation to sustainability and regeneration. Motivations centre mostly around social and personal norms - how they are viewed by the sector, community and potential customers. More human centred.
- Acknowledge the need to be more sustainable and/or regenerative and want to 'do the right thing'.
- However, a stronger focus on sustainability is often a lower priority currently as there is strong emphasis on business growth/profitability and rebuilding post Covid, also an element of "waiting to see" what now be required or becoming the norm.
- Business model/product might be inherently not environmentally sustainable.
- Sustainability usually limited to small, easy to implement, tangible initiatives - most commonly waste management, and/or energy efficiency. Less likely to be engaged in regenerative activity, but generally open to hearing more.
- May not be able to do very much about larger impacts in the short to medium term, due to lack of available technology and/or lack of capital to invest in major technology shifts; or can be constrained by low influence/ability to refit premises.
- Not always clear or connected to what expectations there are of them, or how to proceed, or go further.

> *The carbon footprint…We're only really starting to look at it now, because over the last few years the question has been 'are we actually going to survive this?' If I'm worried about whether or not I can pay my staff week to week, you're not going to be thinking 'Well how can I save the planet?'*
>
> *[Small activities & attractions; Taupo, Positive Follower]*

Ambivalent Followers

Don't fully connect with relevance to their operation yet; may need significant enablement, clear direction and some strong pressure or incentivisation.

- Extrinsically motivated – likely to only do what they see others in the sector doing if it is seen as impacting on business profitability.
- Social norm pressure will likely drive greater motivation.
- Often don't grasp or feel the importance of their role and/or perceive that they (or the tourism sector in general) can't make a big difference, compared to others. Saving the planet is less relatable.
- Some, who may be under financial pressure/uncertainty perhaps, can see no reason to do more than basic environmental hygiene factors (recycling, reduce waste, plastics, use energy saving products where can).
- Information can be overwhelming and opaque for these operators, with too many lofty principles and ideals with insufficient specific, achievable actions that are directly relevant to their business and sector (small steps).
- Looking for easy, clear guidance on best practice and sensible/manageable approaches for their business type.
- Some like idea of enforced standards to make things happen, provide clarity of required actions and ensure a level playing field.

[environmental issues for tourism] *Not too much, to be honest. We've just gotta do the best we can with what we've got. It's an increasing focus though, I'd say. Because people are more aware of what's happening.... Basically, it's obviously the usual like recycling*....[measure your carbon footprint] *No, we've never had to. It's probably something we do need to do*....[if you had the time?] *Probably like the other hotels where the, for example, the aircon unit and the lights get turned on for only people that are arriving. [Medium accommodation provider, Auckland, Follower]*

Low Interest/Rejectors

Do not prioritise and/or deny the need for significant sustainability/regeneration.

- Range of awareness and understanding levels, from low interest/motivation to oblivious to the need to act.
- May be doing the basics that would be expected by customers, or have become "normal" e.g. (recycling, no single use plastics etc.), motivated by social pressure.
- Tend to be less engaged or cynical about industry bodies. Also, tend to be smaller operators, sometimes struggling, or highly impacted over Covid.
- Often can't see how regenerative activities could be funded or monetised within their business; hard to visualise how this could work or pay for itself – or how it is really relevant.
- Extrinsically motivated - likely late followers who will do what is required of them, either from standards and conditions set or because of the competitive environment (keeping up with competitors, or embarassment of lagging behind).
- Others who are doing well financially, can't see relevance, or that it is their responsibility to invest in sustainable/regenerative initiatives.
- May feel, or be aware, that market competitors are no further along than they are and so conclude that a lack of action is unlikely to harm their business.
- Regenerative practices particularly seem unrealistic and outside their responsibility or capability.
- At the extreme end, a very small proportion of operators are either oblivious to the need to consider environmental impact, or deny any significant impact.

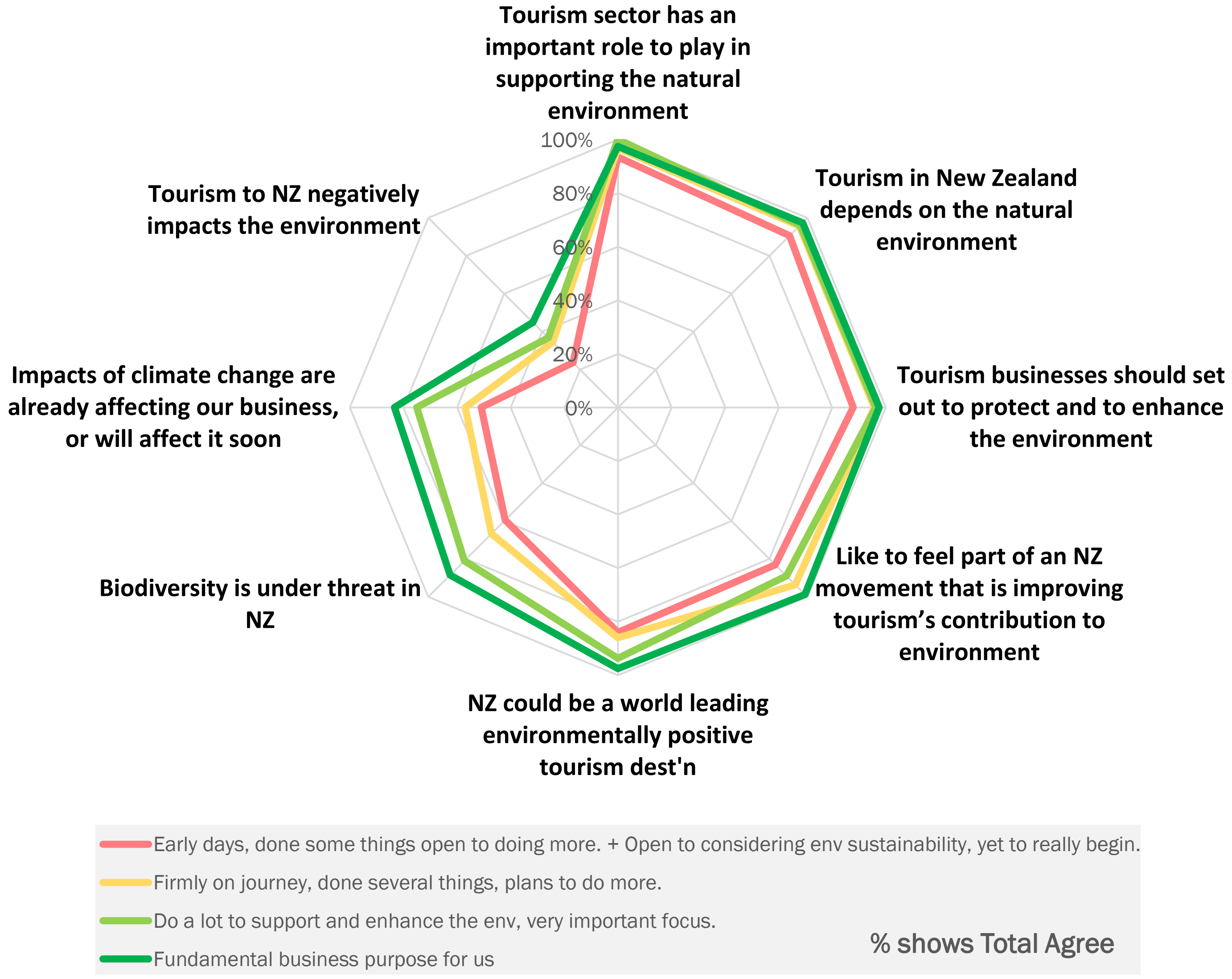
"I'm aware of what's going on with climate change, but it doesn't particularly change my views. I've viewed climate change for years as being something that's cyclic and it is part of the pattern of earth." [Small tour operator; Auckland, Considering/waiting]

General Beliefs Vary by Operator Type

As expected, agreement levels are somewhat lower for those operators who indicate that they have more to do or are yet to begin, compared to those who indicate more activity and commitment to environmental support.

They are notably lower for agreement that biodiversity is under threat; that the impacts of climate change are already affecting, or will affect, their business soon; and that tourism to NZ negatively impacts the environment.

Agreement levels start to diverge more by operator type in relation to beliefs about the impacts of climate change.

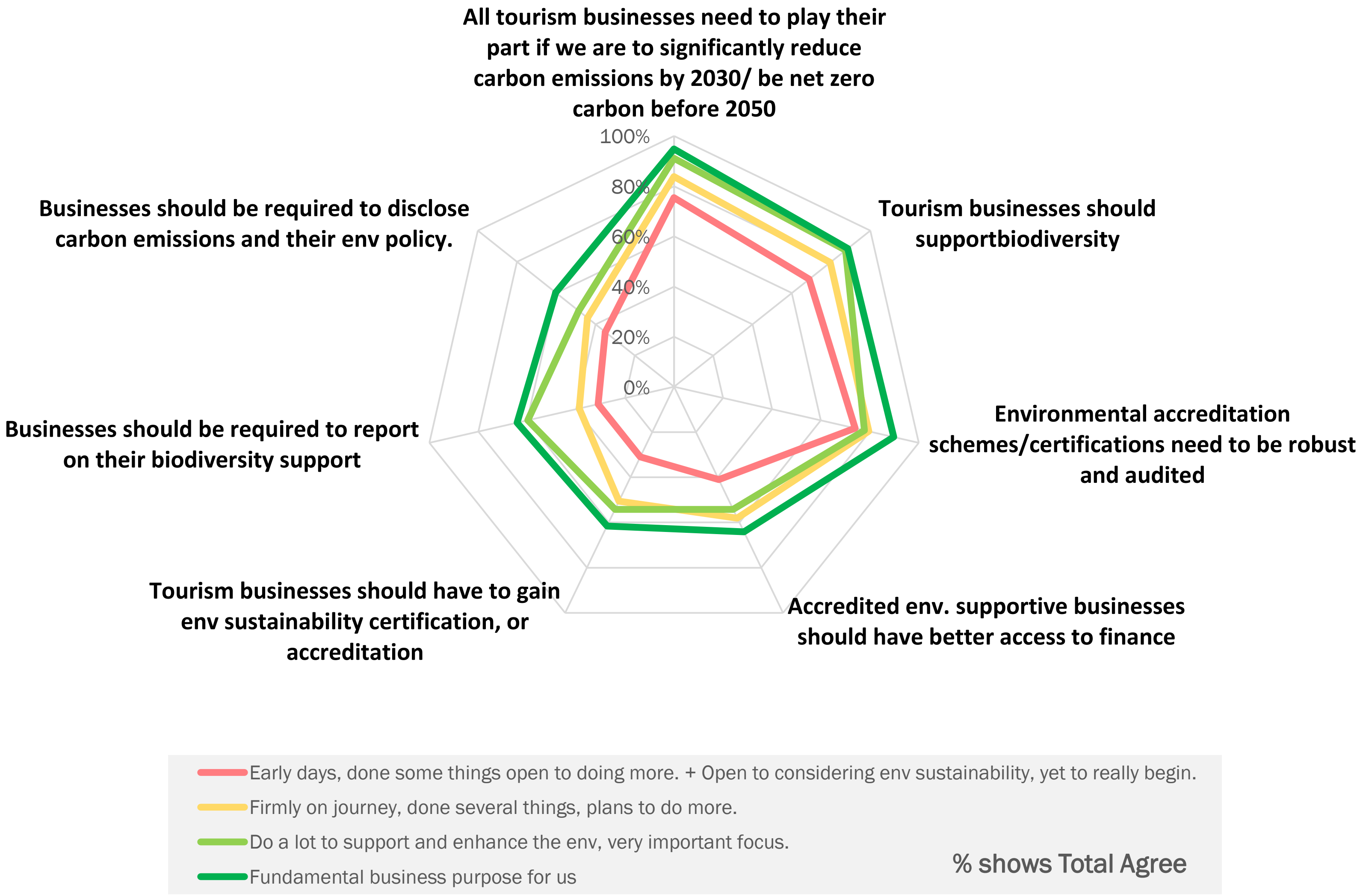


Compliance and Action Agreement

Agreement levels for those who have made least progress are lower generally. Though 75% agree that all tourism businesses need to play their part to reduce carbon to meet targets set.

Agreement is notably lower overall and particularly for the least progress group for agreement that: businesses should have to gain certification/accreditation; should be required to report on their biodiversity support; and to disclose carbon emissions and their environmental policy.

Agreement levels diverge more for the compliance-based statements tested.



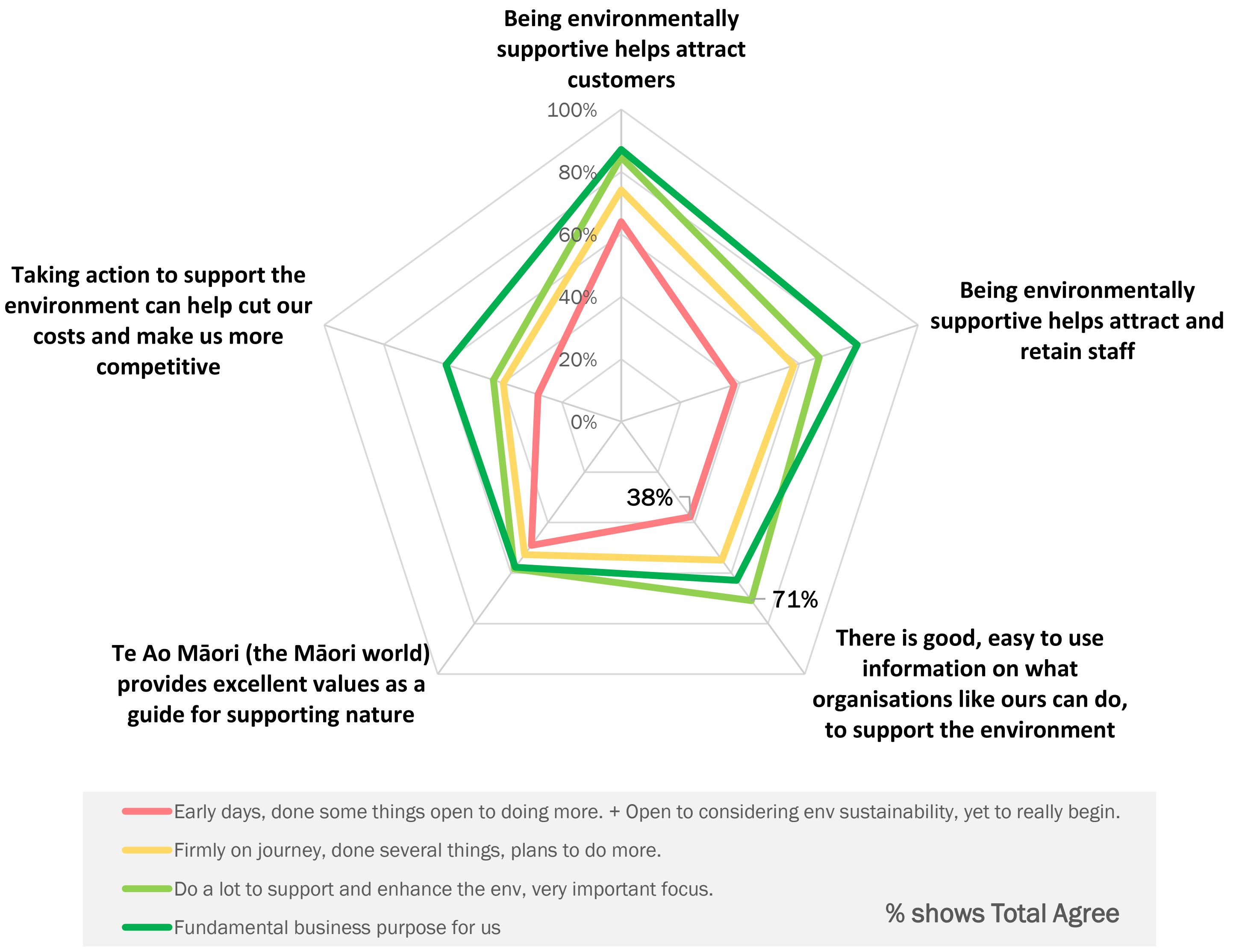
Source: Survey of Tourism Sector – Base=343

Benefits/Frameworks

Operators are notably more mixed in their belief that environmental support can help attract/retain staff, or help cut costs/improve competitiveness. So perceived demand and operational based benefits and are weaker.

Only 38% of the lowest two environmentally active groups believe there is good, easy to use information for organisations like theirs, compared to 71% of the group that say they already do a lot to support the environment.

Agreement is perhaps most mixed for the beliefs that environmental support can benefit operator businesses.



Barriers to Action

gravitasOPG

Introduction

In this section we describe the barriers observed and discussed with operators in the interviews and show the relevant Sector Survey results, highlighting the gaps between those most and least progressed.

- Perceptions of barriers and constraints vary, with those intrinsically motivated often expressing mainly positive motivations and only lamenting constraint of investment to do more, or take larger steps.

- Some of the findings on specific barriers are mixed and can identify factors that are barriers for some and motivating factors for others. For example, perceptions of customer demand or value placed on environmentally sustainable operators vary – so not perceiving customer demand is a de-motivator for acting and gaining an accreditation, for example, for some, but a motivation for others who hold this to be true.

- Lack of resource (time and people); investment needed, financial caution, or lack of funds dominate expressed barriers to further progress. But a lack of clarity of what is expected and what standards are normal for their type of business are also evident (sectoral norms), coupled with a perceptual and motivational hurdle of the time needed and complexity of navigating the information available, which can be described as confusing. Inertia and stalled attention and action were evident at the time of the fieldwork.

- These functional barriers can sit in an attitudinal context of profitability and confidence in forward profitability as the dominating priority, the belief that smaller businesses, in particular, can't make much of an impact, that technology will support reduction of impacts soon but is not quite ready and available and of quite mixed belief that tourism to NZ negatively impacts the environment.

- Societal norms in relation to supporting the environment and acting to address climate change and its effects do not yet provide a strong motivational context.

- Some businesses are active and concerned in supporting biodiversity, others are less connected and really uncertain about how to engage.

Traditional profit-first business models put investment in the natural environment further down the agenda for those not intrinsically motivated

Businesses often firmly prioritise economic activities and success as their purpose. Social and community roles are also tied up in their activities again since they are essentially part of their tangible day-to-day operations.

Support for the environment, although mostly acknowledged as a worthy aspiration, is often not part of their purpose or reward, rather it often sits outside as more of a 'nice to have.'

A key constraint to implementing sustainable/regenerative initiatives is the fundamental **business model**, driven by mindset and attitude that **prioritises volume, growth and profit** alongside being passionate about what their business provided for visitors, for some, and being a good visible community member. These tend to come ahead of investment of energy, time and money into supporting the natural environment.

> *Purpose? Hopefully, to make money. It's a business, it needs to be profitable.*
>
> *[Medium sized, transport operator, Queenstown Lakes, Progressing]*

The order of business priorities (often, it seems for businesses not immersed in nature or purpose driven) are primarily economic, then social, with **environment often as more of a nice to have**. These areas compete for attention, resource and investment. The first four are visible, tangible and quantifiable and offer more immediate benefits and rewards.

1. Financials
2. Staff
3. Visitor/Customer satisfaction
4. Community
5. Environment

Economic (1–3)
Social (1–4)
Environmental (5)

Some operators interviewed see **profitability and sustainability as competing** for funds; or that sustainable initiatives are 'important' but in a business context also need to have a positive cost-benefit before they can be funded at any significant level. Others acknowledge the conflict between profitability and sustainability but sense that **the system needs to change** to flip the emphasis more onto sustainability i.e. demand and business norms don't yet support that emphasis.

Market Demand Recognised by Some but not by Others

Mixed views on whether customers seek or value sustainable businesses or sustainability credentials. General perception of low customer demand specifically for a sustainable/ regenerative product and that a lack of action is not impacting profitability or growth significantly.

Customers are key potential influencers of operator focus, as they bring the revenue and recommendation. Operators observe and listen carefully to them.

Some operators interviewed perceive customer demand for environmentally supportive services and providers and target this directly as a core or important focus. Demand and expectations from Europe and from Generation Z are described and that offering the right experiences and accreditation likely gives them some competitive advantage.

Others feel that whilst it does no harm it is unproven or doubtful that it drives business. Some note that those with strong and genuine concerns for the environment are unlikely to be long-haul international tourists.

> *Your clientele, particularly when they're coming from certain parts of the world, don't give a toss about the environment. A few of them do, but most of them don't really. I mean, people who truly care about the environment don't jump on aeroplanes on trips all over the world. [Small tour operator; Auckland, Progressing]*

These values seem to reflect those of the broader population – that some people are motivated by environmentally supportive credentials from any supplier, others are not and that markets are in the main are predominantly price and experience driven. Some feel their operation has relatively low environmental impact and so sustainability is not a consideration factor.

However, views that this is an area that is emerging and will increase in importance and value in the future appear more commonly held.

> *We have traditionally worked in the youth market... youth is significantly more idealistic, so there was more thought put into that area about, hey, what do our customers actually want. What do our customers actually expect us to do. [Medium-sized transport operator, Nationwide, Leading]*

Some operators, see themselves as being very much in the leisure experience business so sustainability becomes a nice to have, but is not perceived as a key demand factor.

There is also a sense that for the majority of tourists, even among those who may be environmentally conscious at home, having an optimal holiday experience would take priority over making a more sustainable choice. Visitor satisfaction and comfort are felt to often be the priority and providing an escape from everyday life.

> *A lot of our guests are aware but potentially don't care much about the environment. They would rather have a clean towel and sheets every day and not worry about the consequences. [Medium accommodation operator; Queenstown Lakes, Progressing]*

> *From a business point of view, I don't think people make the decision of what bar to go to based on whether it's environmentally sound or not. [Small hospitality operator; Auckland, Considering/waiting]*

Provided that competitors in the market were not seen to be undertaking sustainable/regenerative initiatives in a way that was perceived to offer a competitive advantage, most operators are not experiencing any time pressure to implement – there is a lack of sense of urgency. It is evident that operators monitor the competition and may start to move once they sense a sector norm developing.

Regenerative activity hard to relate to unless business is directly linked to the natural environment and a need for regeneration is tangible

Operators based in urban areas, whose businesses do not access or directly connect to the natural environment find it harder to conceptualise how and where they could undertake regenerative activities.

