



**MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT**
HĪKINA WHAKATUTUKI

New Zealand-Aotearoa Government Tourism Strategy

Summary of consultation submissions

May 2019





**MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT**
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Purpose

The draft New Zealand-Aotearoa Government Tourism Strategy (the Strategy) was released on 6 November 2018 with public consultation closing on 4 February 2019. A total of 254 submissions were received during the consultation period. This document provides a summary of the submissions received on the draft Strategy.

Background on the Strategy

Tourism makes a significant contribution to New Zealand's economic success and to New Zealanders' wellbeing. It's our largest industry and biggest export earner – making up 10.4 percent to New Zealand's GDP and employing 8 per cent of our workforce. More broadly, tourism:

- creates growth by spreading economic opportunities and social benefits across regions outside of the main urban centres – helping to create more vibrant communities ; and
- fosters international connectedness which is critical for New Zealand as a small trading nation.

New Zealand tourism has experienced a boom in recent years, in line with the broader global growth in tourism. Annual international visitor arrivals have increased by almost one million over four years alone – from 2.9 million in 2015 to 3.8 million in 2018.

Growth in tourism has brought wide-ranging benefits across New Zealand – creating new jobs, business opportunities and economic resilience in our regions. It has also brought a unique set of challenges to our regions as they cope with pressures created by this growth – including environmental and social impacts.

The Government is focused on ensuring that the tourism system provides productive, sustainable and inclusive growth for all New Zealanders. A successful tourism system requires well-functioning regional visitor destinations based on five focus areas (or the 5A's). These include:

- **Attractions** – visitors need things to do and see – this influences how long they stay and how much they spend
- **Awareness** – visitors need to know what's on offer – this will drive visitor numbers and spend across the year
- **Access** – visitors need to be able to get to where they want to visit safely in a timely way for an appropriate cost. This includes air, road, rail, sea, trails and cycleways
- **Amenities** – visitors need accommodation, retail and hospitality, drinking and waste water and other infrastructure
- **Attitudes** – communities need to want to welcome visitors to their region.

It is important that these investments and interactions are coordinated at a regional level across central and local government and local business. For instance, there is no point funding/supporting a regional attraction if there is limited access to that region, or without understanding potential impacts on conservation lands and environmental values.

A variety of actors have a role to play in contributing towards these 5A's, including central and local government, industry, communities, and iwi and hapu. It also requires actors to work in a coordinated, joined up way. At present, these actors operate in an uncoordinated context. In many cases, the tourism system presents a fragmented regional picture, with some regions competing rather than cooperating, and some more focused on attracting visitors than managing destinations in line with the expectations of both local communities and visitors.

The Government is looking to take a more deliberate and active role in the tourism system to shape future growth and better coordinate tourism-related investment. The Strategy sets out the role Government proposes to play as an actor and steward of the tourism system. It sets out the Government's aim to enrich New Zealand through sustainable tourism growth – and how it will work with the tourism sector, iwi, local government, communities and other stakeholders to achieve this. It also sets out how the Government will better co-ordinate its activities and investments in tourism, to ensure communities can manage the impacts of visitor growth.

About the consultation

The consultation sought submissions on the draft Strategy. We provided web forms for submitters to respond to targeted questions, which allowed submitters to focus in on key areas of the Strategy. The targeted questions were:

- What do you think about the Government's proposal to take a more active and deliberate role in the tourism system?
- What are the areas you think should be a particular focus?
- Are there areas where the Government's role should be limited?
- The draft Strategy proposes five tourism outcomes for the Government. Do you support these outcomes and are these the right outcomes to focus on?
- The Strategy identifies an ambitious work programme for the Government. What are the highest priority actions from your perspective?

We also received written submissions to allow submitters to provide more in-depth responses, as well as email submissions to provide submitters with an opportunity to express their views. In these cases, we encouraged submitters to use the targeted questions to guide their submission.

We also engaged in consultation with iwi, hapu, and Māori businesses and organisations at a series of hui across New Zealand-Aotearoa.

Summary

The importance of tourism to New Zealanders was evident in the large number of submissions we received during the public consultation period for the Strategy.

We received a total of 254 submissions, representing a cross-section of views from around Aotearoa New Zealand. These included:

141 submissions from members of the public
26 submissions from within the local government sector, including 11 District Councils, seven Regional Tourism Organisations and six Economic Development Agencies
15 submissions from iwi, hapu, Māori businesses and organisations
15 submissions from tourism operators
14 submissions from the hospitality industry
9 submissions from tourism industry associations and advocacy groups
9 submissions from a range of non-tourism related industry associations and organisations
7 submissions from academics, researchers and research institutions
6 submissions from conservation associations and organisations
6 submissions from arts and cultural organisations and associations
4 submissions from the aviation industry
2 submissions from other government agencies and Crown entities

Over 60 percent of submissions were provided as web form submissions, most of which were from private individuals, tourism operators and accommodation providers.

An overwhelming majority of submissions welcomed the Strategy's proposal for the Government to take a more active and deliberate role in the tourism system.

A number of key themes emerged where submitters felt the Strategy would benefit from greater focus/strengthening. These included:

Making the Strategy real through partnership with industry, local government, Māori and communities
Recognising the important role of regions in the Strategy, while not ignoring gateway destinations
Safeguarding our public conservation lands and developing an environmentally sustainable tourism system

Addressing and mitigating the impact of tourism on climate change
Better partnering with iwi and hapu in keeping with the principles of Te Tiriti o Waitangi
Ensuring the industry is innovative, productive and competitive, and ensuring a supportive business environment, particularly for small and medium-sized enterprises
Placing community wellbeing at the fore of our tourism system
Increasing regional dispersal and travel outside peak seasons
Controlling visitor numbers or focusing on increasing value over volume
Increasing transport and visitor-infrastructure investment
Improving the availability and accessibility of data
Promoting Māori culture
Ensuring a skilled workforce and labour availability
Placing emphasis on domestic tourism
Strengthening our cultural and heritage propositions

A complete list of submitters is attached as Annex One.

Breakdown of Submissions

1. Private individual submissions

141 submissions were from members of the public. A strong majority welcomed a more proactive and deliberate approach from the Government, with many believing that such an approach is long-overdue.

Although there was a wide spectrum of opinion, several distinct themes emerged from private submissions. There was a strong desire to place conservation and environmental sustainability at the forefront of the Strategy. There was a strong call for the number of visitors to be controlled or for a stronger focus on growing value over volume.

Many submissions also called for communities and social wellbeing to be placed at the forefront of the Strategy. Increasing transport and visitor infrastructure investment as well as addressing issues around ‘freedom camping’ were also prominent.

A range of very specific or locality-specific issues were raised by individuals reflecting concerns within their community or interest. For example, several submitters from Queenstown raised objections over the proposed extension of Queenstown Airport. Submitters from Waiheke Island raised concerns over their community’s ability to absorb further visitor growth and the environmental impact of tourism.

