

# BASELINE FINDINGS – MARINE AND COASTAL ECOTOURISM, NATIONAL AND REGIONAL PICTURE:

## PART 1: Operator database & map



NEW ZEALAND TOURISM  
RESEARCH INSTITUTE

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# Report for Sustainable Seas National Science Challenge project

## *Growing marine ecotourism (Project code 2.4)*

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SUSTAINABLE  
SEAS

Ko ngā moana  
whakauka

National  
**Science**  
Challenges

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For more information on this project, visit:  
[sustainableseaschallenge.co.nz/growing-marine-ecotourism](https://sustainableseaschallenge.co.nz/growing-marine-ecotourism)

*Front cover and dive images used throughout the report are courtesy of Dive! Tutukaka*

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# Executive summary

- Baseline Report 1 provides a stocktake of current marine and coastal ecotourism activities in Aotearoa New Zealand. The information presented links to and supports Report 2 which focuses on survey and interview research conducted with the marine ecotourism sector. Taken together these reports and resources provide a full picture of marine ecotourism activity and initiatives across the country that support a Blue Economy, and a baseline understanding of how the sector is currently positioned.
- Baseline Report 1 focusses on presenting and interpreting the national marine ecotourism operator database and related Google Map and Data Dashboard. The interactive [Google Map](#) is designed to present operators and their key offerings by their primary activity sector (e.g. dive, wildlife viewing) across the country. The [Data Dashboard](#) provides an interactive platform for the operator database, allowing users to explore the regional dispersal of the industry and compare across regions and activity types.
- The operator database was developed through a desktop audit and review of online content conducted between February and June 2021. The content of the database covers location (latitude and longitude, address of business), activity category type and description of activities, website, and contact details. Where available, details are also provided on certifications, mission and vision statements, Māori ownership, links to other businesses, and the role of marine reserves in the visitor experiences offered.
- A total of 303 marine and coastal ecotourism operators across New Zealand are identified. More operators are based in the North Island (57%) than the South Island (43%).

# Executive summary

- Two thirds of operators in the available database sample are micro in size (under 5 staff) enterprises. Diving, kayaking and wildlife sectors have a higher portion of small businesses (6-19 staff) than other activity sectors. Five sectors feature large businesses with most of these being in the cruise/boat sector.
- Fewer than half of all operators in the database show some form of sustainable tourism accreditation on their website, among those who do half advertise that they are Qualmark (Tourism New Zealand sustainable tourism accreditation scheme) accredited.
- Scenic cruising is the dominant activity within the database and is evenly split between the North and South Islands.
- Wildlife viewing (dolphins, whales, albatross, gannets and New Zealand fur seals) is more dominant in the South Island (two thirds of all operators) compared to a third of operators identified in the database in the North Island.
- Canterbury and Nelson-Tasman have the most operators (as identified in the database) in the South Island. Most of Canterbury's businesses are wildlife operators that are clustered in Akaroa and Kaikōura. The majority of Nelson-Tasman operators focus on kayaking in and around the Abel-Tasman area.
- Diving is dominant in the North Island, there are almost four times more operations than in the South Island.
- Auckland and Northland have the most operators in the country.
- The majority of Māori waka cultural tours identified in the database are in the North Island.
- There are more surf operations in the North Island than the South Island, with Taranaki and the Bay of Plenty key locations.

# Executive summary

- The New Zealand marine ecotourism sector is diverse, both in the range of activities offered, and operational contexts. The database shows that operators cluster around areas where there are healthy and diverse marine ecosystems above and below the water and along the coast.
- Marine ecotourism in the North Island is clustered around urban centres, with the exceptions of Tutukaka and the Far North. Auckland features particularly strongly in terms of overall operator numbers and Wellington has a sizeable diving industry.
- While there are notable clusters around key urban centres in the South Island (e.g. Christchurch and Dunedin), there is considerable regional dispersal in the South Island, notably the Nelson-Tasman region, Southland and greater Canterbury region. In Canterbury both Akaroa and Kaikōura are key hubs for marine ecotourism based on the presence of marine mammals. Peripheral areas such as the West Coast also see some marine ecotourism enterprises.
- Building on the findings in Baseline Report 1, Report 2 explores the challenges faced by the marine ecotourism sector. The importance of marine protection to ecotourism operators and their role in supporting and advocating for sustainable seas will be explored. The national scale findings presented Report 1 and 2 have informed locally/regionally focused case study selection in the North and South Islands – allowing the identification of where marine ecotourism is linked to wider eco-based system management blue economy settings.

# Aims and method



# Aims/Goals Baseline Report One

Baseline Report 1 provides a stocktake of current marine and coastal ecotourism activities in Aotearoa New Zealand. The report focusses on a marine ecotourism operator database that is supported by interactive data tools .

The database allows planners, businesses and regional tourism organisations to visualise for the first time the extent of the marine ecotourism offering in their region, and provides a contact list should they wish to further develop coastal and marine ecotourism contacts and networks.

The report provides a national and regional picture of the size and scope of the marine and coastal ecotourism sector in Aotearoa, in particular it:

- Identifies how many businesses operate in the marine and coastal ecotourism sector in Aotearoa New Zealand.
- Reveals the types of coastal and marine ecotourism activities provided in New Zealand.
- Maps operators and their key offerings by sector (e.g. dive, wildlife viewing).
- Presents a working definition of marine ecotourism for Aotearoa to be further developed as the project progresses.
- Outlines activity categories, inclusions and exclusions of what is included in the database and Google Map.

