

TOURISM 2025 & BEYOND



A SUSTAINABLE GROWTH FRAMEWORK
KAUPAPA WHAKAPAKARI TĀPOI



OUR GOALS

VISITOR
Deliver
outstanding
visitor experiences

COMMUNITY
New Zealanders
are welcoming
hosts

ENVIRONMENT
Aotearoa is
enhanced by
tourism

ECONOMIC
Grow tourism's
contribution to
New Zealand's
economy

OUR VISION

GROWING A SUSTAINABLE
TOURISM INDUSTRY THAT
BENEFITS NEW ZEALANDERS

Tē tōia, tē haumatia

Nothing can be achieved without a plan



Richard Lauder | CHIEF EXECUTIVE Wayfare, CHAIR Tourism Industry Aotearoa

New Zealand does tourism well. We are becoming increasingly adept at generating demand and hosting both domestic and international visitors to very high levels of satisfaction. From this platform, we must take a long-term view on who and what we are as a destination, and as a nation for that matter. This means we must all act now to embed the sustainable future of tourism: to make sure we nurture the environment and communities in which we operate; to continue to make our visitors feel welcomed and valued; and to ensure we are financially prosperous so we can invest back into this sustainable future. Tourism should be good for New Zealand and good for New Zealanders. The long-term success of the tourism industry requires all of us to play our part. Let's not be passive about this: let's get into it.

OUR VALUES

By embracing these values, we will achieve our 2025 vision of a sustainable tourism industry that benefits New Zealanders:

KAITIAKITANGA

Guardianship and protection of our natural, built and cultural resources for the benefit of current and future generations.

MANAAKITANGA

Showing respect, hospitality, generosity and care for others.

WHANAUNGATANGA

A sense of family and belonging: relationships built on shared experiences and working together.



A Sustainable Growth Framework

This Sustainable Growth Framework keeps our focus firmly on growing our value to individuals, communities, the environment, the economy and for our visitors.

By any measure, New Zealand's tourism industry has experienced a remarkable period of growth.

Visitors and the businesses that service them are making a crucial contribution to the economic and social wellbeing of every city, town and region across Aotearoa. Some small town petrol stations are surviving because of the visitors who fill up their vehicles. There may be five quality cafés along the main street, whereas even one might struggle to survive if there were no visitors. Jobs and business opportunities are being created that help keep young people in our regions.

Over summer my wife and I cycled the wonderful Timber Trail through the Pureora Forest. It is one of several activities, including Forgotten World Adventures and Whanganui River canoeing and rafting, that are attracting visitors to the King Country.

A local builder, born and bred in Taumarunui, reckons he has never seen the town so vibrant. And what does he put that down to? Tourism.

On a national scale, we have made incredible progress towards the original Tourism 2025 goal of growing the industry's economic contribution to \$41 billion a year.

However, we recognise the industry's rapid growth has brought challenges as well as benefits. Public

infrastructure, already suffering from decades of under-investment, has struggled to cope when extra visitor numbers were added in some regions. The demand for staff can outstrip the available supply, leading to a dependence on overseas workers.

And locals may find that their 'hidden gem' destination is now a hit on Instagram and has seen an influx of visitors.

As well as addressing current issues, we also need to be looking beyond 2025 and this reset of our industry growth framework is a key contribution to that process. We have updated its title to reflect the increased focus on building an industry that will continue to make a positive contribution to Aotearoa and New Zealanders in the long term.

It is appropriate that *Tourism 2025 & Beyond - A Sustainable Growth Framework* is being released at the same time as the *Aotearoa New Zealand Government Tourism Strategy*. Each complements the other, and reinforces that industry and government both have a role to play in creating a successful tourism system.

With its launch back in 2014, the Tourism 2025 Growth Framework enabled alignment of effort and purpose. I look forward to that unity of effort continuing as we enter the next phase of our industry's development.



Chris Roberts
CHIEF EXECUTIVE
Tourism Industry Aotearoa
May 2019

Top 10 actions

We have identified a long list of actions for the tourism industry and government to work on over the next three years to keep us on track to reach our Tourism 2025 & Beyond goals (see pages 18-21).

Some of these actions could be described as 'business as usual' but all must be given attention for the tourism system to work well. The following are our top 10 actions.

01.



EMBEDDING SUSTAINABILITY

The *New Zealand Tourism Sustainability Commitment* is the sustainability platform for the industry. It aims to be universal so all operators are contributing to overall tourism industry sustainability, and playing their part in preserving and enhancing Aotearoa New Zealand for future generations.

02.



MANAGING DESTINATIONS

Central to creating value in tourism is the nature and quality of the experience that visitors are prepared to pay for. Destinations are a collection of interests (including local government, iwi, communities and business), meaning that coordination and destination planning is needed to deliver the best outcomes both for host communities and visitors. All of New Zealand needs to be covered by Regional Destination Management Plans.