2. Māori, iwi and hapu submissions

Iwi and Māori tourism business owners, operators, interested parties and representatives were invited to contribute to targeted consultation hui held in Auckland, Christchurch and Wellington in January 2019.

Attendees at the Auckland hui included:

Auckland Tourism Events and Economic Development – Māori Tourism Development

Te Kotahitanga o Ngāti Tūwharetoa

Māori Women’s Development Inc.

Ngāi Tai ki Tāmaki Tribal Trust

Ngāi Tāmanuhiri Ngāti Wai Trust Board

Ngāti Whātua o Kaipara

Attendees at the Christchurch hui included:

Ngāi Tahu Tourism

Te Rūnanga o Ngāi Tahu

Attendees at the Wellington hui included:

Federation of Māori Authorities

Te Kāhui Maru (Ngāti Maru, Taranaki)

Ngāti Pāhauwera Development Trust/Hawkes Bay Māori Tourism

Ngāti Pāhauwera Iwi Settlement Trust, and Hawkes Bay Māori Tourism

The Piripi Group

Te Puni Kōkiri

Tapuika/ Tūhourangi/ Ngāti Whakaue

Tourism Bay of Plenty

Te Wharewaka o Pōneke

A strong theme that came through the hui was that Māori and iwi need to be present and highly visible in the Government Strategy, and currently are not. Emphasis was placed on the need to recognise and increase awareness of the role and contribution of Māori and iwi in tourism, to generate greater inclusion and understanding of the tourism sector.

To operate in ‘partnership’ was deemed appropriate for how iwi and Māori need to operate with government in the future, and not be stakeholders that are consulted with. We heard that Māori are not involved in decision-making regionally and nationally, and that the current experience is negative with initial engagement often through consultation when plans and policy are already designed, and to rectify work at reactive stages cannot provide change that is often required.

In addition to the series of hui, we also received 15 submissions from iwi and hapu and Māori businesses and organisations. Below is a breakdown of these submissions.

2.1. Māori tourism organisations

Five Māori tourism organisations and enterprises provided submissions. These included:

Hawkes Bay Māori Tourism and Ngāti Pāhauwera Development Trust

New Zealand Māori Tourism

Ngāi Tahu Tourism

Toi Māori Aotearoa

Wharewaka o Pōneke Enterprises

New Zealand Māori Tourism (NZMT) recommended that there needed to be a stronger focus on Māori and iwi involvement. It argued the Strategy lacks compelling and meaningful inclusion of iwi and Māori tourism. NZMT also argued that one of the tourism industry's biggest challenges and opportunities is around data, suggesting that at present there is 'little to no reliable or meaningful data'.

Toi Māori Aotearoa welcomed the Strategy. Their submission wanted to see Toi Māori Aotearoa as a partner organisation in the Tourism Strategy alongside the Ministry of Business, Innovation and Employment (MBIE) and the Department of Conservation (DOC) as both a ‘steward’ and ‘actor’ in Māori art development. It recommended that Toi Māori Aotearoa contribute directly to the Strategy revision phases and have an opportunity to influence decision-making processes. It also suggested that the shared priorities of Toi Māori operations and the Strategy are identified, established and developed.

Te Wharewaka o Pōneke noted Māori businesses often struggle to access capital investment in order to develop tourism opportunities, and this was a barrier to developing high quality tourist attractions. They also believed Māori should have greater strategic involvement in tourism.

2.2. Iwi and hapu organisations

We received 10 submissions from iwi and hapu authorities, trusts and businesses. These included:

Ngāi Tai ki Tāmaki
Ngāi Tawake ki Tāmaki Trust
Ngāti Rangi Trust
Ngāti Whare Holdings
Tapuika Iwi Authority
Te Kotahitanga o Ngāti Tūwharetoa
Te Rūnanga-ā-Iwi o Ngāpuhi
Te Rūnanga o Ngāi Tahu
Te Whakakitenga o Waikato
Whangaroa Papa Hapū

The majority of iwi and hapu submitters welcomed the Strategy. Ngāti Whare Holdings voiced support for the Strategy stating the proposals for regional development and a partnership with iwi are well-aligned. It argued the success of the Strategy will be measured by the strength of partnerships across Aotearoa.

Some submissions believed the Strategy could be stronger in supporting Māori businesses/iwi authorities to develop capacity in general business functions and accessing capital investment. Recognition of Te Tiriti o Waitangi in the Strategy was also emphasised in several submissions.

The need to ensure adequate provisioning of visitor-related infrastructure was recognised in several submissions. A number of submissions also highlighted the importance of sustainability and addressing environmental problems from current and future visitor growth.

Ngāi Tawake ki Tāmaki Trust noted how the Strategy seems to be focused primarily on regions and was shallow in its reference to main centres such as Tāmaki Makaurau Auckland.

3. Government agency submissions

We received two submissions from government agencies. Submitters included:

Education New Zealand

Ministry for Primary Industries

These submitters provided feedback to strengthen certain elements of the Strategy pertaining to their particular fields of interests.

Education New Zealand's (ENZ) submission saw an opportunity for greater mention of international students, education providers and international education in the Strategy – given the strong links between tourism and international education. ENZ also noted the great overlap between the draft tourism Strategy and the International Education Strategy.

The Ministry for Primary Industries endorsed many of the Strategy's key messages, and provided recommendations for strengthening the language around biosecurity, rural communities and trade in recognition of the impact of tourism on biosecurity and rural communities. In particular, it focused on the biosecurity risks presented by tourists, how industry and New Zealanders could play a role in biosecurity, and how tourism can support rural industries and primary industries exports.

4. Local government submissions

We received a total of 26 submissions from the local government sector.

Local Government New Zealand (LGNZ) argued local government should be acknowledged and treated as an equal partner with Government in the successful development and implementation of the Strategy. They provided a range of recommendations on improving the wording of the Strategy to provide a greater community and local government focus.

They argued the role of local government is too narrow in the current Strategy, and proposed the inclusion of boxes that outlined the different responsibilities and substantive interconnections between local government, government and tourism industry.

LGNZ was also concerned the Strategy development process does not have the level of engagement required to ensure successful implementation, arguing that '*it pays lip service to the principles surrounding inclusion and risks being unable to fully address some of the complex issues such as infrastructure provision during implementation.*'

Finally, LGNZ argued the proposed Investment Framework was overly simplistic and insensitive to the complex issues facing some communities. They recommended the Government examines this in more detail, and suggested a roadshow is undertaken to engage the local government sector more deeply on the Strategy and framework.

