

Ki ngā here Pūrengi

Rangitāmiro ai te kōwhao o te ngira

Ka takakawehia te ara Poutama

To the lashings

Where the common thread is found

Navigate the trails of learning

Marine ecotourism: Where are we now and where are going?

SUSTAINABLE
SEAS

Ko ngā moana
whakauka



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Webinar: 11am, Thursday 2 December 2021

Aims

- What does 'marine and coastal ecotourism' mean in the Aotearoa New Zealand context?
- What does 'marine ecotourism' look like for operators in the sector, what does success in the sector mean?
- What is the size and scale of the current marine and coastal ecotourism sector? What are its key characteristics?
- What are the challenges and opportunities faced by operators now and in the future?
- What more can be done to support the development of marine and coastal ecotourism as a key sector of the Blue Economy in Aotearoa New Zealand.

Method: and 2



- 1. A database** of 303 marine and coastal ecotourism operators was collated from online sources between February 2021 to June 2021 using publicly available online information. **Baseline Report 1**
- 2. Operator Interviews:** Interviewees were selected from the database. Twenty-eight interviews provide insights into operator's knowledge of, and experience with, MCET. Interviews ran from May to June 2021. **Baseline Report 2**
- 3. Operator survey:** sent to the 303 operators in the online database. Ran from 16 to 30 June 2021. The survey builds on interview findings. Ninety-three MCET operators responded - a response rate of 31%. **Baseline Report 2**

Good regional/activity coverage

All Aotearoa New Zealand	Wildlife	Kayak	Waka	Surf	Marine learning	Cruise / Boat	Various	Fishing	Coastal tour	Dive & snorkel	Other marine	Māori owned
Interviewed	11	3	1	1	1	1*	3	1	0	7	0	5
Surveyed	19	9	2	3	3	10	4	3	8	16	4	7
Database	49	40	9	15	11	69	39	n/a	16	39	16	n/a**

North Island	Survey	Interview	Database	South Island	Survey	Interview	Database
Northland	14	4	43	Nelson Tasman	13	1	27
Auckland	15	3	53	Marlborough	8	1	19
Waikato	7	1	24	West Coast	4	2	9
Bay of Plenty	5	1	16	Canterbury	10	4	27
Gisborne	1	1	3	Otago	7	3	20
Taranaki	2	1	9	Southland	8	2	25
Wellington	6	2	17				
Hawke Bay	1	1	6	Regional (all of NZ)	n/a	2	n/a

*One interviewee was the manager of two subsidiary operations (two different activities in two different locations) hence the total across activity categories and locations is 29.

**Not currently included on the database

A person in a black wetsuit and scuba mask is swimming underwater. In the background, a boat is visible on the surface, and a rocky coastline is visible above the water. The scene is overlaid with a semi-transparent blue filter.

Towards a values-based definition of marine and coastal ecotourism

Operators added initially to the database fit the following broad definition of marine and coastal ecotourism:

Low impact (non-extractive) marine and coastal tourism activities

Includes:

- Marine and coastal ecotourism operators from the following sectors (kayaking/stand up paddle boarding (SUP), wildlife, dive/snorkel, cruise/boat, surfing, waka cultural tours, coastal tours, other types of marine/coastal activities, various marine activities)
- Operators offering fishing plus significant additional activities that are non-extractive
- Short/small boat transport such as water taxis
- Coastal tours on the beach or where the focus of the tour is clearly aimed at the coastal environment.

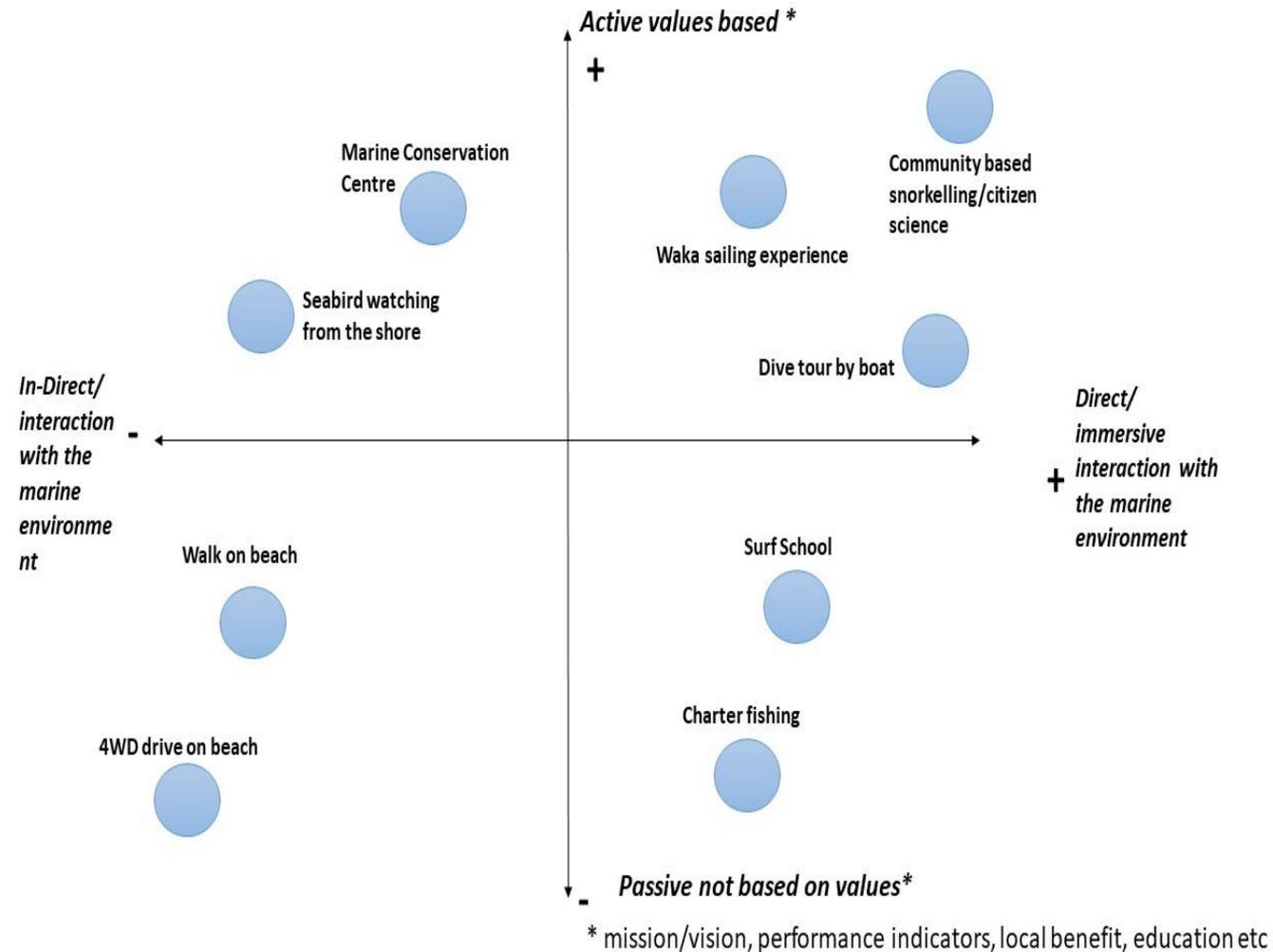
Excludes:

- Large scale cruise ships
- Charter boat fishing (where the only activity is fishing)
- Marine transport (ferries) – where this is the only service offered
- Charter boats (where only hire is available)
- Where the activity only takes place on freshwater
- Third party tour providers who do not directly offer the marine ecotourism experience

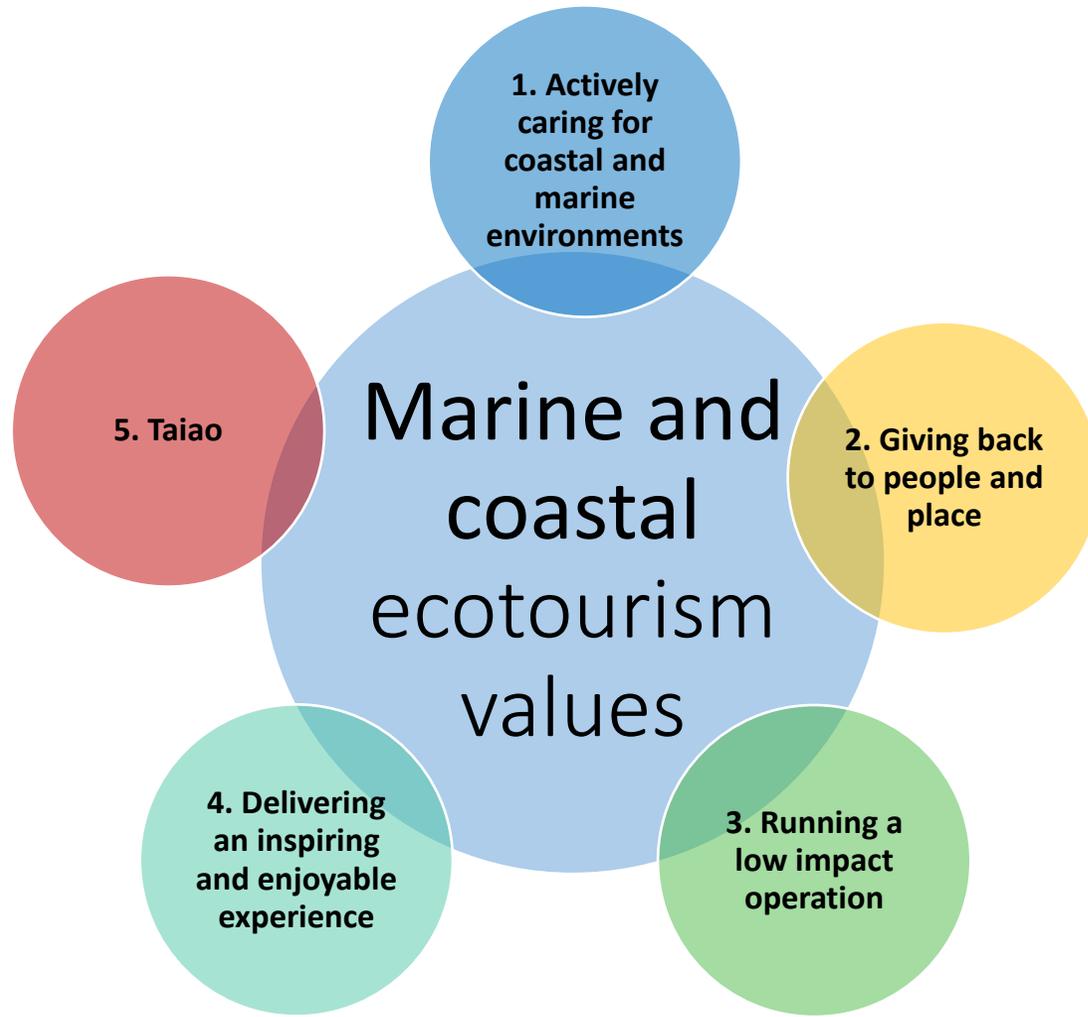
Database a work in progress.... a continua approach may work best

Marine and coastal ecotourism activities can be visualised as sitting within the intersection of two continua. One reflects active/passive engagement with marine ecotourism values, the other the degree (direct/indirect) of the client's immersive interaction with the marine environment.