03.



GROWING AND SHAPING DEMAND

It is imperative that government (via Tourism New Zealand), airlines, airports, regions and industry continue to invest in generating and growing visitor demand. New Zealand operates in a highly competitive global market and attracting high-value visitors requires investment in building a compelling destination New Zealand brand. This brand and subsequent investment in targeted marketing across a portfolio of markets is needed to grow and shape demand in ways that benefits New Zealand and encourages regional and seasonal dispersal.

04.



EMBRACING TIKANGA MĀORI

Māori culture is a unique feature of New Zealand and it is important that all parts of the tourism industry appropriately incorporate elements of Tikanga Māori within their operations.

05.



LIVING TIAKI

Having visitors who meet our behavioural and cultural expectations is central to maintaining the support of New Zealand communities for tourism. *Tiaki – Care for New Zealand* was established by public and private sector agencies. The tourism industry has a role to play in letting visitors know what is expected of them and industry systems are needed to manage issues as they arise.

06.



ENGAGING THE COMMUNITY

The sentiments expressed through the Mood of the Nation Survey provide a clear message - tourism businesses must undertake genuine two-way engagement with their communities to grow mutual understanding of how they contribute to their place, creating a collective vision for tourism development that maintains the *maanakitanga* New Zealand is renowned for.

07.



MEASURING AND MANAGING INDUSTRY CARBON USE

Reducing carbon use will be a key industry priority. Carbon emissions and resultant climate change represent a risk for tourism that requires a systematic industry response.

08.



INVESTING IN INFRASTRUCTURE AND AMENITIES

Tourism activities utilise a wide set of infrastructure, including roads, airports, waters systems, amenities and parking. Ensuring the quality and quantity of this infrastructure is central to achieving high value sustainable growth.

09.



FOSTERING DOMESTIC TOURISM

Domestic tourism activity amounts to almost 60% of total tourism expenditure in New Zealand. So it needs to be understood and managed well to ensure the best outcomes, including the encouragement of domestic tourism as part of dispersal and regional development strategies.

10.



INVESTING TO DELIVER QUALITY TOURISM DATA AND RESEARCH

The industry requires a comprehensive set of trusted data with sufficient rigour and detail to support good decision-making. The industry also needs the capability to research a wide range of industry-good matters to support industry sustainability, value creation and innovation processes.

Alignment with Government Tourism Strategy

The new *Aotearoa New Zealand Government Tourism Strategy* sets out the Government's ambition for tourism, and how it will support and enable this key industry.

The Strategy has the overall aim to 'Enrich Aotearoa New Zealand through sustainable tourism growth'. It proposes a more active role for government in tourism, to make sure that growth is productive, sustainable and inclusive.

The desired outcomes of the Government Tourism Strategy are consistent with the *Tourism 2025 & Beyond* framework. Most importantly, the Strategy's Priority Work Areas set out what the Government will do to support and activate tourism. With these areas mirroring the industry's desired approach and sense of priority, there is excellent opportunity for linked government/industry actions to drive those matters of most importance to the wellbeing of the tourism industry and its contribution to New Zealand. There is also scope for industry to have both a strong independent voice and its own areas of focus.

The Strategy has the overall aim to 'Enrich Aotearoa New Zealand through sustainable tourism growth'.



Kelvin Davis
MINISTER OF TOURISM

The tourism industry is a large and complex system that needs to be nurtured and managed. As Minister of Tourism, I have worked to increase the capability of the public sector to play a more active and deliberate role in the industry. The Tourism Infrastructure Fund and the upcoming International Conservation and Tourism Levy are designed to enable us to do more. The Ministry of Business, Innovation & Employment tourism policy functions have been geared up to increase our ability to be proactive in dealing with industry needs.

This more active Government role is best set out in the *Aotearoa New Zealand Government Tourism Strategy*. In my view, this Strategy sits alongside the industry's *Tourism 2025 & Beyond* Framework and, in fact, they go together – one activates Government, the other activates industry. Bring these together and we are much better placed to jointly advance this important industry for the benefit of New Zealanders.

I look forward to working with TIA and the tourism industry to make this happen.



Stephen England-Hall

CHIEF EXECUTIVE

Tourism New Zealand

If designed and managed well, tourism has the ability to deliver significant social, cultural, environmental and economic benefits. A key part of achieving this is generating and shaping demand with the kind of visitors who deliver the best outcomes for New Zealand. By attracting high-value visitors and influencing their visitation patterns, we spread the benefits tourism delivers across the year and across our communities.

Evolution of Tourism 2025

The evolution of Tourism 2025 over the last five years reflects the changing landscape of New Zealand's tourism industry.