4.1. District Councils

11 District Councils provided submissions. These included:

Dunedin City Council
Hauraki District Council
Mackenzie District Council
Nelson City Council
Porirua City Council
Queenstown Lakes District Council
Rangitikei District Council
Ruapehu District Council
Timaru District Council
Whakatane District Council
Whanganui District Council

District Councils were strongly supportive of the Strategy and looked forward to working with the Government. Many noted how the Strategy worked alongside their own district economic strategies and plans. Some suggested the Strategy could better define the role of local government in the tourism system. Mackenzie District Council said the ‘strategic context for local government’ was not well defined and central Government needed to provide leadership and vision in this area.

Dunedin City Council recommended the principles of Te Tiriti o Waitangi and sustainability are embedded in the goals and priority actions of the Strategy.

We received a joint submission from the Queenstown Lakes District Council and Regional Tourism Organisations (RTOs) – Destination Queenstown and Lake Wanaka Tourism. The joint submission welcomed the Strategy’s regional approach and argued central Government could play a more active role in encouraging collaboration across regions and between RTOs to provide visitors with a seamless experience. It made recommendations around how linking tourism to other export industries, reducing tourism’s carbon footprint, addressing the industry’s productivity challenges, and improving the way we gather and analyse data.

4.2. Regional Tourism Organisations and Economic Development Agencies

13 Regional Tourism Organisations (RTOs) and Economic Development Agencies (EDAs) provided submissions. Regional Tourism New Zealand (RTNZ) provided a submission as the primary body representing the interests of RTOs. RTNZ strongly supports the concept of a broader leadership group that is tasked, resourced and mandated to initiate the Strategy to ensure it meets its stated economic and social goals over an agreed timeframe.

Economic Development New Zealand provided a number of detailed recommendations where the Strategy would benefit from greater clarity and focus.

Seven RTOs and six EDAs provided submissions. These included:

Auckland Tourism, Events and Economic Development (EDA)

Central Economic Development Agency (EDA)

ChristchurchNZ (EDA)

Destination Fiordland (RTO)

Destination Marlborough (RTO)

Hamilton Waikato Tourism (RTO)

Hawkes Bay Tourism (RTO)

Hurunui Tourism (RTO)

Nelson Regional Development Agency (EDA)

Tourism Waitaki (RTO)

Wellington Regional Development Agency (RTO)

Venture Southland (EDA)

RTOs and EDAs were very supportive of the Strategy. The two key themes to emerge from RTO submissions were to secure long-term funding for RTOs and obtain better data to support decision making.

Destination management attracted significant attention. For example, Wellington Regional Development Agency recommended that the development of destination plans for all regions of New Zealand should be seen as a high priority.

The Central Economic Development Agency (CEDA) asked for clarification on the Strategy's intention to develop a national destination plan that is informed by regional plans. It suggested the Strategy needed to clearly define terms such as destination management, dispersal, productivity, and quality jobs. CEDA also noted the omission of Education New Zealand and Immigration New Zealand from the Strategy's reference to an 'all-of-Government approach to the tourism system'.

Auckland Tourism, Events and Economic Development supported the Strategy, noting how many of the priorities were aligned with their own tourism Strategy *Destination AKL 2025*. They argued that Strategy should focus on national demand proportionally across the regions, and not end up focusing exclusively on 'propping up' undeveloped regions. The submission suggested the Strategy could better acknowledge and specify support for New Zealand's main tourism centres such as Auckland and Queenstown – noting the crucial contribution they make towards growing New Zealand's overall tourism value and productivity.

4.3. Other local government organisations

Southern District Health Board submitted that analysis of the environmental impacts of tourism completed by other organisations should be explicitly included in the Strategy. It also noted the health impacts of tourism for visitors or local residents do not feature, and suggested that the Strategy should consider both personal and public health impacts in relation to tourism.

5. Industry submissions

We received a total of 42 submissions from a range of stakeholders within the tourism industry. Below is a breakdown of the submissions.

5.1. Tourism industry associations

Nine submissions were received from industry associations and advocacy groups. These included:

Bus and Coach Association
Holiday Parks
New Zealand Cruise Association
New Zealand Events Association
New Zealand Motor Caravan Association
Proguides New Zealand
Tourism Export Council of New Zealand (TECNZ)
Tourism Industry Aotearoa
Waiheke Visitor Board

Industry associations were strongly supportive of the Strategy and the Government's proposal to take on a stronger leadership and stewardship role, including a more active approach working with key tourism stakeholders. Many encouraged the Strategy to have a greater focus on working with industry. For example, the New Zealand Motor Caravan Association submitted the Strategy could have a more explicit focus on working alongside industry organisations operating at the grassroots level.

Tourism Industry Aotearoa (TIA) welcomed the Strategy and expressed strong support for the tourism system approach adopted. It noted how the Strategy's five themes largely mirror the structural elements of their own tourism framework, *Tourism 2025*. TIA recommended there should be greater recognition of commercial operators in the Strategy, particularly in terms of recognising how Government has a role to play in supporting and enabling businesses to succeed.

TIA also argued it is often difficult to undertake ‘industry-good’ initiatives (in terms of R&D capability, substantive industry actions, telling the tourism story and developing funding models) due to the fragmented nature of the tourism system. As such, it recommended a proportion of the IVL be available for industry use on pressing ‘industry-good’ issues. Finally, TIA recommended the Strategy should take a clear position on the role of Government in providing ‘public-good’ core tourism data.

The Tourism Export Council of New Zealand (TECNZ) welcomed the Strategy and the Government’s intention for increased collaboration/alignment on tourism across government agencies, both at central and local level. It noted that being able to connect with private businesses at all levels will be key given the industry is made up mostly of small to medium enterprises (SMEs), and encouraged close working relations with industry associations like TECNZ.

5.2. Aviation industry

We received four submissions from organisations operating in the aviation industry. These included:

Air New Zealand
Auckland International Airport
Board of Airline Representatives New Zealand
New Zealand Airports Association Inc.

The Board of Airline Representatives New Zealand and the New Zealand Airports Association both stressed the importance of maintaining New Zealand's overall international competitiveness as a destination. As such, both were critical of levies or other charges on air travel. The New Zealand Airports Association’s submission argued a well-functioning tourism system should include consideration of the impact of government cost-recovery and levies.

Auckland International Airport supported the submission, commenting that the Strategy provides a *‘strong foundation for ongoing collaboration between the Government and industry to fully realise the economic, social and cultural benefits that tourism can bring’*. Their feedback focused on how greater emphasis could be placed on increasing the diversity of our visitor markets, recognising the importance of air connectivity in the tourism system, strong destination management, greater recognition of domestic tourism and leveraging trade and tourism opportunities. It also suggested leadership and industry-wide collaboration across the public and private sector will be required to successfully deliver Strategy.

Air New Zealand’s submission welcomed the Strategy – noting their commercial success is underpinned by a thriving tourism industry. It believed the Strategy could be strengthened with a focus on growing tourism demand in off-peak periods. Their submission contained recommendations on the importance of regional tourism development, including support for regional collaboration, taking a macro-regional approach to destination management, and addressing both infrastructure constraints and community concerns about tourism. Air New Zealand expressed its commitment to continue to work with stakeholders, including central Government, in pursuit of common goals, including the Strategy.