An interactive **Google Map** shows the types of activities and their geographical spread across New Zealand:

[sustainableseaschallenge.co.nz/map-nz-marine-ecotourism-operators](https://sustainableseaschallenge.co.nz/map-nz-marine-ecotourism-operators)

A **Data Dashboard** allows users to interactively explore the data in this report:

[sustainableseaschallenge.co.nz/data-dashboard-nz-marine-ecotourism](https://sustainableseaschallenge.co.nz/data-dashboard-nz-marine-ecotourism)

# Method

**An online database** of 303 marine and coastal ecotourism operators was collated between February 2021 to June 2021 using information publicly available online. The database provides information on how many businesses operate, the types of activities provided and their geographic spread. The marine operator database sourced relevant information from the WorkSafe operator register, membership lists from NZ Maori Tourism, Tourism New Zealand, Tourism Industry Aotearoa, Tourism Export Council, plus the Qualmark licence holder list. The New Zealand Business Number list was also cross checked.

Google key word searches complemented these lists and included: “marine ecotourism”, “sea kayak”, “coastal activities”, "diving", "surfing", "wildlife encounter”. Each region’s destination website was also cross-checked for marine ecotourism activities.



# Definitions



## Definition: What elements make-up ecotourism?

### Literature and industry feedback

- An emphasis on sustainable management of marine ecotourism operations - **low impact “light touch” businesses that engage responsibly with nature in coastal and marine environments**
- Educate tourists about the natural marine environment and its conservation while creating a meaningful and enjoyable customer experience
- Provide benefit to communities and the environment
- Promote the conservation of a species or habitat



View the [literature review](#)

# Defining Marine and Coastal Eco-tourism Operators

The coastal and marine ecotourism operator database was built using the following definition. The definition is designed not to exclude operators who may not mention specific elements of ecotourism (e.g. education, conservation) on their website.

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



# Marine and Coastal Eco-tourism Operator Inclusion

## 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** additional types of 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)
- Charter boats (where only hire i.e. non chartered boats is included)
- Where the activity only takes place on freshwater
- Third party tour providers who do not directly offer the marine ecotourism experience

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

## Wildlife sub-sector – icon key



**Primary focus is dolphins**



**Primary focus is penguins**



**Wildlife in general is a focus (no one or two 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.

# Using the resources



# How to use the operator database resource

## Operator Database

- The operator database was built in excel using information gathered from publicly available websites over the period February to June 2021. From database the Google Map and Data Dashboard are produced for users to interact with the data.
- Only operators that had an online presence are included (website/social media/listing on regional tourism organisation or national tourism website). Any operators that were clearly permanently closed were excluded from the database.
- The Google Map shows the locations of all places that operations take place, for example where a single operator offers activities in multiple locations each primary activity is displayed in that location.
- The database (Data Dashboard) focuses on the head offices of operations only and therefore reflects the number of operators in the database. Operators in the database (data dashboard) were counted once even if they operate from multiple locations. The focus is on the number of distinct marine and coastal ecotourism businesses across New Zealand. Subsidiaries are counted as separate operations.
- Where there is overlap in activities offered the enterprise is categorised based on their primary activity. For example, an operator that uses a boat to view marine mammals is categorised as 'wildlife' rather than 'scenic cruise' (this is in line with Tourism New Zealand classifications of these categories).

# Google Map: Marine and coastal marine ecotourism operators

## Google map

- An [interactive google map](#) has been created from the operator database and can be used by the user to explore in more depth the range of activities presented in different regions. Icons on the map represent the different sectors that are represented.
- The purpose of the google map is to show the dispersal across the country of marine ecotourism operators and their primary activity.
- Operators who operate in multiple locations are shown on the Google Map to provide a picture of the locations of all marine ecotourism initiatives.
- The Google Map shows the different primary activity categories of operators. Select the activity categories you wish to see and click on the icons for further details. To enlarge the map – click on the top right square. This map can be linked to from any website and through social media channels.

## Google Map: Operator locations by primary activity category



# Data Dashboard: Marine and Coastal ecotourism

## Data Dashboard

The [Dashboard](#) allows users to access and view desired data with ease.

The Dashboard is built from the operator database, it shows the number of operators and the primary activity type.

