



**GOOD Tourism in Aotearoa/New Zealand:
Opportunities for regenerative tourism in a post-COVID-19 world**

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Abstract

New Zealand's tourism industry is in a state of complete upheaval, forced to reset and reimagine itself as COVID-19 has brought decades of continuous growth to an abrupt stop. Despite the disruption and uncertainty, GOOD Travel sees an opportunity in this moment of pause to reflect on the sustainability of the tourism industry and what tourism could look like in the future.

This research analyses the current state of sustainable tourism in New Zealand, and explores ways in which the industry can build towards regenerative tourism in a post-COVID-19 world. Interviews were conducted with tourism researchers and industry stakeholders in order to establish a picture of what a sustainable and responsible tourism industry could look like in New Zealand. Results have shown that there is both an opportunity and a desire post-COVID-19 to rebuild New Zealand tourism towards a community-led, values based, regenerative industry.

This research has created an image of what GOOD tourism in New Zealand could look like based on the aspirations and intentions of industry stakeholders, and has found that there is plentiful optimism and resilience within New Zealand tourism to enable the shift towards a world-leading regenerative industry.

Introduction

Tourism in New Zealand has grown to be a 41 billion dollar industry, with as many as 4 million visitors arriving here each year. The beauty and hospitality of New Zealand are known the world over, and as visitor numbers have grown, tourism has become increasingly important to our economy - employing 8% of the population and contributing 5.5% of GDP in 2019 (Statistics NZ).

However, under the shadow of COVID-19, the tourism industry is experiencing unprecedented uncertainty. Border closures and travel restrictions have created enormous and ongoing challenges for tourism, and adapting to the “new normal” has and will continue to require exceptional resilience and adaptability by the industry.

Alongside the pandemic, other challenges continue to emerge for tourism as the climate crisis unfolds and the environmental impact of travel and tourism is evaluated. Tourism’s resilience is being harshly tested now, but ongoing impacts of climate change will bring new and unpredictable challenges.

Prior to COVID-19, the Parliamentary Commissioner for the Environment asserted that the unwavering growth of the tourism industry that has seen visitor numbers go from under 1 million in 1990 to nearly 4 million 30 years later cannot be maintained. Many visitors come to New Zealand for our reputation for clean, green, pristine environments, friendly hospitality and manaakitanga, and the wide open spaces unachievable in the large cities elsewhere. If, the commissioner asks in the 2019 report, those environments are destroyed, those friendly hosts are increasingly reluctant to welcome the hordes of visitors, and the arrival numbers continue to grow - tourism is “killing the goose that laid the golden egg” (PCE 2019, 4).

The longevity of tourism in Aotearoa now relies on its sustainability. We depend on our clean, green, 100% pure image to attract visitors, one that cannot be sold in honesty if the status quo remains. Environments frequented by visitors need to be protected, operators need the support and trust of the host communities they work in, and a values based approach to destination management and marketing is needed.

This research has shown that there is both an opportunity and a desire to rebuild tourism to be more sustainable, moving away from harmful and high-impact tourism, and towards tourism that does social, economic and environmental good.

Using evidence gathered from interviews with university researchers, tourism industry experts, and leading sustainable operators in New Zealand, the aim of this research was to establish an image of what a sustainable, responsible, regenerative industry could look like. The research questions that guided this project were:

1. When international visitors return to Aotearoa post-COVID-19, what do New Zealanders want tourism to look like?
2. What forms of tourism should be encouraged, or discouraged, in New Zealand?
3. How can tourism support the rebuild of New Zealand’s economy, regions and communities?

Literature Review

To provide context and basis for the research interviews, recent literature was reviewed, including academic journal articles, government reports, and relevant media articles. The purpose of this literature review is to ground this research in the current academic and industry debates, and to assure the relevance of this research.

Origins of sustainable tourism

Sustainable tourism is a considerably modern concept, and both its definition and its operational use were disputed from the beginning. In his 1999 “state-of-the-art review” of sustainable tourism, R.W. Butler highlights the differences in those definitions, with examples from organisations and scholars that vary from a focus on local economies to ecosystems to “continual growth” to “enhancing opportunity for the future” (Butler 1999, 10).

In the 1970s theorists began to explore the idea that tourism could be harmful to cultures, communities and, later, environments (Berno & Bricker 2001, 2). At that time, tourism was considered by some to be in a state of “coexistence moving towards conflict”, on the tipping point of becoming detrimental to environments and culture (Budowski 1976, 27). Some specific studies addressing tourism’s impacts were also beginning to emerge, for example reports on deforestation and litter caused by trekking in Nepal, or analyses of how little tourist money was actually remaining in and benefiting host communities (Dilsaver 1979, 111).

This literature predates, but is contextualised by, the popularisation of ‘sustainable development’ as a concept, primarily through the so-called “Brundtland Report” (World Commission on Environment and Development [WCED], Brundtland 1987). The Brundtland Report defined sustainable development as development that “meets the needs of the present without compromising the ability of future generations to meet their own needs” (Brundtland, 1987). The report goes on to discuss in detail the implications of a move towards sustainable development on industry, ecosystems, energy, food security and other issues of significance. Tourism, however, is conspicuously absent.