5.3. Hospitality industry

14 submissions were received from the hospitality industry. Hospitality New Zealand praised the Government for its commitment to partner more actively with the sector. They provided a comprehensive submission with recommendations on particular topics, including how the Strategy could help to train and attract a skilled workforce, and develop a regulation framework for peer-to-peer accommodation.

It also recommended the Government should focus on promoting the importance of tourism to ensure all New Zealanders are educated about, and aware of, the benefits and opportunities tourism brings and creates for them, their whanau, and communities.

The 13 remaining submissions were from accommodation providers. These included:

Aspen Court Ltd
Birds ferry Lodge Ltd
Brook Serene
Hospitality New Zealand
Kaipara Views Eco Lodge
Lake Tekapo Lodge
LKNZ Lodge
Oreti River and Rod and Wheel Houses
Paeroa Bed and Breakfast
Pen-y-bryn Lodge
Stay Kerikeri
Tongariro River Motel
Upstairs Hospitality

Accommodation providers broadly supported the Strategy. The main issues raised by accommodation providers included the need to address freedom camping and for the Government to better fund infrastructure to alleviate local pressures. Placing environmental sustainability at the centre of the Strategy was also an important theme.

5.4. Tourism operators

We received 15 submissions from tourism operators. These included:

Alpine Recreation
Catlins Coast Ltd
Destiny Bay Wines Limited
House of Travel
Miles Partnership
Motu Trails
Pukaki Tourism Holdings LP
Quality Tourism Development Ltd
Shotover Canyon Swing & Canyon Fox
Taiao Cycle & Walk
Te Araroa Trust
Waiheke Unlimited Ltd
Whanganui i-Site Visitors Centre
Wild on Waiheke
Woodside Hill Winery

The need to provide adequate infrastructure and ensuring there is a skilled workforce to meet demand featured as key issues through tourism operator submissions. For example, Shotover Canyon Swing & Canyon Fox suggested the Strategy should include a focus on increasing the profile of tourism careers through education and a regulatory framework that supports the industry to recruit overseas labour.

6. Conservation group submissions

We received six submissions from conservation groups, associations and organisations. Submitters included:

Federated Mountain Clubs
Forest and Bird
Leave No Trace New Zealand

New Zealand Conservation Authority

New Zealand Recreation Association

West Coast Tai Poutini Conservation Board

Most of the submissions supported the Strategy and welcomed the high level goals. Management of tourism activity on public conservation land was a strong focus.

The New Zealand Conservation Authority (NZCA) argued the Strategy in its current form appears to be more ‘a discussion paper, as opposed to providing a clear framework’. Nevertheless, they consider it a useful document which provides greater clarity on the main issues going forward, what is happening at the Government level in the tourism sector, and the alignment sought at a regional level. NZCA particularly welcomed the Strategy’s recognition of the need to move towards a clean, green, carbon neutral New Zealand.

The New Zealand Recreation Association suggested the Strategy could explicitly reference the Conservation Act. It also submitted it is not DOC’s role to meet the demand of international visitors, but rather supply opportunities to visitors only in accordance with relevant legislation.

The West Coast Tai Poutini Conservation Board welcomed the development of a whole-of-Government strategic approach to tourism development. However, their submission suggested that Strategy understates both the threats and opportunities of visitor growth in terms of the health and vibrancy of conservation lands.

Several submitters emphasised the importance of adequately resourcing DOC to deliver the Strategy.

In addition to conservation concerns, submitters showed a wider concern for cultural, social and environmental outcomes. Forest & Bird recommended the Strategy’s overarching objective should be to sustain and enhance natural and social capital, providing a detailed revision of the Strategy’s work plan.

Submitters also stressed that supporting international visitor growth should not impinge New Zealanders’ access to nature – including free entry conservation land and the ability to undertake recreational activities.

7. Other community and sector submissions

We received a total of 21 submissions from other sectors and community interest groups. These submissions included a diverse range of interests and views, placing the Strategy within a wider community context.

7.1. Academics and researchers

We received seven submissions from academics, researchers and research institutions working in tourism and environmental-related fields. Submitters included:

Simon Arnold, CEO, New Zealand National Energy Research Institute

Tom Bennion, International Climate-Safe Travel Institute

Dr Anna Carr, Senior Lecturer, School of Tourism, University of Otago

Matthew Darling, Postgraduate researcher, Department of Geological Science University of Canterbury

Wendy McGuinness, McGuinness Institute

Distinguished Professor Robert McLaughlin and Professor Steve Trewick, New Zealand Centre for Planetary Ecology, Massey University

Associate Professor Ian Yeoman, Head of Tourism Management Group, Victoria University of Wellington

The majority of submitters supported the intent of the Strategy, while several submitters focused on addressing particular issues as opposed to providing a view on its merits.

The carbon footprint of tourism and how to better manage and plan for mitigating the impact of tourism on climate change was a major theme. Professors Robert McLaughlin and Steve Trewick recommended bringing outgoing international transport into the ETS and placing a carbon charge on incoming international transport by 2050 including all international travel (discounting any carbon charge in the country of origin). A Strategy for the cruise industry was also recommended. Associate Professor Yeoman recommended New Zealand join the UN World Tourism Organization and the inclusion of the UN's Sustainable Development Goals in the Strategy.

The McGuinness Institute recommended we conduct a self-assessment on the quality of the Strategy document using the Institute's scorecard made up of six content elements. Their submission contained a multitude of specific observations and recommendations.

Matthew Darling recommended we consider ways of managing disaster risk in the Strategy such as education or ensuring visitor assets are placed appropriately – noting a number of key tourist destinations have significant disaster risk exposure, including Milford Sound and Aoraki Mt Cook.

7.2. Arts and cultural organisations

We received six submissions from arts and cultural organisations and associations. These included:

Auckland Philharmonic Orchestra

Creative Coromandel

Creative New Zealand

Heritage New Zealand Pouhere Taonga

Michael Hill International Violin Competition Charitable Trust

Museums Aotearoa

These submissions were supportive of the Strategy and welcomed the focus on New Zealand's unique heritage. However many felt the emphasis on our heritage proposition could be stronger.

Creative NZ, the national arts development agency, advocated for greater focus on arts and culture in the Strategy, emphasising their capacity to attract visitors to the regions, provide year-round tourism opportunities, boost the economy and help visitors to connect to a new culture. It also expressed its support for particular focus on Toi Māori as an identifier of New Zealand's unique cultural identity. Of note, 80 organisations from the arts sector endorsed Creative New Zealand's submission. This sent a clear message from within the sector of the need for the arts to be elevated within the Strategy

Heritage New Zealand Pouhere Taonga emphasised the benefits of historic and cultural heritage need to be realised alongside those for natural heritage through the Strategy. It also noted that Heritage New Zealand is in a strong position to support DOC to deliver the Strategy's historic and cultural heritage outcome. It welcomed further cross-agency partnership with the DOC or a role on the advisory panel in relation to these matters.