Taking a continuum approach does not preclude, for example, sustainable and cultural fishing being included. This is especially true where the fishing contributes to the sustainable management of marine resources. For example, kina collection to reduce kina barrens, and cultural mātauranga Māori systems of protecting the pātaka.



What does 'marine ecotourism' mean to you? Five core values emerge.



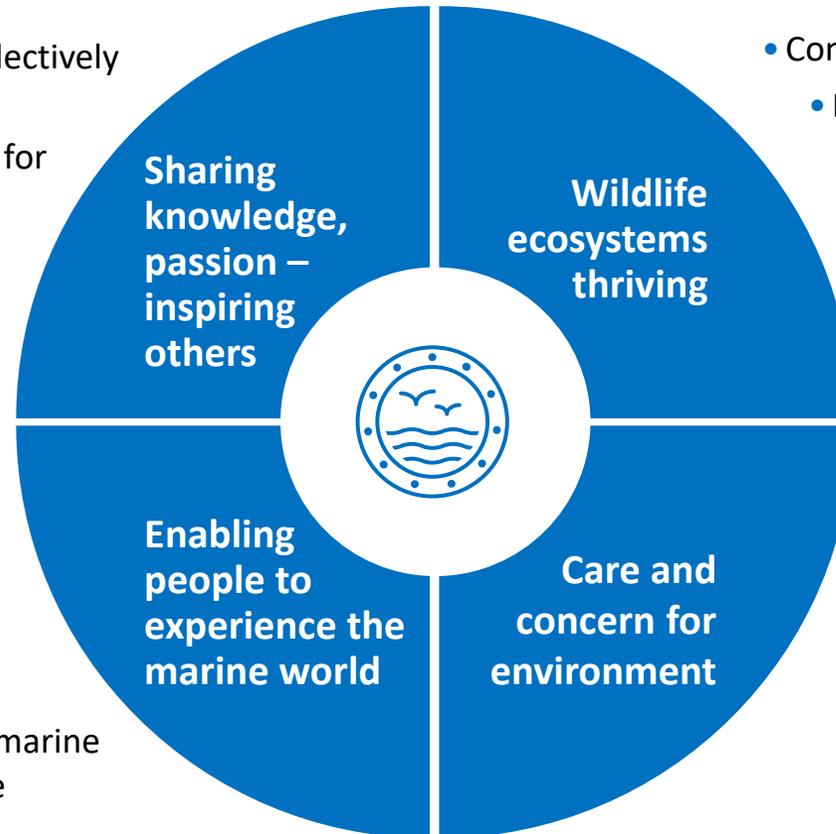
Underpinned by a profitable and well-managed operation



1. Actively caring for the environment is a core value

- Raising awareness of marine issues and how to collectively address them
- Igniting a passion in others, creating a ripple effect for marine conservation
- Youth development and education

- A conduit for locals and visitors to experience their marine environments – linked to wellbeing of communities
- Teach people how to engage with nature responsibly and how to be safe on the water
- More exposure equals more engagement with the marine environment leading to greater awareness and care



- Conducting and enabling scientific research
 - Enabling and promoting citizen science
 - Taking part in the conservation and restoration of natural habitats
 - Get customers involved – emission offsetting schemes, donations to conservation
 - Litter picking on the coast and in the water

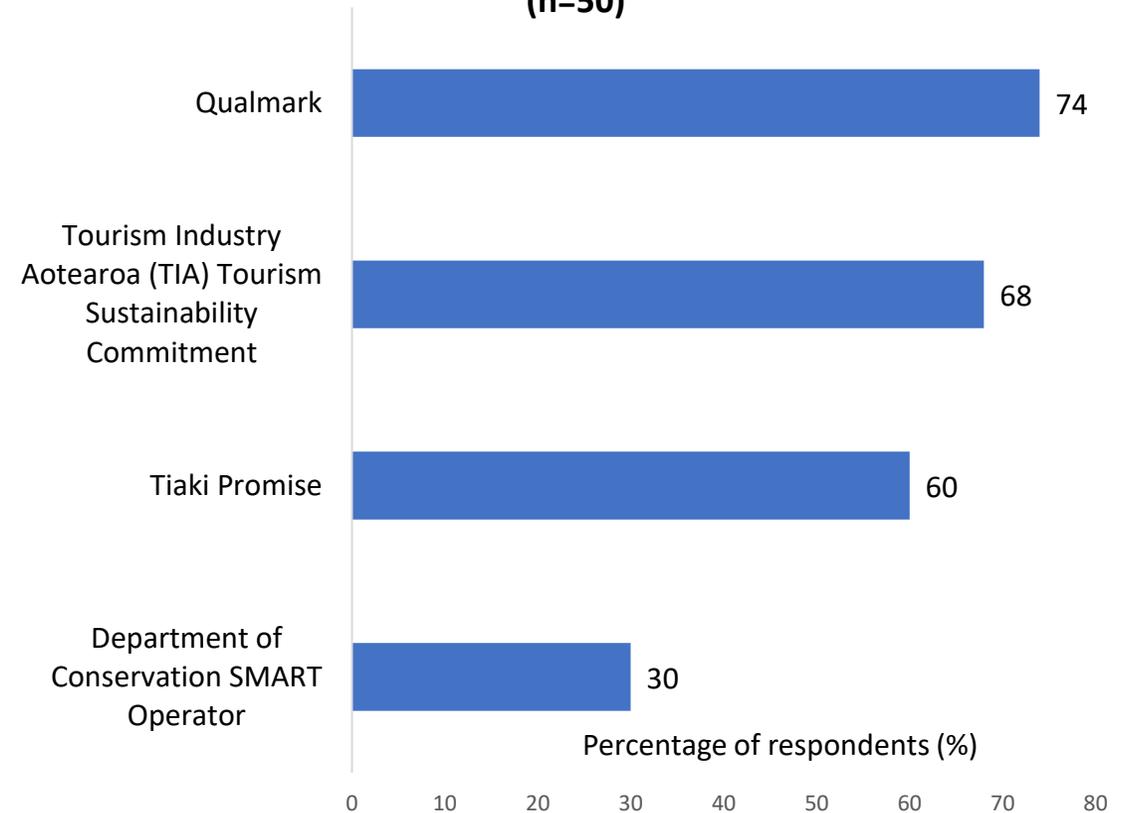
- A sense of duty and responsibility to pass on a healthy environment for the next generation

Sustainable tourism programmes: Nearly three-quarters of those respondents subscribe to Tourism New Zealand's Qualmark sustainable tourism accreditation scheme

- Almost three quarters (74%) of respondents to the question say they subscribe to Tourism New Zealand's voluntary Qualmark paid sustainable tourism scheme
- Almost as many participate in the TIA member Tourism Sustainability Commitment scheme (68%)
- Almost one third (30%) of respondents are part of the voluntary Department of Conservation SMART operator scheme that supports operators to be leaders in sustainable marine mammal viewing.



Please indicate which of following the sustainable tourism programmes that you currently participate in?
(n=50)



Note: Multiple responses, therefore total does not add up to 100%.

Sustainable tourism programmes: some Māori operators talked of standards needing to go beyond the “norm”

“we want to develop our own business models and standards like Qualmark but go beyond this and focus on not just being just sustainable but regenerative. In order for new businesses to use the parent brand – they must meet certain standards”

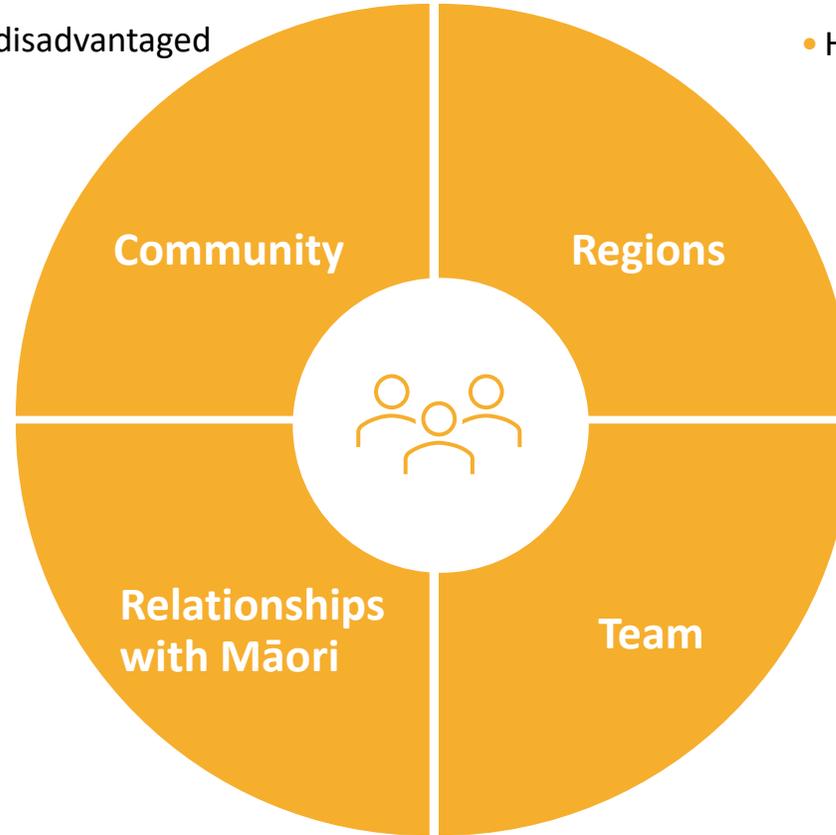
“Hopefully through research like this....we might see western science, western marine science, marine biology and that other stuff, catching up with just normal tikanga a whanau a hapu, mana moana, mana Motuhake, mana o te wai...How can you get a national set of standards that is going to uphold the very integrity of that, whilst enabling the potential growth of a new area within the tourism industry?”