> *Regenerative is much bigger than sustainability…Like how would you make a hotel [in Auckland] regenerative? [Accommodation operator; Auckland, Progressing]*

> *It's always a good story to tell, but sometimes selling conservation doesn't come across as sexy as it needs to be....it's harder to market than, you know, someone on amazing beach somewhere, you know...drinking a Mai Tai or something.... as opposed to, we're going to make you plant a tree or clean up some rubbish on a beach or something like that. [Medium-sized transport operator, Nationwide, Leading]*

Perception of Tourism as Low Impact

Little consideration or responsibility for indirect Scope 3 emissions.

There is a sense that smaller operators particularly can't make much (if any) difference.

There is a sentiment among a significant proportion of operators that the sector has comparatively low environment impact and that NZ as a whole has low impact in an international context. Scope 3 transportation emissions are either not generally considered, or not seen as the tourism sector's responsibility.

> *A lot of the tourism industry is around activities as opposed to a by-product or wastage or rubbish… you're either jumping off a bridge, or you're doing a parasail, or boats out on the Lake or going for bike rides on the mountain biking tracks…A lot of the activities, certainly in this area, probably don't have a big carbon footprint anyway. [Small accommodation operator; Rotorua, Considering/waiting]*

Some in the tourism transport sector (buses, minivans, light aircraft) can see themselves as part of the solution because their offering reduces less efficient independent car travel.

These attitudes lead to a lack of ownership/acceptance among some operators of the need to participate in sustainability/regeneration of the natural environment, with many cautious or not prepared to take a share, or simply not aware of any wider collective responsibility for the impact that tourism has. In some cases, particularly among SMEs, a sense that they can make little difference also leads to a lack of action.

> *It just feels very overwhelming in that it feels very difficult to make an impact and I sort of wonder is it too late anyway. [Large accommodation operator; Auckland, Progressing]*

It can also be a case of 'perfection being the enemy of progress', with becoming net-zero seeming like a very large goal, with no clear pathway back to today and therefore difficult to relate to and begin. Some are waiting to be told what to do.

Resourcing and Lack of Capacity

The backdrop of a tight labour market and rebuilding after Covid-19, means that for many operators, **capacity is strained.** This is particularly the case for small operators, with owners and managers often also stepping in to fill gaps in operational roles.

There is a perception that gaining an understanding of and implementing sustainable and/or regenerative practices will be **resource heavy**, which puts operators off.

> *There's information out there if you look for it. But all this stuff takes time when you go online and do research. And probably most people are just too busy surviving and thinking about ways to increase their business to devote time to it.*
>
> *[Small sized, accommodation, activities & attractions; Auckland, Leading]*

A lack of capacity (and prioritisation on operations and business viability) can also **exacerbate the overwhelm,** which may lead to inertia. Operators feel that time constraints, coupled with the perceived enormity of the task, mean that without significant support, they will not be in a position to take action in the foreseeable future.

> *In terms of this environmental sustainability, it's like a black hole… everyone has no time, they need someone to hold their hand, we need to make it so easy for business[es].*
>
> *[Medium sized; Māori-owned hospitality business; Auckland, Considering/waiting]*

In terms of regenerative activities, without external infrastructure, some operators see this as unachievable independently.

> *[Regenerative activity] needs to be coordinated properly and it needs to be efficient. Because smaller businesses haven't got the time to just do that.*

Scepticism and Cynicism

Scepticism, concerns and uncertainty around 'green washing' can result in hesitancy and deferment.

The literature identifies that scepticism leading to inaction can sometimes be a response to the psychological challenges of addressing climate change.

There is also a level of cynicism among some operators around green certifications being aimed at and benefiting mainly larger businesses, due to cost, time and difficulty of achieving.

Some view that some official bodies such as Tourism NZ, Qualmark etc., focus on marketing over sustainability and don't really take it seriously (for example 'hero' helicopter trips to glaciers in marketing). It was noted that MBIE's innovation fund excludes sustainability initiatives.

Several smaller 'Leader' operators are cynical about official bodies – and advocate more support and learning peer-to-peer, rather than from the top down.

There is some feeling that RTOs and government bodies are absorbing too much funding and less is being distributed to local industry.

There are a few tourism businesses in our area that have got Carbon Zero certification… it seems like businesses with money can just do that and I don't think their practices are necessarily great. They're still burning a whole lot of carbon fuel and not actually thinking about how to reduce that, and the trees they're planting are not necessarily in our area and they might not be native trees as well, so I think there's a whole lot of flaws in that.

[Small tour operator; Nelson-Marlborough, Progressing]

Purchasing carbon credits would be one thing that we'd be open to…but it's controversial, so if there was one that was endorsed as being legitimate, that would be something we could do. We're sceptical, but more importantly, it seems like the general public is quite sceptical.

[Medium sized, transport operator, Queenstown Lakes, Progressing]

I'm not fully committed to these electric vehicles for the environmental side anyway... [Hydrogen] it doesn't need batteries, so you don't have to manufacture all those batteries, or get rid of them.

[Small tour operator; Nelson, Progressing]

Cost and Affordability

The sector is rebuilding with re-establishment of operations and of financial position and reserves. Purse strings are tight.

Investment in sustainability is a lower priority, or can be simply not achievable for high-cost purchases.

Given the context of many operators having made little to no money for several years during border closures and still in the rebuild phase at the time of fieldwork, the perceived **financial investment** involved in adopting sustainable and/or regenerative practices appears to be a significant barrier.

> *The challenge is trying to understand how much it's going to cost, and can we fit that into the budget.*
>
> *[Medium sized, tourist and travel network, nationwide, Leading]*

Many operators indicated that once they become profitable again, sustainability is something that they will start to implement, but in the meantime the **focus is on essential expenditure**. Even among those that are progressing in sustainability, there is often an acknowledgement that this has **not been easy** from a financial perspective.

> *We've changed to hybrid vehicles. But it's not easy just to change, it's all very well people saying to change. You've got to pay the bill at the end of the day and that's not so easy. There's got to be some support mechanisms.*
>
> *[Small sized, tour operator; Marlborough, Progressing]*

Given the mixed perceptions of customer demand or appreciation of sustainable/regenerative products in the tourism sector, operators can see **investment in this area as discretionary**.

> *At the end of the day, businesses that don't make money go bust and they stop. So, if you're doing something [regenerative activities] that isn't making you money there needs to be some pretty good justification for it.*
>
> *[Medium sized, activities & attractions; Queenstown Lakes, Considering/waiting]*

Cost and Affordability

Others have the will and intent but cannot afford higher capital outlay expenditures until they feel more financially stable (either in their growth, or recovery path). Electric/hybrid vehicles particularly are seen as a more expensive option. Capital outlay on alternative heating/power sources was also referenced.

We've just bought our first vehicle, and hopefully if things progress and we keep turning profit then hopefully we can buy an electrical vehicle. And, I think that will be a huge statement.... if I could now I'd do it right now. 'Cos, I think it's the future, right? It's just the funds, I mean, if I could buy one I absolutely would. [Small tour operator; Nationwide, Progressing]

Lack of Clear Guidance

Confusion Around Next Steps

Information and guidance doesn't meet operators' needs

Some tourism operators express that there is a **lack of clear information and guidance** both in terms of what is the expected of them in terms of sustainability and regeneration, and on how to go about implementing change and taking action.

Among those who say they are motivated to do more in sustainability and/or regeneration, there can be a sense of **overwhelm** at the enormity of the task and confusion as to where to begin – leading to **inertia.** The task can seem too vague to undertake, leading to lower ability to make a start and leading to postponement and inertia.

> *It can be quite daunting when you're like 'Oh *#%! where do we begin?'*
>
> *[Medium sized hospitality operator; Queenstown Lakes, Progressing]*

This can be linked to some operators having a lack of **capacity and capability** to investigate the necessary information they need to make decisions – they would prefer it to be provided in an easy and accessible package.

> *You need some help to filter through the greenwashing. There are a lot of companies around who want to be able to do something, but don't know how to start. We've had a lot of people asking us where do you start, like what do you do?*
>
> *[Medium sized activities and attractions; Rotorua, Progressing]*

Underpinning these practical needs is a desire for the process to be **clear and easy to engage** with – with often a strong caveat that expectations must be grounded in what is realistically achievable for business types and reasonable.

Operators seek Specific and Tailored Information and Advice

Need for model or map/sector exemplars to follow

Information that is available and accessible may be **too general, too high-level, not specific** and tailored enough to have practical applicability to the operator's specific business type and sector.

A lot of times when I've looked into how to be more green and more environmentally friendly and what we can do, and a lot of it is more general stuff rather than sector specific and it doesn't always relate to our business. [Large accommodation operator; Queenstown Lakes, Progressing]

Smaller operators also mention the complexity of information and needing more guidance to ease the journey.

Even if I could have a sustainable adviser for a couple of days just helping me, that would be huge …. because, then we could actually implement things, it's just that I go to these webinars and I go to these seminars and I go to these trainings. And, it's understandable but it's hard sometimes because they have all these spreadsheets …and, they're kind of saying the same thing with different titles and it gets very confusing, they talk about regenerative tourism, they talk about sustainability. And eco practice and….. I didn't go to Uni so for me I'm trying to pick things up ….. I just need something straightforward to tell me what I need to do and I'll do it. [Small tour operator; Nationwide, Progressing]

Operators also mentioned trying to seek out information and guidance around a specific issue and being frustrated at the **lack of responsiveness** from agencies.

When I went to them [government agency] about the soft plastic things, they said, 'Oh call this person, this person, this person.' But again, I just was in this circle of like, oh no, you can't go to that person, you have to go to this person. Also, you had to hunt for all the information, there wasn't anything in any one place… And I found it really frustrating. [Medium sized, Māori-owned hospitality operator; Auckland, Progressing]

Affordable Technology and Availability of Infrastructure

Many operators cite a **lack of affordable, available technology** to support their shift to being more sustainable. Most commonly, this is around transportation and the move away from fossil fuel powered vehicles.

> *We're looking but at the moment there's nothing on the market that has the range that we need in an EV or even in a hybrid.*
>
> *[Small sized, tour operator; Auckland, Considering/waiting]*

> *The point where we are developing e-boats and it's likely that they will be up and running in the near future. Technology is one of the main challenges and having that infrastructure in place in time.*
>
> *[Nationwide, activities & attractions, Leading]*

A **lack of viable alternative options**, mean that operators continue with the status quo.

> *We have to maintain our service level. It's not feasible to stop driving or moving luggage around. [Inbound tour operator; Sth Island, Follower]*

> *Sustainability around the aircraft is a bit difficult because the technology has to change at that end. It's not something we can change.*
>
> *[Medium sized transport operator; Queenstown Lakes, Progressing]*

For those that indicate that they intend, at some point, to replace fleets with electric vehicles, there is a strong preference to be a **follower rather than a leader** – i.e., to wait and see what the maintenance issues are, what the lifespan of batteries is, which vehicles prove best, for more extensive charging network to be provided etc. This is a fairly normal response unless clear advantage is evident, as it de-risks the transition and allows others do the research and testing. Many will wait until their fleets need replacing as part of the **normal cycle of capital investment**, under the assumption that costs will continue to decrease.

Lack of Sustainable Supply Chain

A **lack of sustainable options** for suppliers and/or **lack of capacity to be exploring the marketplace** to source the most suitable solutions is a barrier for some operators – particularly those in the accommodation and hospitality sectors.

> *A lot of the packaging coming to us is so unsustainable. If I only order one thing from [supplier] they'll send it in this great big box. It's got blue tape round it. …it's so unnecessary.*
>
> *[Medium sized, Māori-owned hospitality operator; Auckland, Progressing]*

Although this is seen as largely **out of the control of operators**, there was some sense that as a customer they could be demanding more.

> *Maybe being a little bit more forceful with our suppliers and telling them that we are going to be demanding that they get to this standard within the next couple of years.*
>
> *[Small, activities & attractions; Queenstown Lakes, Progressing]*

Certification and Accreditation Landscape can be Confusing

The landscape for "green" certifications and accreditations is viewed as confusing, with operators often feeling **overwhelmed with options.**

Again, the **lack of capacity to investigate and navigate** the options and processes means it gets put in the "too hard" basket.

Challenging for Smaller Operators

Sustainability/ regenerative action is a bigger ask and a more daunting task for smaller operators.

Many of the **barriers** identified – business, attitudinal, and functional – are experienced more strongly by **smaller operators**, where owner/operators often wear multiple hats and there is no dedicated resource responsible for sustainability.

Smaller operators struggle with **how to approach sustainability** and can often feel doubt about **what difference they can make** anyway due to their small scale.

Environmentally sustainable decisions and actions can be seen as very **individual** (rather than a collective effort) and as being **more relevant to larger businesses**, with greater impacts and resources to invest in initiatives.

There was a feeling of **lack of support from government / tourism bodies** for smaller businesses to thrive and a sense that larger players get more support to improve their environmental sustainability footprint.

> *The people on the top who can afford to employ a sustainability manager and have someone who comes in and waste audits for them once a month because they're a big company.*
>
> *[Medium hospitality/food and beverage operator; Auckland, Progressing]*

De-Prioritisation of Sustainability can Feel Justifiable

There may be a disconnect between socially expressed attitudes and actual behaviours.

Some tourism operators appear to be able to **justify their de-prioritisation** and/or deferment of exploring and adopting sustainable/regenerative practices by focusing more on the barriers – many of which are framed as being out of their control – than on the solutions.

Focus on difficulties, ambiguity and anticipated technological or market changes are acknowledged psychological responses to difficult behavioural change and to climate change response particularly – it is renowned as a particularly difficult challenge and is often associated with avoidance, deferral and displacement of responsibility.*

There is a **lack of strong social imperative or sense of expectation** (social and sectoral norms) among some tourism operators that they should be implementing environmentally supportive initiatives, other than the existing and now normalised approaches to waste and simple energy efficiency (i.e., waste management/recycling, plastic reduction, supply chain and product choice, energy efficient lighting). That feels like enough for some.

Although there is a sense of coming requirements/expectations, some operators feel that they have **not yet really been clearly asked** to start taking responsibility for sustainability and/or regeneration – linked to the sense of lack of clear direction. Perceived lack of clear guidance and 'how-to' information, means it becomes **easy to defer or avoid** if the path forward isn't clear and easy - and to justify doing so.

> *If I'm worried about whether or not I can pay my staff week to week… you're not going to be thinking [about] how can we save the planet if we can't save ourselves.*
>
> *[Small activities & attractions; Taupo, Progressing]*

*e.g., Agnogenesis - the fabrication of uncertainty

Summary of Barriers

Barriers from Survey	Total Agree
Carbon measurement is confusing	56%
Investment needed is slowing us down	52%
Certification is confusing	51%
Have to prioritise our financial position at the moment, before we can focus on environmental support	47%
Don't have the resource (people/time) to progress environmental sustainability at the moment	45%
Not sure how our business could support biodiversity	32%

Traditional profit-first business models

- Volume, growth and profit prioritised over minimising environmental impacts
- Business priorities often: economic, then social, with environmental more of a 'nice to have'
- Regenerative activity is harder to relate to role and activity for some

Attitudinal

- **Harder to accept responsibility**, 'give back' when **perceive** business and/or sector **low or no negative impact on environment**
- Feels OK to de-prioritise and 'wait and see', **in favour of business re-establishment**
- **Feeling they can't make much of an impact** and/or too hard to make an impact
- Some **scepticism** and anti-paternalism – why is this tourism's and/or small operators' responsibility?

Functional

- **Cost and affordability** right now
- Time/human resources/owner **capacity**
- **Lack of clear guidance** leading to **inertia**, and postponement. Wanting/needing to follow a model / map / a lead example
- **Confusion** about what to do/do next/how far to go
- Waiting for **affordable technology**
- Waiting for **available infrastructure**
- **Certifications confusing and overwhelming** (carbon and green)
- **Ease of sourcing** sustainable suppliers or local infrastructure and support

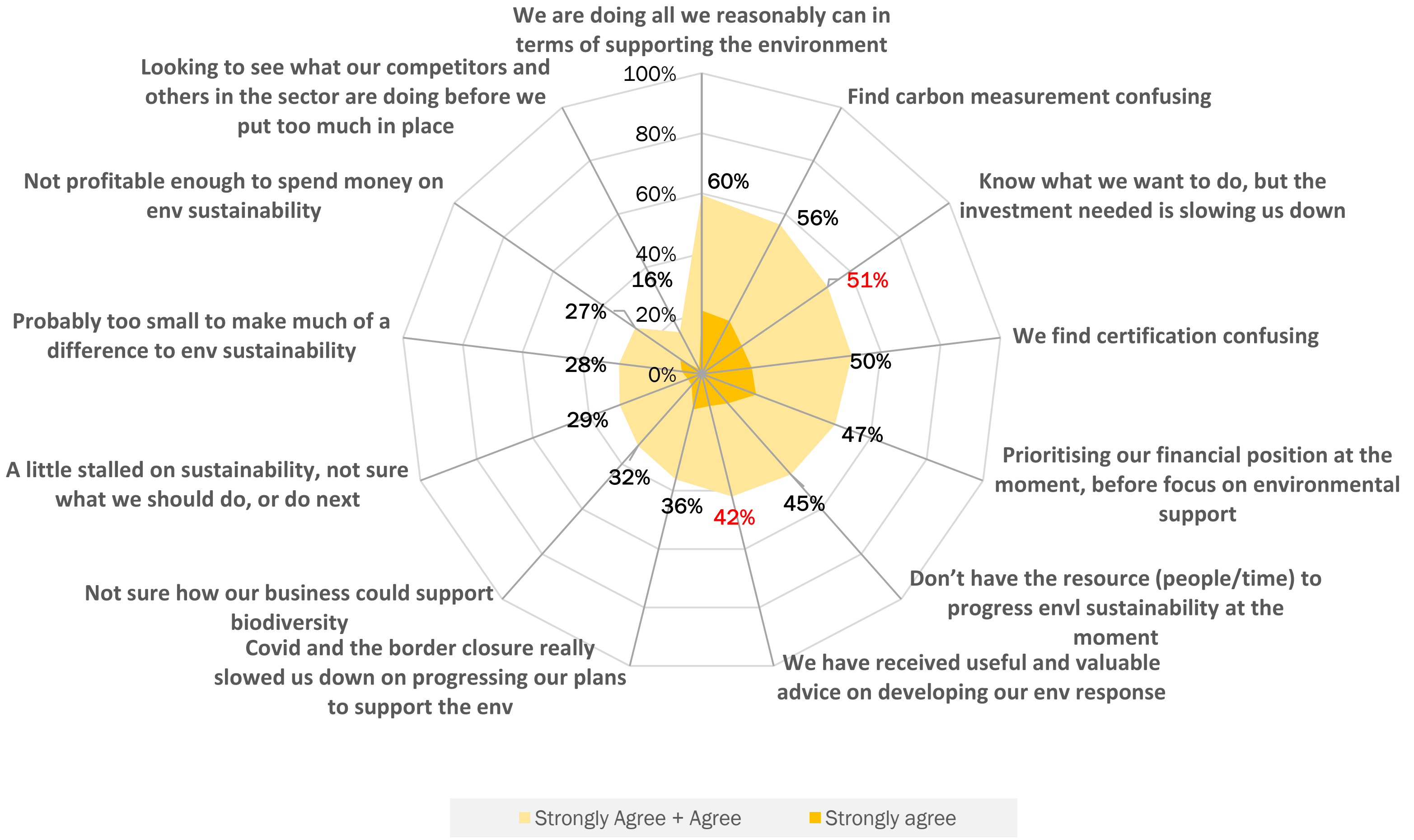
Agreement with Barriers in Survey

Half or more of sector survey respondents: feel they are doing all they reasonably can; find carbon measurement confusing; cite investment as a barrier; and find certification confusing.

Between one third and a half indicated they are prioritising their finances, don't have the resource currently, or stalled over Covid-19.

Four in ten agree they have received useful advice on developing their environmental response, therefore around 6 in 10 don't agree this is the case.

Barriers around lack of clarity on what to do, financing and resources, and prioritisation are evident. Strong agreement levels are relatively low though.



Differences in Agreement Levels across Types

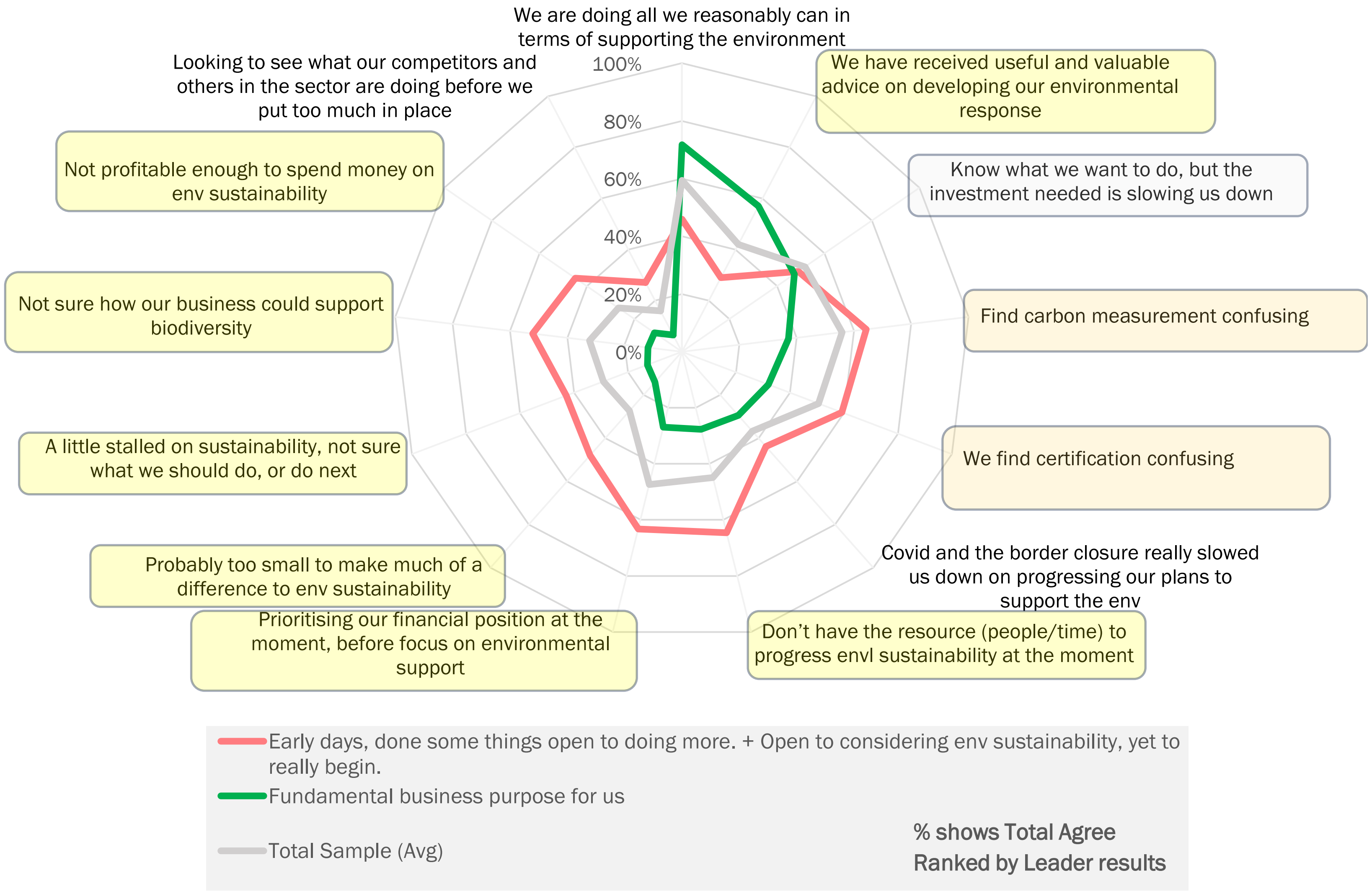
Comparing the group claiming strongest focus on environmental support (Leaders, 21% of survey respondents) to those who acknowledge they have more to do; or are yet to begin (29%), shows some notable differences in agreement levels with barriers.