Tourism’s exclusion from early sustainable development literature is perhaps a sign of the sustainability movement’s historical neglect of tourism and its impacts, despite the research emerging on tourism’s significant impacts before sustainable development was widely discussed (Dilsaver 1979, 109). Weaver and Lawton argue that at that time tourism was not perceived to be an industry that consumed natural resources, and was seen as marginal or not of economic significance. On the contrary, they assert, tourism is “a major consumer of natural resources, and a multi-sector activity that affects, and is affected by, almost all other forms of economic activity” (1999, 13).

It is perhaps unsurprising that tourism was initially not recognised as significant in the sustainable development sector - the multi-faceted and sometimes intangible nature of the industry makes its impacts difficult to define. Tourism is not, Berno and Bricker argue, “a single industry in the traditional sense... does not comprise a single ‘type’ of business... [and] is not a single, tangible product” (2001, 6).

From the very conception of the idea of sustainable tourism in the early 1970s, it was identified that the economic and social impacts of tourism cannot be easily separated from a destination’s general economic and social life (Young 1973). A definition of sustainable tourism, therefore, has different interpretations and implications for different affected groups - for policy makers,

tourism businesses, travellers, sustainability advocates and host communities (Butler 1999, 11).

As the understanding of tourism's negative impacts has grown, there has also been discussion of the potential good tourism can do when it is properly managed and measured. Even in the early stages of tourism's impact being analysed, optimistic threads of what might now be recognised as regenerative tourism theory appear. For example, Budowski writes in 1976: "a change of attitude, leading to a symbiotic relationship between tourism and conservation in the wide sense, can offer a very large variety of advantages and benefits - physical, cultural, ethical, and economic - to a country" (1976, 31).

The New Zealand context

The growth of New Zealand's tourism industry has been rapid and volume driven. From 17 billion in expenditure in the year 2000, to nearly 41 billion in 2019, NZ tourism has been booming and, prior to COVID-19, the growth wasn't slowing. Now, with the industry directly or indirectly employing over 390,000 people, the success of New Zealand's economy has become inextricably linked to the success of New Zealand's tourism industry (Statistics NZ, 2019).

Despite this unwavering growth, many scholars have challenged the high volume model of tourism that has become the mainstream, peaking with nearly 4 million international arrivals in 2019 (Statistics NZ, 2019). Prior to COVID-19, the impacts of over-tourism in New Zealand were becoming increasingly significant, with some commentators arguing that the 100% Pure New Zealand image is becoming more and more difficult to maintain (Insch, 2019).

The Parliamentary Commissioner for the Environment's (PCE) report on tourism outlines the ways in which the continued and untapped growth of the tourism industry in New Zealand is damaging environments and culture. Even so, infrastructure that is being developed to keep up with this growth is encouraging further growth by volume (PCE 2019, 79).

The Government's goals for the tourism industry, as laid out in the 2019 New Zealand-Aotearoa Government Tourism Strategy (Ministry of Business, Innovation and Employment [MBIE] & Department of Conservation [DOC]), are:

- Tourism supports thriving and sustainable regions
- Tourism sector productivity improves
- NZ delivers exceptional visitor experiences
- Tourism protects, restores and champions NZ's natural environment, culture, and historic heritage
- New Zealanders' lives are improved by tourism

These goals perhaps reflect a changing attitude towards tourism in New Zealand, with a focus on sustainability and regeneration. As awareness of the environmental and cultural pressures of tourism increases, some tourism-specific policies have begun to be put in place to mitigate the industry's impact, for example the International Visitor Conservation and Tourism Levy, regional destination management planning, the Tourism Sustainability Commitments, and the Tiaki Promise.

However, there is some scepticism that enough is being done to transform the industry from its high-impact business-as-usual. The PCE suggested that most of these Government policies

“have limited capacity to decouple tourism growth from the impacts it has on the environment... considerably more ambition will be required if a continued worsening of tourism-related environmental pressures is to be avoided” (2019).

These goals were the government’s policy priorities for tourism before COVID-19 changed the industry drastically, and many scholars have said that now is the time to refresh and do more than the bare minimum for sustainability. The government has proposed a “reimagining” of the tourism industry, with former Tourism Minister Kelvin Davis saying that the current policies will be reviewed and the government will be working with the industry to “rethink the entire way we approach tourism to ensure that it will make New Zealand a more sustainable place, enrich the lives of all our people and deliver a sector which is financially self-sustaining in the longer term” (Davis 2020).

What this reimagining will look like remains to be seen, but many suggest that one focus should be on shifting away from the high-volume model that has dominated. Post-COVID-19, as put succinctly by Anna Carr, “the focus is no longer one of growth at all costs” (2020, 5). In Tourism Industry Aotearoa’s Industry Survey, 66% of respondents said they would like to see more focus on quality, high yield visitors over quantity. The report says that “There is also an underlying sentiment that we don’t want to go back to volume tourism” (TIA 2020).

Researchers also argue that it will be essential for host communities to be included and consulted as a part of the reimagining process. Recent research from Angus and Associates shows that in the rebuild from COVID-19, “it’s crucial that industry, local and central government consult with communities about what they want from tourism.” This is based on the understanding that there has been “a lack of in-depth research into how Kiwis perceived an industry that played such a huge part in New Zealand’s economy” (Angus and Associates 2020).