2. Giving back to people and place is a central value of MCET

- Pay it forward – free trips for community and disadvantaged sectors
- Contributing to the community financially – supporting infrastructure and community organisations
- Providing a community resource
- Linking to schools learning outside the classroom in marine environments

- Creating meaningful relationships with mana moana is key to success
- Working in partnership on shared aspirations for protection of the moana

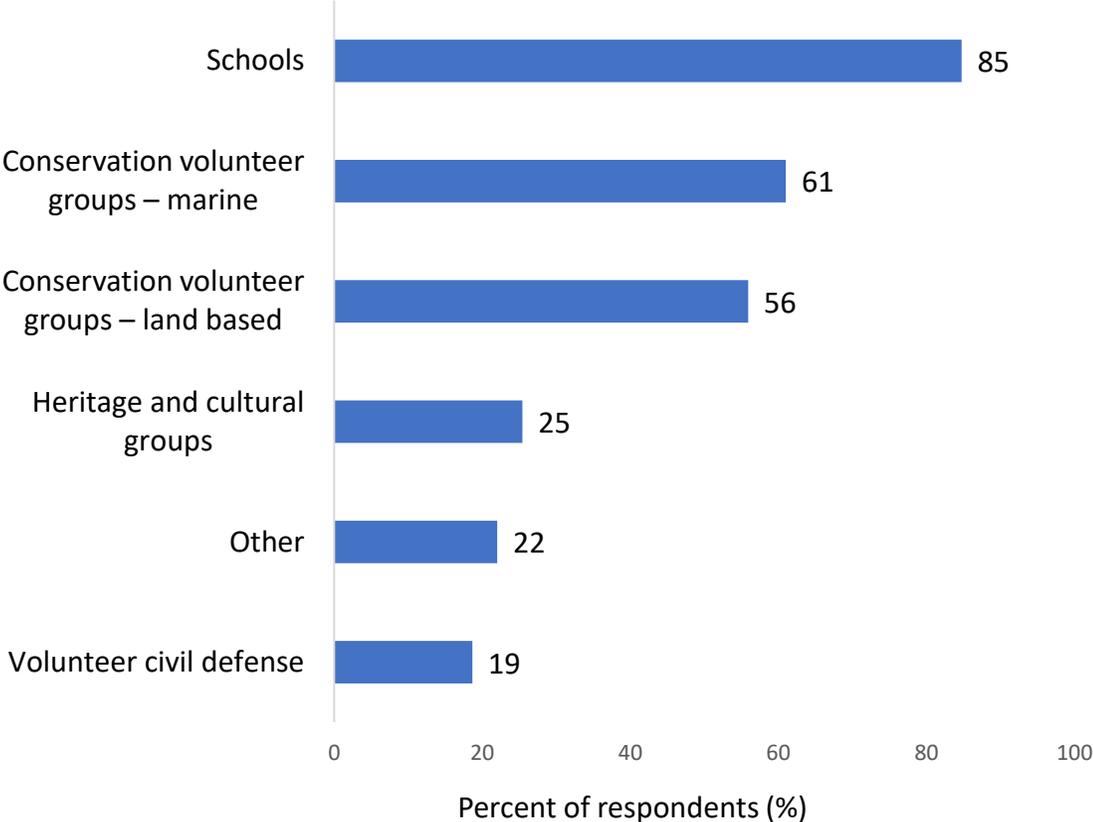


- Helps to create a destination
- Local economic development from tourism – another activity another half day/night
- Local employment and training including internships and pathways into marine industries

- Building a strong cohesive team that's engaged and want to stay on is important to operators
- Taking care of your people, your team is an important part of MCET

Giving back: 85% of respondents interact with schools and over half work with conservation groups

What community groups does your business interact with?
(n=59)

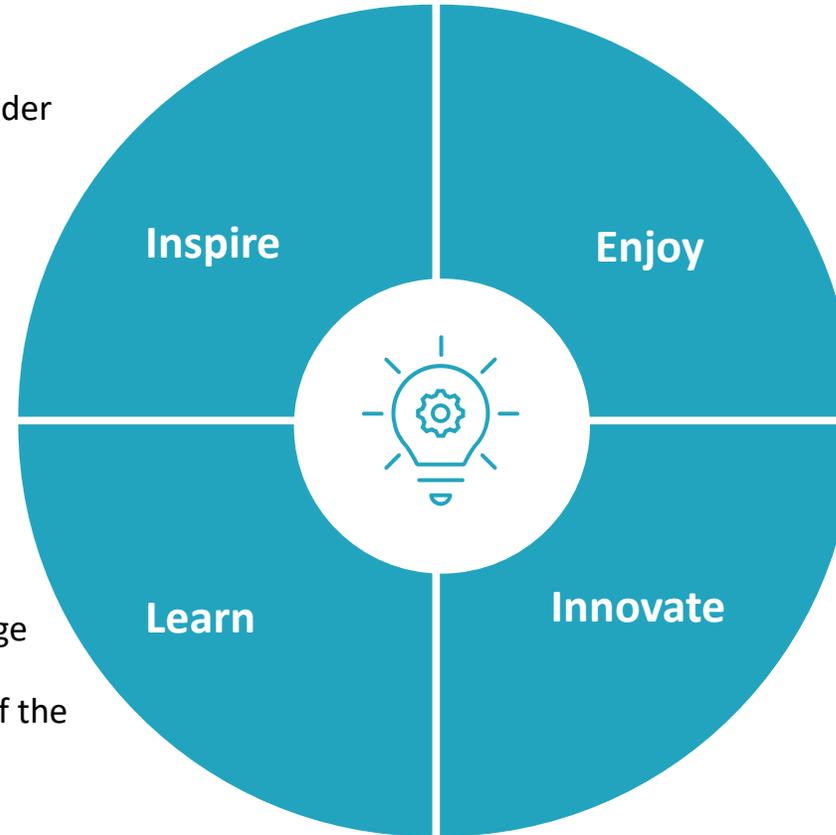


Note: Multiple responses, therefore total does not add up to 100%.

3. Delivering an inspiring and enjoyable experience is a strong theme

- Inspiring by uncovering the extent and wonder of the marine world
- Storytelling
- Instilling a passion in others

- Learning about the marine and coastal world beyond 'big ticket' items
- Learning about mātauranga Māori knowledge
- Sharing about history and the importance of the moana to Māori and others

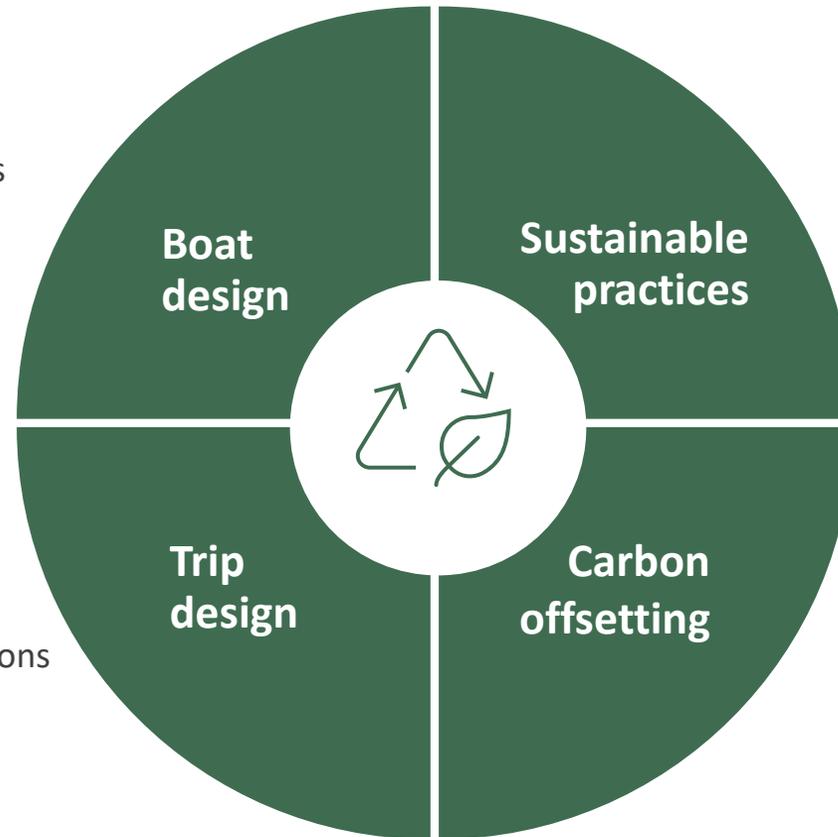


- Creating a fun and enjoyable experience
 - Keeping people safe
 - Engaged and passionate staff
- Being innovative in how and what you deliver
- Add new experiential dimensions and utilise technology