Gaps in order of size are:

- Uncertainty about supporting biodiversity
- Lack of resource(people/time)
- Prioritising financial position first
- Feel too small to make a difference
- Not profitable enough
- A little stalled, uncertain what to do next
- Have received useful advice

Investment needed is slowing progress is expressed consistently. Leaders have much higher agreement that they are doing all they reasonably can (72%).

Gaps between leaders and least progressed groups emphasise the barriers to progress for those earlier in their journey



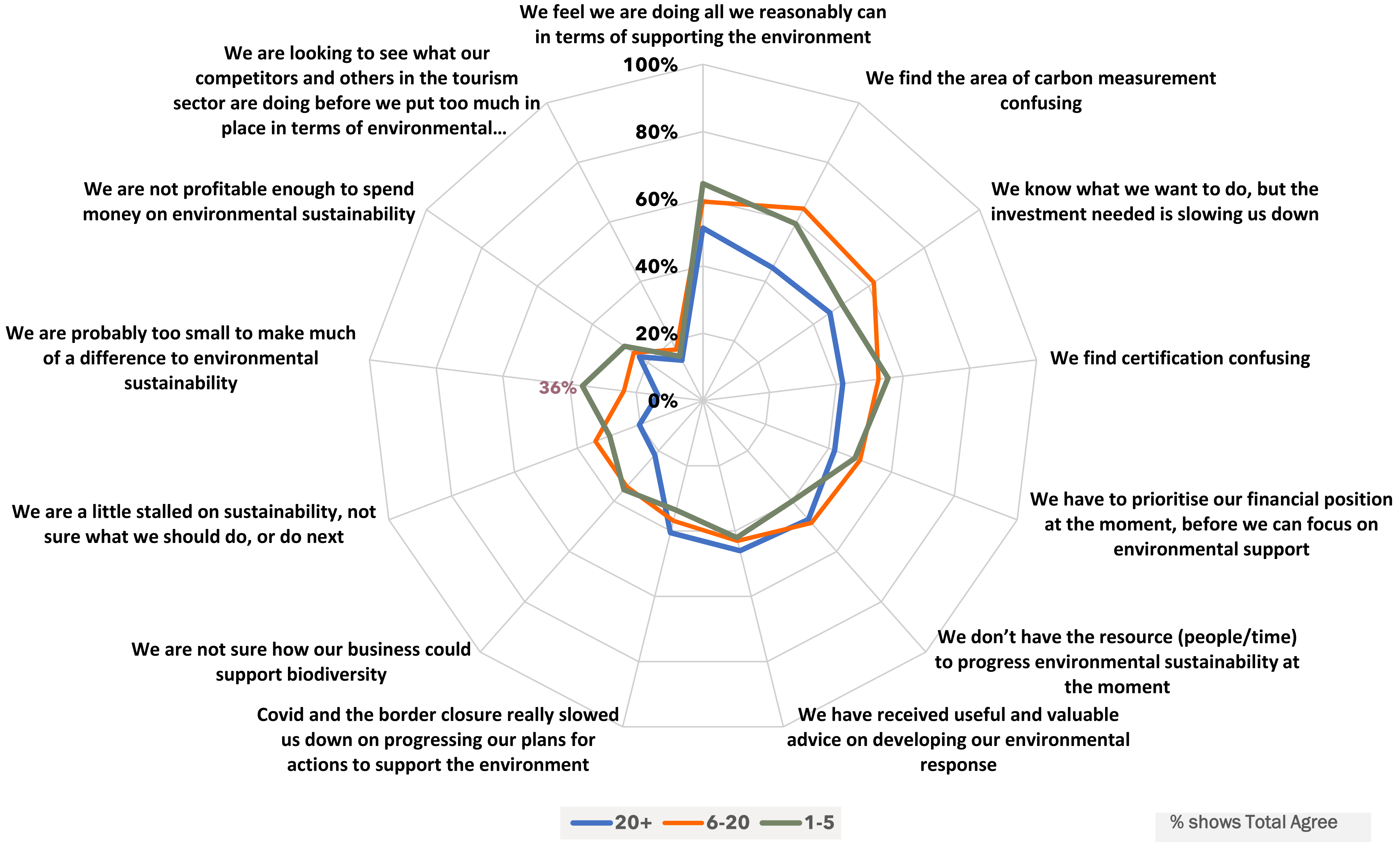
Ranked Difference in Agreement Levels across Types

Ranked agreement levels by gap size highlight the biggest differences and areas of greater consistency

% shows Total Agree
Ranked by Gap Size

Firm Size Shows Some Differences

Smaller firms show generally stronger levels of agreement with the barriers to their progress than those with over 20 full time staff. Gaps are not as significant as for environmental orientation types.



% shows Total Agree

Number of FTEs

Motivations and Motivators

gravitasOPG

Introduction

In this section we describe the motivating factors for sustainable and regenerative actions observed and discussed with operators. These relate both to personal/organisational values, sectoral and social norms (social legitimisation) and to practical enablers.

- We observed a range of motivations and understanding levels in relation to supporting environmental sustainability and regenerative activity. The literature (see accompanying literature review) describes intrinsic and extrinsic motivations as a key differentiator, with intrinsic motivations believed and observed to be more powerful drivers of action. We observed a range of connection and enthusiasm levels which influenced activity and intent.

- Those influenced *extrinsically*, by rewards/benefits, the behavioural norms they see and hear around them, by initiatives and communications, tend to be more pragmatically focused on specific tasks and actions being considered or that are more readily achievable, rather than being driven by a purposeful desire to support the environment.

- Of course, there is a spectrum with degrees of intrinsic motivation through to those extrinsically motivated and to those with very low inclination. However, it seems that a level of intrinsic motivation is something people either have or don't have and is closely connected to values, beliefs and altruistic inclination. The research data indicates that more organisations are extrinsically rather than intrinsically motivated.

- Business contexts are material – industry type, scale of business and profitability, local RTO activity and influence, other tourism peak body approaches and communications, along with the views of influential others (peers, advisors, friends, family, whanau) can impact on approaches, understanding, development of positions and motivation to act.

- We note that it is common to express a desire to support the environment and to contribute but that the degree to which this translates into action, and particularly more urgent action, varies and is influenced by a range of factors and situations.

- Generally, regenerative activity is less well understood and harder to connect with in terms of obvious activities or initiatives for operators to easily access and support.

Motivational Types in the Literature

A significant European survey of approximately 900 tourism enterprises in 57 European protected areas to understand the motivations for tourism enterprises to act more sustainably*.

The firms were split into three groups, based on their motivations to be sustainable:

- Business driven firms are defined in relation to research on **cost reduction competitiveness –** the most commonly referenced frame in business sustainability.
- Legitimisation driven firms are defined in relation to **societal legitimization**. This refers to the sustainability actions *visible* or *expected* by others – sectoral and social norm.
- Lifestyle and value driven firms are defined in relation to research on **lifestyle-value drivers**. The literature highlights another frame beyond (but still including) the expectation of economic gain and associated with the values and lifestyle of their owners. This third frame differs from the first two frames in explaining pro-sustainability behaviour because of personal choices and habit and sometimes is presented in conflict with an exclusive pursuit of economic gain – intrinsic motivations.

**As referenced in the Literature Review Summary - Sustainability motivations and practices in small tourism enterprises in European protected areas. Font et al, (2016). Journal of Cleaner Production. See literature review for fuller description.*

Motivational Types in the Literature

Key findings from the European survey are:

Although motivations are linked to economic and financial goals, the lifestyle of the owner and their desire for societal legitimisation were found to be more motivating.

Enterprises motivated by business motivations *(cost reduction competitiveness)* undertake some operational internal actions that may lead to operational savings. Some are also introducing more advanced measures.

Enterprises motivated by societal legitimisation undertake externally different measures, highlighting taking actions, seeking marketing and image benefits from being seen to respond to consumer demand.

Enterprises that are motivated by lifestyle-value drivers are the most likely to undertake the most meaningful sustainable action.

The enterprises that took more sustainable action were then more likely to be satisfied with their economic performance, even if they did not necessarily perform better than the average.

In our discussions, we observed broad consistencies with this work, in terms of intrinsically motivated operators (lifestyle and personal values), those compelled by the traditional profit motivated business model and concerned about financial sustainability and those influenced by sectoral and social norms. This research supports that intrinsically motivated operators are more likely to prioritise the environment and to take most action and that those motivated in other ways can be more inclined to make slower progress and to wait for direction from others.

**Sustainability motivations and practices in small tourism enterprises in European protected areas. Font et al, (2016). Journal of Cleaner Production. See literature review for fuller description.*

Intrinsic Motivations to Support the Environment and Nature

A genuine love and respect for the natural environment and desire to contribute to regeneration of the environment is the intrinsic motivator for those who are leaders - and in some cases progressing - towards sustainable and/or regenerative businesses. This is can be strongly linked to having a close connection to nature throughout their lives and often as a child.

> *My motivation is love for the planet and however I can spread that word, because I believe that people generally protect what they love above and beyond everything else.*
>
> *[Small accommodation operator; Auckland, Leading]*

Māori-owned businesses consulted feel a sense of responsibility and connection to te taiao through their whakapapa and as kaitiaki and/or mana whenua.

> *I've done a lot of tree planting and things like that over the years, not just since the business, all through our lives. And, you know protecting native birds and things like that. We were taught that when we were young anyway, so just a continuation of that really.*
>
> *[Small, Māori-owned tour operator; Nelson-Marlborough, Progressing]*

Those with intrinsic motivations towards the natural environment are taking the most action on sustainable and particularly on regenerative activities and gain personal satisfaction from doing so – they may have no need to advertise or promote their environmental initiatives to attract customers.

Intrinsic Motivations to Support the Environment and Nature

A purpose, that aligns with values and has personal meaning. Implies understanding of the subject – can drive task-relevant focus, effort and effective planning.

Though all businesses have to survive financially, for some with intrinsic motivations, impacts on business growth and profitability are acceptable trade-offs for doing what they feel is right by the environment; while some have no desire to grow their business and are happy to maintain current volumes. They are more likely to find ways to overcome barriers, such as costs of action.

> *We will never get a payback on it…financially the sums don't work but it does make sense from an environmental point of view, from the goodwill that stems from that and to be doing the right thing... There's a sense of both duty and pride in doing those things.*
>
> *[Medium sized accommodation operator; Queenstown Lakes, Progressing]*

These businesses are also likely to be embedded in their local community and focused on supporting and contributing socially. They are often open to sharing their experiences and knowledge and are likely to be keen to be involved in local environmental initiatives or groups, if they are not already. Again, motivated by their love of nature and altruistic values.

Notably, when asked which from a spectrum of descriptions fit them *personally* most closely - almost half of the sector survey* respondents (48%) aligned *themselves* (i.e. personally not necessarily their organisation) with the statement: ***I have a very strong connection with nature. Guardianship and protection of the environment (kaitiakitanga) are a fundamental priority for me personally.***

Whilst this doesn't necessarily translate into intrinsic environmental motivations driving decisions at an organisation level, it at least indicates a strong personal alignment and a receptive audience for environmental communications and discussion within the sector.

**Survey of sector Jul-Aug 2023, n=308*

Note: the survey is likely to understate those with lower intentions towards environmental support and over-represent those with higher intentions

Extrinsic Motivations

Influenced by external rewards, either tangible (profit, certification), or in the form of status, praise, or regard. People can be motivated this way to perform tasks that are not of themselves rewarding – but have an outside reward or benefit.

We observed the following external motivators to greater or lesser degrees:

Levers/Influences

- Being seen as relevant to a target market that is sought or being marketed to, or targeted for future focus (i.e. younger age-bracket; those looking for a 'slower' tourist experience; or a nature-based experience). Or believing the market (or a significant sector of it) is moving in a more sustainable direction and now starting to prefer or at least more favourably weight more sustainable offers.
- A sense then that it creates either a point of difference/advantage in the marketplace, or at least a point of parity (offsetting the fear of being left behind).

Generation Z tourists, they're not like the old tourists, you know, the generations that just wanted to go around and do as much as they could and get wasted and pub crawl and things. These people actually want to make a difference, they want to be able to add value in the communities they go to..... they're a lot more, sort of, understanding (aware) when it comes to nature, and if there's already sustainable practices in place they're very supportive of it, and I think that is a huge factor when they book, they will compare companies. [Small tour activity operator, Nationwide, Progressing]

- Attracting and retaining staff who share similar values around caring for the natural environment, or feel that this orientation is a marker of an organisation with contemporary values. Operators mention this most often in relation to younger people and some note that environmental credentials are best couched as core values and clearly explained and lived.

[.. help you in terms of attracting –staff?] *Yes. It does....we've historically had a fairly young workforce in our business and.. their values are more idealist than perhaps workforces that are older....we did a workshop together to set out...what our values were and what our purpose was.... you get solid buy in from someone if that's part of your onboarding. . [Medium-sized transport operator, Nationwide, Leading]*

Extrinsic Motivations

- Financial benefits, logical choices or incentives For example, retro-fitting energy efficient heating in accommodation that will reduce power costs, reducing towel wash frequency in accommodation becomes a "a no-brainer" as it is environmentally friendly, can be easily 'sold' to guests, has become somewhat of a sector norm *and* saves cost (the latter may be the catalyst, or key motivator for some). Operators can seek support for investment commitments in this context.

- To achieve an accreditation or certification – which has other end motivations relating to presentation of the brand to customers, to staff, to ensure not out of step and the functional benefits of clarity of what to do and the ability to track progress and motivational aspects of audit processes.

We also observed the following motivating factors relating to social and sectoral norms, that could potentially be developed and leveraged at both a national, local and individual level. :

Social Norms

- Social conformity with sector and business norms either generally or more locally. To comply with expected standards, do the right thing. Most people are amenable and don't want to be non-compliant or contrary, or feel they are under contributing, but also don't necessarily want to be first movers or risk sticking their necks out.

- Keeping up with the trend and being relevant are also motivators. Not being seen as out of step, or non-contributary "not just taking". Familial or social pressure from respected others (esp. children in some cases, it appears) can be influential here.

- Positive self-image rewards for owners - being seen as a strong contributor, leader even, and the type of person/organisation that gives back/contributes.

Regulation and Compliance

Discussion

- **The sector has mixed views:** Qualitative discussions and survey results in the following slides show that attitudes to introduction of formal compliance around environmental sustainability requirements, disclosures and audits are mixed, as are attitudes to environmental accreditation becoming a requirement – with about half of survey participants in support of each these, 20%-30% rejecting them and the balance unsure.

- **The positives are clear:** There are good arguments and reasonable support for both some level of compliance or mandatory accreditation. The main drivers are that it can provide a level playing field – better ensuring all play their part, could promote a clear structure of expectations, minimum standards, a motivating framework and processes, and could potentially incentivise and reward strong compliance and higher-level action in some way.

- **Negative views will be challenging to overcome:** Some feel (sometimes strongly) that there should be no regulation or compliance placed on the sector on, the basis that this may: distract from natural organisation (particularly at local levels), collaboration and activity, place an unfair burden on the sector and particularly on smaller organisations. For some, this is more ideological, and/or based on lack of confidence that government and administrative bodies have sufficient understanding to make this work effectively.

- **The evidence says some operators will be slow act:** Both the literature on the sector, on behaviour change and this research indicate that some level of compliance will likely catalyse and speed up focus and activity and provide greater certainty around the scale and extent of actions by some operators. Time differences between a supported approach and one which sets minimum compliance levels are a key consideration.

- **Encouraged and supported accreditation may be a middle path:** From the survey, over one third of organisations have some intent or, are still considering becoming accredited in some way. There is therefore the potential to support and encourage a good proportion of sector operators towards accreditation/certification. From behavioural science – this could focus on *clarity* on the specific behaviours that we want operators to adopt: with *empathetic support* – via messaging which is direct and personal in its tone; tailored support to show understanding of operator situations; enhanced and driven by human contact to bring programmes and support to life; with financial support to show a level of partnership and garner commitment.

This should be an effective way to support and encourage operators towards desired standards of practice and therefore to develop clearer *sectoral norms and expectations*, which in turn should drive adherence to minimum levels of action and behaviour. Compliance to minimum standards could be re-considered once the pace and extent of adoption and of sector change is assessed.

What would help your organisation play its part in supporting the natural environment?

Comments on cost or funding include:

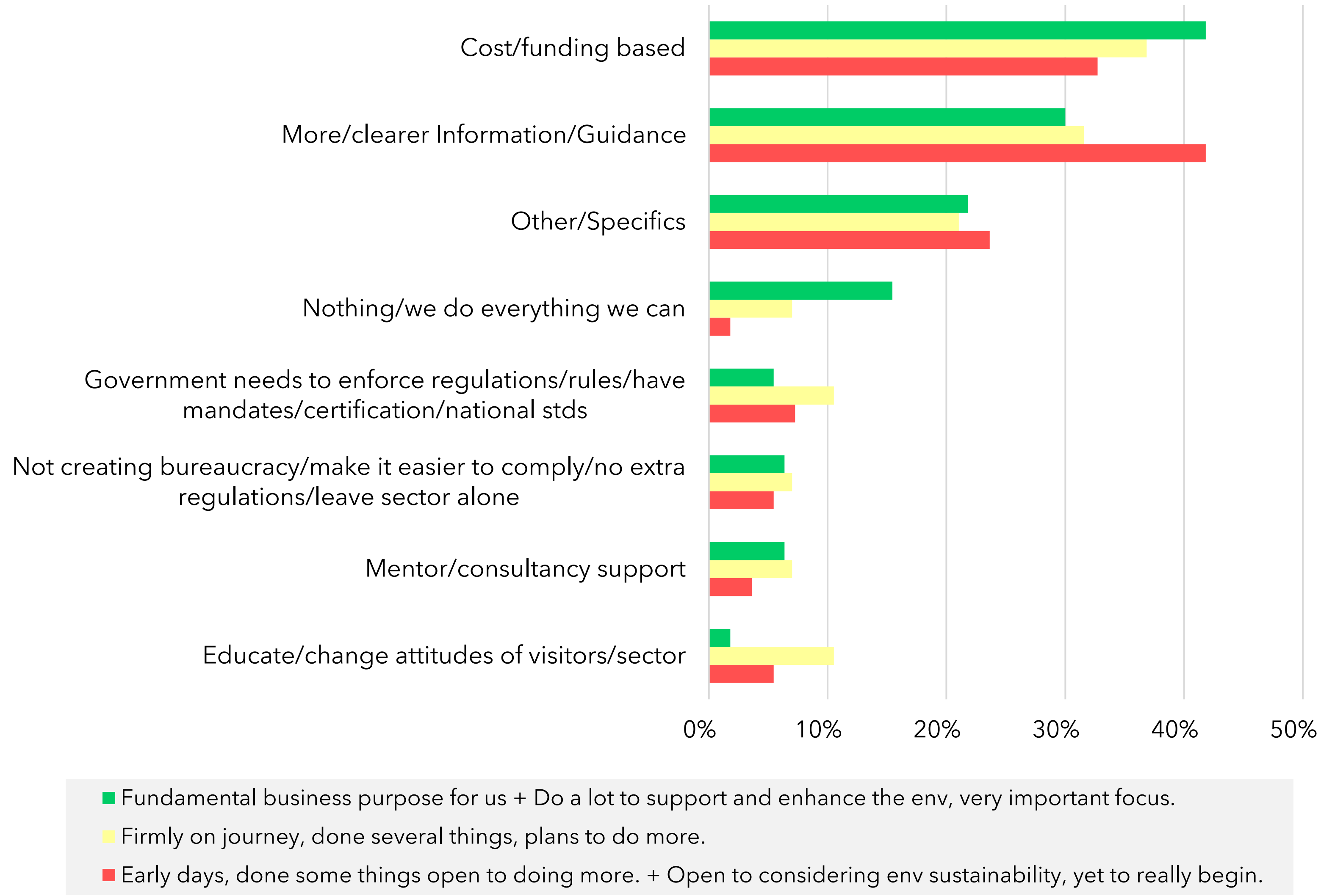
- more funding
- financial support
- incentives
- grants
- cheaper processes
- credits

to do things planned or directed towards.

Information based comments include requests for:

- industry specific information
- guidance on carbon
- guidance on biodiversity
- examples of what others are doing
- information for visitors (to educate the market).