Museums Aotearoa supported the overall goals of the Strategy. It encouraged the Strategy to recognise public museums and art galleries as a vital component of our national tourism offering, and to consider additional central Government support for the capital infrastructure needs of cultural assets, given the funding constraints of local government.

7.3. Non-industry organisations

We received nine submissions for associations and organisations that are not tourism industry specific. These included:

Blind Foundation
Carbon Neutral New Zealand Trust
Cardrona Valley Ratepayers Association
Federated Farmers
Horticulture New Zealand
New Zealand Winegrowers
Queenstown Chamber of Commerce
South Canterbury Chamber of Commerce
Waiheke Winegrowers Association

Horticulture New Zealand recommended to enhance the biosecurity component of the Strategy (as international tourists are known to exacerbate risk), and the importance of biosecurity for New Zealand's tourism destination reputation.

Federated Farmers' recommended the potential environmental effects of increased numbers need to be catered for ahead of time with infrastructure investment and education. It argued the Strategy needed to ensure tourism also protected and enhanced New Zealand's other

economic activities, including the primary sector. It made a range of recommendations around rewording the third outcome of the Strategy.

The Blind Foundation's submission asked that the Strategy consider the opportunities of providing outstanding access to tourism. The submission recommended that the Strategy include research and information on seniors and disability access, including how this would contribute to future-proofing the tourism industry. It also noted that other groups would benefit from accessible tourism (e.g. caregivers and parents with small children).

The Carbon Neutral New Zealand Trust argued the Strategy did not pay sufficient attention to the impact of tourism on climate change and suggested the Strategy be completely rewritten using a climate change lens.

The Queenstown Chamber of Commerce supported the outcomes of the Strategy and made a number of recommendations specific to the Queenstown context. It also recommended the '5As' should include an additional 'A' for *aptitude*. It argued the Strategy does not adequately use the expertise already present in the tourism business community in achieving the five outcomes. It suggested the Strategy could explore how to optimize the performance of existing, high-performing, tourism companies to encourage expansion into emerging tourism markets.

Response to targeted questions

1. What do you think about the government's proposal to take a more active and deliberate role in the tourism system?

An overwhelming majority of submitters supported the Government's proposal to take a more active and deliberate role. Many private submissions expressed enthusiasm and believed a more proactive Government role in tourism was timely and needed. Industry submissions across-the-board were particularly supportive and welcoming of the proposal. Local government and Māori were equally supportive.

A minority of submitters did not express a particular view, instead focusing their submission on a particular issue.

Only a very small minority of submitters contested the proposal, citing the need to reduce bureaucracy and allow the private sector to self-manage. Some were critical of tourism as a whole due to either its carbon footprint or its low productivity.

While nearly all submitters supported an increased Government role in tourism, submitters held a range of differing views on the areas where the Government should focus its efforts.

Government response: *We are pleased to see the majority of submissions supported the need for an increased role for the Government. We are also sensitive to the fact submissions held a variety of views on where that role should lie. Going forward, MBIE and DOC looks forward to working with other agencies, stakeholders and communities to ensure the Government's role meets the expectations of New Zealanders.*

2. What are the areas you think should be a particular focus?

Question two prompted the most responses, demonstrating how submitters had a range of views on where the Strategy should be best focused. Below are the main themes we found across all submission groups:

2.1. Community wellbeing

Concerns over freedom camping, environmental deterioration, visitor growth and infrastructure featured in a number of submissions – particularly from private individuals’ calling for a greater focus on safeguarding communities and community wellbeing. Industry submissions were also concerned with ensuring communities were consulted and considered in the decision-making process. The need to maintain tourism’s social license to operate was identified as a particular concern in a number of industry submissions.

Government response: *We acknowledge the importance submitters placed on ensuring community wellbeing and the benefits to New Zealanders from tourism. The Strategy has placed community wellbeing to the fore of a number of the outcomes.*

2.2. Environment and conservation

The importance of preserving and protecting our public conservation lands, and ensuring visitor growth does not result in environment deterioration featured as a major concern for a significant majority of submitters. Industry and Māori were strong advocates for sustainable growth, while a number of private submissions were strongly against further growth, reflecting public anxieties around environmental deterioration.

Government response: *The overall aim of our Strategy is to enrich New Zealand through sustainable tourism growth. We recognise submitters concerns over the impact of tourism on climate change. We believe the final Strategy integrates concerns around climate change under our priority work areas, one of which is to deepen our understanding of the relationship between climate change and tourism and the move to a low-emissions economy.*

2.3. Infrastructure

Concerns over transport and visitor-related infrastructure and the need to ensure the adequate provisioning of infrastructure featured as a major issue for submitters.

Government response: *Work is already underway through the Tourism Infrastructure Fund to address existing and future community needs. Policy work is already underway, as part of the Strategy, to consider the funding and financial needs of local government with respect to visitor-related infrastructure, including the Productivity Commission’s Local Government Funding Inquiry. This will continue to be a priority.*

2.4. Regions

Many local government, industry and Māori submitters welcomed the Strategy’s focus on regions, and in a number of cases suggested the Strategy could more strongly reflect the need for Government to work with regions and support regional development. The Strategy’s focus on regional and national destination management planning received wide-spread support

from industry and local government. Several submitters, particularly from Auckland, cautioned against overlooking the important role that gateway destinations play in the system.

Government response: *Ensuring tourism supports thriving and sustainable regions features as an aspirational outcome we are seeking to achieve. Already, there are a number of policies and programmes aimed at supporting regions, including gateway destinations. The Strategy will continue this work.*

2.5. Dispersal and seasonality

A number of submitters from industry and local government wanted greater focus on encouraging the dispersal of visitors throughout Aotearoa New Zealand and off-peak travel as ways of developing regions and spreading the benefits of visitor growth.

Government response: *Expanding the regional and seasonal spread of visitors remains a key priority for Government and this is reflected in the Strategy.*

2.6. Productivity

Industry submitters noted the productivity challenges the industry faces and welcomed the Strategy's focus on productivity. Several submitters believed collaboration and developing tourism-specific accelerators and avenues for R&D would be a particularly important area where the Strategy could help to uplift industry productivity.

Government response: *Addressing the tourism industry's long-standing productivity issues remains a central focus for Government and is recognised in the Strategy. Our work stream includes establishing a process for generating 'game changers' and developing a deeper understanding of the barriers to innovation*

2.7. Collaboration and consultation

Many industry, local government and Māori submitters indicated an appetite for a deeper relationship with central Government to support the tourism system. A number of submitters recognised the success of the Strategy will depend on the ability of central Government to work in collaboration with industry, local government, Māori and communities.