4. Running a low impact operation is a core value for many MCET operators

- Minimise disturbance
- Invest in cleaner/more efficient vessels
- Investigating electric boats
- Sail and paddle power

- Travel slowly
- Reduce number of routes
- Comply with marine mammal regulations
- Limit numbers
- Limit trips

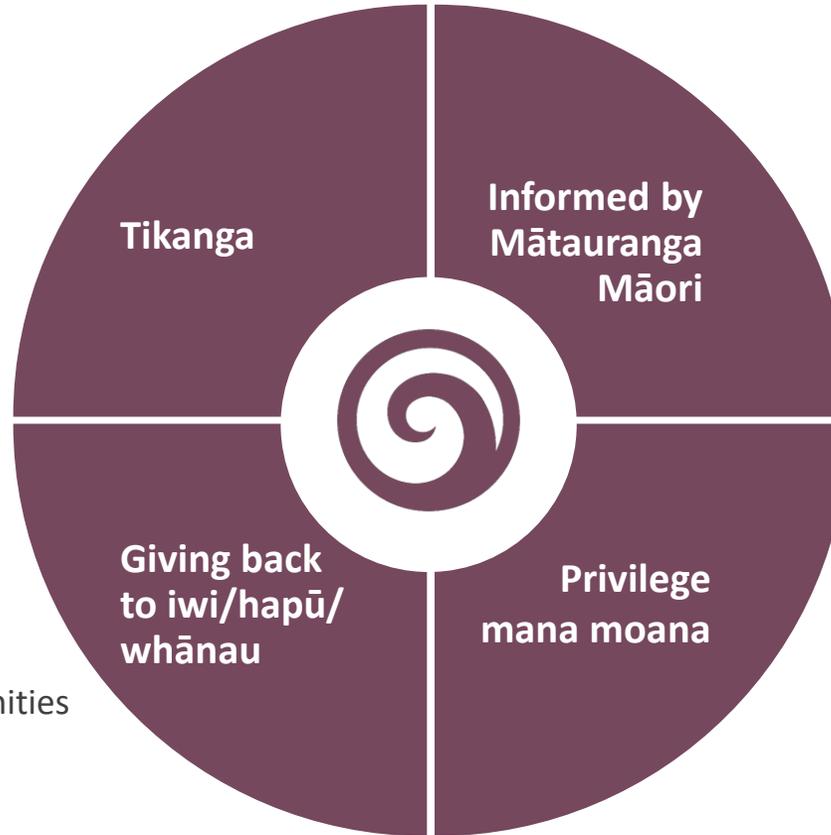


- Local suppliers
 - Eco-friendly products
 - Low carbon transport
 - Rubbish management
 - Ethical supplies/suppliers
- Carbon off-setting schemes

5. Te Taiao is critical for MCET in Aotearoa – this is stressed by both Māori and non-Māori businesses

- Doing things the right way
- Protection of intellectual property
- Accountability processes
- Reciprocity

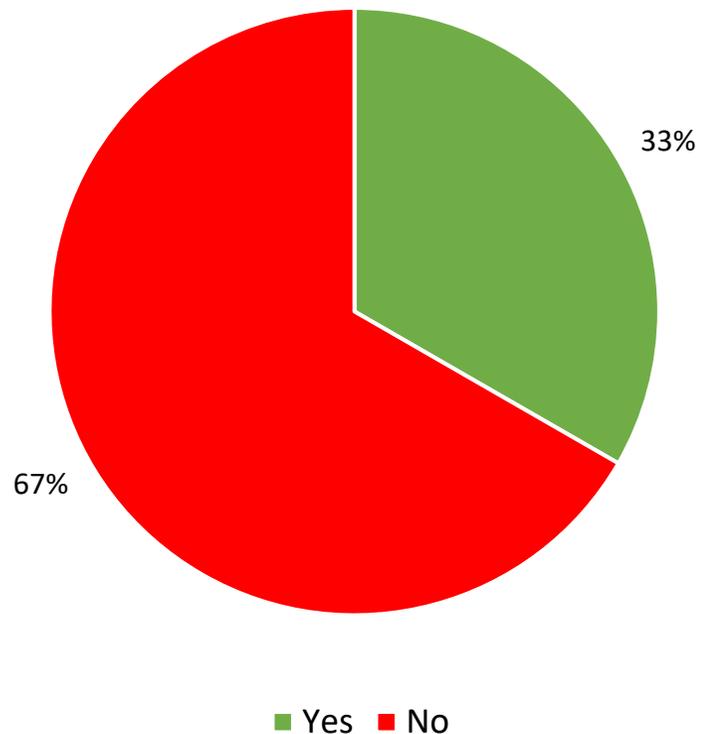
- For iwi owned businesses giving back to iwi/hapū/whānau members through meaningful mahi is important
- Empowering people and enabling opportunities



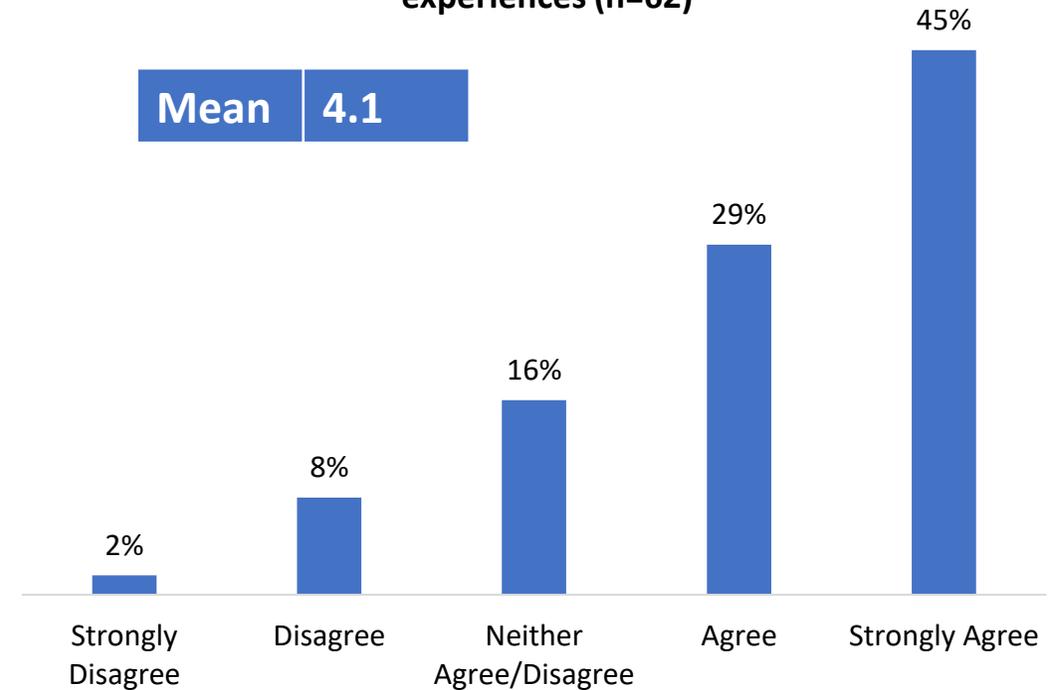
- Mātauranga Māori of local marine areas important to MCET
 - Mauri
 - Storytelling
 - Context is everything
 - Whakapapa goes deeper
- Having relationships with iwi that honour the place of mana moana is key to success
- Reciprocity

One third of survey respondents currently work with iwi organisations, 74% say they would welcome the opportunity to collaborate with iwi/other iwi in developing marine/coastal experiences

Do you work alongside any iwi organisation (s)? (n=66)



I would welcome an opportunity to collaborate with iwi/other iwi to co-develop marine/coastal tourism experiences (n=62)



Mana moana can share tikanga relating to operating in the marine environment

“Specifically some operators who do not understand tikanga practices. Example smoking on wahi tapu and public places. Mātauranga Māori and Te Reo often not used. Example mispronunciation of Māori kupu, birds are incorrectly named, Māori narratives and stories are not talked about, therefore Te Ao Māori remains fixed in a contemporary world”.

“We deliver a unique perspective, cultural knowledge and experience as mana whenua of our rohe - that cannot be duplicated by other operators. We are in a unique position and while happy to share our experience with others but are concerned that we retain our rights and IP.”



Greenwashing is an issue when it comes to ‘ecotourism’ labels

Several operators caution that the term is sometimes used purely for marketing and “greenwashing” purposes. To be true to core values and successful - you have “to walk the talk”.

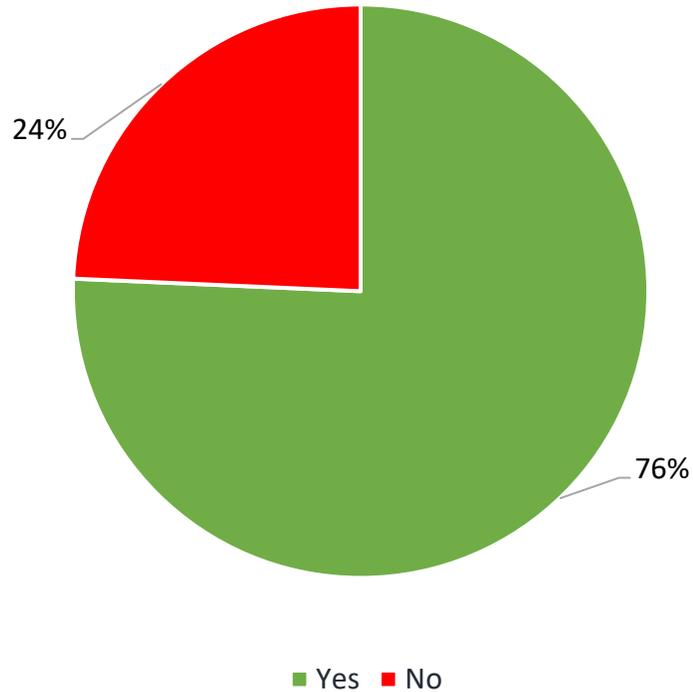
“I’m wondering if ecotourism should be promoted or not....it’s a loose term, I think it needs to be scrutinised. If we’re going to promote it, we need to be really careful. We don’t want an ecotourism business to create more problems than, say, fisheries, or anything else that we have problems with.”