Tourism 2025 was launched in 2014 following an extended period of flat demand. The industry's singular priority was to stimulate growth. With its audacious goal of making tourism a \$41 billion a year industry by 2025, the *Tourism 2025 Growth Framework* succeeded in bringing a diverse industry into alignment behind a shared vision.

The Tourism 2025 elements of Target for Value, Connectivity, Productivity, Visitor Experience and Insight provided the framework for the actions needed to achieve the \$41 billion goal.

Since then, the visitor economy has grown strongly, and the challenges and opportunities facing the industry have changed. TIA, as custodian of Tourism 2025, has evolved the framework to keep it relevant.

...the Tourism 2025 Growth Framework succeeded in bringing a diverse industry into alignment behind a shared vision.

The first update came in 2016 with *Tourism 2025 – Two Years On*. This reaffirmed the key elements of the Framework, and reinforced the focus on Seasonality and Dispersal. It also introduced two new areas of emphasis: Capacity Development and Infrastructure; and Sustainability.

In 2017, TIA launched the *New Zealand Tourism Sustainability Commitment* to provide a framework for all tourism businesses to operate more sustainably for the long-term benefit of New Zealand. Tourism operators have been quick to demonstrate their commitment across a balanced set of economic, host community, visitor and environmental elements, all of which are necessary for a long-term sustainable tourism industry. Getting this right will mean

more quality jobs, more business opportunities, a reduced carbon, waste and ecological footprint, and welcoming and vibrant communities to operate in and for visitors to enjoy.

Now, *Tourism 2025 & Beyond – A Sustainable Growth Framework* becomes the latest addition to the Tourism 2025 'family'. The key change is that sustainability is now at the centre of Tourism 2025, providing a clear pathway towards a sustainable tourism industry for Aotearoa New Zealand.

We have added Visitor, Community and Environmental goals, and pushed the Economic goal up to \$50 billion a year by 2025.

INDUSTRY PARTICIPATION

Tourism 2025 & Beyond was developed with the support of a Project Reference Group comprising leading tourism industry representatives. Our thanks to:

Dave Bamford | Dave Bamford Tourism Development

Anna Black | General Travel NZ Ltd

Hoki-mai Chong | NZ Māori Tourism

Rebecca Ingram | Tourism New Zealand

Jeroen Jongejans | Dive! Tutukaka

Richard Lauder | Wayfare

Kauahi Ngapora | Whale Watch Kaikoura

Jenny Simpson | Air New Zealand

Scott Tasker | Auckland International Airport Limited



2014

Tourism 2025 launched following an extended period of flat demand

2016

Two new areas of emphasis for Tourism 2025 were identified: Capacity Development and Infrastructure; and Sustainability.

2017

New Zealand Tourism Sustainability Commitment launched

GOING FORWARD

Sustainability now sits at the centre of Tourism 2025.

TOURISM 2025 & BEYOND A SUSTAINABLE GROWTH FRAMEWORK

Tourism 2025 & Beyond has evolved from the original Tourism 2025 Growth Framework.

Sustainability is now firmly at the heart of the framework. This sees the tourism industry achieving economic, visitor, community and environmental goals. The Sustainable Growth Framework rests on a base of fundamental values that guide our behaviour.

CONNECTIONS

KNOWLEDGE

Kaitiakitanga

Manaakitanga

Whanaungatanga

FRAMEWORK ELEMENTS

SUSTAINABILITY

THIS SITS AT THE HEART OF THE FRAMEWORK

Leading the world in sustainable tourism. This is the Vision of the *Tourism Sustainability Commitment*. The tourism industry is achieving economic goals through being a destination of choice for international and domestic travellers. We share the benefits with our communities, while contributing to restoring, protecting and enhancing our natural environment.

CONNECTIONS

New Zealand tourism is deeply connected to the world, and is aligned and connected as an industry. The pipeline of aviation capacity provides the flow of competitively-priced seats to get to, from and around New Zealand. 'Connections' equally applies to the connections within the tourism industry – how people work, interact and make things happen.

KNOWLEDGE

Tourism has the knowledge it needs to inform decisions, enable innovation and manage progress. Quality data, research, analysis and innovation provide the knowledge to enable industry development through offering investment surety, business innovation, and tracking and monitoring insight for effective management.



VISITOR

New Zealand delivers world-leading experiences for both international and domestic visitors. Value is created in the tourism industry by making our visitors increasingly happy with the products and services they experience. People will only pay more if the value proposition for them increases. Tourism must constantly strive to exceed visitor expectations.

COMMUNITY

New Zealanders understand, support and benefit from tourism operating in their communities. Tourism takes place in the backyards of New Zealanders, so it is essential that this activity is welcomed by our communities. Tourism must be a good citizen - engaging with communities, providing quality employment and using supply chains that benefit the local economy.