Government response: *A key part of our Strategy is aimed at addressing the failure of central Government agencies to work in a joined-up and co-ordinated way with stakeholders. We welcome the strong indication from stakeholders to partner with Government to deliver better outcomes at the local and community level. We believe improved collaboration and consultation is at the heart of the Strategy and will feature as a key approach for bringing change to the tourism system.*

2.8. Value over volume

Private submitters were especially critical of high-volume visitor growth, and in some cases stated a preference for controlling visitor numbers. Overall, while a number of private submissions expressed concern over high visitor growth forecasts, there was also wide-ranging support for the Strategy's focus on value over volume growth. This was widely supported by industry and other submitters as well.

Government response: *Achieving more productivity gains from increased value over volume features as an important part of the final Strategy. The Government does not believe placing*

restrictions on visitor numbers is necessary under present conditions. The Strategy has a dedicated work stream to develop a detailed picture of future demand to help with planning.

3. Are there areas where the government's role should be limited?

Most submitters focused primarily on areas where Government intervention would be best applied. As such, there was no clear indication from submitters on where the Government's role should be limited.

The majority of submitters either did not respond to this question or did not present a particularly strong view on where the Government's role should be limited. Some private submitters suggested that given growth pressures, the Government should not feel constrained in dealing with issues at hand. Some industry and RTO submissions cautioned against the Government intervening too strongly in immigration settings.

Government response: *We recognise the wide-ranging support for an increased Government role in the tourism system and acknowledge the need to ensure Government interventions are done in partnership and consultation with stakeholders.*

4. The draft Strategy proposes five tourism outcomes for Government. Do you support these outcomes and are these the right outcomes to focus on?

The majority of submitters supported the outcomes of the Strategy. Most recognised the rationale behind these outcomes. Many of the responses repeated the same themes brought up in question two.

In some cases, submitters provided recommendations on particular outcomes that required greater focus or clearer messaging. For many, the environment and environmental sustainability could have benefited from clearer signalling in the outcomes. Many private submitters strongly advocated for an outcome that emphasised safeguarding the environment and ensuring sustainable visitor growth. This was echoed in a number of submissions from Māori as well as industry.

Some submitters believed that the ordering of the outcomes was important and could potentially act as an indication of priority.

Government response: *We note the importance many submissions placed on the environment and sustainable growth. We believe the final Strategy's high-level goal of enriching New Zealand through sustainable growth as well as the range of associated policy work streams reflects these concerns.*

5. The Strategy identifies an ambitious work programme for Government. What are the highest priority actions from your perspective?

Submitters provided a range of different responses reflecting particular local, personal and sectoral concerns, in most cases expanding on themes already touched on in the second question. Below are the key priority actions identified in the submissions:

5.1. Environmental sustainability

Many submissions focused on ensuring tourism contributed positively to conservation and environmental sustainability. In addition, many wanted the Strategy to address current and emerging environmental challenges caused by high visitor growth.

5.2. Moving towards a low emission economy

A number of submissions prioritised the need to address tourism's impact on climate change and transition towards a low emission economy.

5.3. Investing in infrastructure

Ensuring there is adequate infrastructure and funding featured prominently across all submission groups. Many submitters argued there was immediate need in some communities for infrastructure to address shortfalls from recent visitor growth.

5.4. Achieving value over volume

Ensuring value grows faster than volume was viewed as a key priority across all submissions as a way of optimising the tourism system and achieving better outcomes overall.

5.5. Partnering with stakeholders

Ensuring that the Government developed the framework for working with stakeholders at the industry, regional and community level was identified as a key priority for ensuring the success of the Strategy.

5.6. Getting better data

Underscoring their responses in other questions, a number of submissions emphasised the importance of gaining better insight into the tourism system through data to support decision-making.

***Government response:** We fully agree with the priorities identified by submitters. The final Strategy attempts to deliver on a number of concerns, including the ones identified above. The*

ultimate aim of ensuring New Zealand benefits from sustainable tourism growth speaks to all of the themes identified above.

6. What are the areas in this draft Strategy that you think could be strengthened?

Responses varied markedly and in most cases returned to the themes identified in the second question.

6.1. Crown-Māori partnership

Submissions from a range of groups, including Māori, iwi and hapu, called for more explicit recognition of the important role Māori have in the tourism system, not just as a key visitor proposition, but also as Te Tiriti partner. Māori indicated a strong desire for the Government to have a more meaningful relationship with Māori in the system. Several submissions from Māori and local government groups commended the use of Aotearoa New Zealand as the branding for the Tourism Strategy. At our series of hui, Māori and iwi felt they needed to be recognised as partners in this national Strategy and the lack of Māori and iwi presence was a concern.

Government response: *We have taken on board the suggestions of submitters and iwi participants and strengthened the Strategy to better involve tangata whenua. Going forward, we intend to more proactively engage with stakeholders, particularly tangata whenua.*

6.2. Transparency

A number of private and industry submissions called for more measurable goals, as well as better translation of the high-level goals into clear actions. Several submitters suggested the Strategy lacked specifics and details on how to tackle key tourism-related issues, indicating a preference for translating ideas into action.

Government response: *We believe the Strategy should remain high-level and act as an overarching vision to support our more detailed work programme. The Strategy contains specific work streams aimed at supporting tourism outcomes and well as indicators of what success should look like. MBIE is progressing the Data Domain Plan and considering aggregates to measure sustainability and the progress of the Strategy.*

6.3. Climate change

Climate change was also a significant theme – with a number of submitters suggesting further work is needed to consider the impact of climate change on tourism, and take steps towards mitigating and reducing the carbon footprint of tourism. A number of submissions suggested that the Strategy did not give sufficient attention to the issue of climate change.

Government response: *We believe the Strategy clearly identifies the issue of climate change. The Strategy signals the importance the Government attaches to the issue of climate change and transitioning to a low-emissions economy. Several of the priority work areas specifically look at ways of transitioning the industry and how tourism can be a leader in sustainability. We also note the work industry is doing in promote and implement sustainable practices.*

6.4. Visitor growth

A particularly noticeable theme from individual submissions was the need to manage visitor growth and focus on value over volume. Several submissions questioned the value of tourism and suggested visitor numbers needed to be capped.

Government response: *The Government does not believe placing restrictions on visitor numbers is necessary under present conditions. The Strategy has a dedicated work stream to develop a detailed picture of future demand to help in planning.*

6.5. Tourism and internationalisation

Industry and local government submitters emphasised the interrelationship between tourism and our other export sectors. Tourism has a role to play in supporting export goods in visitor markets through the halo effect tourism creates. Ensuring the Strategy focused on increasing air connectivity also featured as an important theme.