It is widely acknowledged that a responsible and sustainable tourism industry requires buy-in from host communities - or ‘social license’ - and by its nature should benefit (or at least not negatively impact) those communities. Sustainable market orientation requires the cooperation of all stakeholders, particularly host communities (Insch 2019, 2).

However, analysis of surveys over time of host communities’ perceptions of tourism show that these perceptions are becoming increasingly negative. The most recent Mood of the Nation report by TIA (2019) puts the percentage of New Zealanders who think international tourism puts too much pressure on NZ at 42%.

These perceptions vary by community and are conditional on issues such as public infrastructure, seasonality, and cost of living (PCE 2019, 73). MBIE’s Tourism Data Domain Plan (2018) suggests that more in-depth, regional analysis of community perceptions is one of the key issues for data in sustainable tourism. Post-COVID-19, these perceptions will need to continue to be tracked and measured if goals for a sustainable industry are to be met.

Angus and Associates have released insights from a 2020 survey showing that New Zealanders are “not expecting business as usual” from post-COVID tourism, citing interest from participants in investment in infrastructure, a focus on domestic tourism, and emphasis on sustainable tourism (2020). In a media release, they noted the importance of community consultation in the reimagining of the industry: “Resetting and reimagining tourism via an industry and ministerial focus group without meaningful community research and engagement could be a path to poor policy decision making” (Angus and Associates, 2020).

In the planning of this reimagining, it is also important to acknowledge that the variety of tourists who visit New Zealand is diverse, and not all tourists are suited to all activities or regions. Some operators and communities benefit from high-spending package tour groups, while others benefit most from slow-moving solo travellers. “It is up to destinations,” argues Dave Stanford, “to prioritise which quality is the most desirable” (2008, 271). This idea of destination management based on community and visitor values is key to understanding what a *values*-based, rather than volume-based, industry could look like.

Māori perspectives are also considered by many to be crucial to rebuilding a sustainable industry. Recent tourism strategies from MBIE, TIA, and DOC outline goals for building on Māori input in and agency over tourism in their communities, but it is widely agreed that more work is needed in this space. Some scholars argue that a regenerative tourism model in Aotearoa needs indigenous values to be central. The interviews completed for the 2019 PCE report identified the values of kaitiakitanga, manaakitanga, and tino rangatiratanga as key concepts for Māori, but tino rangatiratanga in particular excluded from any national tourism strategies (Matunga 2020, 297).

Regenerative tourism models have a lot to gain from drawing on existing Māori frameworks for environmental decision making, such as the Mauriora Systems Framework (Matunga 1993), and building Māori values into tourism models has benefits beyond the industry itself. “Involving indigenous communities in planning processes,” argues Anna Carr, “or enabling self-governance, can enhance resilience in health, recreation, leisure, education and business settings... indigenous values can lead to thoughtful, nature-centric solutions” (2020, 495).

A significant challenge that faces the sustainability goals of New Zealand’s tourism industry is the lack of centralised and consistent data in sustainability. The 2018 Tourism Data Domain plan identified that “there is no agreed model for measuring the sustainability of the tourism industry” (MBIE 2018, 31).

Many researchers agree that much more data collection and analysis is needed to support the move towards a more sustainable industry (Insch 2019, 3; Patterson & McDonald 2004, 5; Becken & Simmons 2002, 344). This data should accurately calculate tourism’s contribution to the nation’s “energy bill” (Becken 2002, 344); weigh up environmental and economic impacts of business-as-usual to the “clean green” image (Patterson 2004, 14); and requires an integrated approach across government, industry, regions, and operators (Page & Thorn 1997, 60).

Sustainable tourism may be a fairly modern theoretical concept, but the extent of the literature that now exists on tourism’s impacts and ways to mitigate them is evidence of the complexity and importance of this issue. Despite being left out of early sustainable development research, tourism is now recognised for its widespread impact, convoluted nature and economic importance, and so should continue to be increasingly present in sustainability research and movements.

Many scholars contend that the challenge now faced by New Zealand tourism is how to best use this unique opportunity to rebuild tourism beyond ‘business-as-usual’ and to begin moving towards a regenerative tourism industry in Aotearoa. The literature reviewed also suggests that the continual growth model of the past is no longer viable. Thus, the current research investigated tourism industry stakeholder perspectives how to create a sustainable and regenerative New Zealand tourism industry post-COVID-19.

Methodology

This research was conducted using a qualitative approach and included a literature review, interviews with researchers, and interviews with operators. Overall, six 1-hour video interviews and nine written question-and-answer interviews were completed. The list of written sources are included in the reference section, and interviewed participants are listed as Appendix 1.

A number of journal articles and government reports were read and assessed in the process of this research in order to understand the current issues in New Zealand and to imbed GOOD Travel's research in the debates already taking place. It is noted that many articles are from a pre-COVID era and therefore the relevance of their context has shifted. Articles related specifically to tourism post-COVID were also included.