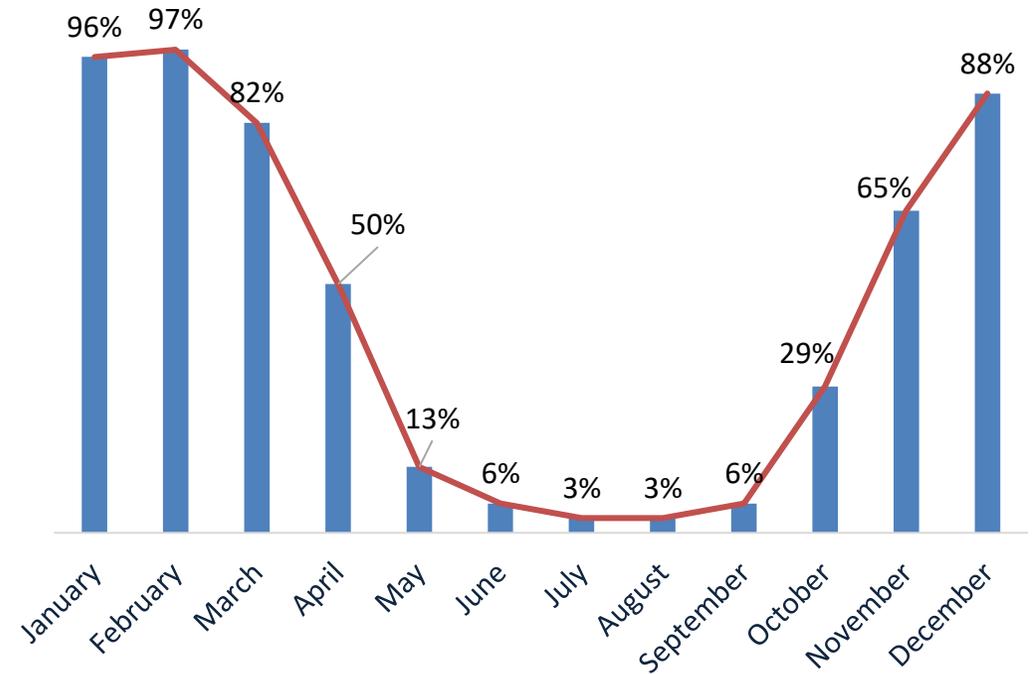
Current Context, Future Focus

Three quarters of MCET businesses operate all year round, nearly all consider the summer months to be high season

Does this marine and/or coastal tourism business operate all year round? (n=70)



What do you consider to be the high season for your marine and/or coastal tourism business? (n=68)



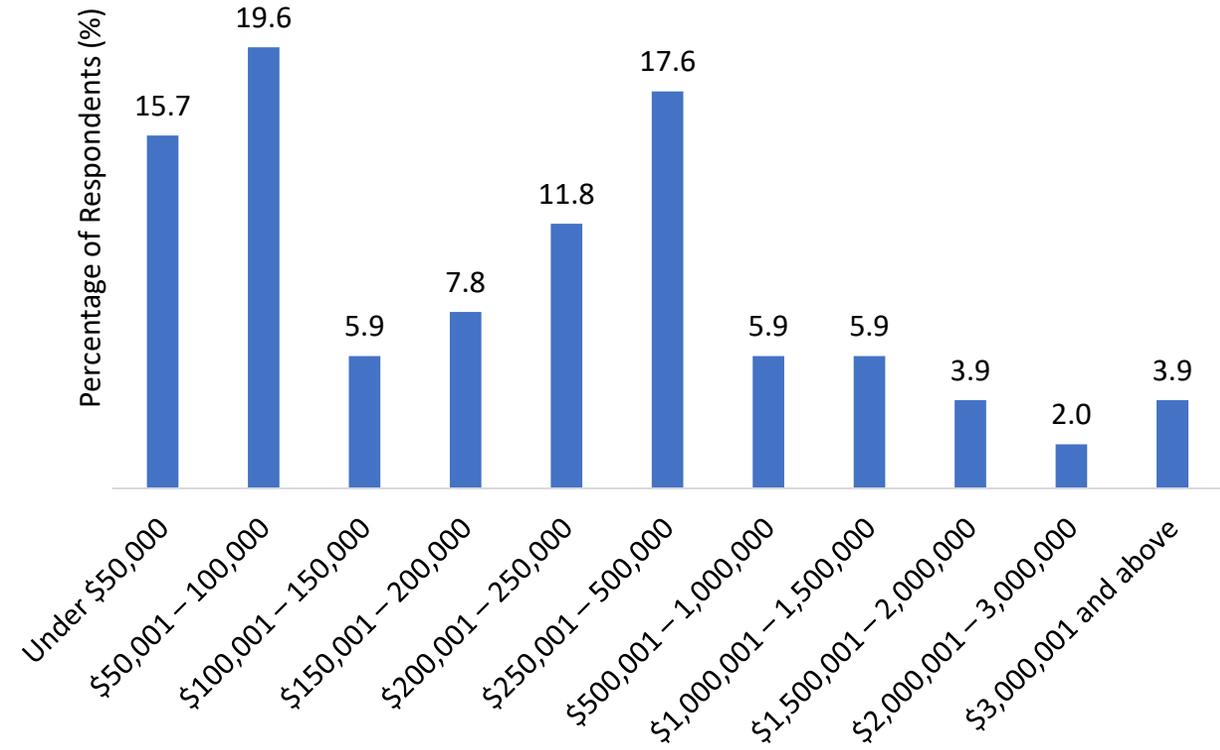
Note: Multiple responses, therefore total does not add up to 100%.

Turnover varies greatly among marine and coastal ecotourism operators (June 2020 to May 2021).

- Thirty-six percent of operators surveyed had an annual turnover of \$100,000 or less in the past 12 months (June 2020 to May 2021)
- Sixteen percent of businesses had a turnover of over \$1 million with two operators having a turnover of greater than \$3 million in the past 12 months (June 2020 to May 2021)



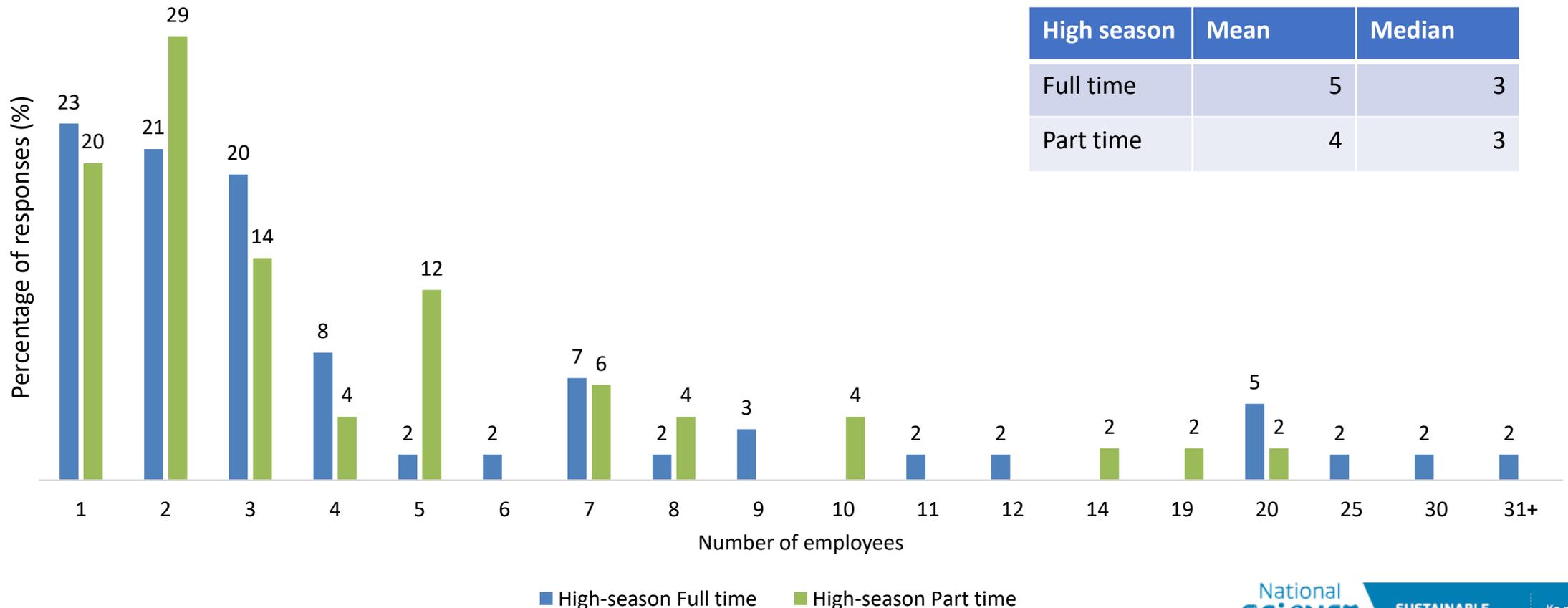
What was the approximate annual turnover of this marine and/or coastal tourism business for the past 12 months (June 2020 to May 2021)? (n=51)