Government response: *Through the China New Zealand Year of Tourism we are working to support people-to-people connections with our second largest visitor market. The Strategy also plans to ensure a strong New Zealand brand proposition in our offshore marketing campaigns. We will also continue to work with other agencies and stakeholders to ensure tourism plays a role in supporting the ‘NZ Inc.’ brand.*

6.6. Māori culture

A diverse range of submissions argued the Māori cultural imprint in the Strategy could be strengthened. Many suggested the Strategy did not accurately reflect the importance of Aotearoa’s unique Māori heritage as a key destination proposition that enhanced the tourism experience and differentiates our country from the rest of the world

Government response: *We intend to work with New Zealand Māori Tourism and other stakeholders to increase the awareness of the opportunities for Māori tourism and ways to deliver authentic experiences.*

6.7. Domestic tourism

Private submitters, industry and a range of organisations all emphasised the importance of domestic tourism and ensuring sufficient attention is paid to this important market. Some suggested the Strategy placed too much focus on the international visitor market. Private submitters also noted the importance of ensuring that New Zealanders still enjoy their own backyard and are not priced-out.

Government response: *We believe the importance of domestic tourism in growing visitor economies at a regional level, and providing opportunities for New Zealanders to enjoy their country, has been better defined in the Strategy. We look forward to working with RTOs and EDAs to improve destination management planning and supporting domestic tourism will be a key part of destination management.*

6.8. Data

Industry, local government and Māori submitters underscored the importance of good data and for relevant stakeholders to have access to data. Many submitters felt we currently lack a

complete picture of the tourism system due to a lack of data and felt the Strategy could more clearly identify the need for data.

Government response: *We acknowledge a large number of submitters were emphatic about the need for data to help inform better decision-making. Progressing the Data Domain Plan and commissioning data to better understand our tourism system remains at the fore of the final Strategy.*

6.9. Visitor revenue

Private submitters in particular felt levying further charges and/or taxes on visitors was necessary to increase funding or limit visitor numbers. A number of industry submissions were explicitly opposed to any further increases in visitor charging, particularly in the aviation and hospitality industry.

Government response: *At this stage, the Government is focused on developing sustainable revenue streams to support visitor-related infrastructure and projects. Officials are working to progress the International Visitor Conservation and Tourism Levy. A part of the Strategy involves exploring sustainable local government funding and financing options for visitor-related infrastructure. DOC is also working on international visitor pricing for a number of Great Walks.*

6.10. Supporting local government

Local government, RTO and EDA submitters noted the important role they play in our tourism system. Some submitters sought greater recognition of the role of local authorities and organisations in the Strategy as well as more support in carrying out their role in the system.

Government response: *For the Strategy to be successful, we recognise the need to manage and develop regions, through supporting the development of quality destination management plans.*

6.11. Supporting SME's

Many industry submitters emphasised the crucial role small and medium-sized enterprises (SMEs) play in our tourism system. Some felt the Strategy could have benefitted from clearer mention of the role of SMEs and identify ways the Government could support SMEs.

Government response: *The Strategy is focused on lifting the productivity of the sector. This will include working with industry to lift the skills of workers and increase our understanding of support needed for tourism businesses, including Māori tourism operators, to build capability.*

6.12. Skills and labour

Industry submissions commented widely on the ways the Strategy could ensure the tourism industry has a skilled workforce, including a focus on education and working with industry to develop career pathways. Submitters cautioned against creating restrictive labour migration settings to ensure the industry still has access to overseas labour.

Government response: *The Strategy's work stream includes working with industry to lift the skills of workers as well as working with the industry and education providers to strengthen pathways from education into tourism employment.*

6.13. Culture and heritage

We received a number of submissions from cultural organisations to emphasise the important role culture and heritage plays in tourism and asked for the linkage be made stronger in the Strategy.

Government response: *Ensuring New Zealand's natural environment, culture and history are protected, enhanced and promoted features as a key outcome in the Strategy. We have reflected the role tourism can play in encouraging international visitors and New Zealanders to better connect to, and value, Aotearoa New Zealand's land, people, heritage and stories, particularly in relation to Māori tourism and culture.*

Conclusion

We were delighted with the quality of submissions we received during the consultation process and recognise the thought that went into them. The diversity of submissions was particularly welcome and demonstrated the importance of tourism to our communities. There was a clear mandate for the Government to have a more proactive and deliberate role in the tourism system.

We were also pleased there was majority support for the Strategy. Most of the submissions asked for better emphasis on certain elements already contained within the existing Strategy. During the analysis of the submissions, it was clear there were a number of recurring themes centred on maximising the benefits of tourism for New Zealanders.

Feedback from submissions reinforced the importance of the Strategy's overall aim – to enrich Aotearoa New Zealand through sustainable tourism growth. We have made a number of changes to better reflect the important issues identified by New Zealanders through the consultation process. The five outcomes have been tightened and grouped into five themes:

1. The Economy – Tourism sector productivity improves

This outcome focuses on the type of growth that we want tourism to deliver – with a focus on lifting the productivity of the sector, rather than continuing to rely on input-fuelled growth. It is based on the foundation of ūhangā/whairawa, to drive economic prosperity in the tourism sector.

2. The Environment – Tourism protects, restores and champions Aotearoa New Zealand's natural environment, culture and historic heritage

This outcome signals the importance of restoring and protecting the quality of the natural environment, culture and historic heritage that international visitors come here to experience, and New Zealanders want to see being looked after.

3. International and Domestic Visitors – Aotearoa New Zealand delivers exceptional visitor experiences

This outcome recognises that to ensure the sustainability of the tourism sector Aotearoa New Zealand needs to develop and promote high-quality, authentic visitor experiences that draw on our unique visitor proposition.

4. New Zealanders and their Community – New Zealanders lives are improved by Tourism

This outcome signals the importance of tourism providing benefits beyond the economy. Well-managed tourism can provide social and cultural improvements to New Zealanders lives too – together these drive social license.

5. Regions – Tourism supports thriving and sustainable regions

This outcome focuses on ensuring that the benefits of tourism are distributed across regions and that tourism supports thriving and sustainable regions.

Given the diversity of opinion, we believe the final Strategy strikes an appropriate balance between industry, local government, Māori and community interests.

In addition to refining the Strategy, central and local government and industry have worked proactively to contribute to the Strategy's outcomes. Recent work includes:

Tiaki Care for New Zealand

In November 2018, the Minister of Tourism welcomed the launch of *Tiaki Care for New Zealand*, an industry-led initiative that encourages visitors to act as guardians of New Zealand. The initiative is a result of cross-sector collaboration, including public and private sector tourism organisations who have proactively come together to encourage positive visitor behaviour.

Responsible Camping

In August 2018, the Minister of Tourism announced that \$8.5 million was being made available for a pilot to respond to immediate actions recommended by the Responsible Camping Working Group. The pilot has created infrastructure, technology, monitoring and education projects across 27 councils.