In addition to academic sources, recent relevant media articles are included in the review. As the research was taking place during the COVID-19 pandemic, many of the tourism-related debates were regularly covered by local news sources, and reviewing these contributes to establishing the views of communities, operators and industry stakeholders. The reliability of these sources was considered and they have only been used as evidence where claims are backed by academic sources or interviewees.

Qualitative interviews were conducted with tourism industry stakeholders including representatives from government departments, university researchers, governing bodies, and tourism operators. Relevant expert fields included responsible tourism, sustainable development, indigenous tourism and development, environmental protection and regional development - although participants were predominantly in the tourism field. Individual participants were chosen based on their expertise, or organisations were asked to nominate a relevant member of their team to contribute.

Written responses were submitted via email, and video interviews completed using Zoom. Due to COVID-19 lockdown restrictions at the time of research, and the distribution of participants across the country, these methods were the most reliable. Zoom interviews were recorded for the purpose of capturing quotes and ideas from participants accurately through transcription.

Semi-structured interviews were conducted using the following questions to guide the interviews:

1. When tourism returns to New Zealand post-COVID-19, what do you want to see more of? What do you want to see less of?
2. How could we use tourism to support the rebuild of our economy, our regions, and our communities?
3. Other than yourselves, who are the businesses, organisations, communities or individuals you believe are leading the way in responsible and sustainable tourism in New Zealand?
4. How easy do you think it is to be a responsible traveller in New Zealand? Where can GOOD travellers go for information about travelling responsibly here?

Researchers and industry stakeholders were interviewed with the purpose of identifying the primary issues in NZ tourism as understood by experts. Tourism operators were interviewed in order to establish a picture of what action is already being taken towards developing a sustainable and responsible tourism industry, and what leading sustainable tourism operators

believe is important for the future of the industry. This also allowed us to compare the action being taken by the industry to the issues identified by academics and experts.

Due to the significant challenges being faced by many tourism operators during the time of this research, the number of operators able to be interviewed was limited.

Data collected from interviews was analysed using the six stages of thematic analysis outlined by Braun and Clarke (2013). This method is widely regarded to be a thorough and robust process, and was used to assist with coding and analysing the qualitative data collected through interviews.

Zoom interviews were recorded and transcribed, and then read thoroughly along with written interviews for familiarisation. Notes were also made during the transcription process to note context, tone or focus points that would help to accurately represent the interviewees' comments and assist with the analysis.

Data was coded manually by highlighting and labelling patterns from interview quotes. The coding took into account similar ideas or sentiments, as well as the types of interviewees and patterns between those from similar or different sectors of the tourism industry.

From this coding process, approximately ten initial themes were identified by pulling together coded segments and identifying the key points emerging from the data. These themes were reviewed and some were further refined or combined with other similar themes in order to best represent what had emerged from the interviews.

Following this review process, the remaining six themes were then defined and connected back to the research aims and questions. These shaped the writing of this report, and each theme is explained and analysed in the Findings section. For clarity, discussion of each theme is included in the Findings section, and cross-thematic analysis is included in the Implications and Conclusion sections.

Three key themes were used to develop infographics that were distributed to participants. These infographics were designed to simplify and clearly communicate this report's key findings for an industry and academic audience. They were shared through GOOD Travel's networks and many participants have also responded that they have shared these highlighted results with their colleagues and networks.

This research was peer-reviewed at multiple key stages, including during the thematic analysis and after the initial draft of this report. This was to make sure that accurate themes were identified from the data and to minimise bias in data analysis.

It is noted that, in acting as a researcher for GOOD Travel, the data collected may have been influenced by our social enterprise's reputation, partnerships or media. GOOD travel is known for our focus on sustainability and partnering with GOOD businesses, so participants' responses may have been influenced by their knowledge of this. We also employed existing GOOD Travel relationships and partners to find research participants, so this may have influenced who was contacted to be involved and who was willing to take part in the research.

Note on the impact of COVID-19

This research began just as COVID-19 began to spread internationally and as the first cases appeared in New Zealand. During the planning for this research, announcements of great significance to the tourism industry were unfolding daily: travel sanctions followed by border closures, domestic travel restrictions, and lockdowns.

As a result, the scope and intentions for this research had to adapt along with the industry. Issues that may have been prevalent in this research prior to COVID's impact were no longer relevant. Instead, the experts and operators interviewed were primarily focussed on challenges and potential beyond tourism's business-as-usual in New Zealand. This meant, of course, immediate challenges posed directly by COVID, but also opened the conversation up to think about the "reimagining" of the industry.

So, while COVID in some ways has created a distraction from issues of sustainability and regeneration in tourism, it has also, as seen in the optimism and resilience demonstrated in these interviews, created an opportunity to reflect, rethink, and reset.

That said, at the time of this research many operators in particular were facing closures, staff losses, and other significant uncertainties. Many operators declined to participate because their focus was needed for the immediate challenges in front of them. Those who did participate noted that, due to COVID-19, issues that were usually top of mind were no longer relevant, and some focus was placed on the necessity for the industry to return at all, on top of the need for sustainable changes.

In the literature, many of the articles reviewed are from a pre-COVID era, so this was considered during the analysis. Some academic work that has been released during the pandemic has been included, as well as media articles, reports, and surveys that help to provide context.