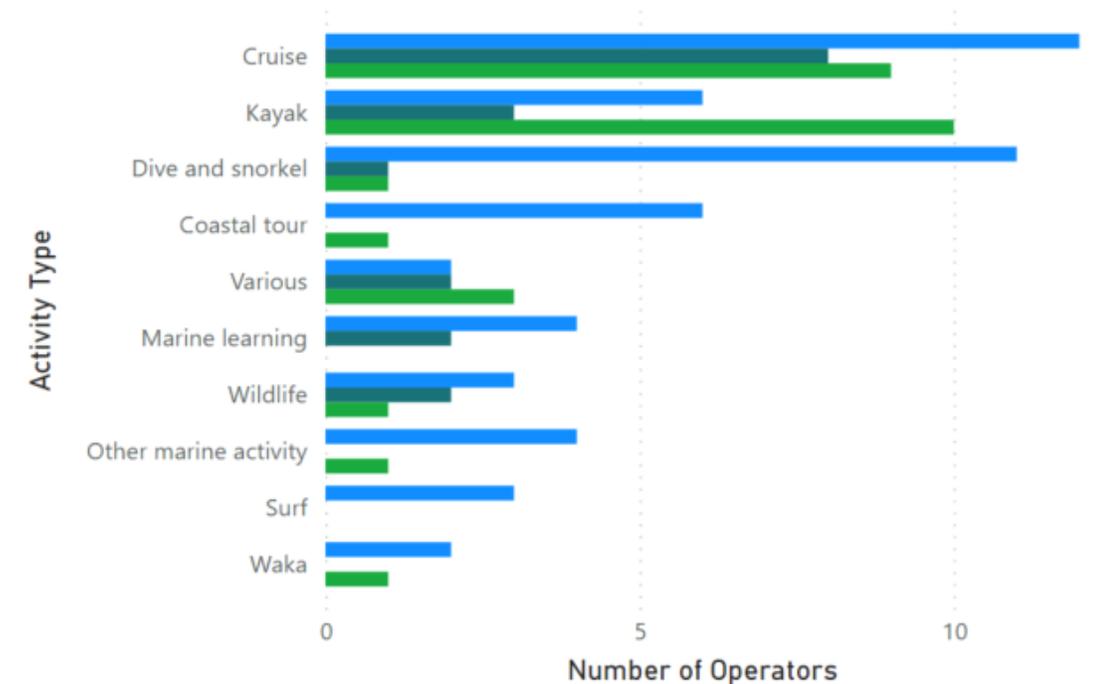
A simple interactive data dashboard allows users to explore national and regional comparisons (see left figure as an example).

The specific regional dimensions of marine ecotourism, including primary activity profiles, can be viewed via the dashboard.

## Dashboard: Operator regions primary activity comparison

### Operators by Activity Type and Region

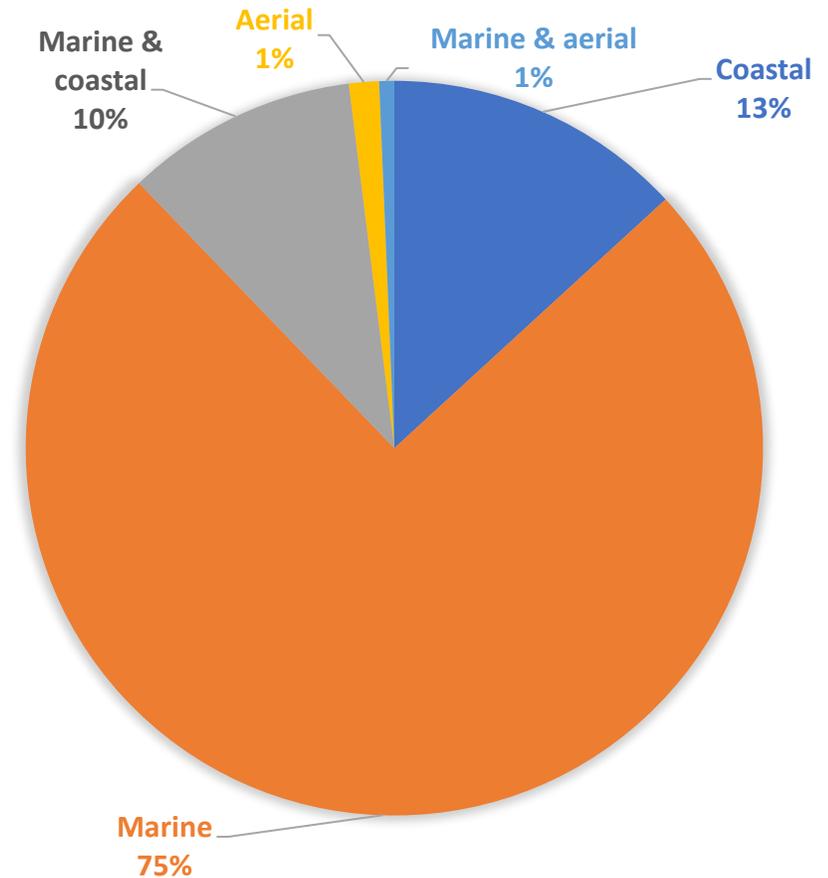
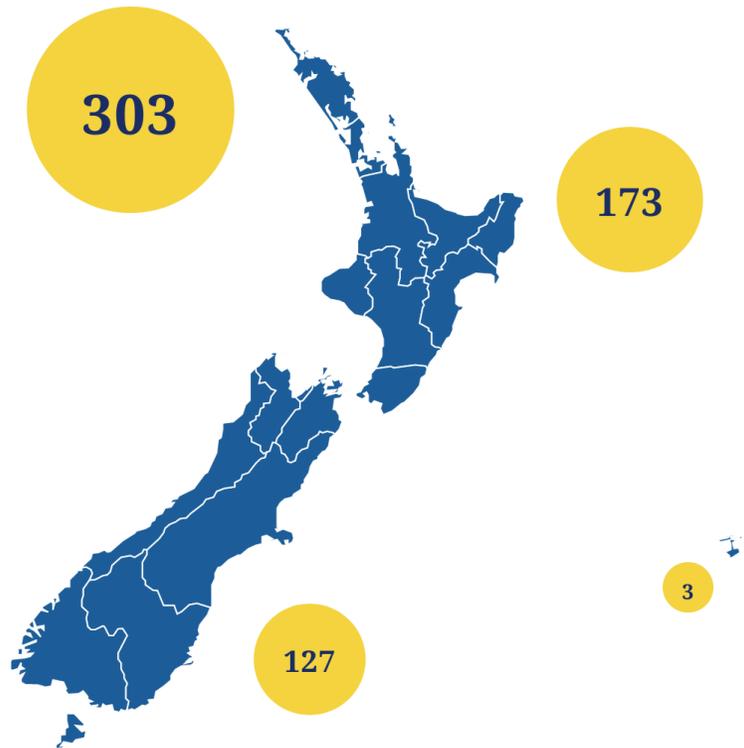
Region ● Auckland ● Marlborough ● Nelson - Tasman