Funding support and guidance and information are the two most commonly expressed needs to help operators progress



Source: Survey of Tourism Sector – Base=222/336 (66%) responded to this open-ended/freetext question

Illustrative survey comments on funding

Environmental Accreditation needs to be standardised and provided free of charge as small businesses have difficulty in affording it. Accreditation at the moment is a luxury of larger businesses. For example, the latest requirements for Qualmark gold certification is for a third-party audit, which is expensive for small businesses coming out of 2 years of little income due to Covid.

Funding to be able to action our ideas

We pay vast amounts of tax - direct and indirect - GST, Income, PAYE, compliance, etc. It is the role of Government to finance those initiatives from that vast amount of money they collect. Stop putting the emphasis on business to fix this problem or give us the money back to do it..

Financial incentives to measurable goals. NO more regulations.

Incentives or credits for environmental practice - co-investment

We already collect rubbish daily but we'd love to get funding to put solar panels on our business roofing to enable our bikes and vehicles to be charged by solar energy.

Education, direction, incentives

....we would like to be able to put in solar generation on our roof however we cannot afford the investment. If government funding could cover the capital cost and we paid that back at minimal interest cost then that would help progress green energy. Without that investment support nothing will progress.

Our purpose is to restore an ecosystem. Secured funding is our main limiting factor to meeting that purpose

Access to mentoring and funds to move forward.

Clearer directions, funding.

Source: Survey of Tourism Sector – example comments on needs help organisation play its part in supporting the natural environment

Enablers

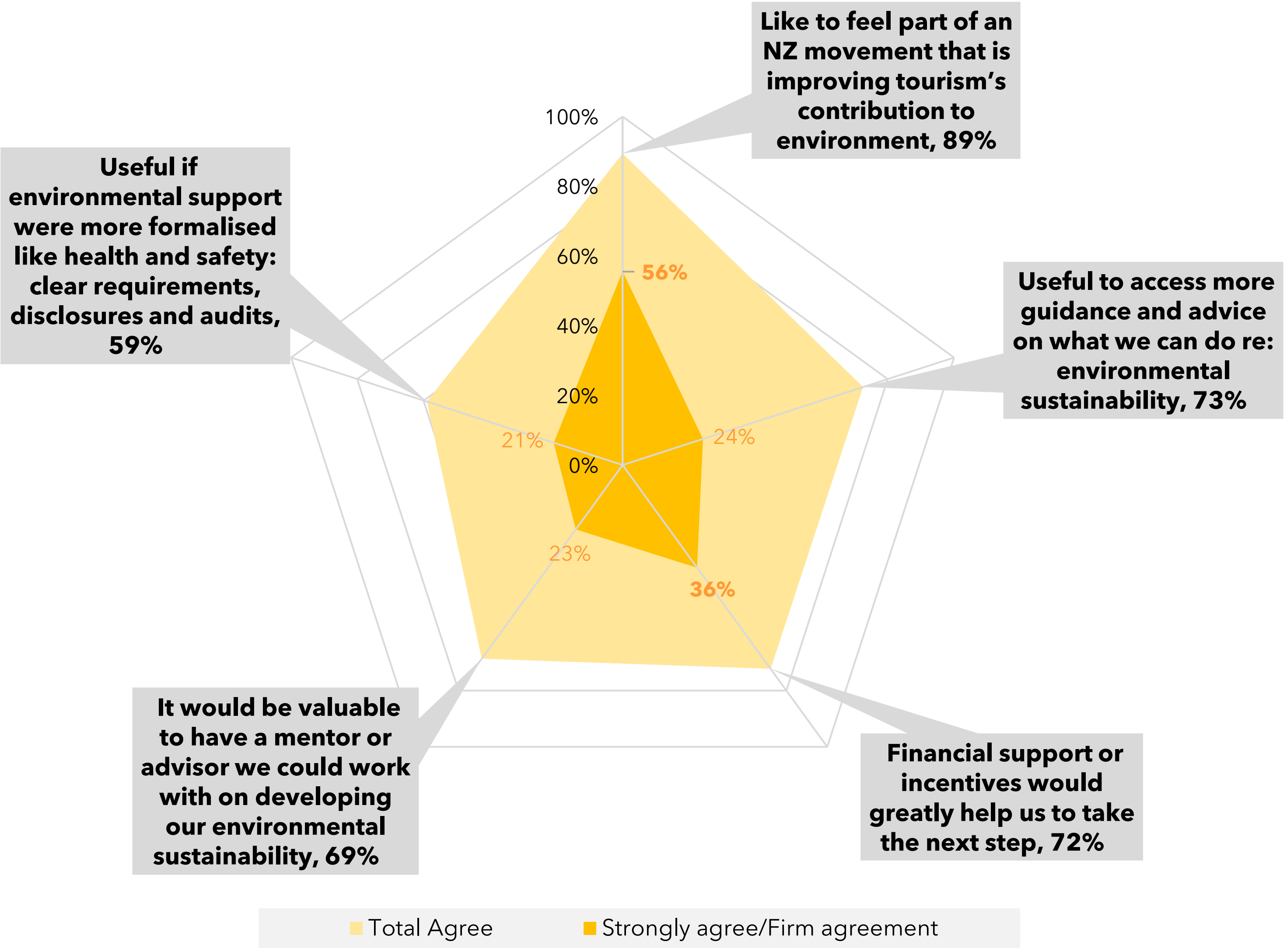
In the survey, operators show support and desire at scale for:

- **Feeling part of movement**
- **Guidance and advice**
- **Financial support/incentives**
- **Mentorship**
- **Compliance models**

But it's not one size fits all and should **be tailored** to the industry sub-sector and operator size.

Also motivating, will be if operators sense customer demand, a change in market orientation or a large-scale initiative (that defines sectoral norms and leverages sectoral and national pride), with opportunity to engage and contribute locally.

Enabling initiatives are clear, but strong agreement is more moderate and highest for being part of a movement and for financial support

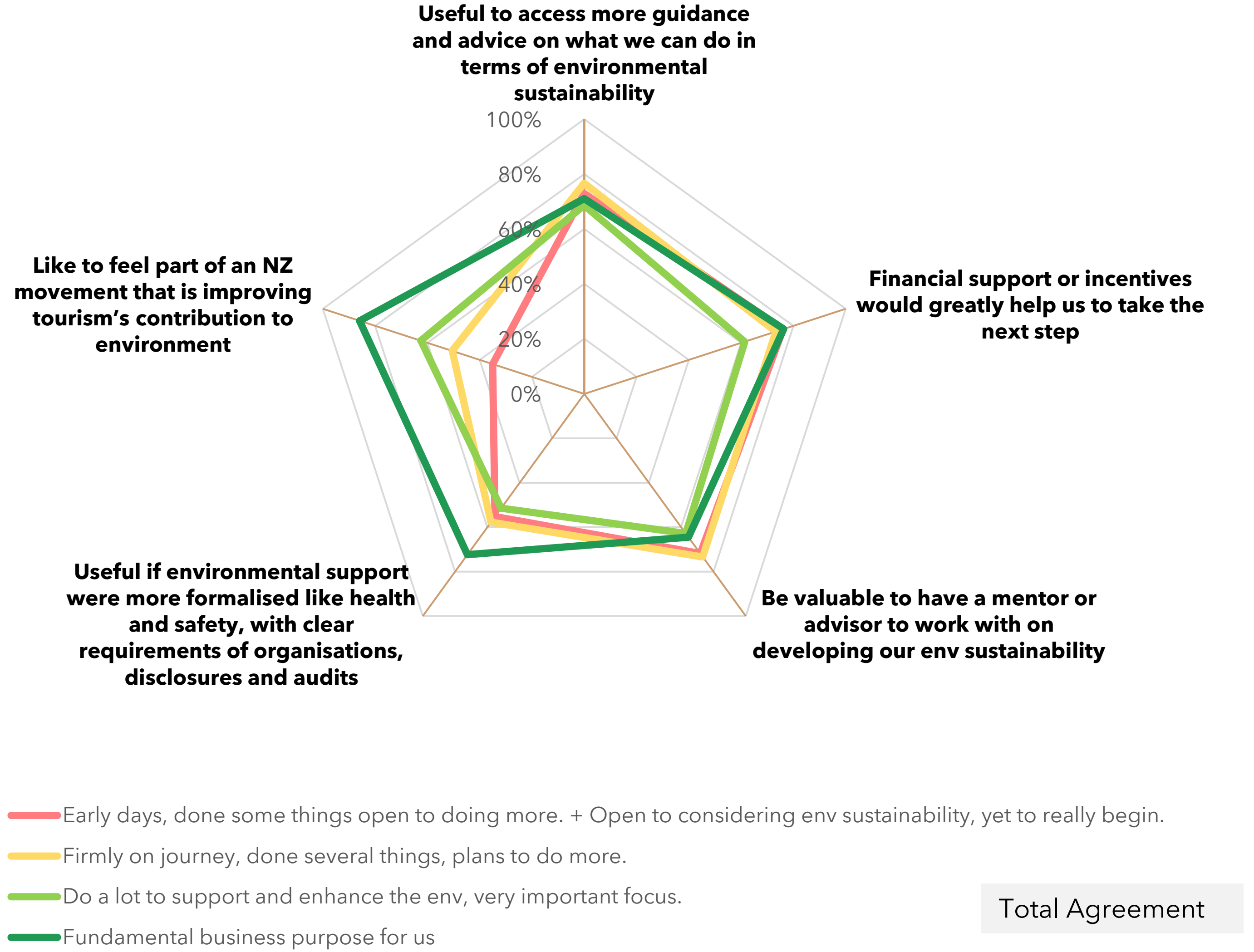


Enablers

Leaders show stronger agreement levels in terms of being part of a movement and in support of the usefulness of a level of compliance.

Agreement is at broadly similar levels for accessing guidance and advice; for financial support and the value of a mentor or advisor.

Agreement levels are reasonably consistent across operator types, except particularly in relation to feeling part of a movement; with differences also on usefulness of compliance



Financial Incentives

Financial incentives and funding mechanisms could **motivate, facilitate** and **reinforce** activity and drive standards. They could be powerful in several ways.

Funding/co-funding, tax breaks, grants or subsidies may act as a decision breakers, raise awareness, as catalysts for earlier action. They could also reward and reinforce desired actions.

In addition, they demonstrate commitment by government to the intent of policy and plans.

Some operators seek financial incentives both to assist with affordability and with cost-benefit investment decisions. Funding can be the sweetener that tips decisions in favour and enables investment.

Funding or subsidies also provide a signal of the government's commitment and intent (as per e-vehicle subsidies).

> *There's no support or there's no funding that I know of that can assist and help with that…(a lot) of this does cost money and some of it can totally be a leap of faith.*
>
> *[Medium sized transport and tours operator; nationwide, Leading]*

> *Funding, grants or low interest loans to switch to electric vehicles [Survey respondent, Leading]*

> *Funding assistance to implement targeted Kaupapa. [Survey respondent, Leading]*

Quid pro quo – there is evidence (and behavioural science theory) of some wanting something (subsidies, grants, access to favourable finance) in return, to trigger a sought behaviour, that has no immediately felt benefit.

> *If the government was serious on maintaining it and having a better carbon footprint for the industry, then they'd start investing into it a lot better from a small-operator's perspective.*
>
> *[Small activities & attractions; Whanganui-Taranaki]*

> *I think penalising people is never going to be a great thing, but if there were benefits of meeting targets or doing whatever, I think that would certainly be a great thing … like tax breaks.*
>
> *[Small, activities & attractions; Taupo, Progressing]*

Guidance and Support

Tailored information, guidance, mentoring and monitoring will provide the structure and motivation that some operators need to begin, progress and regularly review their activity - **facilitate** and **reinforce.**

Operators firmly on the journey but with more to do, those who are open, but yet to begin and those that have made a start but have more to do, will often benefit from this support - Positive Followers and Ambivalent Followers*. The survey data shows similar levels of interest in this resource across operator types (see chart above), with those more progressed still keen to have access to expertise and support to see what more they can do.

Mentors and advisors

- Some businesses with some interest in becoming more sustainable and/or regenerative, but with low capacity and capability, would be motivated by the provision of accessible guidance and mentoring to support them to navigate what best practice would look like and how to achieve this. Ideally this process would also address concerns about costs in terms of identifying efficiencies, savings, best priced options and access to any funding, grants rebates etc.

> *If there are all these specialists and there's funding out there to get them to come in, they might make all the difference for someone's business to be able to move forward. [Small activities & attractions operator; Taupo, Progressing]*

> *I think if you were wanting to get this, and for it to get legs and to stand-up quickly, I think you'd need to put some navigators in to drive it. If it was left up to sectors and to businesses, it will take you a long time. [Medium sized hospitality operator; Wellington, Progressing]*

- Whilst some operators would really value access to advice, support and mentorship, we note that others prefer to go it alone and rely on information and guidelines alone, with perhaps access to a service to contact with specific questions, if needed – to minimise stumbling blocks once in progress.
- We note that there are a range of audiences for information and guidance relating to organisation structure and scale, position on the journey and so on. Some are seeking quite prescribed "road maps", to do lists or templates, along with highly relevant case studies, to illustrate and reassure. Others may need more detailed information. Consistently people ask for information that is clear, easy to digest and to apply.
- Most operator's journeys will begin with accessing available information and guidelines on what to do, and how to do it, so this support aspect is fundamental, of course.

*These types constitute more than half of organisations in the survey.

Guidance and Support

Detailed and longer documentation will be daunting for some, especially smaller operators, those in more junior roles and those with English as a less familiar language.

Communications should be developed to suit audiences and an incremental approach will likely be easiest to engage with and put into action.

Tailored information

- Guidance and provision of information should be tailored and targeted to operator's specific sector and acknowledge organization size - rather than general messaging aimed at the wider tourism industry, to be relevant and be more immediately applicable.

> *More case studies or examples of how business can improve biodiversity outcomes. How do we know what to prioritise, what is value for money, what are the steps we should be taking, other than planting trees?*

Incremental framework

- Understanding clear steps and small changes that can be made feel much more achievable for those who are motivated to be more sustainable but feel overwhelmed by where to start and by how big the task is.

> *Ideas around small steps we could take. It all seems so big, but improving a step at a time would help with planning and achievement. [Survey respondent, Considering/waiting]*

> *Not everybody has the resources to be able to make those changes…So I think it's about educating people and businesses to be able to make those changes slowly. And what you could be doing now, so you could have some short-term goals, mid-term and long-term. I think having some sort of national certification would be great, that's recognised internationally. [Medium sized; activities and attractions; Rotorua, Progressing]*

Illustrative survey comments on information and guidance

Information is key and it needs to be accurate.

In tourism, to get businesses to shift their focus to explore environment friendly options we need to get customers to value this change and get them to make decisions about their holiday activities based on how well a business addresses environmental issues. If there is no financial gain to a business, it is very hard to get policy change. Tourism businesses also need better information and ideas on how they can be more effective with environmentally friendly practices.

More easily accessible advice or better advisors who can do a site visit and help you plan

The more information sharing and open support different tourism businesses can give one another the better in this space. Put competition to one side for the greater good of the planet and Aotearoa.

Guidance and support on what steps to take

There needs to be more guidance on what we can be doing 'day to day' to have a positive impact on the environment - everyone is short-staffed so these things will not get done without more support

More information specific to our business e.g. office situations

More information on what to do for our rental car business would be helpful.

It is always useful to have workshops/ webinars to keep us focused. Have an accreditation plan for small businesses.

Guidance - a mentor/advisor - clarification on how to measure carbon emission - financial support

Action lists / clear direction Shared knowledge of what others are doing

Not enough practical guidance for businesses or tourists. Most understand the WHY, we need more HOW

More case studies or examples of how business can improve biodiversity outcomes. How do we know what to prioritise, what is value for money, what are the steps we should be taking, other than planting trees?

Source: Survey of Tourism Sector – example comments on needs help organisation play its part in supporting the natural environment

Accreditation

Accreditations and certifications can be a motivator and provide good structure and great accountability – **motivate**, **facilitate** and **reinforce**.

From discussion, the auditor/mentor can be key and quite influential. They potentially set a norm for some parts of the sector (such as accommodation).

- Some operators interviewed really value their accreditation (with Qualmark most common in the sample), appreciating the structure it provides on what they must do and how to document it. The audit and site visits are also valued as motivational and useful and as "putting the acid" on operators, they can also give a great sense of provide and satisfaction if well achieved.
- Larger operators can use audit results as a KPI and for local managers to demonstrate how well they are doing to management/ownership. They provide targets to achieve and then goals to do even better, which some find motivational.
- However, operators were often unsure whether an accreditation had (or would) impact customer perceptions or demand, some feeling it would make a difference others less sure but feeling it would do no harm and helped them achieve and prove they operate to a good international level standard.
- Others questioned the value in terms of both the cost and whether anyone actually noticed. Documentation intense processes do not suit some smaller operators who felt they are aimed at more corporate organisations that have the time/resource or aptitude for that kind of compliance approach.

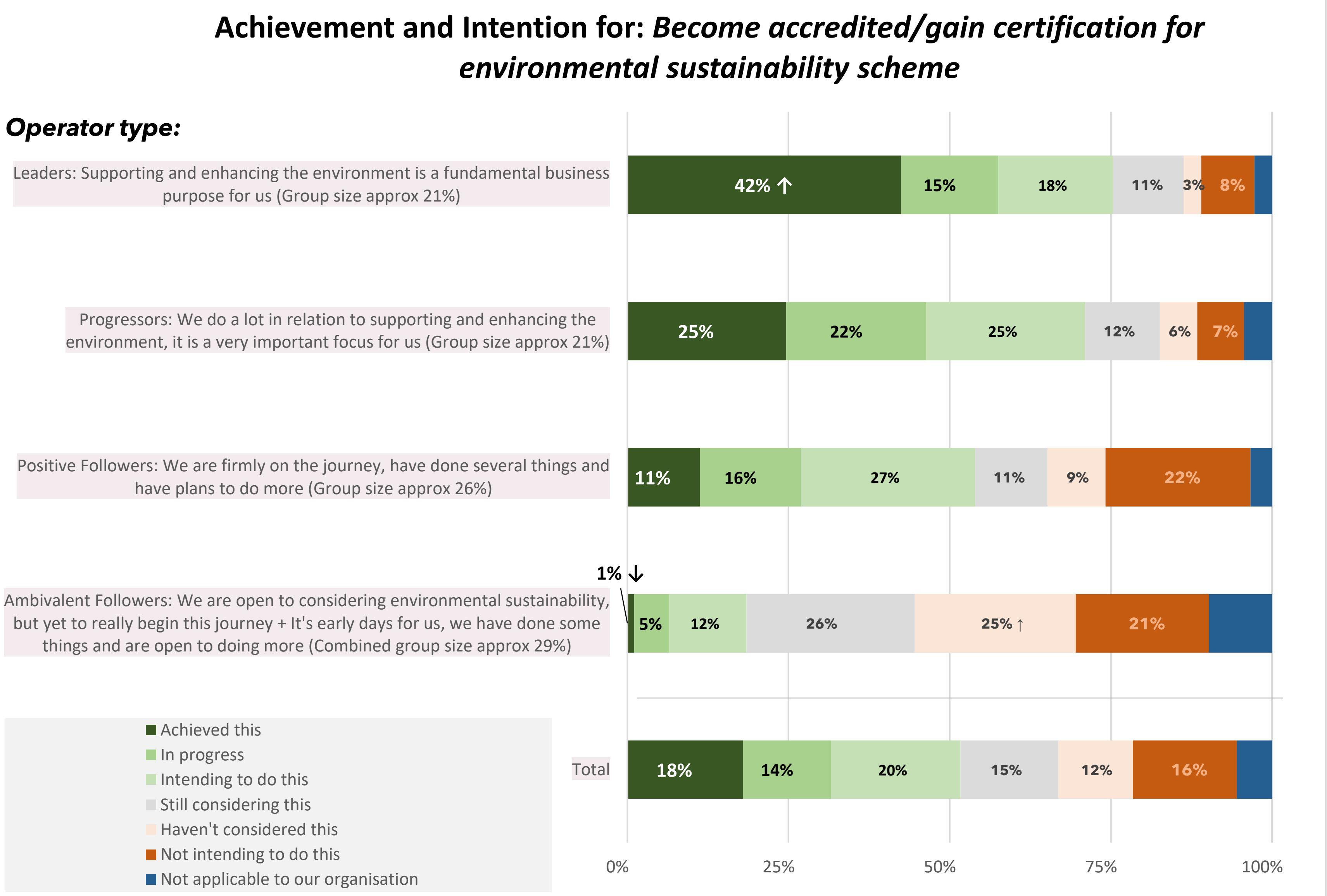
We have the Qualmark silver rating. We've got it because we tick enough boxes and being part of Qualmark that's an encouraging thing. We certainly want to keep it, so we're working on keeping that. Having Qualmark is probably just motivation that it's an internationally recognisable entity that provides a standard that people internationally trust. [Medium sized accommodation operator; Nelson-Marlborough, Progressing]

We have Qualmark Gold. I like the audit, it makes you act, it provided the pressure. We earned that certification! It is a bit of a badge of pride, we'll keep it up. I'm not sure what value it provides to customers, awareness of it could be improved. We found that the value is dependent on the auditor, we had an accomplished business-person, he held us to task, but knew our business. He was great to talk things through with. [Medium sized activity operator; National, Progressing]

Operator Types Vary in their Accreditation Progress

Achievement and progress on accreditation/certification are higher in those operator types with more stated commitment to environmental support. Positive Followers and Progressors also show greater intention - offering more immediate potential.

Further down the decision journey - a significant proportion of Ambivalent Followers are still considering or haven't yet considered accreditation (but haven't rejected it).



Accreditation Intention

From the survey, the pipeline of operators with potential to become accredited in some way appears substantial.

Patterns of achievement and intention appear to be more related to disposition towards environmental support than correlated with sub-sector or revenue level. Though some correlation with firm size by number of FTEs is evident – perhaps reflecting governance financial capacity.

- **1/3: 1/3: 1/3**….Overall, in the sector survey* just over one third of organisations have achieved an accreditation or have it in progress; a further 20% say they are intending to gain an accreditation; and another 15% are still considering whether to or not. This is **a pipeline of over one third of organisations that have some intent or are at least still open to embarking on an accreditation journey**. A further third are *not* intending to become accredited, have *not* considered it, or it is not relevant to their organization.