Methodologically, COVID-19 meant that all interviews were completed remotely, either by video call or email. This is not expected to have significantly affected the data collected, and due to the geographically diverse participants, may have been the case with or without COVID-19.

Findings and Discussion

Thematic analysis of interview data led to the identification of six key themes that addressed the research questions, which are explained and discussed here with supporting data. All italicised quotes are comments are taken directly from interview transcriptions or written interviews.

The data collected showed the importance of tourism establishing ‘social license’ in host communities in order to be truly regenerative and give back to the people and places visited. This idea of community being central to sustainability goals also came through in the focus on a values-based tourism model, matching the values of destinations and communities to those of travellers, and moving on from a volume-led or economically centred model.

All themes were underlined by the idea that more data and monitoring is needed in order to achieve sustainable tourism goals. It is considered essential to the success of sustainable tourism that progress is able to be tracked, measured and reported on in a centralised way. Measurement should include traveller and tourism impact, as well as community sentiment, impact and values. Linked to this, the data showed that working towards a purpose-driven industry is key, including the collection of meaningful data. The data highlights a purpose-driven model as the difference between ‘box-ticking’ sustainability, compared genuine, centralised sustainability goals and values.

Domestic tourism was widely discussed in interviews and therefore has been included as a key theme here. All other themes are also relevant to domestic tourism, however significant emphasis was placed on it by research participants (primarily due to COVID-19 impacts) and therefore it merited independent analysis. Primarily the data highlights the need to prioritise and sustain the domestic market.

Finally, the need to foster traveller awareness came through in interviews as key to the success of a sustainable industry. Most other findings were related to industry or operator led changes, so it is important to also note the participants’ views that travellers must participate in the reimagining of tourism.

Enhancing social license in host communities

Interviewees identified that in rebuilding tourism, community values, interests and impacts should be central to sustainability goals. It was acknowledged that in the past tourism has not always existed in symbiosis with host communities, and that this should not be the case in a post-COVID, ‘reimagined’ industry.

As discussed in the reviewed literature, community support or ‘social license’ is considered essential to building a regenerative industry that gives back to people and destinations (Insch 2019, 2; Angus and Associates 2020). Research participants also acknowledged host communities as fundamental to the success of tourism, and therefore argued that communities should directly benefit from tourism and help to define how the industry grows.

“Let’s bring our communities in to the conversation so they can be part of the outcome rather than ‘have tourism done to them’ as has been the sentiment of some in the past. We have the opportunity to wrap the well-being of communities and meaningful partnerships with iwi into how we define and position our places.”

Participants' emphasis on including communities in decision making processes also aligns with the Parliamentary Commissioner for the Environment's report on tourism that highlights the importance of social license in host communities to the sustainability of the industry, including appropriate infrastructure and destination management. (PCE 2019, 87). Participants suggested that destination management planning should be developed with both local populations and their visitors in mind.

“Genuine practical win-wins for local communities and tourism should be sought actively. These could include public transport, recreation opportunities, and events.”

Interviewees have asserted that post-COVID tourism should have community values at its heart, and that a rebuild of the tourism industry should necessarily include uplifting the communities in which tourism operates.

Embracing values based tourism

As in the literature, interviewed participants were also critical of the high-volume model that has been prevalent in New Zealand tourism. Participants argue that the focus on maintaining the upwards trend of growth and monetary value of the tourism industry has meant we have lost sight of the real “value” we want tourists in Aotearoa to bring.

“The mantra of high value versus high volume tourism needs to be critically assessed. What determines high value – is that money, money less impact, regional spread, per-day spend, per-visit spend? What other ‘value’ do some visitors bring other than money – cultural value, lifetime value, trade value (as in will they purchase NZ goods on their return)? Someone staying in a lodge owned by an overseas investor, flying around in helicopters, flying first class, never interacting with real new Zealand and staying in one location is not a ‘high value’ visitor.”

Participants suggested that more recently, even as the industry has begun to question the high-volume approach, a high-value approach has been proposed, and this is not the desired alternative. Participants said that visitors are too often targeted for their monetary value - their ability to spend extensively on lavish accommodation, high end restaurants, and extravagant activities. They suggest we should shift this focus on a visitor's value to their *values*. Why do visitors want to come to New Zealand? Are we marketing towards visitors who share our Kiwi values? By rethinking the way that we market ourselves as a destination, we can better cater for the kinds of tourists we want to have in New Zealand.

“Prefer to see the strategy focus on values rather than ‘value’: visitors should be targeted for their genuine interest in new Zealand's natural environment and cultural landscape over their spending capacity.”

“The mantra of high value versus high volume tourism needs to be critically assessed. What determines high value - is that money, money less impact, regional spread, per day spend, per visit spend? What other ‘value’ do some visitors bring other than money - cultural value, lifetime value, trade value?”

This approach suggests that destination management and destination marketing need to be more closely aligned. The plans we put in place to protect our environments and communities from tourism's impacts should be reflected in the way we market ourselves to visitors. Participants suggested that campaigns such as the Tiaki Promise could be used not only for destination management and encouraging conscious travel, but also as a marketing tool to attract visitors who share New Zealand's values.