# National Overview



Three quarters of the 303 marine ecotourism operators across New Zealand focus solely on marine activities



# Heatmapping shows the regional density of operator numbers

Heatmap: Number of operators across Aotearoa New Zealand

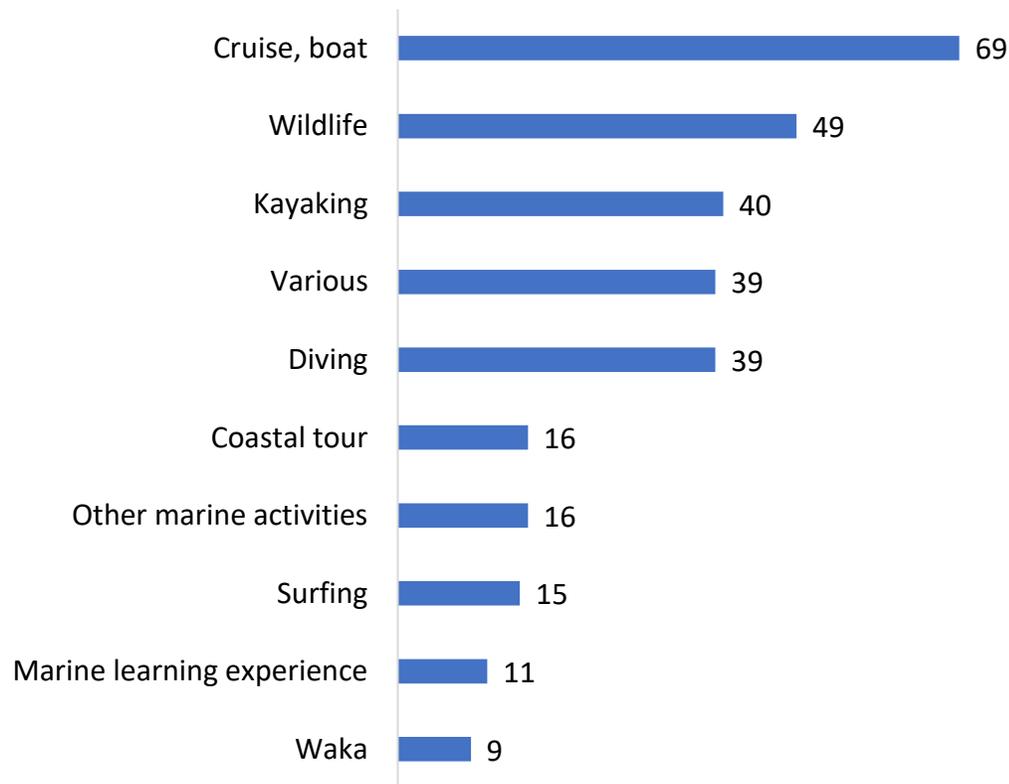


Heatmapping provides a visual interpretation of the dispersal of operators across New Zealand. Note the hot spots of Auckland and Northland and the top of the South Island in Nelson-Tasman and the Marlborough region.

This type of mapping can be explored further in the Marine Ecotourism Operator [Data Dashboard](#).

# Cruise/boat and wildlife make up 38% of marine and coastal ecotourism operator's primary activities across New Zealand

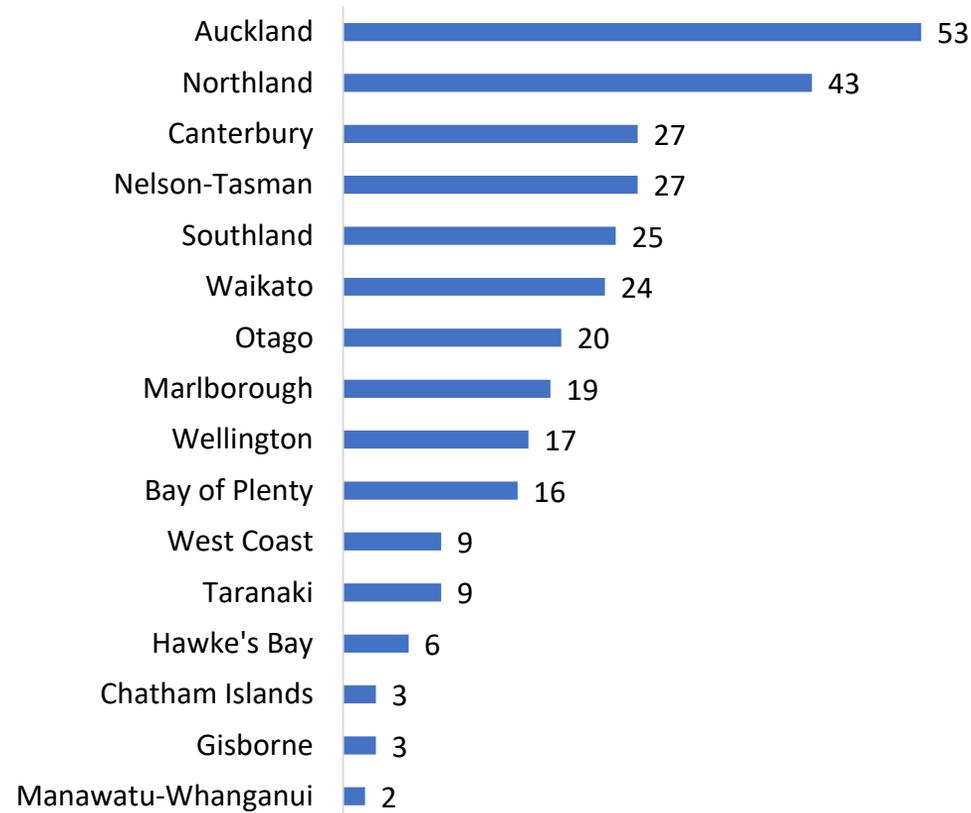
**Number of operators by primary activity**