High season employment: the sector is dominated by SME

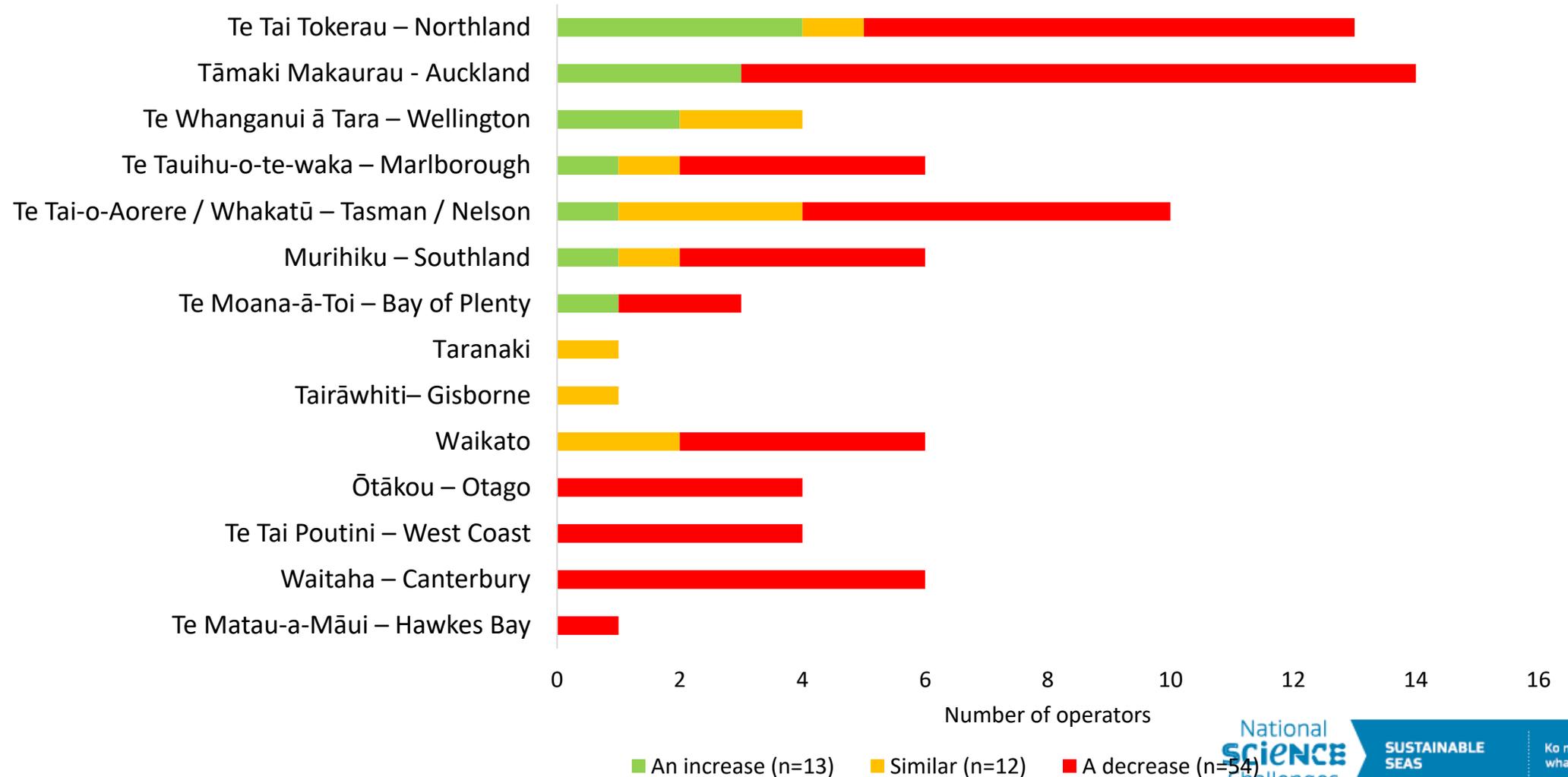
HIGH SEASON: How many full and part time staff (including yourself) were employed in this marine and/or coastal tourism business over the last 12 months (June 2020 to May 2021)? (n=61)



High season	Mean	Median
Full time	5	3
Part time	4	3

COVID-19: All regions struggled with visitor declines from June 2020 to May 2021 – operators in Otago, West Coast, Hawkes Bay and Canterbury all saw a decline

Looking at the past 12 months (June 2020 to May 2021), how do your customer numbers compare to January to December 2019?



Ongoing business challenges 2019, 2021 and beyond

- COVID uncertainty (borders and lockdowns)
- Finding and retaining skilled and qualified staff
- High cost (money and time) of compliance
- Environmental degradation
- Changing climate, extreme weather events
- General increase in marine resource users
- Negative community perceptions of tourism (overtourism/COVID)

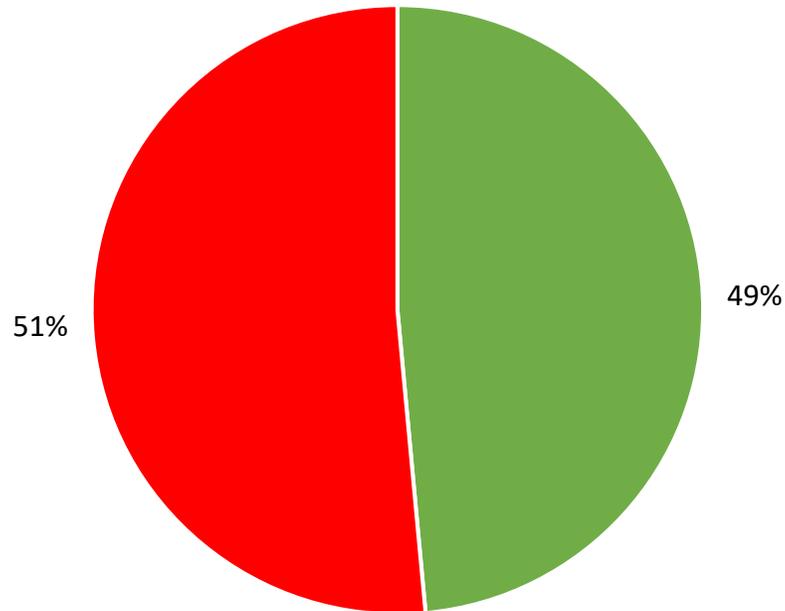
Opportunities 2022 and beyond

- ‘Reset’: strengthen focus on ‘giving back’ and sustainable business planning
- Collaborate with other operators and strengthen community links
- Build on the Domestic market – including strengthening links to the education sector
- Add further dimensions to existing experiences, the power of stories
- Listening to the moana – informed by the voices of mana moana (Taiao)
- Link more effectively into marine and coastal decision making

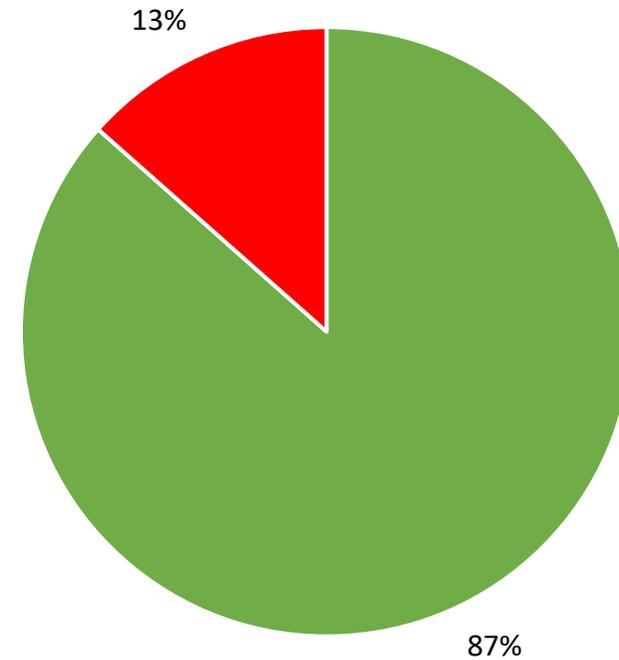
Decision making: Half of those surveyed are already involved in planning initiatives for tourism and/or coastal and marine issues.

Most (87%) want to be more involved in decisions that influence the coastal and marine environment

Are you (or your business) involved with any national, regional or local planning initiatives for tourism and/or coastal or marine policy? (n=68)



Would you like to be more involved in decision making about policies and initiatives that influence the marine and coastal environment where you operate? (n=67)



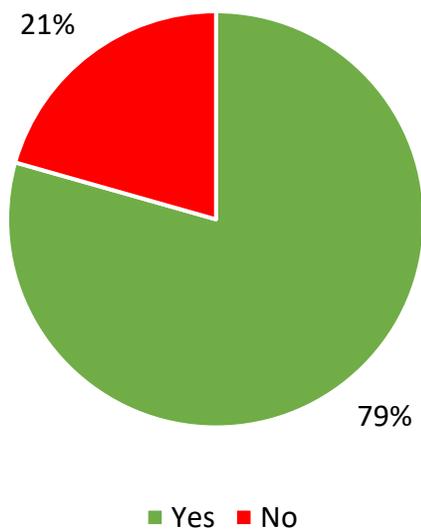
■ Yes ■ No

■ Yes ■ No

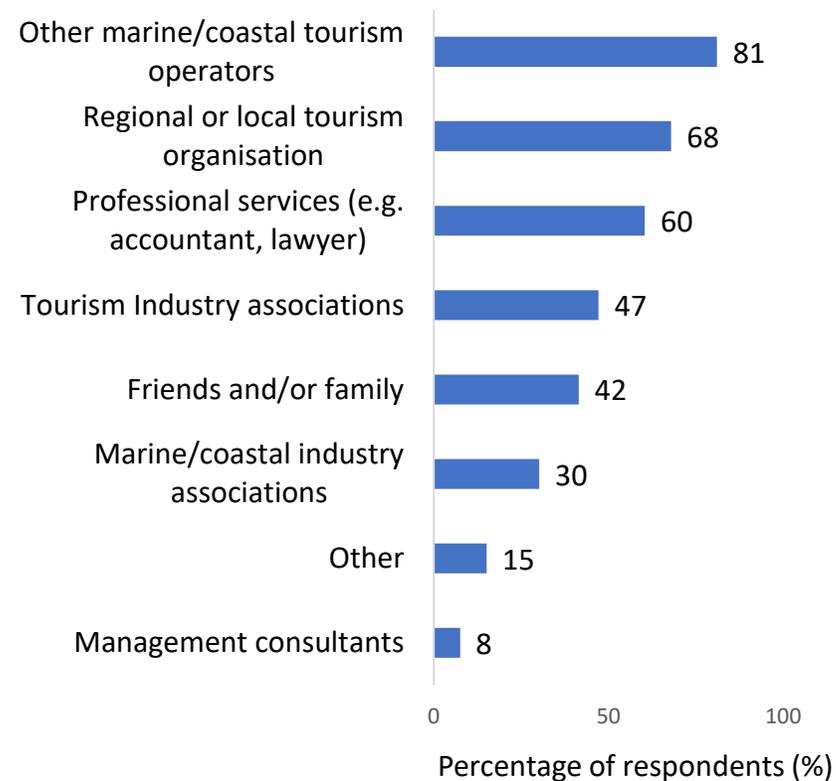
Collaboration: The majority of survey respondents seek business advice - mainly from other operators.