“Tourism players, regional tourism destinations are interested in trying to match their values with the values of their visitors... or the values of their visitors need to match the values of the communities these tourists are visiting.”

“Need to rethink how Tourism NZ and Air NZ and Regional Tourism Organisations actually present themselves to visitors... historically we've been focussed on engine markets and high growth markets... but we need to focus more on sustainable markets and the sorts of visitors that are going to be more dispersed and travel more slowly and spend more time here and therefore spend more money here and so forth.”

These findings suggest that a values-based tourism model would grow the tourism industry in a way that is sustainable. It would have community-values at the centre and travellers' values being regarded more highly than their spending capacity. Using this model to design destination marketing that aligns with mindful destination management would foster a visitor culture in New Zealand more in line with campaigns such as the Tiaki Promise and 100% Pure New Zealand.

Improving data and monitoring

Interviews overwhelmingly suggested that the lack of centralised data collection and monitoring systems is a threat to the sustainability and the resilience of the tourism industry. The 2018 Tourism Data Domain Plan highlights that there has been a historical focus on economic monitoring, without the depth of understanding about environmental and social impacts, and that there is no agreed method for measuring sustainability. (MBIE 2018, 37-38),

Many participants discussed the need for taking a holistic approach to sustainable tourism and the way we measure it. This emphasis on seeing the industry and its impact as a whole are in line with the desire to move away from volume-centric tourism reflected in the literature (PCE 2019, 79; Inch 2019; Carr 2020, 5).

One holistic framework suggested by participants was the four capitals model, an economic model developed by the New Zealand Treasury that was designed to encapsulate the balance of wellbeing for New Zealand. The four capitals are natural capital (the environment), social capital (culture and community), human capital (people and knowledge) and financial capital (monetary and physical assets) (The Treasury 2019). Participants suggested that this model should be considered in order to see the industry as a whole and ensure tourism is benefiting communities.

“As we look to rebuild the industry, we need to consider the four capitals (human, environmental, financial and social) together to ensure our communities have ownership and are proud of the industry they are a part of.”

This model is also in line with the values based tourism model discussed above, with the balance sustainability and wellbeing being driven by New Zealand, community and individual visitor values.

Participants also suggest that data collection should be cross-discipline, with a systems thinking approach. Tourism is connected to almost every other industry and research and monitoring should reflect this. For example, research into waste management issues in Queenstown might show the freedom campers and other visitors put disproportionate pressure on systems - but results will be relevant for locals as much as tourists, and outcomes should benefit the local community as much as the visitors they are hosting.

“I want more systems thinking in general... that is not just the tourism industry but the whole of the nation and everybody involved in providing services to travellers and taking into account when they do that what impacts that has.”

This echoes the reviewed literature in that it acknowledges tourism as a part of a bigger whole - within individual communities, and within New Zealand’s economic and social frameworks.

Another holistic framework that was suggested by participants was the quadruple bottom line approach - with focus on people, profit, planet, and purpose - in order to establish new data and monitoring systems that are centralised around collective goals and values, and to understand the collective impact of the industry. The quadruple bottom line approach also highlights the need for purpose to be at the heart of the industry’s sustainability goals.

“There’s a need for longitudinal robust data collated by academic research teams working alongside others (e.g. Stats NZ, LandCare research) with quadruple bottom-line approach, as the focus on economics is a concern.”

Having the ability and tools necessary to track and measure sustainability in tourism is considered essential to the work towards a regenerative industry. Data collection needs to be holistic and centralised, while taking into account the diversity and regional disparities in the industry. This is widely regarded as a significant obstacle that is holding New Zealand tourism back from its sustainability goals, and the research suggests that post-COVID-19, measuring sustainability should be considered central to destination management planning.

Creating a purpose-driven industry

Putting *purpose* at the centre of tourism business and destination management planning is considered to be how sustainability can be built into tourism goals in a holistic way, rather than being tagged on as an afterthought. A purpose-driven industry would be one that prioritises sustainability in the same way it has historically prioritised economic or volume-based goals.

Interviewees discussed the difference between sustainability for the sake of appearances and sustainability as integral, both for tourism operators and for travellers. Engaging visitors who want to travel in a sustainable way was described as important, and a re-evaluation of what ‘value’ tourists should bring was highlighted as essential to rebuilding a more sustainable tourism industry in Aotearoa.

Participants explained how sustainability certifications for tourism businesses in theory help travellers to identify operators who are genuinely engaging with sustainability practices, but the over use of these accreditations and the costs associated with them means that these kinds of labels have lost a lot of their meaning.

“Currently there are so many certifications out there that don’t really mean anything because you have to pay to get them which already excludes small operators who may be doing an amazing job in their local community but just don’t have the money to pay Qualmark.”

Participants said that costs associated with accreditations, such as the widely recognised Qualmark, can often mean that smaller operators aren’t able to access them. In particular they noted that in a time of financial strain, like the post-COVID environment we are heading into, businesses are less likely to spend time and money on accrediting themselves. Although Qualmark membership fees were waived for 2020, this was not seen as a long-term solution by participants.