ENVIRONMENT

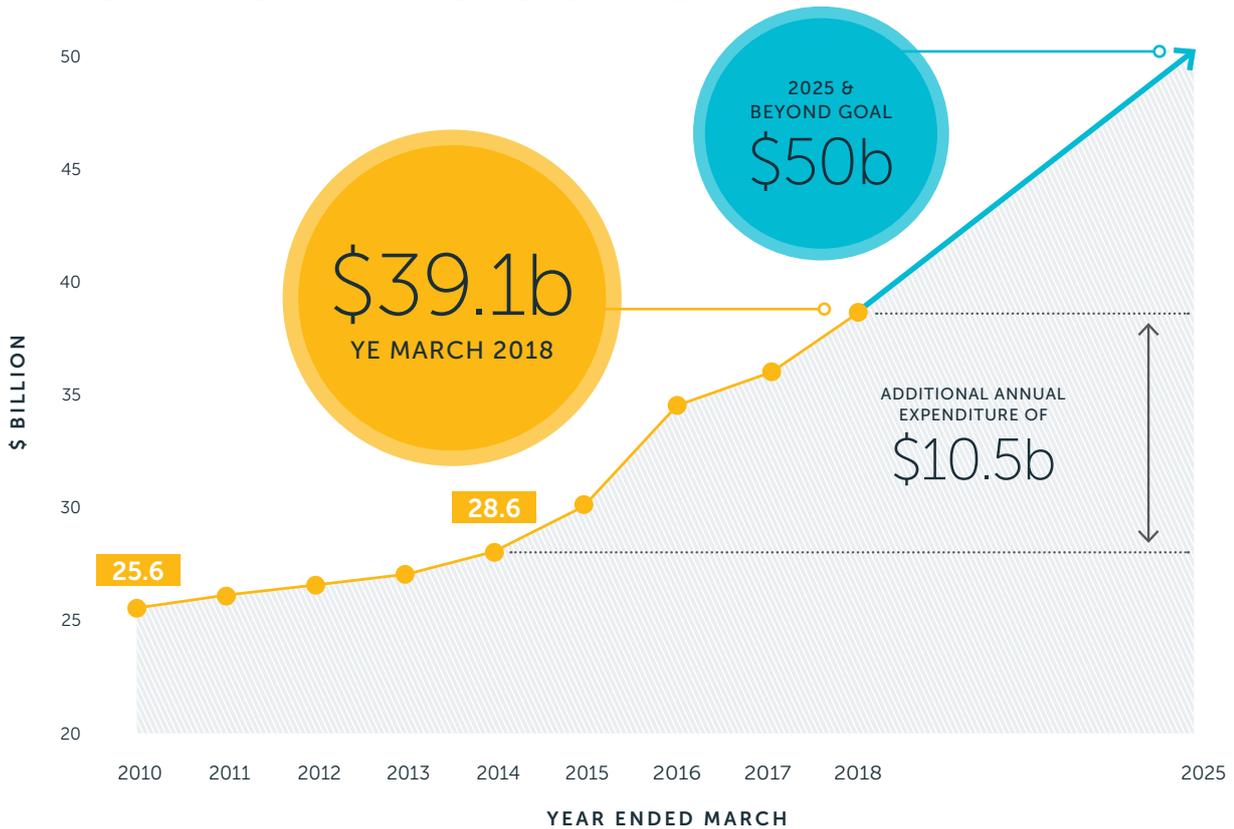
Tourism strongly contributes to protecting, restoring and enhancing New Zealand's natural environment and biodiversity. The tourism industry has the great opportunity to establish a positive and enduring relationship with New Zealand's environment and biodiversity. Tourism must actively strive to contribute to restoring ecology, while reducing its waste and carbon footprint.

ECONOMY

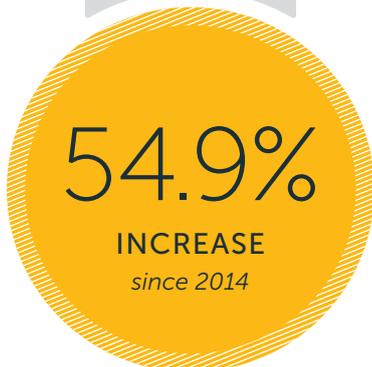
Tourism delivers opportunity and prosperity across the New Zealand economy. Tourism is an important part of the New Zealand economy. It is vital that it performs well in terms of creating wealth, supporting successful businesses and quality employment. Financially successful businesses are best placed to advance the other elements of sustainability.