Provincial Growth Fund Tourism

Tourism is a key sector benefiting from the Provincial Growth Fund (PGF), with approximately \$101 million committed to tourism projects. For example, in November 2018 the Ministers of Regional Economic Development and Conservation announced an \$87 million investment in West Coast tourism by the PGF. This included significant funding for key strategic visitor sites, including Punakaiki and the Oparara Basin.

Tourism Infrastructure Fund

In February 2019, the Minister of Tourism announced the opening of the third round of the Tourism Infrastructure Fund for applications from local government and not-for-profit community organisations. The fund provides co-funding for visitor related infrastructure to meet existing and future needs. The fund provides up to \$25 million annually.

Great Rides Fund

In February 2019, the Minister of Tourism announced the opening of the tenth round of the Maintaining the Quality of Great Rides Fund. The Fund has a budget of \$2

million each year across two rounds to support projects that maintain and improve completed sections of the Great Rides of Ngā Haerenga – the New Zealand Cycle Trail.

Going forward, new priorities identified through the Strategy include:

Establish Long-term Sustainable Funding Mechanisms

Officials are working to implement the International Visitor Conservation and Tourism Levy and pass the relevant enabling legislation.

Destination Management Planning

MBIE is developing a set of guidelines on destination management planning to help support Regional Tourism Organisations and Economic Development Agencies in better managing their respective destinations.

Capability Development and Partnerships

This will involve MBIE building the capability of destination management planning across the sector and regions and support implementation of destination management plans through partnering with regions and enabling access to sustainable funding sources and investment

Strengthen Tourism Data and Insights

MBIE is working to implement key elements of the Tourism Data Domain Plan, which sets out the priorities for tourism statistics, based on agreement by industry and Government stakeholders.

Protect Aotearoa New Zealand's natural capital and indigenous biodiversity

DOC is working to prioritise how money raised through the conservation pillar of the International Visitor Conservation and Tourism Levy will be spent to support indigenous biodiversity. Other actions identified in the Strategy, such as long-term landscape-scale spatial and destination plans, will support better management of the impacts of tourism and protection of natural capital and indigenous biodiversity.

Transition to a low-emissions and climate resilient Aotearoa New Zealand

This will involve MBIE deepening current understandings of the implications of climate change for the tourism industry and the move towards a low-emissions economy.

MBIE and DOC thanks the submitters for their contribution. We have, where possible, attempted to better reflect the views of submitters in the final Strategy document.

Annex One – List of submitters

142 submissions from members of the public
Air New Zealand
Alpine Recreation
Aspen Court Ltd
Associate Professor Ian Yeoman, Head of Tourism Management Group, Victoria University of Wellington
Auckland International Airport
Auckland Philharmonic Orchestra
Auckland Tourism, Events and Economic Development
Birds ferry Lodge Ltd
Blind Foundation
Board of Airline Representatives New Zealand
Brook Serene
Bus and Coach Association
Carbon Neutral New Zealand Trust
Cardrona Valley Ratepayers Association

Catlins Coast Ltd
Central Economic Development Agency
ChristchurchNZ
Creative Coromandel
Destination Fiordland
Destination Marlborough
Destiny Bay Wines Limited
Distinguished Professor Robert McLaughlin and Professor Steve Trewick, New Zealand Centre for Planetary Ecology, Massey University
Dr Anna Carr, Senior Lecturer, School of Tourism, University of Otago
Dunedin City Council
Education New Zealand
Federated Farmers
Federated Mountain Clubs
Federation of Māori Authorities
Forest and Bird
Hamilton Waikato Tourism
Hauraki District Council
Hawkes Bay Māori Tourism and Ngāti Pāhauwera Development Trust
Hawkes Bay Tourism
Heritage New Zealand Pouhere Taonga
Holiday Parks
Horticulture New Zealand
Hospitality New Zealand
House of Travel
Hurunui Tourism
Kaipara Views Eco Lodge

Lake Tekapo Lodge
Leave No Trace New Zealand
LKNZ Lodge
Mackenzie District Council
Māori Women's Development Inc.
Matthew Darling, Postgraduate researcher, Department of Geological Science University of Canterbury
Michael Hill International Violin Competition Charitable Trust
Miles Partnership
Ministry for Primary Industries
Motu Trails
Museums Aotearoa
Nelson City Council
Nelson Regional Development Agency
New Zealand Airports Association Inc.
New Zealand Conservation Authority
New Zealand Cruise Association
New Zealand Events Association
New Zealand Māori Tourism
New Zealand Motor Caravan Association
New Zealand Recreation Association
New Zealand Winegrowers
Ngāi Tahu Tourism
Ngāi Tai ki Tāmaki
Ngāi Tai ki Tāmaki Tribal Trust
Ngāi Tāmanuhiri Ngāti Wai Trust Board
Ngāi Tawake ki Tāmaki Trust

Ngāti Pāhauwera Development Trust/Hawkes Bay Māori Tourism
Ngāti Pāhauwera Iwi Settlement Trust, and Hawkes Bay Māori Tourism
Ngāti Rangi Trust
Ngāti Whare Holdings
Ngāti Whātua o Kaipara
Oreti River and Rod and Wheel Houses
Paeroa Bed and Breakfast
Pen-y-bryn Lodge
Porirua City Council
Proguides New Zealand
Pukaki Tourism Holdings LP
Quality Tourism Development Ltd
Queenstown Chamber of Commerce
Queenstown Lakes District Council
Rangitikei District Council
Ruapehu District Council
Shotover Canyon Swing & Canyon Fox
Simon Arnold, CEO, New Zealand National Energy Research Institute
South Canterbury Chamber of Commerce
Stay Kerikeri
Taiao Cycle & Walk
Tapuika Iwi Authority
Tapuika/ Tūhourangi/ Ngāti Whakaue
Te Araroa Trust
Te Kāhui Maru (Ngāti Maru, Taranaki)
Te Kotahitanga o Ngāti Tūwharetoa

Te Puni Kōkiri
Te Rūnanga o Ngāi Tahu
Te Rūnanga-ā-Iwi o Ngāpuhi
Te Whakakitenga o Waikato
Te Wharewaka o Pōneke
The Piripi Group
Timaru District Council
Toi Māori Aotearoa
Tom Bennion, International Climate-Safe Travel Institute
Tongariro River Motel
Tourism Bay of Plenty
Tourism Export Council of New Zealand (TECNZ)
Tourism Industry Aotearoa
Tourism Waitaki
Upstairs Hospitality
Venture Southland
Visit Ruapehu
Waiheke Unlimited Ltd
Waiheke Visitor Board
Waiheke Winegrowers Association
Wellington Regional Development Agency
Wendy McGuinness, McGuinness Institute
West Coast Tai Poutini Conservation Board
Whakatane District Council
Whanganui District Council
Whanganui i-Site Visitors Centre

Whangaroa Papa Hapū

Wharewaka o Pōneke Enterprises

Wild on Waiheke

Woodside Hill Winery