However, only just over one third of operators say they share information with others. Collaboration is desired and can be strengthened

Do you seek business advice from others? (n=68)



Who do you go to for business advice? (n=53)



Note: Multiple responses, therefore total does not add up to 100%.

Supporting the sector

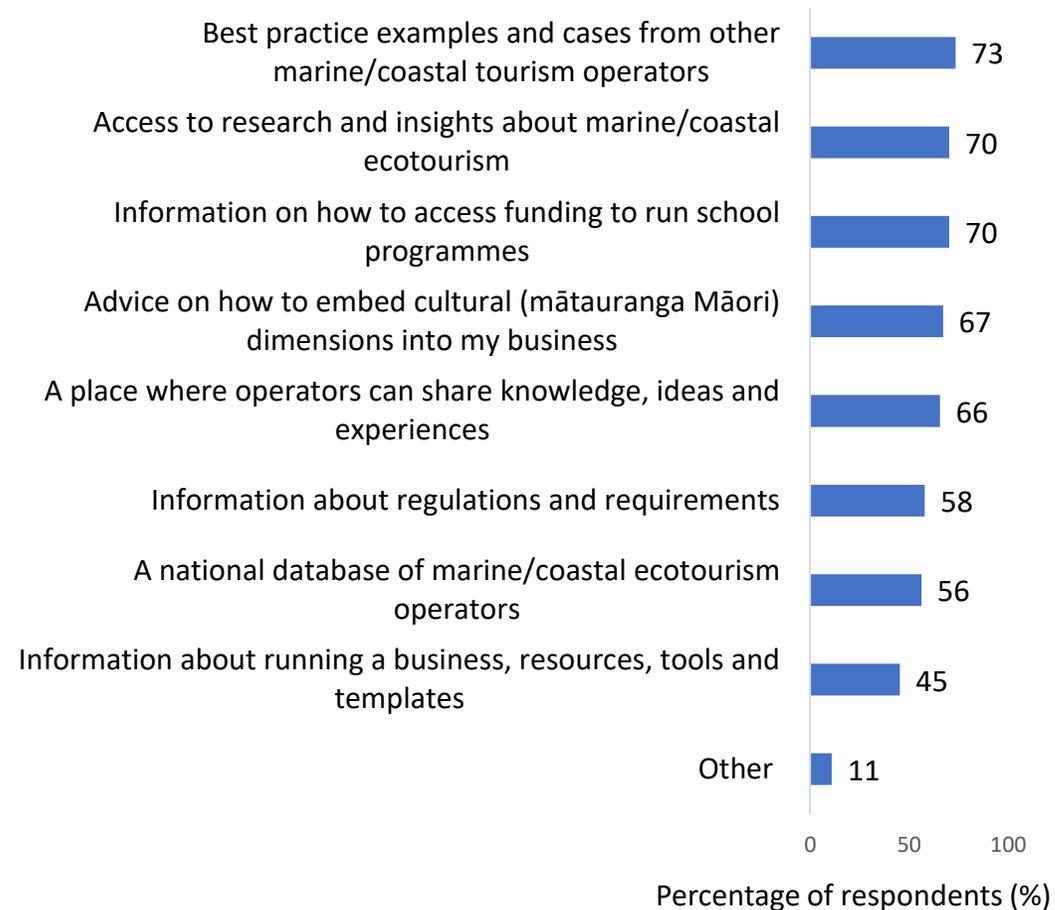
Operators were asked what could further support the sector as a whole.

- Assistance with collaboration and networking (e.g. with other operators, Māori, DOC) and improved information sharing
- Funding and support for marine ecotourism as a sector
- Strengthen marine protection: legislation, standards & enforcement
- Assist linkages with education and learning experiences outside the classroom
- Improve sustainable tourism accreditation – increase accountability and reduce costs for small operators to subscribe
- Provision of useful resources in one easily accessible location



Resources: Examples of best practice, information on how to access school programmes and advice on how to be informed by mātauranga Māori dimensions are the key resources surveyed operators are looking for

If an online resource was created for operators, what features would you find useful? (n=64)



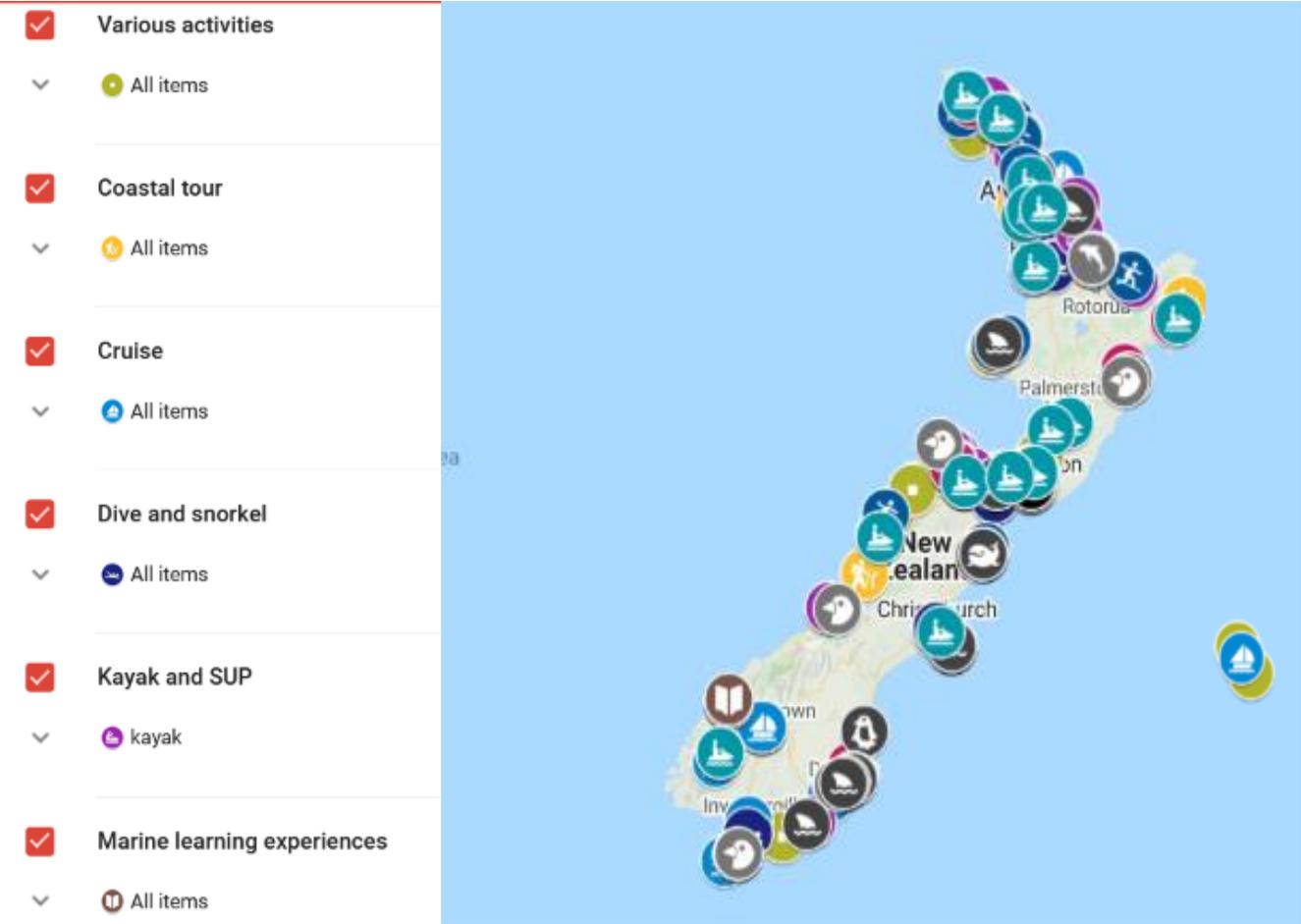
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Development of Resources



Marine and coastal marine ecotourism operators database: MAP AND DASHBOARD

Screenshot: Google Map - Operator locations by primary activity category



Activity Categories – primary focus of the operator

Map logo	Category Name (primary activity focus of the operator)	Description of category (primary activity focus of the operator)
	Kayaking and Stand Up Paddle boarding (SUP)	Focus is sea-kayaking and/or stand up paddle boarding
	Wildlife	Focus of the tour is aimed at viewing/interacting with marine and coastal wildlife. Excludes diving and snorkelling
	Cruise/boat (Scenic cruise)	Small to medium sized boats and/or yacht cruises and sailing experiences usually with a scenic cruise focus
	Diving and snorkelling	Diving and/or snorkelling
	Surfing	Surfing
	Waka	Waka including traditional Waka sailing and Waka Ama tours
	Coastal tour	Tours that focus on coastal areas including beaches – excluding a main focus on wildlife
	Marine learning experiences	Learning about marine environments or maritime activities
	Other marine activity	Focus is on another type of marine activity that is not one of the main categories
	Various activities	Offer multiple different types of marine/coastal activities

Examples of interactive google maps – see spread of activity. Compare activities in different locations.