- Whilst proportions of survey respondents that have achieved or are in progress with accreditation trend higher among firms in higher revenue brackets (23% in <$100k to 37% in $10m plus), levels of *intention* to become accredited are fairly similar at around 20%-25% across all revenue levels.

- Levels of achieved, or in progress increase with firm size by number of FTEs, from 18% for sole operators to 51% for those with 50+ employees; with a step change from organisations with 6-10 FTEs or more (having 37% and upwards). This highlights that organisations with up to 5 FTEs may find accreditation most challenging. Smaller firms of 2-5 FTEs, show highest levels of *not* intending to pursue accreditation (29% compared to 16% overall). Again, levels of *intention* to pursue accreditation are fairly consistent by number of FTEs at around 20%-25%.

- Survey results for progress and intention on accreditation don't have any notable patterns by sub-sector, as base sizes are too small to support statistical comparison – except that accommodation providers and activities and attraction operators show similar levels of achievement, in progress and intention (at around 50% combined) and non intention (at around 18%-20%) and tour operators show higher levels of achievement/in progress/intend (at 61%) and lower non intention (7%) - these differences are not statistically significant however.

** As noted, the sector survey potentially skews somewhat to those more orientated towards with environmentally supportive activities.*

Regulation and Compliance

Compliance models or the establishment of minimum standards would work for some, as a clear framework of expectations, to better ensure adoption of sustainable and/or regenerative practices and provide a framework of what to do and access to how to do it – this could **motivate** and **facilitate** action and potentially reward achievement - **reinforce**.

- There is some support for regulated minimum standards among operators as a motivating factor - much in the way that health and safety standards are a requirement to run a business. This was seen by some as useful to set a baseline level of requirement and compliance, and as a motivator/call to action.
- Regulation would ensure a level playing field, which is important to some, so that any investment made would also be required to be made by their competitors (no freeriders).

> *I think anybody with common sense knows that that's a good thing to look after the environment but we're running a business, and I can't see the directors getting on board with such things. I think for us and probably a lot of people and small businesses you need to legislate. [Small transport operator; Auckland, Considering/waiting]*

> *I think there's got to be broad ballpark regulations that are for the betterment of sustainability whether people like it or not, that something has to happen. [Small, allied services business; Auckland, Progressing]*

- Some of those who would be reluctant to make any investment in environmentally sustainable and/or regenerative practices acknowledge that they would do so only when required to, in order to continue operating.

> *If it's regulatory then obviously you do what you have to do. It's like the Health and Safety statements. You know, it's not really a motivating factor, you do it because you have to do it. [Small accommodation operator; Rotorua, Progressing]*

Regulation and Compliance

Models of compliance or the establishment of minimum standards will be most effective and acceptable if specific and tailored to operator types (industry and scale) with reasonable timeframes and progress rates.

Implementation would need careful design so as not to disadvantage smaller operators with lower capacity both to act and for governance activities – the disproportionate burden of compliance.

- There is an assumption that any compliance model would have specificity which would define a clear framework of expectations and requirements. This would may also work for organisations where staff on the ground may need a catalyst to get attention/traction with owners/management.

  Comments include ensuring there is:

  - Reasonable notice
  - Realistic, reasonable requirements
  - Stair-cased transitions
  - Normalised standards
  - Acknowledgement of differing sectoral situations
  - Acknowledgement of more limited financial and management capacities of smaller businesses
  - Minimising paperwork

  [some mandatory things that a business of this type has to do?] *I think it would be good, as long as there's a bit of a grace period to get everything up and running... 'Cause as a hotelier, you know, when your liquor license or your food license or your building license is up, you wanna make sure everything's right anyway..... I wouldn't have a problem with at if there was mandated service practices. I think, as long as it's reasonable [Medium sized accommodation provider; Auckland, Considering/waiting]*

- Some see this type of compliance model in a positive and enabling light – assisting with providing consistent clarity of expectations and a way to measure progress.

  It would be great to have one single point where everyone could make a commitment, set goals and have their sustainable actions assessed according to their individual situations. [Survey respondent, Progressing]

  I think penalising people is never going to be a great thing, but if there were benefits of meeting targets or doing whatever, I think that would certainly be a great thing … like tax breaks. [Small, activities & attractions; Taupo, Progressing]

Regulation and Compliance

It will be challenging to handle so as not to undermine greater achievement, or acknowledge the work already done or planned, or to undermine the potential for engagement and development of locally driven initiatives.

Best processes for some wouldn't be too intensively document based.

- Others reject the idea as too paternalistic, preferring central government to set the expectations and support and enable, rather than compel and enforce.
- Local action and collaboration was advocated by some with concerns about central level overarching regulation or compliance that may not make sense locally, not be cost efficient, and be potentially susceptible to just lip-service levels of compliance.
- Some expressed concerned about the burden of compliance (costs and time) and its potentially disproportionate impact on smaller businesses.

Please do not force operators into another audit. We cannot afford it. We do not have time for it. It might be OK for large businesses who have money behind them or Iwi backing, with lots of staff. But small family-owned businesses have no extra time as it is. [Survey respondent, Considering/waiting]

Please don't make this compulsory. All you will do is create compliance costs for operators, and the money for that will come out of what they are already putting into their own programs.

SMEs can't do this on their own. Government needs to step up and help upgrade power infrastructure to enable EV uptake. We don't need more complexity or compliance, we are already drowning in paperwork and it's just another thing for exhausted SME owners to deal with. [Survey respondent, Considering/waiting]

- In contrast, it is also evident that some operators don't really feel that environmental sustainability is their responsibility, nor that it should be a cost to their business or a priority. In this context, the idea that most of the sector will self-motivate and regulate seems optimistic.

Regulation and Compliance

- The sector survey data also shows a mix of views on measures that describe reporting, or activity compliance, with polarisation at the strong agreement and rejection levels.
- There is however a clear net proportion in support or neutral on these sentiment measures. Support is shown by around half of respondents with rejection (disagreement) levels ranging from 1 in 5 to 1 in 3.5.
- Notably, a relevant measure (..useful if *environmental support formalised like H&S, with requirements, disclosures and audits*) shows 58% agreeing it would be useful. Sole operators (one FTE) were the only group with less than half showing support (under 50% total agreement) at 32%.

Survey measures	Strongly Agree	Total Agree	Total Disagree
A: It would be useful if environmental support were more formalised like health and safety, with clear requirements of organisations, disclosures and audits*	21%	**58%**	20%
B: Businesses should be required to disclose carbon emissions and their environmental policy	24%	46%	25%
C: Businesses should be required to report on what they do to support biodiversity	25%	46%	28%
D: Tourism businesses should have to gain environmental sustainability certification, or accreditation	24%	**47%**	29%

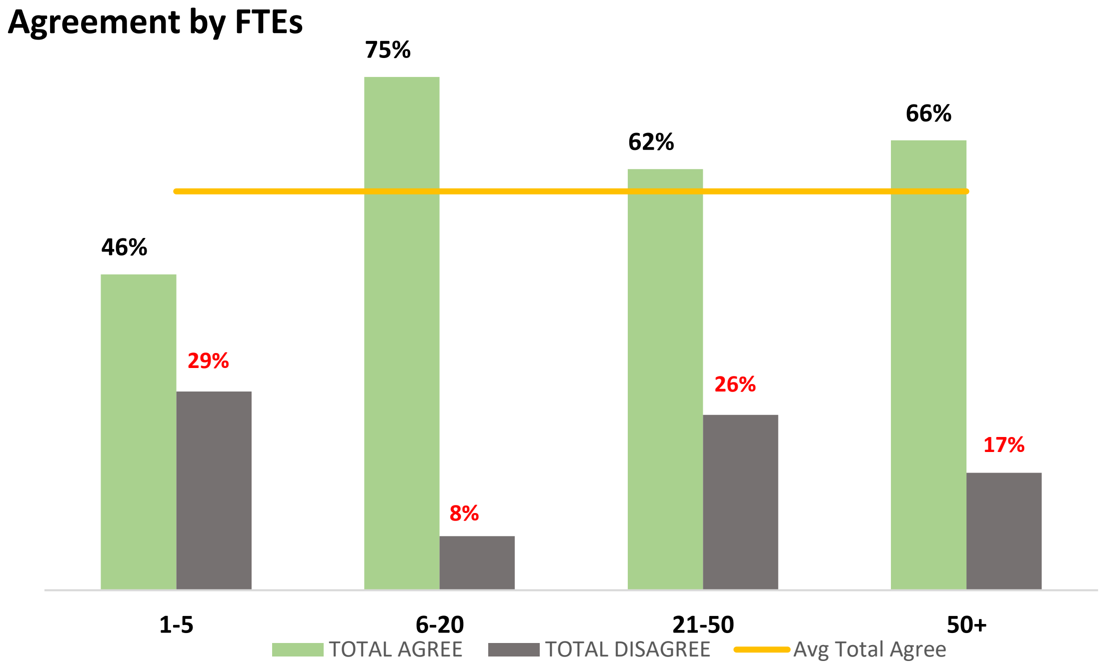
- Around one third (32%) of organisations surveyed had made progress in this area (18% achieved an accreditation/certification and a further 14% were in-progress).

Source: Survey of Tourism Sector – Base sizes: A=338; B, C, D=349
** Rating scales differ for question A – so Total Agree ratings not directly comparable.*

Usefulness of Formalising Environmental Support.

Statement Agreement: It would be useful if environmental support were more formalised like health and safety, with clear requirements of organisations, disclosures and audits

- As shown, agreement levels are lowest for organisations with 1-5 EFTs. Those with 6-20 EFTs show highest levels of agreement.
- (Not shown). Agreement levels are fairly consistent across operator types at between 51%-58%, the exception being a higher result for those with sustainability as fundamental purpose at 72%.
- Results by operator industry type are inconclusive (due to low sample sizes).
- Māori operators show higher levels of agreement (61% compared to 46% for non-Māori) - but the sample base is very small so this is a qualitative result rather than statistical.



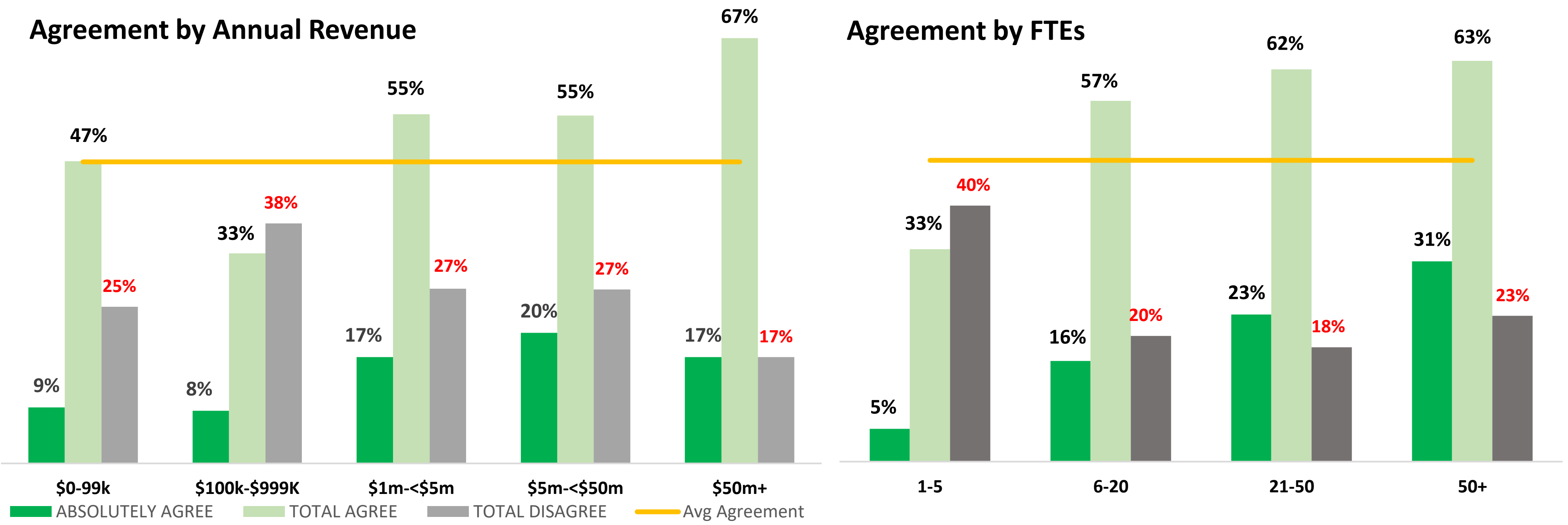
Source: Survey of Tourism Sector – Question Base=338. Results by category depicted are not statistically significantly different from the average, except that 1-5 EFT group has s. significant lower result.

Compulsory Accreditation?

Just under half those surveyed agree with some type of mandatory accreditation (47%).

Those with fewest FTEs show least support.

Statement Agreement: *Tourism businesses should have to gain environmental sustainability certification, or accreditation*



- As shown, agreement levels show an increasing trend by revenue level *and* by EFTs – with smaller organisations having lower agreement levels.
- As expected (not shown), agreement levels increase with the level of commitment expressed by operator types, from 31% agreement for those *yet to begin* to 62% for those with *sustainability as fundamental purpose*.
- Results by operator industry type are inconclusive (due to low sample sizes).

Source: Survey of Tourism Sector – Base=349. Results by category depicted are not statistically significantly different from the average but show useful trends. (Smallest EFT group has s. significant lower results to larger organisations; the $100-999K has lower results than the $1m-$<$50m categories)

Literature on Regulation and Compliance

The literature review sourced one study that had contradictory levels of support of legislation as an effective behaviour change intervention. Gössling and Scott (2018)* found numerous statements of support for legislative action to accelerate sustainable action in the tourism sector. One interviewee stated that "to rely on industry is a leap of faith", with another arguing that "we cannot let the sector self-regulate".

Several leaders in the study framed government enforced mitigation targets and measures as a way to 'level the playing field' across the industry. Along with restrictive legislative measures, leaders also saw incentives and reward systems as valid mechanisms to reduce emissions. Though other leaders interviewed disagreed.

Other regulatory based initiatives in the literature are:

Zero Emissions Fjords, Norway
This initiative requires zero emissions from cruise ships, tourist boats and ferries in world heritage fjords in Norway by 2026.

MedECA (proposal that could come into force January 2025)
Proposal to designate the Mediterranean Sea as an emission control area (ECA) for sulphur oxides.

Short-haul flight ban, France
Removal of short flights where high-speed rail transport is available and would take less than 2.5 hours.

The examples cited relate to controls on types of carbon polluting activity, and so perhaps differ from regulation requiring operators to do a range of more sustainable/supportive things within their businesses.

Nevertheless, they point to the need sometimes for compliance models to encourage and accelerate behaviours of high perceived impact where people are slow to adopt and not incentivised to change.

*The decarbonisation impasse: global tourism leaders' views on climate change mitigation. Gossling, S. & Scott, D. (2018). Journal of Sustainable Tourism, 26.

Regenerative Environmental Activity

Can be hard to pin down and for some, can be hard to reconcile with their day-to-day business.

- Some operators struggle to connect their business activity and responsibility with environmental impacts, the concept of a regenerative approach to the environment can then be even harder to reconcile – even among those that are sympathetic to the environment.
- Often operators don't really understand what a regenerative approach would involve for their business; what activities or contribution, how much? They may be willing, but it just isn't clear what to do next.
- People often feel it is about supporting compromised environments, planting, clearing – work in the field. This can be a hard direction to go in, if it is not your natural inclination, or you have no experience and may not fit well with day-to-day capacity and operations.
- Asking people to work on sustainability in their business is tangible and their business is an area they are expert in – regenerative activity is harder to connect with and outside their sphere of familiarity and expertise – so is much harder and riskier territory to engage with.

Regenerative Environmental Activity

Local activity is most motivational but is harder in cities.

Local resource, expertise and connections are also often felt to already be in place.

- Whilst some have no familiarity and little understanding of regenerative approaches, other have experience, expertise and clear views.
- Some note that there is often no shortage of volunteer labour already in their area (rural/provincial areas), willing to help with regenerative fieldwork, but that it needs applying carefully - coordinating and doing well *"not just about planting a few trees"*
- Some have clear ideas and local expertise. For example, one operator, very familiar with environmental work in their area, notes that nationally there are 12 community trusts that have very substantial financial assets, thorough processes for supporting projects, allocating funding and evaluating impacts and, by definition, have strong local understanding and connections. They felt that these organisations were ideally placed to quickly and expediently channel funding to the places where it is most urgently needed. in a low risk and effective way, that local tourism operators could easily and confidently connect with.
- Some operators also note that if this work needs to be done at scale, then a visitor levy makes sense to contribute to funding initiatives that operators can then be involved in and share with their customers. Others, are wary of levies and their potential impacts on demand. Those in favour tend to feel that the incremental charge to visitors is negligible in terms of overall expenditures and will not deter the kind of visitors we seek i.e. those who wish to contribute and support, not extract, and have resources - especially if a clear story is built around the purpose and use of the funds.
- The connection between supporting both people and place was noted in terms of regenerative activities by some participants, that they are intertwined and that is perhaps a tangible and key part of the value.

Local Regenerative Opportunities

Making it easy for operators to participate in or support regenerative initiatives in their local area – in the same way that many contribute to the community, make donations, sponsor and so on. Providing a manageable, accessible and tangible opportunity to contribute.

- Operators being provided with local opportunities to contribute to environmental regeneration through programmes managed or organised by external organisations/groups, that they can tap into and that are ideally endorsed in terms of their regenerative contribution and easy to connect with and promote or describe to visitors.

[A regenerative activity would] need to be really coordinated properly and be efficient. Because, at the end of the day, businesses if they don't make money, go bust…So, if you're doing something that isn't making you money there needs to be some pretty good justification for it….also it needs to be coordinated and planned because most smaller businesses like us just haven't got the time to do that….but if people say, listen, there's this project would you like to be involved? For sure, I'd go, yeah. [Medium-sized accommodation and activities operator; Queenstown Lakes, Considering/waiting]

If we did have carbon emission trading for regenerative forests, I think that leads us down the path of telling a good story, rather than just going oh we'll just put some pine trees up and that'll be fine. . [Small activities & attractions; Whanganui-Taranaki, Progressing]

You feel good about giving something back to the community... to go out and plant trees is something that wouldn't happen realistically, but if I could provide free transport, I could do that... You've got to micro things down so people understand it in their world. Rather than some great initiative, it's how does that relate to me? Then they can actually put themselves in the picture and think 'Wow, actually I can see how this could happen'. [Small transport operator; Wellington, Considering/waiting]

Leveraging the Social Aspects

It seems some of those not so intrinsically motivated towards environmental sustainability are more likely engage with and be influenced by connections to people and to community benefits - motivate, and reinforce.

He tangata, he tangata, he tangata.

- Tourism businesses might be about enabling visitors to access our beautiful country – but they are often **people businesses primarily**. Operators often mention that the environment and social support are intertwined.
- Life events, such as becoming a parent and considering the legacy for their children can be a motivating, moment of truth.
- If environmental sustainability is not a strong personal driver, or seems not so relevant or understandable, the challenge is to make the need more relatable to stimulate action.
- There is a **tendency to prioritise more immediate human concerns**, such as ensuring financial sustainability (for family, employees), focusing on customer satisfaction and looking after staff, supporting the local community.
- How can we make this mahi more about people:
    - Support **connection** – people seek belonging - to a community/group
    - Reinforcing this is about **caring for the future of loved ones**, the next generation, loved places
    - **Protecting** our wellbeing, our security, our status
    - Joining to **work for our community**, for purpose
    - **Mentors and navigators** bring a human face and can connect people to others
- It is human nature to want to **feel happy, proud, part of something, acknowledged**.
- Intergenerational thinking – for your children – we **don't want to be the generation that didn't act.**

Online Workshop Key Findings

- An online workshop was conducted with a group of operators that had made some progress towards environmental sustainability but acknowledged that they were still on the journey. Our facilitators purposely avoided mentioning terms like sustainability in the workshop, as we were keen to see whether these ideas would be self-prompted, or what other values might be expressed.
- There was a lot of positivity around why people worked in the tourism space. However, it proved difficult, if not impossible, for the participants to maintain this positive outlook throughout the workshop. This was particularly evident as soon as financial or regulatory interventions or challenges were mentioned.
- A lot of the joy was expressed by participants around "being outdoors" and especially helping people (visitors) to enjoy themselves also enjoying building a team of staff that enjoy and are good at their roles, but the participants did not explicitly link this to ecological issues (being more focused on the people aspects).

- We tested responses to a range of interventions and found wide ranging views, especially for tourist taxation and the concept of high and low tourist value in terms of potential expenditure.
- A general distrust of government and regulation was expressed. Paradoxically, so was the desire for more regional support.
- In certain regions (e.g. Wanaka, Queenstown), community engagement was seen as integral to how participants business operated ("assumed this was business as usual"). Operators recognised the opportunity to pull together disconnected community initiatives but were wary of centralisation.
- There were **varying opinions on the value of certifications**, ranging from enthusiasm to reticence, especially around the review or audit processes. In the survey over half (58%) were positive they could be useful and 47% agree they should be compulsory.
- Despite expressing a range of frustrations, many participants remained hopeful about the future of tourism. They expressed the "Need to look to small businesses to come up with solutions that will see us into the future“

Overall, the workshop highlighted that participants acknowledged the expectation to address environmental sustainability within their businesses and were active in their approaches to various degrees. This was not a core element of participants’ purpose, or the enjoyment they gained from their operations. Local action and collaboration was advocated, with concerns about central level overarching regulation or compliance that may not make sense locally, nor be perceived as cost efficient. Some concern about whether this would be enough for the planet was expressed, others felt optimistic that NZ was in good shape environmentally.