- Scenic cruises (boat/cruise) are the most common type of operator in line with earlier studies of marine tourism activity (Orchiston, 2006).
- Wildlife viewing and kayaking are also primary activities offered by a significant number of operators.

# Regional Dispersal: over 30% of all operators in the database are located in Auckland and Northland

Number of marine and coastal operators



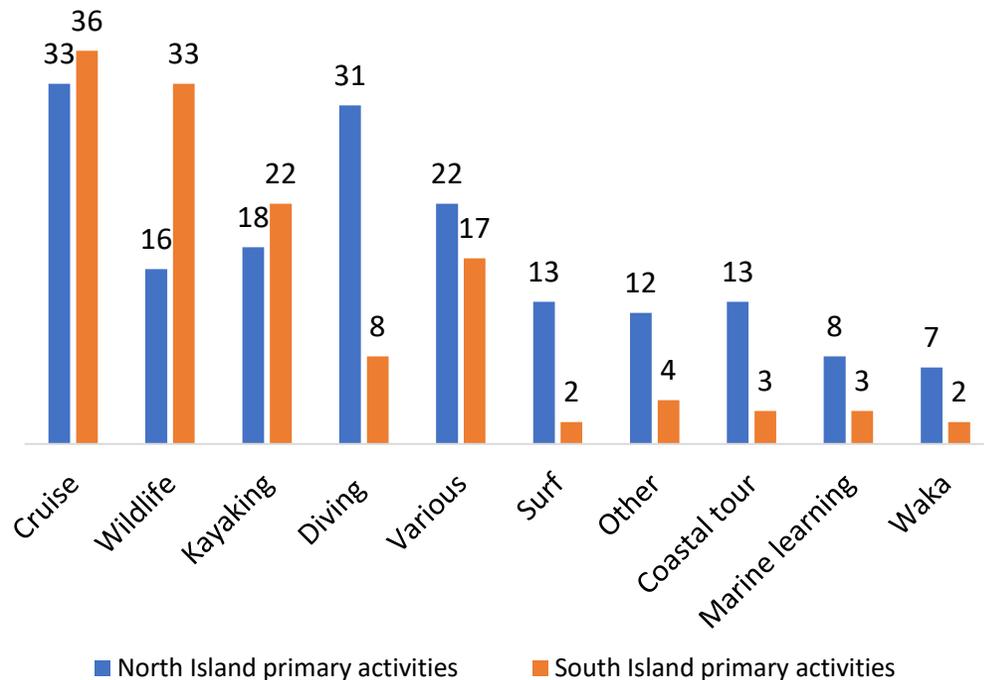
[Explore the map](#)

Operator locations by primary activity



## Primary activity comparison: Wildlife experiences are particularly significant in the South Island while diving features strongly in the North Island