Tourism today

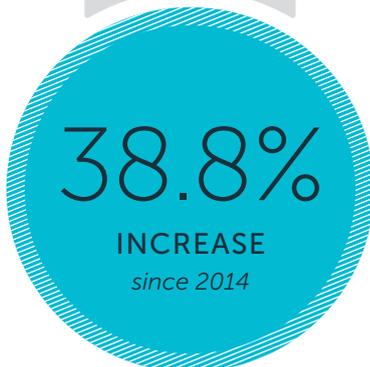
TOTAL ANNUAL TOURISM EXPENDITURE



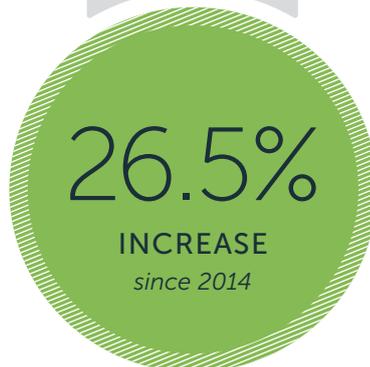
INTERNATIONAL VISITOR SPEND



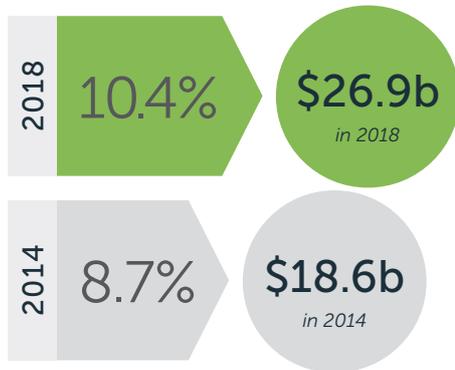
INTERNATIONAL VISITOR ARRIVALS



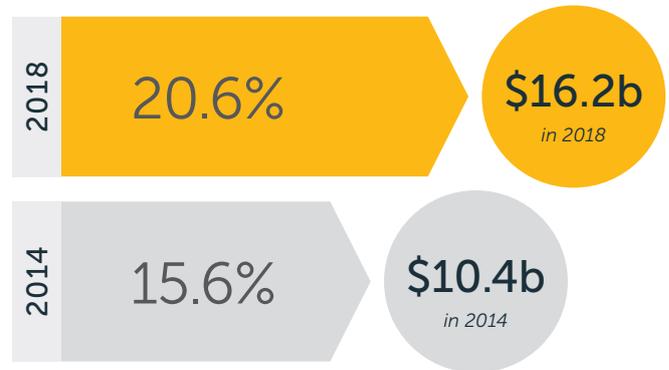
DOMESTIC TRAVELLER SPEND



TOURISM'S TOTAL CONTRIBUTION TO GDP (DIRECT AND INDIRECT)



TOURISM CONTRIBUTION TO NZ'S EXPORT EARNINGS



EMPLOYMENT



Saskia Verraes
 GENERAL MANAGER
 RESPONSIBLE MANAGEMENT
 Tourism Holdings Ltd



Pania Tyson-Nathan
 CHIEF EXECUTIVE
 NZ Māori Tourism

As an industry we are very lucky to be able to offer such a beautiful country at the heart of our experiences. Without this, the long term success of our industry is not guaranteed. Therefore, more than ever, we need to walk the talk and show our own commitment through the *Tourism Sustainability Commitment* and promoting the Tiaki Promise. The best experiences of our current visitors are those that preserve what makes Aotearoa so special and enable others to follow us in looking after our world so it is available for our future generations too.

From developing products to delivering experiences, from commodifying culture to culturalising commerce, from kaitiakitanga to Tiaki Promise - the industry continues to make significant steps to integrate and participate in that which is unique and special to our people, our culture, our manuhiri and our place.

Tourism 2025 & Beyond reflects today's intent and tomorrow's aspiration. Mauri ora!



Kauahi Ngapora
GENERAL MANAGER
Whale Watch Kaikoura

It is my hope that Te Ao Māori becomes a normalised part of the tourism industry – not needing specific attention – just part of who we are as Kiwis providing manaakitanga to our guests, and being proud of our unique culture.

While our journey continues we are making positive progress. This document reflects an important step towards the wider use of Te Ao Māori values and Tikanga across our industry. Through this, we are all strengthened.

Looking ahead to 2025 and beyond

In 2019, New Zealand's tourism industry is facing new domestic and global influences. Each of these need to be factored into industry thinking and actions.



MANAGING TOURISM GROWTH

Globally, the growth of tourism is seeing increasing protests from residents of popular international holiday hotspots who fear that 'over-tourism' is harming their lifestyle and environment. While New Zealand has a relatively low visitor density, tourism activity at certain places and times is stimulating a negative community response.

To ensure New Zealanders continue to offer manaakitanga to our visitors, it is essential that tourism is managed to reduce and mitigate the impacts. The industry's social licence to operate is an intangible, but very real, asset that must be measured and managed.