In addition, some of those accreditations or commitments that are not paid, participants said, don’t have the incentives or requirements attached to them that encourage real action. The Tourism Sustainability Commitment, created by TIA, is considered a useful framework but there isn’t accountability built into it. Similarly with the Tiaki Promise, participants said it was common for operators to sign up and take the “promise” without changing any business practices. This also supports the idea that sustainability needs to be purpose-led and central to a business’ plans and goals in order to be meaningful.

If a quadruple bottom line approach was taken, as discussed by participants, the fourth bottom line, purpose, could be seen as the difference between on-paper, box-ticking sustainability, and real, resilient sustainability. This is central to the point that many participants argued - that there is too much green-washing or shallow commitment to sustainability, and what is needed is for purpose to be at the heart of tourism businesses.

“Inspiring the operators as they bring their businesses back to full strength to build in broader sustainability principles, and to work to really being seen as good community citizens... if [tourism operators] understand sustainability with their heart, you’ll have an industry that will live close to it and understand it, and move closer to the 100% Pure NZ image.”

Participants also suggested that a purpose-driven approach is how we can ensure that the industry becomes more sustainable from the bottom up - rather than just a few extremely sustainable businesses being exceptions to the rule.

“As a full industry..., instead of picking out you are good and you are not, how do we bring everybody up... ideally our whole industry would be good. Ideally there wouldn’t be anybody operating that doesn’t comply with a certain level at least... because they will undermine all the other efforts that are being done.”

These insights suggest that a purpose driven sustainable industry is the difference between short term and long term change, and is resilient to times of financial strain or other challenges. This sense of purpose on an organisational and industry level is what should encourage collaboration in order to uplift the entire industry to a higher standard of sustainability.

Developing domestic tourism

Perhaps unsurprisingly given the closed borders at the time, domestic tourism was a common theme in the research interviews. Domestic tourism is considered to be a key part of the work towards a regenerative industry, and especially in a post-COVID environment.

Participants frequently discussed how the focus of tourism marketing strategies has been disproportionately focussed on international visitors. In 2019, about 60% percent of tourism revenue came from domestic travellers, and yet there has not been a focussed campaign on this market (Statistics NZ 2020).

“The future should be far more focussed on domestic tourism. The neglect of domestic tourism over the last three decades in this country is absolutely unacceptable. And now we find ourselves in a crisis going ‘how do we market to ourselves?’ No one knows. The domestic tourists have all flown overseas as they’ve been neglected here.”

It should also be acknowledged that domestic tourists usually have a lower carbon footprint, if only because of avoiding the long distance travel required for most internationals to reach New Zealand. As a result, participants suggest the future of tourism should be domestic focussed.

“Short-haul tourism has greater potential to be genuinely sustainable than long-haul visitation; the industry should adjust its focus accordingly.”

“We would like to see more domestic travel, to encourage kiwis to travel more in their own backyard.”

Research participants discussed the need to prioritise domestic travellers in a number of ways. Firstly, marketing strategies should be re-focussed to encourage Kiwis to support local and travel domestically. Strategies should include education like the Tiaki Promise to encourage sustainable forms of travelling domestically. Participants argued that while for the most part domestic visitors want to do good, not all New Zealanders know how to travel well even in their own country, and regional values, tikanga and specific natural environments should be taken into account.

“New Zealanders inherently want to care for our place. I think that’s why Tiaki-Care for New Zealand speaks so strongly to the domestic market. Last Summer, [DOC] created a video aimed at letting kiwis know what Tiaki means to our international visitors and how we, as hosts, but also domestic visitors need to follow the Tiaki Promise.” - LS DOC

Diversification of the domestic market was also discussed, and participants felt that domestic marketing should have an emphasis on places that are not frequented already.

One participant also noted that Kiwis travelling in New Zealand are not “tourists”. They argued that Kiwi travellers are helped to see themselves as of the places they are visiting, a greater sense of responsibility and care can be ingrained.

“When [Kiwis] are on holiday in New Zealand, we’re exploring the place that makes us who we are... Kiwis should not be referred to as tourists in our own land.” - FMC

This idea of domestic travel being an exploration of identity, a development of self and sense of place, better understanding who we are could be key to the sustainability and responsibility of tourism. As the industry pivots to more domestic marketing, the ideas of community and values driven approaches should be central as is suggested for approaches for an international market.

Fostering traveller awareness

Many participants discussed the lack of centralised resources and information for travellers who want to have a positive impact when they visit New Zealand. This is considered a barrier to regenerative tourism goals, as travellers need to be a part of the reimagining process in order for progress to be sustainable. Educating travellers on what good tourism looks like is considered an essential part of achieving these goals.

There are some resources available for travellers planning sustainable trips for specific regions or types of trips. DOC and mountain safety council provide some information and safety and responsibility in NZ wilderness. TNZ and TIA have done campaigns around Tiaki promise, which encourages tourists to take on the responsibility of lessening their impact and doing good. But there is no centralised place for prospective travellers to New Zealand to find information about sustainable and responsible travelling.

“There are a few websites like Mountain Safety Council and DOC which have good info, but the information is quite outdoor/environment specific. Not many resources for other areas.”