North Island South Island Activity Comparison

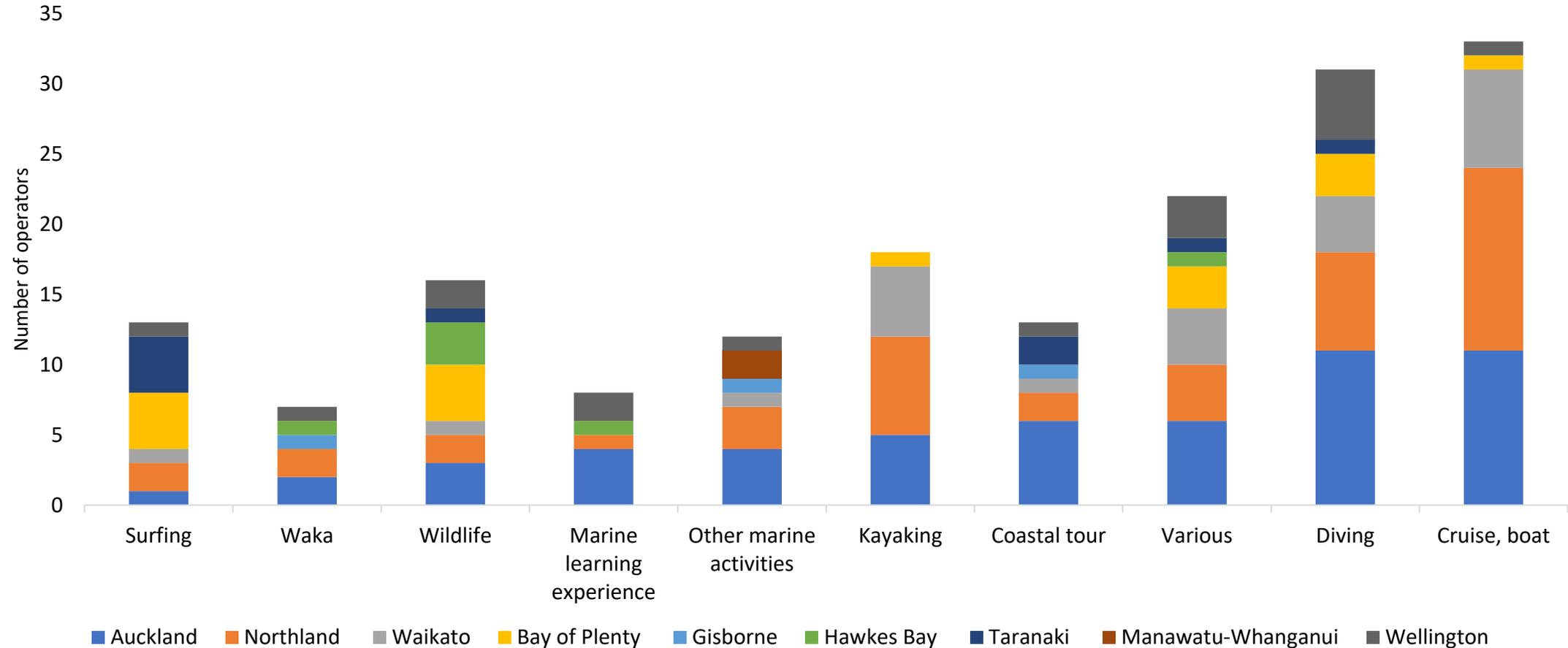


- There are more than double the amount of wildlife viewing operators in the South Island than in the North Island.
- The North Island has almost four times more diving operators than the South Island.
- The North Island has four times more marine learning experiences than the South Island.
- There are a similar amount of scenic cruise operators between the two islands.
- Surf operators are far more frequent in the North Island than in the South Island.

# North Island operator primary activity by region:

Cruise/boat is less important in Gisborne, Hawkes Bay and Taranaki than Auckland, Northland and the Waikato

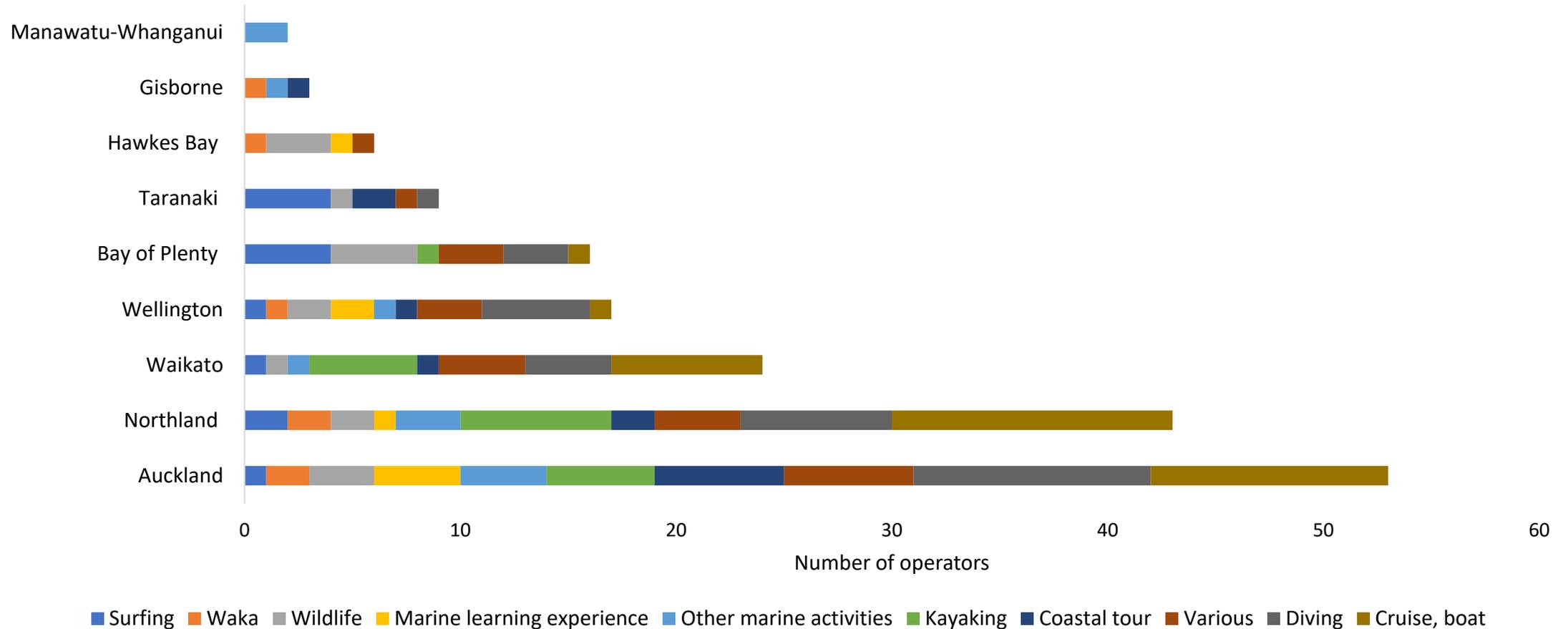
North Island, operator primary activities by region