Strategies to develop and implement include:

- > demonstrating that tourism is generating benefits for communities through quality jobs, business opportunities, and better services and amenities
- > ensuring there is investment in infrastructure to support growth
- > ensuring the workforce to support tourism growth is available
- > the destination is actively managed to reduce or mitigate negative impacts.



CHANGING VIEWS ON MANAGING RESOURCES IN AOTEAROA

Māori values are becoming more mainstream within New Zealand society, as are iwi-owned operators within the industry.

The more the Māori view of the world permeates our thinking, the more society's attitudes to our mountains, lands, forests, rivers and seas will change. This represents a significant shift away from seeing natural resources as something to be exploited, to that of kaitiakitanga, where we all have a duty to care for the natural world around us. The tourism industry can do more to put these values into practice.



ACTING ON CARBON AND CLIMATE CHANGE

There is increasing recognition that urgent action is required globally to reduce carbon emissions, and to mitigate and adapt to a wide range of expected outcomes – such as extreme weather events, rising sea levels and rising snow levels. It is likely that consumers will be increasingly influenced in their choices by climate change concerns.

International aviation is a carbon-intensive activity so there is a risk that consumers may act to reduce their carbon footprint by cutting back on travel. If this occurs, New Zealand is more exposed than virtually any other destination. This means that New Zealand needs to be able to demonstrate that we are a leader in reducing our reliance on carbon across the tourism system, and also in measuring, managing and reducing our overall environmental footprint.

Measuring our progress

Measuring progress on the Tourism 2025 & Beyond goals will track the success of the Sustainable Growth Framework.

VISITOR

GOAL Deliver outstanding visitor experiences

MEASURE International and domestic visitor satisfaction of 96%



Measurement source: International Visitor Survey and Angus & Associates Visitor Insight Programme

ENVIRONMENT

GOAL Aotearoa is enhanced by tourism

MEASURE 90% of tourism businesses have environmental plans to measure and reduce their carbon, waste and ecological footprint

CURRENT LEVEL Not available at present. To be measured through TIA's annual TSC survey

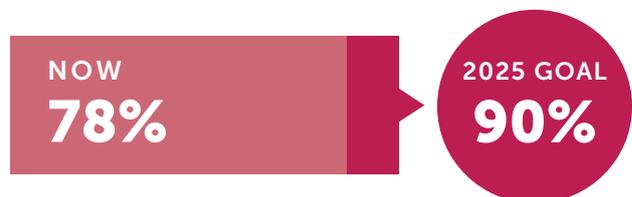
Measurement source: Tourism Sustainability Commitment Survey

TIA will continue to track a number of other key industry objectives, including seasonality, regional dispersal and the size of the aviation pipeline. TIA will work with public and private stakeholders to investigate and establish other hard measures of industry progress, such as a longitudinal series of carbon use in the tourism industry over time.

COMMUNITY

GOAL New Zealanders are welcoming hosts

MEASURE 90% of New Zealanders are happy with the level of tourism and support growth

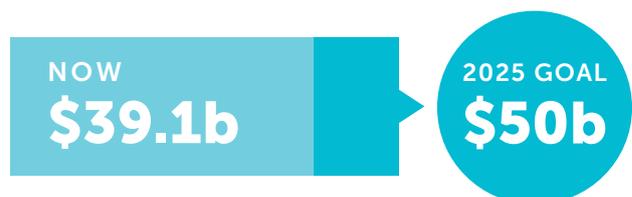


Measurement source: Mood of the Nation Survey

ECONOMIC

GOAL Grow tourism's contribution to New Zealand's economy

MEASURE Annual tourism spend of \$50 billion by 2025



Measurement source: Tourism Satellite Account



Christopher Luxon
CHIEF EXECUTIVE OFFICER
Air New Zealand

A thriving tourism industry is good for New Zealand. We need to grow if we are to invest in better communities, more skilled people and alternative energies, enhance biodiversity, and create product innovations. What is clear, however, is that we need to grow differently. By working together to develop a more sustainable tourism industry, we can continue to drive economic growth for New Zealand and provide an outstanding experience for our visitors and communities while protecting our natural environment. The bottom line is that the business case for growing tourism sustainably is compelling and positive on numerous fronts – and will position New Zealand as a leader in this space on the world stage.

What we are going to do

In order to reach our Tourism 2025 & Beyond goals, we have identified a long list of actions that the tourism industry, central and local government need to progress over the next three years.

This list reflects the complexity of the tourism system. It shows there are many things that need to be working well for the system as a whole to prosper.

The 'Tourism System' actions below require input by all stakeholders across the tourism system. These are followed by actions that are linked to each element of *Tourism 2025 & Beyond – A Sustainable Growth Framework*.

Within this long list, we have identified a number of priorities (see page 4-5).