“At the moment it is not easy for visitors to find these kind of initiatives: organisations that are working on providing more sustainable choices for visitors.”

“It takes time to research and choose those companies that align with their values by visiting their website, asking at i-sites, and taking the Tiaki Promise”

The research shows that there is a lack of centralisation of resources for sustainable travellers to New Zealand, and that this is a significant and harmful gap. More research is needed to greater understand this shortfall, and destination marketing and advocacy work should consider this an essential challenge to overcome in order to reach sustainability goals.

Implications for Theory and Future research

This research was limited by the availability and fast-changing circumstances of tourism operators, and more research is needed to fully understand the perspectives of operators on a values-based regenerative tourism model. In general, more data is needed, and the research suggests that the existing Mood of the Nation report is not sufficient to build an understanding of community reception of tourism.

The lack of data around host-communities' issues related to tourism is a threat to the social license and regenerative intentions of New Zealand's tourism industry. Greater understanding of community views of tourism are clearly needed. Understanding on community, regional and national levels of what is important to hosts, and using this to market to visitors who share those values, could be transformative for the industry. Research in this area should also include an in-depth assessment of iwi and Māori perspectives on tourism, and of how a values-led regenerative tourism model could incorporate Māori values and frameworks.

The research also shows that attracting visitors based on *values*, rather than seeking pure volume or monetary value, is essential for long-term sustainability. Aligning destination management work with destination marketing campaigns is essential to this values-based approach, and more research is needed to better understand how these disconnected workstreams can be better linked.

Many regions are in the process of developing destination management plans and these usually include sustainability planning. But centralisation of this work is essential to understanding the national status and goals, and so research is needed to understand the connections and differences in the independent plans being developed.

In general, more data and measurement of tourism's sustainability is needed. There must be an agreed framework for measuring sustainability in New Zealand tourism, with regional as well as national centralised analysis. This research suggests that the lack of centralised data is the biggest hurdle to reaching the industry's regenerative tourism goals, and so should be prioritised by leading government and industry stakeholders.

Traveller awareness of sustainable tourism practice is also considered to be essential to the success of the industry's regenerative goals. More understanding of the gaps in traveller knowledge, the values of travellers and how this affects the way they travel, and destination marketing and advocacy designed to encourage responsible travel is needed.

Conclusion

This research has highlighted some of the key issues in New Zealand tourism at the moment, and is evidence of the transitional time the industry is in, both with the immediate threat of COVID-19 and for the increasing importance of sustainability to this and every industry. In particular, participants have highlighted the importance of a community-led, data-based, regenerative tourism approach to tourism.

For the sake of resilience, social license and holistic sustainability, host communities should be much more a part of the conversations and decision making in tourism. Destination management plans should properly understand and address the needs of the community. This requires extensive consultation with communities including iwi, councils, residents, and local operators. This work should be taken with a systems thinking approach that considers the tourism industry as a part of a greater whole - both in terms of the way it can benefit communities and the country, and in terms of its social, cultural and environmental impacts.

The research also shows that destination marketing should be much more closely linked with destination management. The desire to shift away from the volume-based model of the past, and the emerging focus on monetary value, is evident from both the literature and the research interviews. Instead, a *values* based model is proposed, with a focus on matching community and visitor values. This approach could create a better experience for both the visitor and the host communities, matching visitor values to the types of tourism that are beneficial to unique communities.

Any work towards a values-based regenerative tourism model must be based on research and data, and research participants argue that there is a significant shortage of data in the sustainable tourism space. Region-specific data is needed to better understand community needs and values, and centralisation of this data will allow the industry to track and measure progress towards regenerative tourism goals. It is essential that a model of measuring sustainability is agreed upon and used consistently by operators, regional tourism organisations, industry bodies, and government.

New Zealand tourism now finds itself in a moment of both unprecedented challenges and unique opportunities. For an industry that has grown so rapidly, and that is so intrinsically linked to New Zealand's economy, this pause is one that can and should be used to reconsider what post-COVID tourism will look like.

With our "clean, green" reputation, and having fared better than most nations during the pandemic, New Zealand should be a world leader in the shift to regenerative tourism. We have an opportunity to showcase what it would mean to have an industry that supports and benefits communities, protects natural environments, and is centred around purpose-driven businesses and values-based destination marketing and management.

This research has demonstrated that there is much opportunity, much optimism, and astounding resilience within New Zealand tourism. It will be these things that shape the reimagining of the industry to be more sustainable, responsible and resilient than ever,

Appendix 1.

Participant organisations and interview type.

Organisation	Type of interview
Akina Foundation	Zoom interview
Destination Stewardship Centre	Zoom interview
Qualmark	Zoom interview
Otago University	Zoom interview
Tourism Holdings Limited (thl)	Zoom interview
Tourism Industry Aotearoa	Written response (from multiple people at TIA, collated by Lynn)
Federated Mountain Clubs (FMC)	Written response
Tourism Recreation Conservation Consultants (TRC Tourism)	Written response
Department of Conservation	Written response
Adventure Capital	Written response
YHA	Written response
Sherwood Hotel	Written response
Abel Tasman Ocean View Chalets	Written response
Whale Watch Kaikoura	Written response

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