# North Island operator primary activity by region:

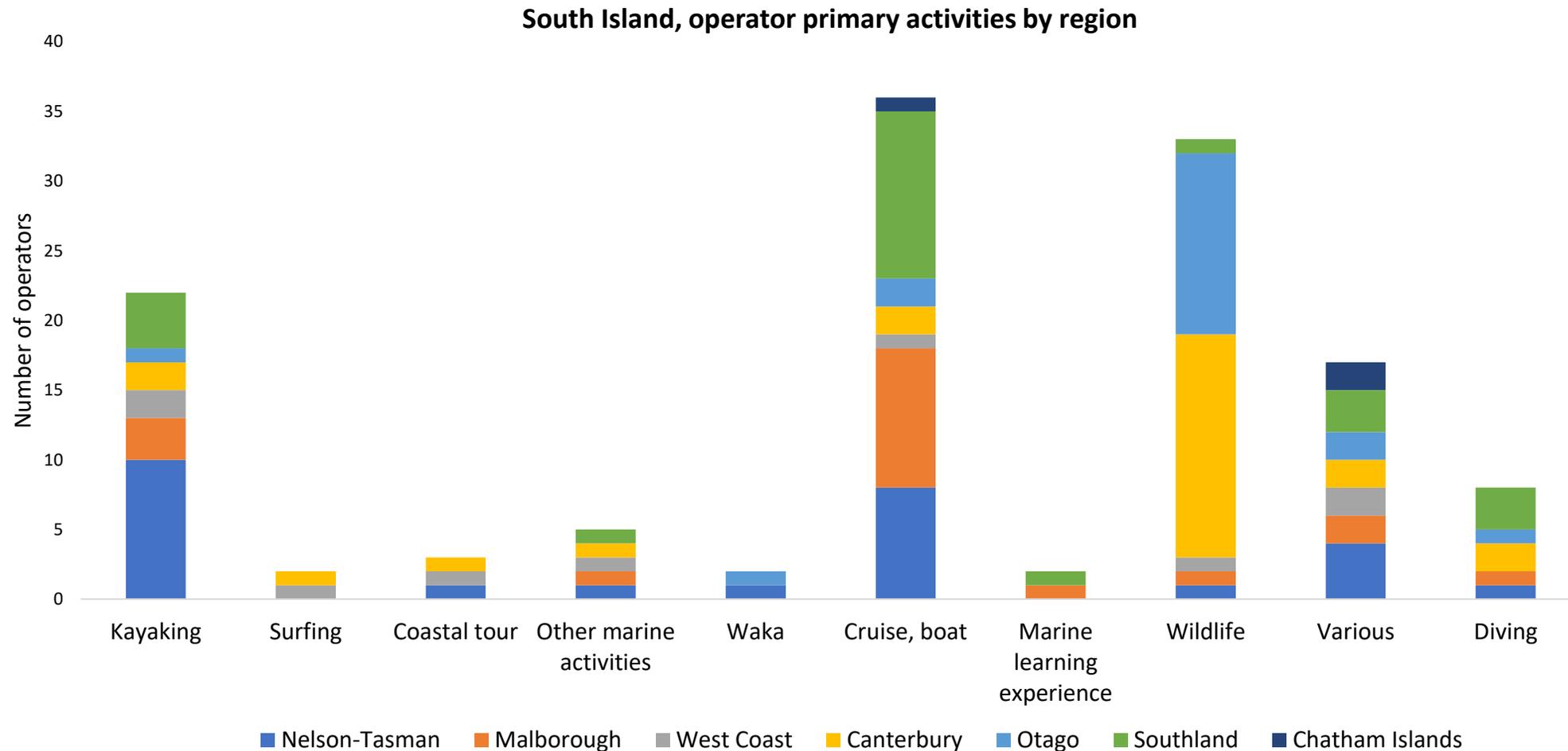
## Auckland and Northland offer the widest array of activities