Barriers and Potential Motivators by Operator Type I

Type & disposition	Disposition / values / beliefs	Barriers to (further) progress	Motivations	Solutions to explore
Leaders Fundamental to business *(21% in survey)*	Passionate nature lovers Strong connection to whenua /mauri Prioritise the natural environment Free-thinkers Growth and profit are lower prioritiy Engaged in regenerative practices Important to know carbon footprint	*Feel we are doing all we reasonably can (plateaued – done a lot)* *(Further) Investment needed* *Impact of Covid*	*Kaitiakitanga* *Desire to protect and contribute to regeneration* *Personal values and purpose* *Often highly motivated*	Financial support / incentives - to do more Guidance and advice (always eager to know more – has to be at right level as often have expertise) Opportunity to leverage expertise and passion May support formalised requirements for others
Progressors Important focus *(21% in survey)*	Support and value the natural environment Pragmatic and strategic Prioritise operational efficiencies, growth and/or profit Engaged in sustainable practices; interested in regeneration	*Feel we are doing all we reasonably can (plateaued)* *Confused about carbon measuring* *Confused about certification* *Impact of Covid*	*Want to be part of the solution* *Want to be seen as leading rather than following* *Brand alignment/development* *Keeping up with competitors* *Customer demand for environmentally sustainable and/or regenerative practices*	Guidance and advice Clear depiction of scope of possibilities and expectations for their business type Keep regenerative tourism messages coming Measure and publicise sectoral achievements Reward progress (accreditations) Accountability Mentorships
Positive followers Firmly on the journey *(26% in survey)*	Aware of the need and want to do more May be focused on the barriers Engaged in some sustainable practices	*Confused about carbon measuring* *Investment needed* *Confused about certification* *Need to prioritise financial position* *Lack of capacity/resource*	*Don't want to be 'left behind' / seen as laggards* *Funding / resourcing / incentives* *Clear, easy to access information /tools*	Guidance and advice Leverage personal values Drive norms of activity for sector/sub-sector Promotion of te ao Māori values Support creation of local movements Focus on regenerative aspects Clear, concrete 'how-to' plans Mentors and navigators/advisors Financial support / incentives

Barriers and Potential Motivators by Operator Type II

Type & disposition	Disposition / values / beliefs	Barriers to progress	Motivations	Solutions to explore
Ambivalent followers Open to considering what they can do *(19% in survey)*	May believe tourism to be a low impact sector Engaged in few sustainable practices Will be slower movers	Confused about carbon measuring Confused about green certifications Lack of capacity Need to prioritise financial position / not profitable enough Impact of Covid Unsure how business can support biodiversity Inertia – not sure what to do next May assume too small to make a difference May not really see the connection to their operation	Strong social norm pressure Market demand Incentivisation/Funding Ease, manageability and achievability Clarity of what to do Step-by-step, targeted guidance	Fostering positive social norms Bring simplicity, ease and clarity Exemplify (achievable) good practice Facilitate connections to peers (esp. local) Access to advice & support Mentors and navigators/advisors Reporting of carbon emissions Financial support / incentives
Low interest/ rejectors Do not feel a responsibility *(10% in survey)*	May be climate change cynical/ideologically opposed Don't perceive tourism to have significant impact Strongly independent Cynical about authority May be undertaking basic 'hygiene factors' Don't feel it is their role/responsibility	Avoidance Denial /lack of belief Lack of will Low capacity/resources Lack of sense of any expectation on them to act Need for autonomy over own decisions	Regulations / compliance Market conditions Funding	Provide funding Establish minimum expectations Compliance: Formalise requirements (like H & S) with clear requirements, disclosure and auditing

Summary of Motivations

Intrinsically motivated

Leaders appear not so motivated by customer demand; **more by personal values.**

- Te taiao kaitiakitanga as purpose - genuine love and respect for the environment
- Desire to contribute to regeneration; no need for positive cost-benefit equation
- Māori owned businesses that are motivated by te ao Māori and tikanga Māori.

Enabling is still important and this group still says investment holds them back from doing even more. They are a natural starting point for local level initiatives and support for others.

Extrinsically motivated

Will need external incentives, in the form of encouragement and enablement and importantly, a social-norm context to motivate. Regenerative approaches particularly will need external guidance and support as often outside their business operational sphere and experience.

- Clear, easy, accessible guidance and advice and support; Demand/revenue benefits; funding, subsidies, tax breaks and grants; customer and employer brand benefits; financial benefits/cost savings; and increasing perceptions that target market is moving in a more sustainable direction.
- To achieve an accreditation or certification; to comply with expected standards; avoid penalties/disadvantage/social shame. **Social norms:** Positive self-image rewards; Sectoral conformity - being seen as relevant; contributing, part of something, not 'out of step'.

Māori Tourism Operators

Interviews with 12 **Māori owned and operated** businesses across five regions, with one operating nationally. Types included activities & attractions; accommodation; hospitality/food & beverage; and tour operators. They included small/owner-operators, medium sized, and large/corporate organisations.

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Context

Uncertainty and a focus on immediate business needs – has not deterred the environmentally sustainable efforts of Māori-owned Tourism Operators.

The business model of most of those consulted is informed by the holistic approach of te ao Māori (the Māori worldview) enhancing both the mana and mauri of te taiao and tangata whenua.

- Māori-owned tourism operators (MTOs) spoken with demonstrated their commitment to environmental sustainability kaupapa (activities) including recycling, waste management, pest control, planting of native trees, transport sharing for manuhiri (visitors) and kaimahi (staff), delivery of business products and other carbon-reducing activities through rangatiratanga (self-determination).
- MTOs frequently identified key tikanga Māori values including, manaakitanga, kaitiakitanga, whanaungatanga and kotahitanga as underpinning their activities and decision-making processes.
- Even though many MTOs have faced loss of income, kaimahi issues and reduced manuhiri due to the enduring impacts of the COVID-19 pandemic and recent climatic events, this has not deterred their commitment to environmental sustainability. For many MTOs, this period of disruption has provided time to reflect, plan and collaborate with their local hapū, iwi, hāpori (local community) and other MTOs to enhance all areas of their business.
- A number of MTOs expressed their aspirations to reduce their carbon footprint even further by using more environmentally friendly vehicles, renewable energy sources and hospitality equipment (eg. fridges, ovens) within their business, but face barriers including the high cost to upgrade, financial uncertainty, minimal or zero funding support from the government and a lack of technological advancement and infrastructure.
- The business model of the majority of MTOs consulted is informed by the holistic approach of te ao Māori (the Māori worldview) enhancing both the mana and mauri of te taiao (nature) and tangata whenua. This approach guides them in a purposeful and sustainable manner in relation to environmental sustainability action.

Motivations

Māori-owned Tourism Operators are motivated by te ao Māori and tikanga Māori when implementing environmentally sustainable practices

Te ao Māori and traditional Māori values have a significant impact on the behaviour of MTOs and are the common thread motivating their actions in caring not only for the wellbeing of te taiao, but also for tangata whenua in a continuous relationship of reciprocity.

Kaitiakitanga

- Māori tourism operators expressed their desire to protect and care for the whenua and te taiao through their inherent role as kaitiaki (guardians) and the matauranga (knowledge) that restoration, conservation, and sustainability practices also benefits the wellbeing of people and their communities now and for future generations. For some, education is a vital component within kaitiakitanga:

> *So, there's a huge education component within our business too and we want it to start with, well it's already started with our kōhanga babies through to our kura kaupapa, so that there's a consistency of understanding about, not just their culture and history here, but the science of what is happening to our water quality, how our whenua benefits, things like that. [Small, Māori activities and accommodation operator, Rotorua, Progressing]*

- The role of kaitiaki also plays an influential role in the long-term vision and planning for Māori tourism operators.

> *Our vision is to drive [our area] towards being a self-sufficient climate-neutral community that thrives in all areas within its cultural, social, environmental and economic diversity. So, I guess that's our long-term mission – it's our hundred-year vision. That's our long-term goal and we look at that yearly and we have 10- year goals and so forth. [Medium-sized Māori tourism operator, Leader]*

Motivations (cont.)

Manaakitanga

- Manaakitanga in respect to tourism for MTOs means demonstrating care, hospitality and respect for manuhiri and is at the forefront of their offerings. It is also a vehicle for sharing traditional knowledge and values in relation to caring for te taiao and its natural resources.

> *The most important thing is how we maanaki our visitors, whoever they are, so we really uplift our visitors, they're really important to us. We're small, so every single one that comes is important. We want our visitors, whether that's school kids or international, high-end internationals, whoever they are, to have a sense of connection with us, with our culture and with the environment. [Small, Māori tourism operator, Marlborough/Nelson, Progressing]*

- Sharing the cultural narrative of local hapū or iwi inherently includes environmental sustainability and is a key aspect of manaakitanga for many MTOs as described in the excerpt below.

> *People [manuhiri], well, what they see is the cultural element, but they don't understand the story around a revitalisation of culture, of who we are and where we stand, basically. So, it is about telling that narrative, and whatever narrative those particular hapū or iwi have inside of their area. So, I think that's important. [Small, Activities & Attractions and Hospitality Māori tourism operator, Whanganui/Taranaki, Progressing]*

Kotahitanga

- Kotahitanga (the act of unity and collective action) inspires Māori tourism operators to work with iwi, hapū, local community organisations, manuhiri, government bodies and each other to achieve greater impact for the benefit of te taiao.

> *We do have sustainability collectives across each business unit. So we work very closely with organisations down there for pest eradication. We set up traps along the way where we enable our manuhiri to do sponsored trips, so they can pay for pod traps for stoats. We also work with reforestation, so we're planting native trees. [Large Māori tourism operator, Leader]*

Motivations (contd.)

- Participants also described the importance of kotahitanga for driving future planning and shared vision with iwi, hapū and other organisations to mitigate climate change:

> *We've got a climate change programme to be started up with inside of the marae and it's a marae in the middle of nowhere. And they've asked us to participate as a company because we're a high user of the marae. So, I'm not sure what that looks like yet for us, but we're planning to be involved with it. And working with all of those other organisations that have an impact on the awa (river) to make sure that everybody is on the same page. [Small, Activities & Attractions and Hospitality Māori tourism operator, Whanganui/Taranaki, Progressing]*

Whanaungatanga

- Māori tourism operators operating within te ao Māori see whakapapa (ancestral connection) between people and te taiao as inseparable and highlighted the role of whanaunagatanga (relationships) encouraging people to care for te taiao and each other. Operators demonstrated whanaungatanga by providing a sense of kinship within their business and wider community, delivering initiatives that empowered people and local communities through the learning of mātauranga Māori (Māori knowledge), shared experiences and working together.

> *We created a charity. We did this when COVID started, and it's a collective, it's a collective vehicle for others that hold [mātauranga Māori] in our area, so those are things that have been passed down from our ancestors. So that's weaving, carving, mau rākau, waka, celestial navigation, sailing waka, all these types of things. We wanted to create something where we could come together and then be able to use funds to be able to support Māori connecting and rising up in that space. And then once we're a bit stronger, we can deliver to others and share. [Small, Māori tourism operator, Marlborough/Nelson, Progressing]*

Motivations (contd.)

- Whanaungatanga was also reflected in creating future education and employment opportunities for rangatahi (youth) through enhancing their connection to te taiao and their community through mātauranga Māori:

> *It's all about the experience and providing some employment for our rangatahi that are coming through that enjoy being on the river and that's quite important. Most of our awa navigators come from what we call the wānanga (school that teaches mātauranga Māori) that we have every year on the awa. [Small, Activities & Attractions and Hospitality Māori tourism operator, Whanganui/Taranaki, Progressing]*

Specific supports that help motivate

- Understanding clear steps, small changes that can be made feel much more achievable for those who are motivated to be more sustainable but may feel overwhelmed by where to start and how big the task is.
- Strong leadership and creation of a movement that tourism operators will feel inspired to get on-board with, with socially normalised approaches and achievements.
- Operators being provided with local opportunities to contribute to environmental regeneration through programmes managed by external organisations/groups that they can tap into.

> *Not everybody has the resources to be able to make those changes. You could have the most [environmentally] sustainable company but then your staff aren't getting any work and you've put all your eggs in one basket. So, I think it's about educating people and businesses to be able to make those changes slowly. And what you could be doing now, so you could have some short-term goals, mid-term and long-term. [Medium-sized Māori tourism operator, Leader]*

> *"You look at the big mountain 'Oh I'll never climb that' but I can do 10 steps today, 20 steps the next day and eventually I'll get there. But if you look at the whole thing in one hit … what are the things you can do now with the resources you've got right now here today? Doing little steps all the time, I think it accumulates into something significant over time."*

Barriers

- Participants described a lack of investment in the tourism industry by government and key tourism bodies to support smaller tourism operators in becoming more environmentally sustainable.
- A lack of clear guidance, leadership and an effective system for achieving higher standards of environmental sustainability was emphasised by MTOs.
- MTOs highlighted a need for more funding support from the government to enable the adoption of environmentally beneficial technologies coupled with a delay in technological advancement and infrastructure to replace current technology eg. transportation vehicles, hospitality equipment such as gas ovens and fridges, electric hand-dryers and renewable energy sources such as solar power and hydrogen.
- Most MTOs spoken with are not buying into carbon offsetting through organisations such as Ekos and Toitū which are viewed as costly, time consuming and complex to initiate. Some see it as a luxury only large tourism operators can afford and would prefer to measure, offset and reduce their carbon footprint themselves within their local area.
- Financial security is prioritised over environmentally sustainable actions for a small number of Māori Tourism Operators, especially those who have recently set up their business.

> *We've changed to hybrid vehicles now, but again, that's for someone who's trying to do that, you know the government does a little bit. But it's not easy just to change. It's all very well people saying to change, you've got to pay the bills at the end of the day and that's not so easy. There's got to be some support mechanisms there and they've got the e-vehicle subsidy and things like that, but that's bugger all. [Small Māori tourism operator, Progressing]*

Barriers (cont.)

- Hospitality operators located in an urban setting feel less connected to the natural environment and aren't actively participating in regenerative activities as some in rural/natural settings. To mitigate this, they feel that contributing to their community in other ways such as providing kai to groups conducting regenerative activities or supporting schools and sports teams is a way of contributing.
- Lack of government policies to support the provision of environmentally sound packaging to MTO's, particularly in the hospitality sector, are inhibiting their ability to reduce their carbon footprint.
- Few operators perceive that there is current customer demand or expectation to be operating sustainably or regeneratively. However, more expect this to be the case in the near future, which has been a motivator for some who are progressing towards being more sustainable.
- Tourism operators feel there is a lack of clear information and guidance regarding what are reasonable expectations of them in terms of sustainability and regeneration, and how to go about implementing these initiatives. This is likely strongly linked to many having a lack of capacity and capability to undertake the necessary research and investigation to uncover the necessary information – they would prefer it to be provided in a neat package to them.
- The landscape for "green" certifications and accreditations is viewed as confusing, with operators feeling overwhelmed with options and lacking in capacity to investigate each – they would prefer support here perhaps via an endorsed or recommended option.

Until there is a strong social and/or business imperative to be regenerative, most Māori operators interviewed will require incentivising.

- Although there are leaders within the Māori tourism industry who are demonstrating the value of localised approaches and working collaboratively with iwi, hapū , local community and other Māori tourism operators for greater impact on environmental regeneration, until there is a strong social and/or business imperative to be regenerative, most other operators will require incentivising.

- For example, government and/or tourism bodies' incentives to uptake new/cleaner technologies to enable Māori tourism operators to further reduce their carbon footprint by switching vehicle fleets to electric, replacing gas with electric cooking equipment, and/or installing alternative energy such as solar panels.

Recommendations

Māori Tourism Operators

There needs to be a greater focus on supporting small to medium-sized Māori tourism operators to shift to the next level of environmental sustainability through the adoption of advanced technologies that have less impact on the environment.

MTOs have provided examples of an indigenous approach to sustainable environmental practices underpinned by te ao Māori and tikanga Māori. The holistic approach of these businesses can provide a guiding framework for all tourism operators across Aotearoa through a purposeful environmentally sustainable approach, though this will need to be applied with consideration of cultural appropriation.

Localised approaches and the building of relationships with iwi, hapū, local community and MTO leaders who are passionate and know what their community needs, has the potential to achieve greater impact. Tapping into their specialised area knowledge to inform effective planning and strategies for their local environment will be required for greater effect.

Operator Progress on Actions and Planning

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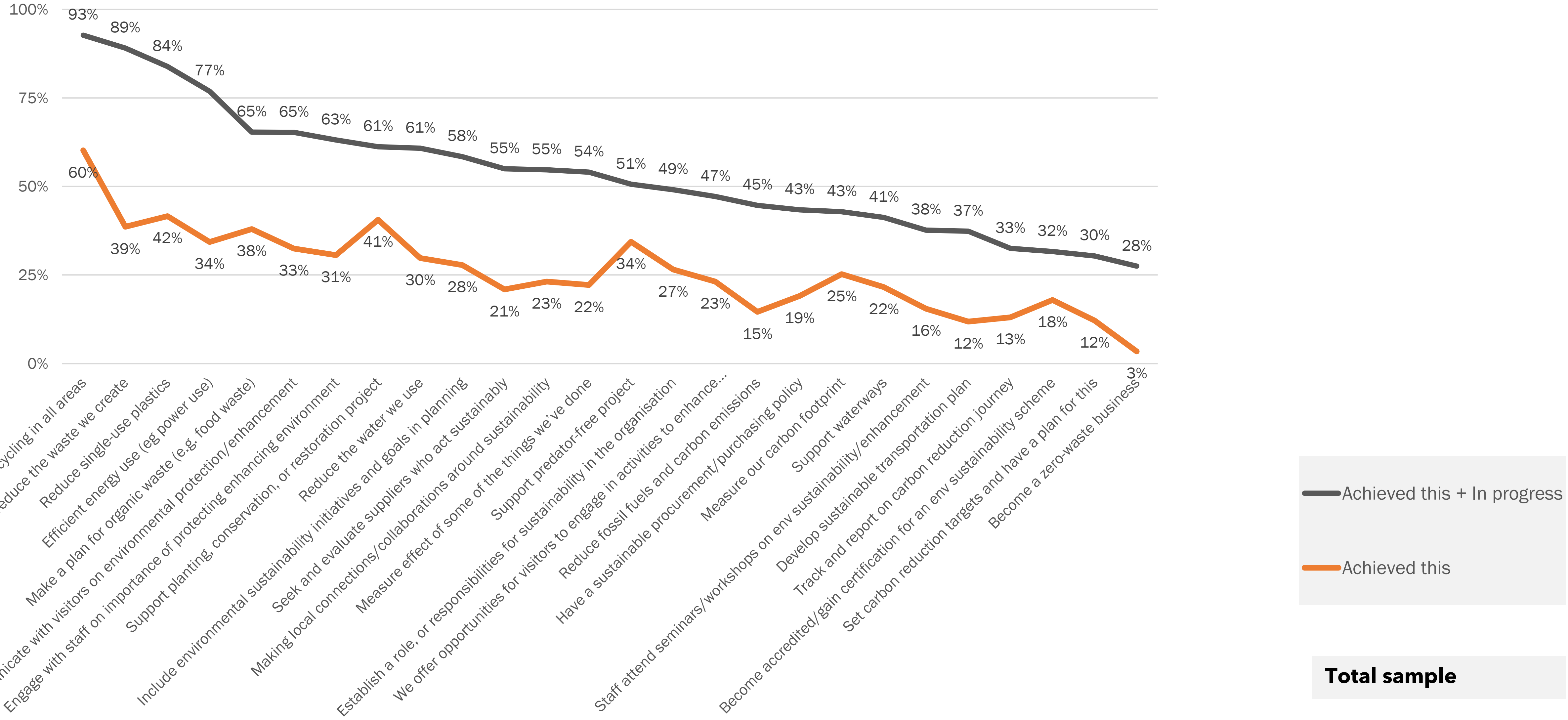
Progress and Intention to Act.

The survey of the sector measured levels at which operators felt they had achieved or were in progress for a range of potential actions.

- Overall stated levels of activity appear reasonable, of course these are broad indicators and do not quantify the extent of work undertaken and progressed. Nevertheless, the figures show broad activity.
- Higher levels of stated activity (65% plus, *achieved or in-progress*), are: introducing recycling in all areas; assessing and reducing waste created; reducing single use plastics; efficient energy use (e.g., power); having a plan for organic waste.
- Good proportions also reported they had *achieved* supporting a planting, conservation or restoration project (41%) and for supporting a predator free project (34%) – these could include action and/or financial support.
- Levels of achievement are lowest for carbon reduction journey tracking and reporting; gaining accreditation or a certification; setting targets for carbon and having a reduction plan and are lowest for becoming a zero-waste business. These areas reflect aspects mentioned as daunting, confusing or uncertain in discussions with operators.
- Analysing this information by four environmental orientation types shows the difference between the top two groups most progressed and inclined towards operating environmentally supportively and those groups who are still progressing or at the early stages of their response.