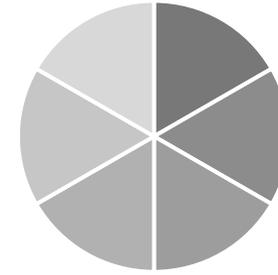
Dive/Snorkel: operators primary activity



Dive/Snorkel & Kayak/SUP operators South Island



Wildlife sub-sector – icon key



Primary focus is dolphins



Primary focus is penguins



Wildlife in general is a focus (no one particular species is singled out)



Sea birds including albatross and gannets are the focus



New Zealand fur seals and or sea lions are the focus



Whales are the main focus or are included with dolphins as a focus

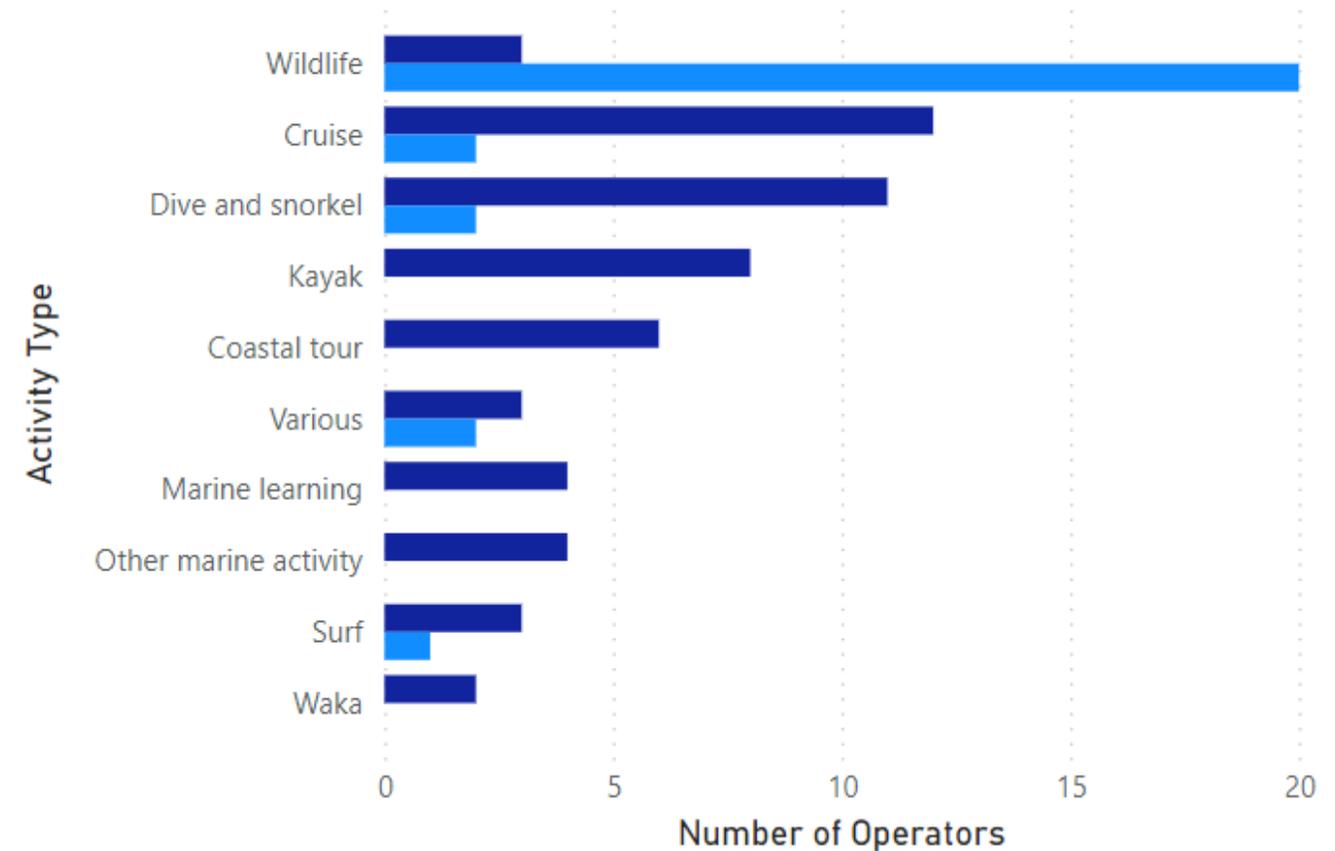
Wildlife = Primary focus aimed at viewing/interacting with marine and coastal wildlife be this on the water, on the coast or viewing by air. Excludes dive and snorkel.

Dashboard – enables comparisons between regions and activities



Operators by Activity Type and Region

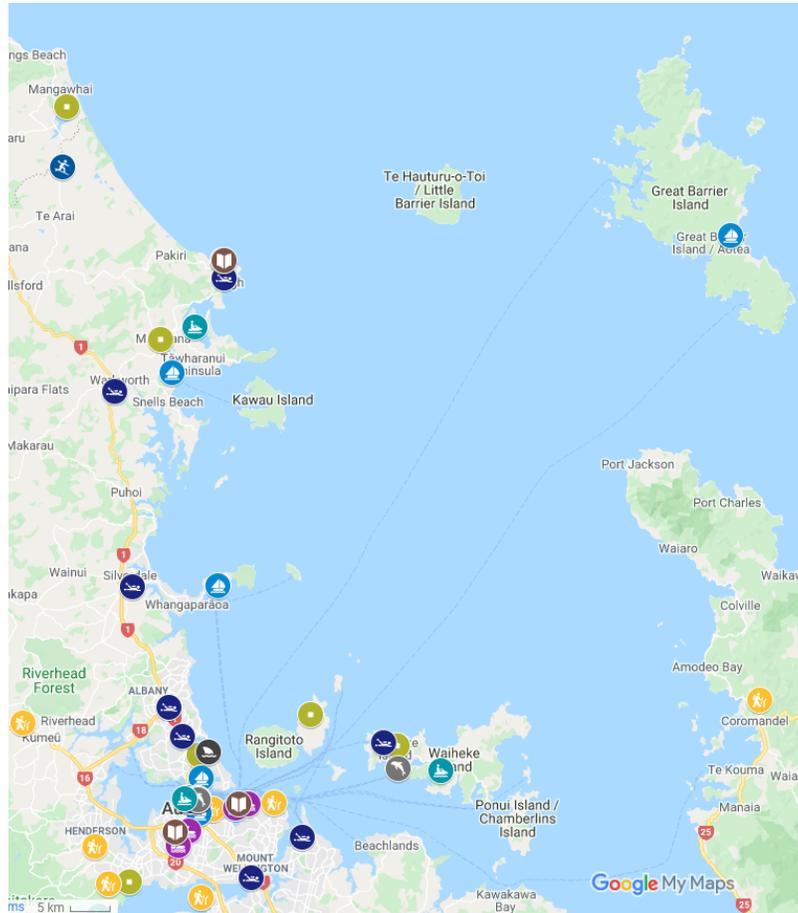
Region ● Auckland ● Canterbury



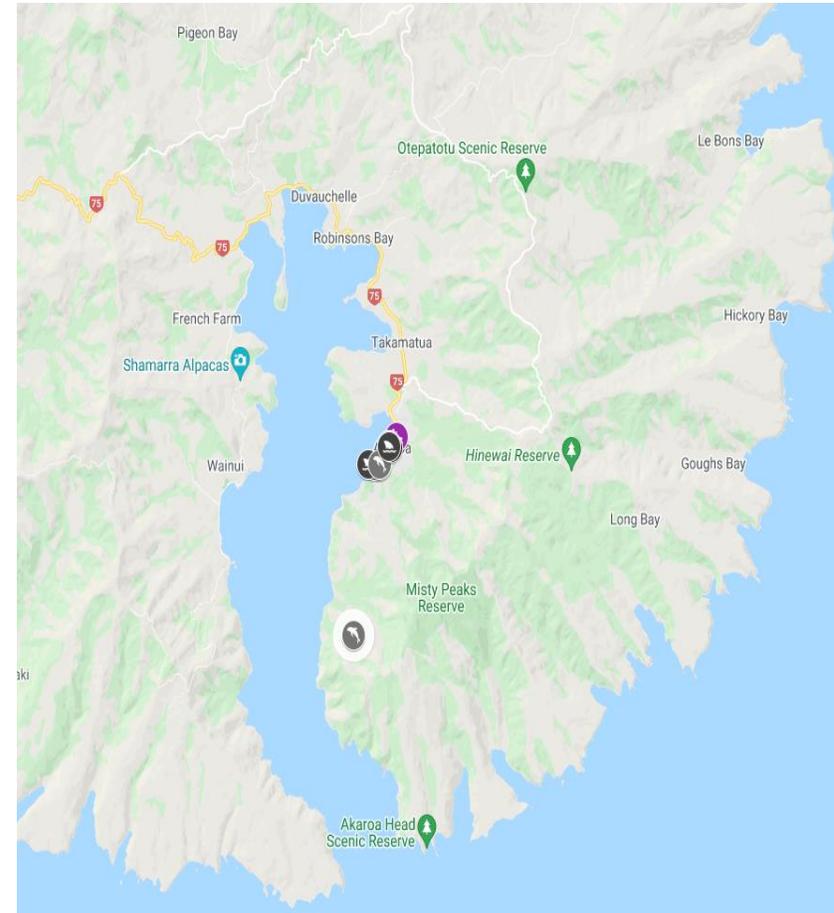
Next steps – Stage 2

Next steps: local cases will explore key issues in greater depth

Case study Tāmaki Makaurau Auckland



Case study Akaroa



“creating relationships with the mana moana is the only way to capture the essence of sustainable eco-tourism for all the different peoples of the wai.”

Ki ngā here Pūrengi

Rangitāmiro ai te kōwhao o te ngira

Ka takakawehia te ara Poutama

To the lashings

Where the common thread is found

Navigate the trails of learning

For more information on this project, visit: <https://www.sustainableseaschallenge.co.nz/our-research/growing-marine-ecotourism/>

National
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