TOURISM SYSTEM	
ROLE OF GOVERNMENT	<ol style="list-style-type: none"> 1. Government ensures funding and resources are allocated to enable implementation of the <i>Aotearoa New Zealand Government Tourism Strategy</i>. 2. All government decisions and actions take full account of the impact on tourism. 3. Government works with industry on implementation of the <i>Tourism 2025 & Beyond</i> framework.
ROLE OF INDUSTRY	<ol style="list-style-type: none"> 4. Industry comprehensively implements the <i>Tourism 2025 & Beyond</i> framework. 5. Industry works with government on implementation of the <i>Government Tourism Strategy</i>.
SUSTAINABILITY	<ol style="list-style-type: none"> 6. All tourism businesses join the <i>Tourism Sustainability Commitment</i> and work towards achieving each of the 14 business-level Commitments. 7. TIA develops information, tools and resources to support the implementation of the TSC. 8. TIA investigates ways to harden up the TSC measures to continually raise the sustainability performance across the industry. 9. Investigate how Qualmark and TIA could work towards the provision of business-level assessment against TSC sustainability requirements.
FUNDING	<ol style="list-style-type: none"> 10. Government works with stakeholders to ensure optimal utilisation of government funding to support the sustainable development of the tourism industry. 11. Identify mechanisms that address funding deficits for 'industry-good' activities, including research and development, workforce initiatives and community engagement.
LOCAL GOVERNMENT	<ol style="list-style-type: none"> 12. Industry works with central and local government on actions arising from the Productivity Commission inquiry into local government funding that advance tourism industry interests. 13. Investigate innovative approaches on how local government can support their visitor economies.
DESTINATION MANAGEMENT	<ol style="list-style-type: none"> 14. Industry supports the development of a national destination plan for New Zealand, based on regional destination plans. 15. Every region develops and maintains a destination plan in consultation with industry that sets out its aspiration for its visitor economy and how it will achieve it.

GROWING AND SHAPING DEMAND	16.	Invest in building, maintaining and evolving New Zealand's international tourism destination brand and market positioning.
	17.	Government and industry marketing is configured to shaping demand growth that contributes to industry-wide objectives, such as dispersal, seasonality and growing the value of tourism at a faster rate than the volume of visitors.
TIKANGA MĀORI	18.	Tikanga Māori is embraced across the tourism industry as a mark of respect for Tangata Whenua, as a reflection of the values of kaitiakitanga, manaakitanga and whanaungatanga, and to present a unique point of interest for visitors.
	19.	Tikanga Māori is incorporated within the <i>Tourism Sustainability Commitment</i> .
MANAGING RESOURCES IN PARTNERSHIP WITH MĀORI	20.	Industry supports the Māori role in resource management and strives to achieve benefits across the tourism industry, including maintaining access for tourism businesses.
CRISIS MANAGEMENT AND RECOVERY	21.	Regions have tourism-specific components within their wider crisis management and recovery plans.
	22.	A cross-agency, national-level tourism crisis readiness capability is maintained.
EASE OF DOING BUSINESS	23.	All central and local government agencies that tourism businesses deal with strive to make their processes as easy to use as possible.
QUALITY AND RESILIENCE	24.	Tourism businesses work to raise the quality of their products and services, and utilise quality assessment programmes such as Qualmark.

ECONOMIC

TARGET FOR VALUE	25.	Industry and government strategies, and the resultant activities, focus on targeting those markets that deliver value growth at a faster rate than the volume of visitors and which best contribute to New Zealand.
	26.	An agreed definition of a 'high-value' visitor is developed.
INFRASTRUCTURE	27.	Industry infrastructure needs are identified and prioritised, and where appropriate are considered in terms of the government investment framework for tourism.
PRODUCTIVITY	28.	Establish replicable productivity measures for tourism and use the results to manage the tourism system to drive increased productivity.
PEOPLE AND SKILLS	29.	Implement the industry 'Careers in Tourism' package to attract more New Zealanders to tourism.
	30.	Government agencies work with industry to ensure migrant staff are easily accessible when there are no suitable New Zealanders.
DOMESTIC TOURISM	31.	Develop a systematic approach to understanding and activating domestic tourism, particularly to support regional dispersal and seasonality goals.
BUSINESS CAPABILITY	32.	Support tourism business capability through specific industry-good activities and through raising use of the wide range of existing business capability programmes.
FOSTERING MĀORI BUSINESSES	33.	Foster the development of Māori participation in the tourism industry to unlock opportunities for both Māori and tourism.
EVENTS	34.	Include Event Plans as part of regions' destination plans.
TRANSFORMATIVE TECHNOLOGY	35.	Foster innovation and technology uptake by tourism businesses.