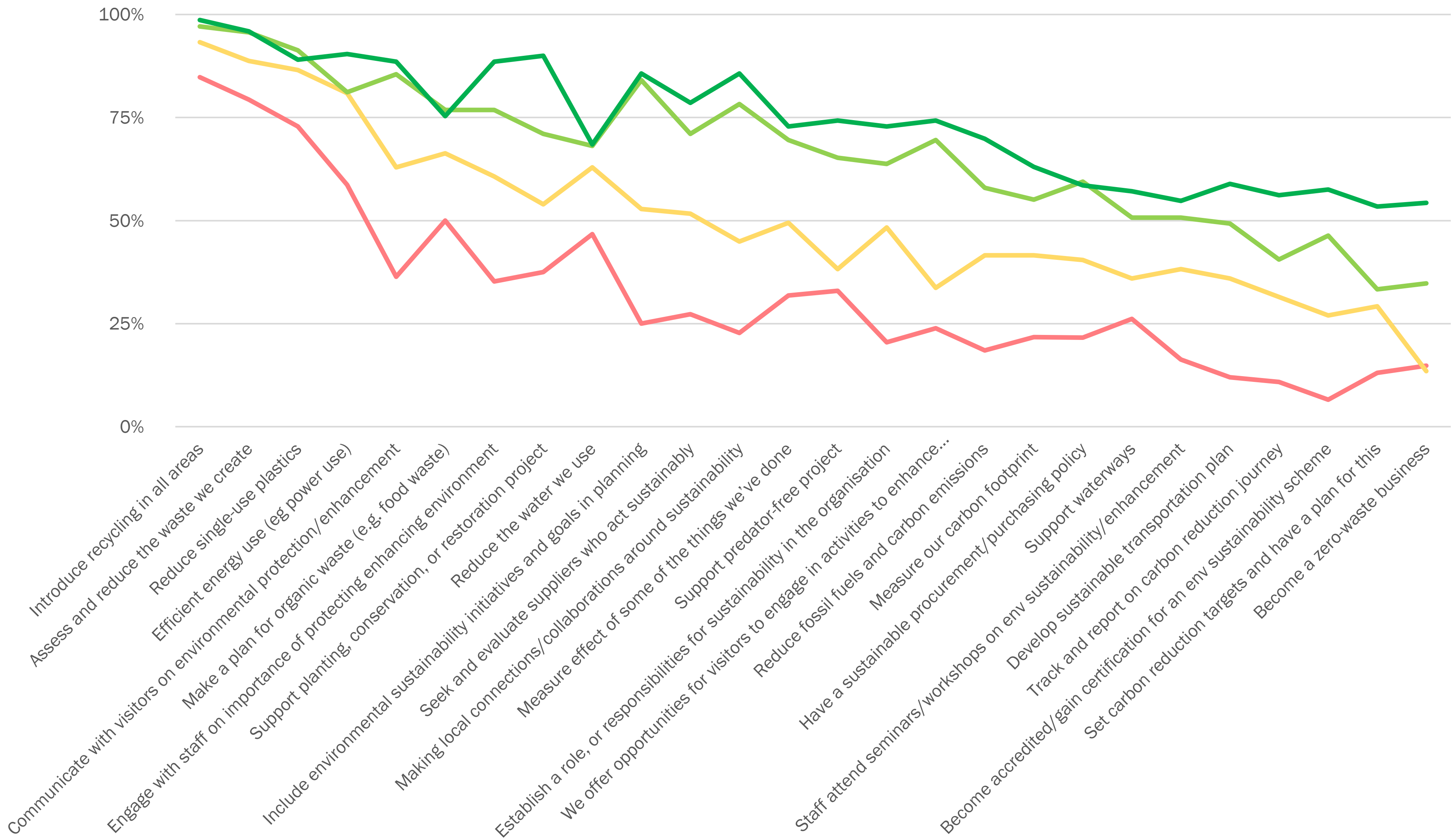
Progress on Actions



Total sample

Source: Survey of Tourism Sector – Base=320

Progress on Actions Across 4 Operator Types



Progress is consistently highest for recycling and waste initiatives, energy use – then reduces and differences between operator orientation types become more apparent.

- Early days, done some things open to doing more. + Open to considering env sustainability, yet to really begin.
- Firmly on journey, done several things, plans to do more.
- Do a lot to support and enhance the env, very important focus.
- Fundamental business purpose for us

Chart shows: % Achieved + In progress

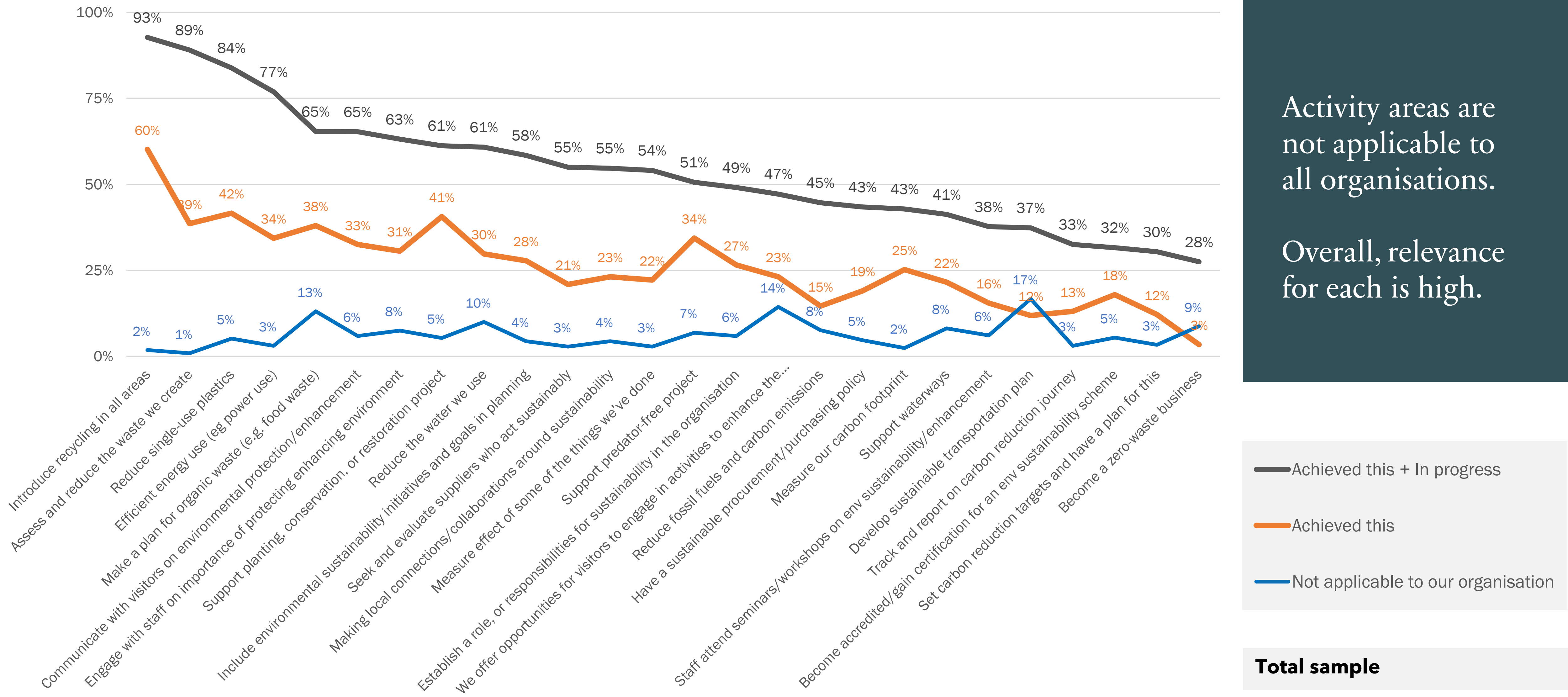
Source: Survey of Tourism Sector – Base=320

Progress level ratio between the top 2 and bottom 2 operator types shows progress gaps. Ranking identifies the areas where those earlier in the journey have most to achieve and may need most support.

Chart shows: Ratio of Achieved + In progress Levels of Lowest 2 Operator Types to Highest 2 Operator Types

Source: Survey of Tourism Sector – Base=320

Progress on Actions

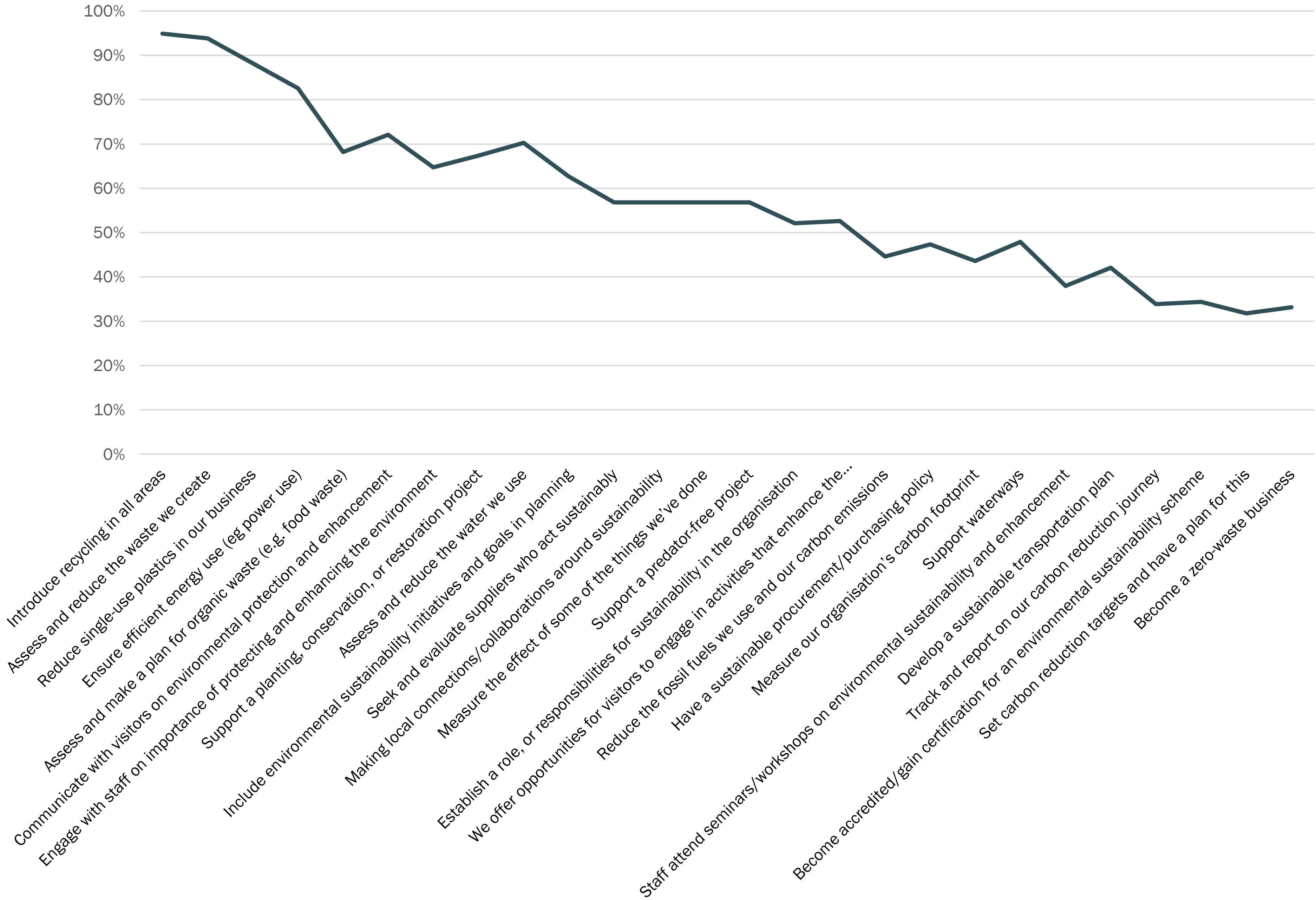


Activity areas are not applicable to all organisations.

Overall, relevance for each is high.

Total sample

Source: Survey of Tourism Sector – Base=320

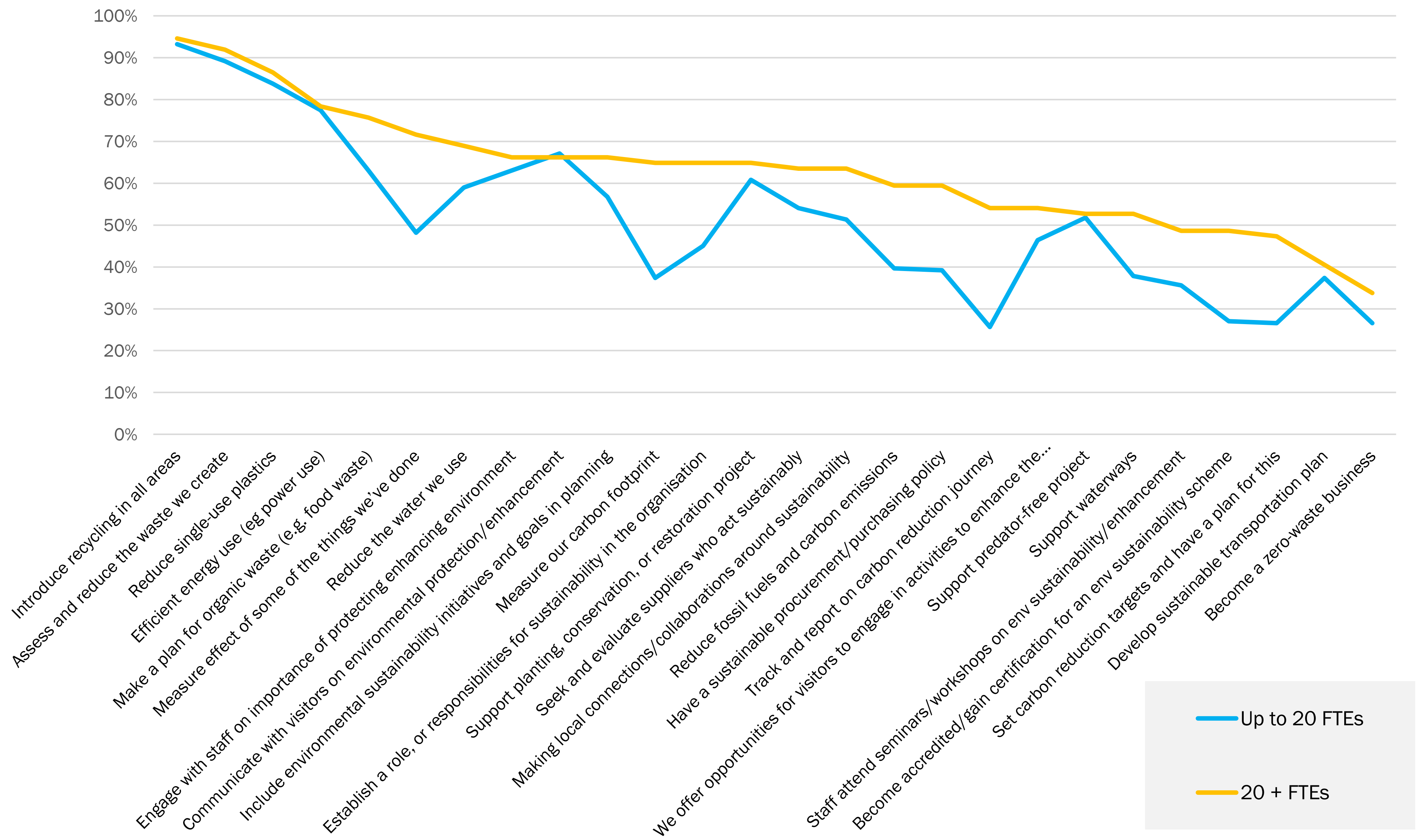


Progress by those agreeing : *We feel we are doing all we reasonably can in terms of supporting the environment* (60% of those surveyed).

This shows many areas where action is yet to be started. Response to the question may reflect lack of understanding and connection with expectations, or capacity, or feelings of inability to do more.

% Achieved + In progress

Progress by Size (FTEs)



Progress by smaller firms is quite similar to those with more resource (6-20 EFTs), with clear differences on carbon reduction planning and measurement and environmental accreditation or certification.

% Achieved + In progress

Discussion

Behavioural Change Considerations

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Behavioural Change Context

It is not easy to change people's behaviour, get them to re-think/adjust their business model, or to act at scale ….

People are complex, we like to put them into categories and explain their behaviours simply, but often the reality is more complicated with behaviours quite contextual and not straightforward to change.

Potentially influential behavioural science considerations, in terms of behaviour patterns, **biases and contexts that support inaction, or avoidance**, are described below. These can be consciously held, but are often unconscious:

- **Bias towards now** - People tend to overvalue the current, in some ways we are designed to instinctively live in and for the present and near present and find it harder to imagine what the future will or could look like.
- **Procrastination or deferred engagement** and decision making - people put off, or park things they don't really want to do, or defer things they want to do thoroughly and well… often preferring the more immediate and more psychologically rewarding tasks and initiatives, things that develop financial security (the enabler), dealing with the day-to day challenges of any operation, developing efficiencies.
- **Status quo bias** - people draw comfort from current situations that they have good understanding and control of, particularly if they are working well. **Changing approaches, introducing new factors, means taking a risk – and most of us are naturally cautious** and careful, at least a little risk averse and more sensitive to potential losses than possible gains. In this context, gains or improvements over the current are not that clear and certainly personal gains seem only apparent in relation to personal norms and values. **Status quo bias and inertia are challenging to overcome.**
- **Deliberate ignorance** and **ambiguity bias** are acknowledged responses to information or concepts that unsettle or create uncertainty, or perceived, or unquantified risk. Reasons for deliberate ignorance can include regulation of negative emotions, avoidance of personal conflict, scepticism about the information compiled, and rejection of the controlling authority's domain over the information.
- Generally, **omission bias** says that we have a **tendency to judge harmful actions** as wrong, **more strongly than harmful in-actions** even if the consequences are similar. If people are not, or do not feel they are causing much negative environmental impact, then it may be comfortable to be slow to act.
- This is about encouraging operators to act to prevent and redress harm, so essentially stopping 'harmful' behaviours and adopting more actively beneficial behaviours. The beneficiaries are the planet and future generations and operators don't necessarily see their current behaviours as harmful, or at least not outside of the social norms of what other operators, other businesses, other sectors are doing.
- **Rewards and tangible progress can be key motivators** of sustained behaviour change. Currently it is **hard to easily see return on efforts** when supporting the environment - so no clear and evident reward for effort/change.

The psychology of engaging with climate change is renowned as a particularly complex and difficult problem, that is often avoided*.

The wider societal response is relevant contextually and currently lacks urgency.

"We have come to believe we are entitled to be spared the hassle of caring at this detailed level.."*

- Gaining traction among tourism operators in relation to environmentally sustainable and regenerative activity at a macro level can be considered to have a broader context of the psychological response to climate change and its effects generally.
- Climate change and the psychology of response is a serious emotional issue generally - people struggle. It is a great threat and as such can provoke anxiety and a flight, fight or freeze response. How people present on the outside may not necessarily always reflect their true emotions – that individuals may not even be aware of themselves.
- The bottom line that 'today is as good as it gets climate-wise' and the future is already irreversibly compromised, is very difficult, even unfaceable. One which global and local populations often do not engage with, to the extent that we do not prioritise action on this above our current ways of life and comforts.
- The brain's desire to resolve anxiety and distress can lead to denial or fatalism:
  - it's not a big deal, someone else will deal with it
  - it's too late there's nothing to be done….
- **Action on climate change is a concern for New Zealanders, but not an immediate priority it seems**. For a range of reasons climate change mitigation plays second fiddle to more tangible risks and trends in our communities and the economy. Recent population surveys** show 82% of New Zealanders say they are worried about the impacts of climate change that are already being seen globally (80% locally). However, more immediate pressures are felt more keenly, with just under a quarter (23%) of New Zealanders citing *Climate change* as one of the three most important issues they feel are facing New Zealand today – making it overall the 5th ranking item behind *Inflation/cost of living* (63%), *Crime/law and order* (40%), *Housing/costs* (31%), *Healthcare* (31%) – more human centric problems.
- As context though, New Zealanders are less likely to agree that government, business and people have a clear plan for how we're going to work together to tackle climate change than many other countries, and 64% believe NZ should do more***.
- If it is the issue that most of us prefer not to face, or know how to deal with and is not seen as urgent as other more salient matters – why should tourism operators be any different?

**Psychological Roots of the Climate Crisis – Sally Weintrobe – as covered in New Yorker article – "What to do with Climate Emotions"*
**Ipsos Issues Monitor (May 2023); ****Ipsos Global Advisor Climate Survey Report 2023*

Social norms and the collective mentality are important

- **Social norms are important** - everybody wants to belong…
- **Changing contexts (rather than minds) is often more effective in bringing about change**. Reframing to increase relevance.
- Recognised pitfalls in behaviour change include:
  - underestimating the role of social norms
  - assuming motivation is key - motivations may not be the only barrier, whether organisations/individuals have the capacity is fundamental
  - assuming people just need "more information"*
  - failure to plan effectively for the future (e.g. New Year's resolution pattern of idealised goals, but early failure):
    - inappropriate or unrealistic goals (too big, too soon, too complex…)
    - lack of structured **approach** – what change, by when, where and how
    - lack of emphasis on approaches to monitor and provide feedback – reinforcement and progress markers are important and motivating
- Strategies that arouse guilt over past activity/role, or fear about future are least likely to inspire change. **Strategies that inspire hope and action towards a positive goal are most effective**, the more connected the better e.g., a cleaner air initiative in our community, or being part of a movement that is world leading.
- **Emotional rewards are often a core component** of successful behavioural change programmes - people need to feel happy about what they're doing, or have a greater sense of belonging, or of achievement, feel proud about their legacy and contribution and so on.
- **Rewarding achievement is often an effective motivator**. Environmental support is difficult in this context and portraying the negative consequences of inaction may not be as motivating as supporting positive action. **Legacy for future generations is an emotional reward mentioned by some participants** and fundamental in te ao Māori.

** Yale study concluded that public apathy over climate change was not related to science literacy*

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Social norms provide influence and endorsement, people follow others because it feels safer, eases decision making and we like to fit in.

Personal (organisational) Values and Image

- **Fashion** to be an early adopter, leader, ahead of the curve.
- **Right thing to do**, doing our bit/not freeloading, moral compass.
- **Authenticity/consistency with image/brand** – smart, cool, modern, well-run, contributing business.
- **Connection to nature** – intrinsic desire to protect and enhance.

Sectoral Norms

- **Provides reassurance, saves time and effort, de-risks.**
- **Following the herd**, not wanting to be out of step with the standards observed.
- **Future and trajectory of the industry,** being prepared for the future, fear of being left behind.
- **Expectations of customers, peers and staff.**
- **Māori tourism operations**.

Societal and Cultural Norms

- **Te ao Māori values** and norms in relation to te taiao.
- **Expectations of local people/the community** – may vary by location e.g. Wanaka as example of important value forming area, Auckland less so.
- **National /population** attitudes to supporting the environment and role of business.

A social norms intervention seeks to change the behaviour of a target by exposing them to the values, beliefs, attitudes or behaviours of a reference group or person.

MINDSPACE* Framework for drivers of behaviour

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Useful as a diagnostic tool in understanding the barriers and motivations and considerations for developing incentives

		Description	Comment and Research Context	Considerations for Approach
M	**Messenger**	*We are heavily influenced by who is communicating information.*	There is some cynicism around centralised government's ability to understand operator situations and local contexts. An anti-patriarchal feeling and stance is not-uncommon, a flow on effect from border management through Covid perhaps. National strategies and plans can feel remote and less relevant to smaller operators.	The **best voice is someone relatable and trusted,** a recognised expert, with authority who understands and has true empathy – peers, regional organisations?
I	**Incentives**	*Our responses to incentives are shaped by predictable mental shortcuts, such as the strong desire to avoid losses.*	People like and respond to rewards and recognition. There is a balance between motivating people with rewards or incentives and not subduing natural energy, creativity and enthusiasm for a challenge i.e. crowding out intrinsic motivations. Incentives should be applied thoughtfully and sparingly and are good as kickstarters. Sanctions and penalties can be effective in reducing unwanted behaviours.	**Small incentives can be effective in driving behaviour** and continued progress. If we have a model of behaviours sought, then these could be rewarded via incentives for individual operators, or for collectives.
N	**Norms**	*We are heavily influenced by what others do.*	People seek to belong and mostly don't want to be an outlier. The safety of the herd is evident, with operators looking to their industry peers and their social/community group to see what they feel is the norm and therefore expected of them (as it de-risks). Perceived trends in customer expectations are powerful – as the customer brings the revenue. Social norms can be both a hindrance and an enabler. Norms can be counter-productive e.g. adopting an attitude of concern for the environment but taking less/little action feels normalised.	**Create a sense of this is where the industry is going**, how progressive, successful operators are acting and where customer demand is tracking. **Describe the new paradigm and future**. The broader context of population level attitudes to environmental responsibility is also relevant.
D	**Defaults**	*Tendency to stay with the status quo and the pre-set options.*	Inertia and status quo bias are evident and work against change adoption and speed of progress.	Consider **nudges that make change easier, whilst still allowing freedom of choice.** Defaults that are opt-out rather than opt-in perhaps, or set the required minimum standard through the vision and with examples, or as a compliance requirement.

**MINDSPACE Framework: Influencing behaviour through public policy.* Institute for Government UK, 2010.

MINDSPACE Framework for drivers of behaviour

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		Description	Comment and Research Context	Considerations for Approach
S	**Salience**	*Our attention is drawn to prominent and emotionally striking things that seem relevant to us.*	This is about getting people's attention. Understandably operators are often most strongly drawn to the challenges of rebuilding the previous comfortable and profitable status-quo and growth trajectory. Care for the environment can easily be de-prioritised as there are lower apparent benefits, or immediate relevance. Especially when the environment seems unchanged locally. Extreme weather events were an example of climate change impacts becoming more salient and 'real' for a time, but they seem soon forgotten.	At some point there will be the need to make environmental support more prominent again. Simple information, and clear expectations work best. **Showing inaction as an active choice with consequences may help** as may reducing the salience of short-term costs in comparison to long term effects/benefits.
P	**Priming**	*Our actions are often influenced by subconscious cues – words and image associations.*	Currently the auto-associations with an operator response to the environment may be more limited to easier wins (waste management, power use). Regenerative activity may conjure tree planting mainly.	Ensure communications reinforce the imagery and associations being ideally sought.
A	**Affect**	*Our actions can be powerfully shaped by our emotional associations and emotional state and System 1 thinking.*	Some operators are still in recovery, feel under pressure and still somewhat uncertain about the future and what the new normal may be. Contributing resource and funds to developing a regenerative response may intuitively feel a lower priority at this point. Perceived business risks outweigh wider environmental degradation risks.	**Counter the default argument that this can wait.** Consider upping the risks of delay through future scenarios and business impacts and community and people impacts. **Doing this for our children and future generations** is a motivating purpose.
C	**Commitment**	*We seek to be consistent with our public promises and to reciprocate actions.*	Procrastination and deprioritisation of environmental planning and action is evident. Commitments are more achievable if realistic and stepped, rather than grand.	Commitments with consequences if broken have most effect. **Audits motivate and hold people to account. Reciprocity can be very influential** if a social or personal contract has been made.
E	**Ego**	*We act in ways that make us feel better about ourselves.*	Doing the right thing, being on trend as a smart, modern operator and more of a leader than a laggard all support positive personal/business values. Rewards for achievement are also relevant.	Creating a social norm that defines and depicts **smart operators as being active in this space, prioritising environmental and regenerative practices.** Provide information to show when people are improving or ahead of the average. **Awards for achievement**.

Conclusions

Key Themes Evident

- There are a range of views and orientations towards the role of operators in environmental support and from this a range of activity levels and intentions.
- Even where commitment is evident, action may be down the list of current priorities, or people may feel comfortable with their current sustainability actions and approaches, which aren't yet regenerative.
- Uncertainty is a demotivator – uncertainty of purpose, of expectations, and of impact feeds reliance on the status quo and reduces proactivity. Operators not intrinsically motivated often lacked a sense of what was expected of them and where to start.
- Some operators feel they are already doing pretty much what they reasonably can to be sustainable in relation to their perceived impacts, and they may well be – as they don't necessarily feel like they are taking very much.
- Some can see the potential of re-imagining a more sustainable/regenerative sector, others see only costs, more work, difficulties and unfairness.
- It will be useful to normalise behaviours sought, bringing clarity and simplicity. Reframing, supporting and enabling will be important.

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Summary of Motivational Landscape

Motivators

- Intrinsic te taiao connection as purpose, te ao Māori values
- Keeping up/being a smart, modern operator – not a laggard/non-contributor
- Perceived, or imminent customer expect'ns
- Having "enough" v growth
- Having resource ($$, staff that are interested, time)
- Complying with what is expected, required, exemplified – following the herd (followers)
- To maintain/achieve accreditation
- To contribute locally "what local problem does this solve"
- Staff retention
- Cost saving/cost neutral decisions
- Incentives: Subsidies, funding, grants
- Support of mentor/navigator
- Human values - participating, connecting, protecting esp. locally

Clear behaviours we'd like operators to adopt?

May vary by sub-sector, size, structure

Social norms are influential

Barriers

- Call to action not heard, not clear
- Waiting for critical mass/don't want to be early mover
- Waiting for infrastructure/technology
- Prioritising financial sustainability
- No time, no staff, no funds available
- Location – if not in a natural setting
- Stalled/deferred/reached a plateau
- Accepting can make a difference
- Confused about what to do next esp. regenerative and carbon measurement
- Waiting for cost /benefit to work
- Seek subsidies, funding, help
- Climate crisis too big to contemplate/government/other countries responsibility
- Little sense of relevance of carbon impacts of tourism transportation

Smaller operators have resource and cost constraints

Operators generally want to do the right thing, but some are not clear what that is – what is expected of them, how to go about it, and even what difference it will make (the 'Why')

The challenge of de-risking and overcoming inertia - moving the environment up the to-do list – implies raising the sense of urgency, communicating responsibility and opportunity, and enabling and providing a simple clear path. Rewards for activity and achievement and measurement/reporting of progress will then reinforce and motivate.

- Social change theory says when a challenge/issue becomes too big, complex, or intimidating, paralysis or inertia can result. An antidote often proposed is to focus on one achievable step at a time.
- Hero businesses may be off-putting and less relateable for smaller business with less opportunity for change and impact. Tailor expectations and guidance to leverage their passion, expertise and willingness to engage and contribute.
- Clarity and ease are important – as there is likely a lack of understanding among smaller operators and a risk of too many messages and messengers and inertia thrives on ambiguity. E.g., need to be clear on the message (and incentives) to spend on carbon reduction rather than offsetting.
- People often seek a simple process and tools to act.
- Small incentives/carrots are advocated – there is a wariness around a compliance model due potential resentment and since it adds cost, which is not equitable for smaller operators. Though some say they won't act unless compelled, or seek the structure this would provide
- Generally, this may be more about starting a movement and people feeling part of something important and good.
- Do we need a new definition of success in tourism – as growth becomes less acceptable and affordable – growth still seems to be the guiding star, with a mixture of uncertainty and rejection of "high value visitors " as a focus, particularly when it feels mandated, too coarse and overly simplistic.

Considerations

- Fundamental influences for those not intrinsically motivated include:
    - Human connection
    - Belonging
    - Reassurance
    - Reward

- Some will need
    - Prescriptive approach
    - Others more consultative
    - Others more independent

- Everyone will need clarity of expectations – on the types of activity, initiatives and approaches that businesses in various sectors can employ and the extent to which these are expected to be employed both as a minimum standard and ideal level.

Considerations

Followers – need leadership…. strong, clear direction and enabling support and an environment of socially accepted/expected behaviours and standards.

- If operators perceive low climate impacts to date, no direct current impact and/or low perceived risk of near future impacts on their environment and their business, there is no real personal skin in the game, gains are not clear, societal losses and altruism are not necessarily strong motivators, especially if operators feel that profitability (i.e., what's being taken out of the system) is not excessive and may be fragile.

- Emotions are influential, even if seemingly rational and considered, with any significant behaviour change the emotional journey of interventions and communications should be managed. It is human nature to want to feel happy, proud, part of something, acknowledged.

- Develop and connect to social norms – enable/encourage collaboration/buddying up; demonstrate what relatable others (businesses like them) are doing and why and what outcomes and benefits look like/will look like – model desired attitudes and behaviours. Use relatable trusted messengers. People seek to belong, so develop a sense of a common purpose and a well aligned group where possible.

- Timing is important, to capture attention afresh at times when messages are likely to be best received.

- Rewarding appropriate activity and commitment will sustain activity. This could be in the forms of rebates, subsidies, discounts, improved access to resources, or perhaps via comparison e.g., benchmarking carbon reduction against other operators, businesses, sectors.

Develop social-norms for sector and for operators, which leverage values to work smart, do the right thing and forward think and for NZ to strongly achieve.

Define the grand purpose and goals and exemplify achievable good practice. Be clear on behaviours sought. Help operators to see themselves as agents of improvement in their own eco-system – creating a better future.

Make it easy for operators to get on board.

Tailored, accessible information, guidance, mentoring and monitoring will provide the structure and motivation some operators need, as well as reinforcing expectations - smaller operators in particular need support - an incremental framework will be fairest and most achievable.

Financial support and incentives will gain attention, catalyse and facilitate activity.

Regenerative environmental activity – is harder to engage with and to reconcile with day-to-day operations.

People will need encouragement and **easy opportunity in their local area**. Providing a manageable, accessible and tangible opportunity to contribute in whatever way suits and makes sense.

The connection between **supporting both people and place** is noted in terms of regenerative activities; that they are intertwined and that this is perhaps the tangible value.

Regulation and compliance <u>may</u> be required for 'ambivalent followers' and 'low interest/rejectors'.

These would need to not undermine greater achievement, or disadvantage smaller operators. Consider:

- Reasonable notice
- Realistic, stair-cased transitions
- Normalised standards – adapted to the operating environments of the various sub-sectors, as needed.

AT A HIGH LEVEL, WE SEE THREE 'CHALLENGES TO ADDRESS' GOING FORWARD USING A STAGES OF CHANGE FRAMEWORK

1 Motivate

Supporting the environment is often a lower priority at the moment, something to be looked at when we can. Regenerative activity especially.

Encourage
Engagement

2 Facilitate

Some operators struggle to engage with available information and to translate it into suitable actions and next steps for their business.

Make Easy
Clear Map

3 Reinforce

Need to keep firmly on the agenda and ensure progress and new norms.

Remind
Reward

CONSIDERATION TO EXPLORE: CLEAR ON THE PURPOSE, THE VALUE AND WHY 'THIS MEANS YOU'

1

Motivate

Supporting the environment can often be a lower priority at the moment, something to be looked at when we can. Regenerative activity especially.

Solutions to Explore

Is there a narrative problem? (e.g. Operators don't connect with the impacts of tourism...)

Operators often gravitate towards the status quo

Social norms need to point the way

Leverage personal values – to work smart and do the right thing, forward think, protecting our future, providing for next generation

Drive norms of activity for sector and sub-sectors

Leverage people's urge to support people and to protect their local place

Support the creation of a (local) movement

A launch/restart will help

Te ao Māori values can underpin but not everyone connects as a motivator

CONSIDERATION TO EXPLORE: ENABLING AND SUPPORTING ACTION REMOVING BARRIERS

2

Facilitate

Some struggle to engage with available information and translate into suitable actions and next steps for their business.

Solutions to Explore

Bring simplicity, ease and clarity of options

Exemplify good practice (that is achievable)

Facilitate connection to peers and sector norms from local level up

Clear, concrete how-to plans, tailored by sub-sector

Incentivise – certification, access to finance

Subsidise, offer grants

Enable through access to advice and support

Mentors/navigators will make a big difference to some

Consider requirements to report carbon emissions/policy (ex v small operators)

CONSIDERATION TO EXPLORE: REWARDING AND REMINDING

3

Reinforce

Need to keep firmly on the agenda and ensure progress and new norms.

Solutions to Explore

Keep regenerative tourism messages coming

Measure and publicise sectoral achievements and progress

Reward progress and achievement (accreditations)

Add in some accountability

Mentorship will motivate ongoing progress and commitment

Findings Mapped to Solutions for Consideration

Response Framework	Context	Barriers to progress	Motivations	Suggested Solutions to explore
Motivate	**Supporting the environment is often a lower priority at the moment, something to be looked at when we can.** **Regenerative activity especially.**	Investment needed (SMEs) Capacity (SMEs) Rebuild post Covid Lack of clarity of what is expected Feel we are doing all we reasonably can Not sure why tourism is the focus Feels too big/Don't feel can make a difference Lack of understanding of what regenerative approaches actually mean Limited access to ways to contribute Preference for local initiatives	Social and sectoral norms – industry trajectory Alignment with personal/community values Want to be part of the solution/Fear of being out of step Want to be seen as leading rather than following Clarity of purpose Evidence of customer demand Funding/grants Compliance (some) Accessible and enabling tools Kaitiakitanga Desire to support and engage locally and contribute to local place	**Is there a narrative problem?** (e.g. Operators don't connect with the impacts of tourism…) **Operators often gravitate towards the status quo** **Social norms need to point the way** **Leverage personal values – to work smart and do the right thing, forward think, protecting our future, providing for next generation** **Drive norms of activity for sector and sub-sectors** **Leverage people's urge to support people and to protect their local place** **Support the creation of a (local) movement** **A launch/restart will help** **Te ao Māori values can underpin but not everyone connects as a motivator**

Findings Mapped to Solutions for Consideration

Response Framework	Context	Barriers to progress	Motivations	Suggested Solutions to explore
Facilitate	**Some struggle to engage with available information and translate into suitable actions and next steps for their business.**	Confused about carbon measuring Confused about certification *Agnogenesis* (fabrication of uncertainty as an avoidance response) Time to engage Lack of capacity (SMEs) Accessibility of information Feel information not relevant to their sector/business No accountability Low capacity/interest to engage with wordy documents	Clear map at sub-sector level Relatable examples of good practice Easy to access information /tools Manageable/achievable steps Advice and mentorship (some) Financial support incentives (as catalyst and enabler) Easy access to advice and support Local support/peer network	**Bring simplicity, ease and clarity of options** **Exemplify good practice (that is achievable)** **Facilitate connection to peers and sector norms from local level up** **Clear, concrete how-to plans, tailored by sub-sector** **Incentivise – certification, access to finance** **Subsidise, offer grants** **Enable through access to advice and support** **Mentors/navigators will make a big difference to some** **Consider requirements to report carbon emissions/policy (ex v small operators)**

Findings Mapped to Solutions for Consideration

Response Framework	Context	Barriers to progress	Motivations	Suggested Solutions to explore
Reinforce	**How to keep firmly on the agenda and ensure progress and new norms.**	Sense that have done all can reasonably do Lack of social and sectoral norms of behaviour/achievement Easy to de-prioritise when busy	Acknowledgement of achievement Desire to comply Some accountability, measurement, applicable standards Local regenerative contribution and achievement as Accreditation goals and high standards (brand enhancing and competitive advantage)	**Keep regenerative tourism messages coming** **Measure and publicise sectoral achievements and progress** **Reward progress and achievement (accreditations)** **Add in some accountability** **Mentorship will motivate ongoing progress and commitment**

ANNEX: Methodology and Participant Profiles

In-depth Interviews

- Participants were mainly recruited from Tourism Industry Aotearoa (TIA) sample list, kindly provided, with additional recruitment was from sample lists created from the Tourism Export Council NZ (TECNZ) website members' list, Business Events Industry Aotearoa (BEIA) website list of members, for which phone numbers were sourced online via company websites.

- Kaupapa Māori participants were sampled from the NZ Māori Tourism website and via existing networks.

- Participants were purposively sampled to include a mix by region, industry within the tourism sector and size – with an emphasis on small to medium sized organisations to ensure robust coverage of the reflect the sector structure. As we were interested in what might motivate action, participants were also selected to place more emphasis on those operators that were at the early, or progressing stages in terms of their response to environmental support and less emphasis on those that had already developed a strong response and were known as such – though some organisations of this type were included.

- Potential participants were contacted by phone and informed about the purpose of the research and what participation would involve. They were then sent an information sheet that explained the benefits to participation and what their rights as participants were.

- Post interview, operators were classified by size of organisation and sustainability/regeneration disposition.

- Four pilot interviews were initially conducted to ensure that the discussion guide was effective in gathering data that would address the key research questions.

- Interviews were conducted between March and June 2023 predominantly online with some by phone at participants preference and took between 40 and 90 minutes, with most averaging around 60mins

- The guide provided a basis for discussion; participants were encouraged to share their views by adopting a conversational approach.

Qualitative Interview Participant Profile

61 tourism operators across a range of types, sizes, regions, and sustainability/regeneration dispositions were included in the qualitative research. The tables below outline the participant profile by these variables. Fieldwork was held mainly in late April, May and June 2023.

Region	Number	
	Interview	Workshop
Auckland	16	2
Queenstown Lakes	13	4
Marlborough/Nelson	9	1
Multiple/nationwide	8	1
Rotorua	4	
Whanganui/Taranaki	4	1
Taupo	2	
Wellington	2	
Canterbury	1	
Hawkes Bay	1	
Kaikōura	1	

Size	Number	
	Interview	Workshop
Small/owner-op	36	7
Medium	16	2
Large/corp.	7	

Disposition*	Number	
	Interview	Workshop
Leading	11	1
Progressing	38	8
Considering/waiting	10	
Not considering / rejecting	2	

Type	Number	
	Interview	Workshop
Activities & attractions	18	2
Accommodation	14	2
Tour operators	9	1
Allied services/events	7	2
Hospitality/Food & Bev.	6	1
Transport	6	1

12 operators interviewed were **Māori owned and operated** businesses and two of these participated in the workshop.

These 12 operators were across five regions, with one operating nationally. Types included activities & attractions; accommodation; hospitality/food & beverage; and tour operators. They included small/owner-operators, medium sized, and large/corporate organisations.

** Disposition towards sustainable activity was assessed based on screening questions when recruiting those interviewed which were then ratified based on discussions and adjusted as needed.*

Online Workshop

- An online workshop was facilitated by The Sustainable Business Network with 11 tourism operators sampled and recruited from interview participants.
- Attendees were purposively sampled to include those who were categorized as ‘progressing’ towards sustainable/regenerative policies and practices and were experiencing barriers and challenges in doing so.
- The workshop took a positive, values-based approach and was informed by the core findings of the literature review. This states that positive environmental behaviour is significantly influenced by the expression and reinforcement of intrinsic human values. The approach used was intended to test this premise, as well as garnering more general responses.
- Therefore, the intention of the workshop was to provoke responses that would reveal and work from shared positive values.

Online Survey of Sector

- A survey questionnaire, informed by the qualitative data, was designed in consultation with the Leadership Group.
- The questionnaire was programmed as an online survey with an 'open' link – meaning that anyone receiving the survey could respond.
- An individual survey link was created for each of the organisations who supported the research by distributing the survey invitation to their members. They are: Tourism Industry Aotearoa (TIA); Tourism Export Council NZ (TECNZ); and Regional Tourism NZ for distribution via RTOs.
- The survey links were live between 12th June and 4th August 2023.
- Completion took an average of 17 minutes.
- A total of 309 respondents completed the survey, in addition around another 100 or so people began the survey and answered some questions but did not complete fully, data for the responses they provide has been included in the analysis where appropriate, as it provides stronger coverage.
- The survey was completed by a good cross section of organisation types and a profile of the sample collected is provided.

Note on Sector Survey: *Survey participants were invited via sector organisations (NZTEC, TIA, RTNZ) and as shown in the sample participant profile captured a good mix of organisation types. This is essentially a self-selected sample and therefore cannot be considered to necessarily provide a precise representation of the sector, rather it provides useful broad quantification to support the qualitative findings. For example, given the nature of the questions it may underrepresent those less interested in environmental sustainability.*

Sector Survey - Participant Profile

Years in business	(n)
<1 year	4
1-2 years	11
3-5 years	37
6-10 years	44
11-20 years	73
20 years+	139

Māori owned and operated	(n)
Yes	25
No	273

Provision of nature experience	(n)
Entirely	93
Partly	192
Not really/not at all	125

Sector	(n)
Accommodation	146
Activity/Attraction	89
Tour operator	50
RTO	32
Transport	22
Hospitality	22
Inbound tours	14
Consultant/research	9
Events	7
Association	5
Travel agent	4
Information	4
Environmental	3
Retail	2
Workforce	2
Other	4

Employees >30 hrs/wk	(n)
1	38
2-5	79
6-10	43
11-20	33
21-50	39
51-100	19
101+	16

Employees <30 hrs/wk	(n)
1	34
2-5	99
6-10	42
11-20	26
21-50	14
51-100	7
101+	8
None	5

Region	(n)
Otago	74
Bay of Plenty	33
Canterbury	31
Auckland	30
Waikato	26
West Coast	21
Wellington	20
Southland	18
Manawatu-Wang	17
Hawke's Bay	12
Nelson	10
Northland	10
Tasman	7
Marlborough	4
Taranaki	4
Gisborne	1
Nationwide	35

Annual turnover	(n)
Break-even/ loss	17
$1-$99,999	40
$100,000-$999,999	85
$1m-<$5m	84
$5m-<$10m	21
$10m-<$20m	12
$20m-<$50m	11
$50m-<$100m	6
$100m and over	6

Note: Survey participants were invited via sector organisations (NZTEC, TIA, RTNZ) and as shown captured a good mix of organisation types. This is essentially a self-selected sample and therefore cannot be considered to necessarily provide a precise representation of the sector, rather it provides useful broad quantification to support the qualitative findings. For example, given the nature of the questions it may underrepresent those less interested in environmental sustainability.

Sustainable Tourism Operators Research

Understanding the incentives and barriers for tourism businesses to make sustainable decisions

Research Report November 2023

Sustainable Business Network

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