VISITOR

VISITOR SATISFACTION MANAGEMENT	36.	Customer satisfaction monitoring, evaluation and reporting is undertaken and used at operator, regional and national levels.
VISITOR SAFETY	37.	Existing programmes, such as driver safety and adventure tourism safety, are effective and new programmes are established as needed.
	38.	Regulations and other government interventions that relate to visitor safety are fit for purpose, including those of the Department of Conservation, WorkSafe, Civil Aviation Authority and Maritime New Zealand.
TIAKI	39.	Educate visitors about New Zealand's cultural and behavioural expectations by incorporating <i>Tiaki – Care for New Zealand</i> into industry processes and implementing the Tourism Sustainability Commitment No 6.
RESPONSIBLE CAMPING	40.	Government and industry agree a transparent and consistent national framework for managing responsible camping.
VISITOR FLOWS	41.	Government takes a 'touring destination' lens to the tourism system, and provides adequate funding for tourism routes, and the roading and amenity requirements.
ACCESSIBILITY AND INCLUSIVENESS	42.	Tourism businesses, destinations and regions ensure their goods, services and amenities offered to visitors are accessible and inclusive.

COMMUNITY

QUALITY EMPLOYMENT	43.	Tourism businesses ensure the quality of the employment that they provide contributes to the employment attractiveness of the industry.
COMMUNITY ENGAGEMENT	44.	Tourism businesses engage with their communities to increase understanding and trust, and to maintain the manaakitanga that New Zealand is renowned for.
TELLING TOURISM STORIES	45.	Implement the TIA-led Tourism Narrative project as a structured approach to getting industry and destinations to showcase the benefits of tourism.
SUSTAINABLE SUPPLY CHAINS	46.	Socially and environmentally sustainable supply chains are universally used across the industry (TSC Commitment 10).

ENVIRONMENT

ECOLOGICAL RESTORATION	47.	Tourism businesses identify and act on ways they can contribute to restoring and enhancing nature.
	48.	TIA works with government to ensure that the visitor economy is taken into consideration and is engaged with the management of our natural resources.
REDUCING FOOTPRINT	49.	Tourism businesses measure and understand their footprint, and act to reduce it through supply-chain management, waste management, water management and energy use.
CARBON AND CLIMATE CHANGE	50.	Tourism businesses measure their carbon footprint and act to reduce it.
	51.	Government supports the investigation of innovative ways for industry to reduce its carbon footprint.
DOC ENGAGEMENT	52.	The Department of Conservation's Visitor and Heritage strategy enables access of visitors and reflects the importance of concessionaires as facilitators of managed tourism and recreation activities on the public conservation estate.
	53.	TIA and DOC deliver the goals in Project Groundswell, an MOU of agreed expectations.
VISITOR ACCESS	54.	Industry works with parties and organisations, such as the Walking Access Commission, to ensure continued access to a wide range of lands and waters throughout New Zealand.

CONNECTIONS

INTERNATIONAL CONNECTIVITY	55.	Continue to pursue a healthy and competitive aviation market connecting New Zealand to the world.
	56.	Industry and government work with the aviation industry so that international connectivity supports the goals of the <i>Aotearoa New Zealand Government Tourism Strategy</i> and the <i>Tourism 2025 & Beyond Sustainable Growth Framework</i> .
OPEN SKY POLICIES	57.	Continue to pursue open sky agreements with other countries not currently covered by existing agreements.
EFFICIENT BORDER FACILITATION	58.	Border services are designed and operated to facilitate ease of movement to and from New Zealand, while ensuring the necessary border requirements are achieved (immigration, customs, biosecurity).
	59.	Visa processes are enabling of travel to New Zealand, and not a barrier due to cost and process complexity.
	60.	The new Electronic Travel Authority and its collection of the International Tourism and Conservation Levy is effectively operated.
DOMESTIC CONNECTIVITY	61.	Industry and government work with the parties that enable domestic connections, particularly aviation and roading, to ensure that domestic connectivity is supported.
INDUSTRY ALIGNMENT	62.	Industry, sectors, businesses and other interests maintain open communications and foster opportunities to connect across tourism, other industries and with the New Zealand public.
ONLINE CONNECTIVITY	63.	Take every opportunity to promote the importance of the industry's online connectivity needs to government and telecommunications service providers, especially in remote, low service level places.

KNOWLEDGE

TOURISM INSIGHT FRAMEWORK	64.	Industry supports and implements the Tourism Insight Framework.
IMPROVED TOURISM DATA	65.	An implementation plan for the Tourism Data Domain Plan is developed, resourced and implemented with support of industry, including data-related actions from the <i>Aotearoa New Zealand Government Tourism Strategy</i> .
	66.	Comprehensive and trusted data provides the base understanding of the tourism industry.
INDUSTRY RESEARCH CAPABILITY	67.	Investigate options to fund and establish an industry-led tourism research and development capability.
INNOVATION	68.	Undertake the Lightning Lab Tourism initiative and assess outcomes to determine viability of further programmes.



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

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