North Island – operator primary activity by region



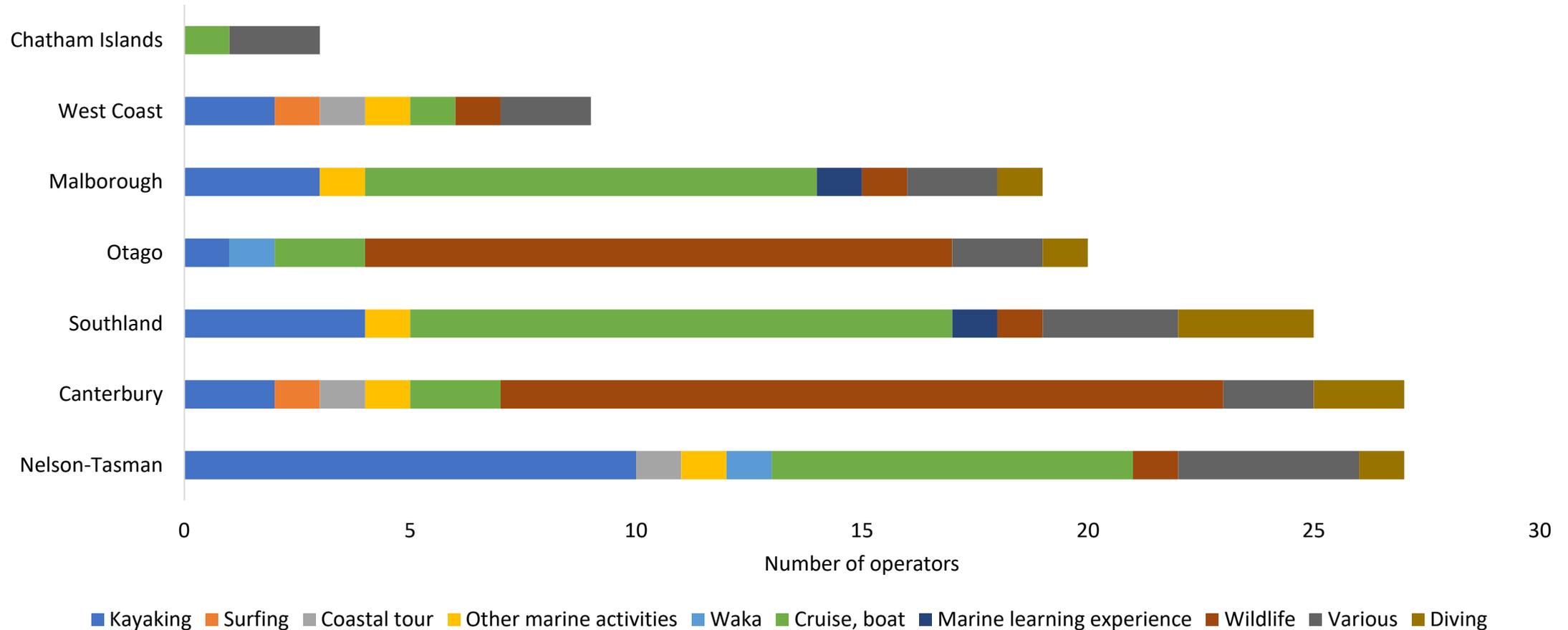
# South Island operator primary activity by region:

Kayaking operators feature across most regions of the South Island and are particularly prevalent in Nelson-Tasman



# South Island operator primary activity by region: Cruise/boat is most important to Southland while wildlife is most prevalent activity in Otago and Canterbury

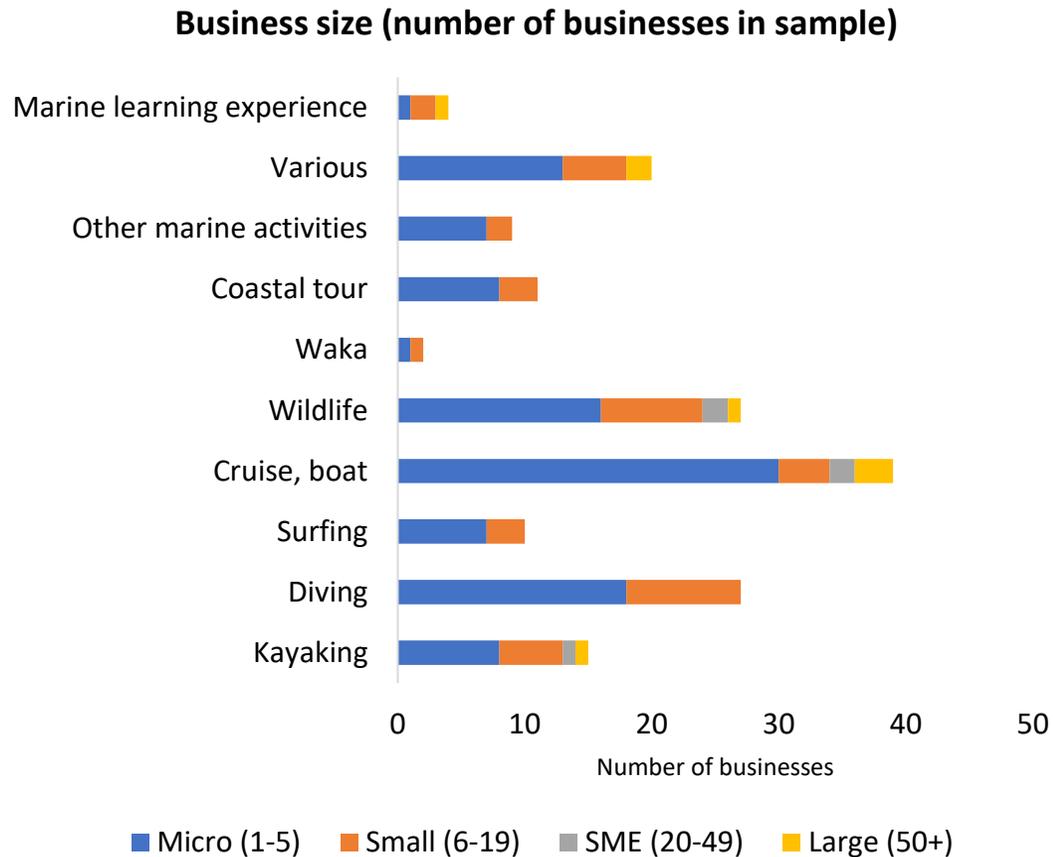
South Island, operator primary activities by region



# Industry Characteristics



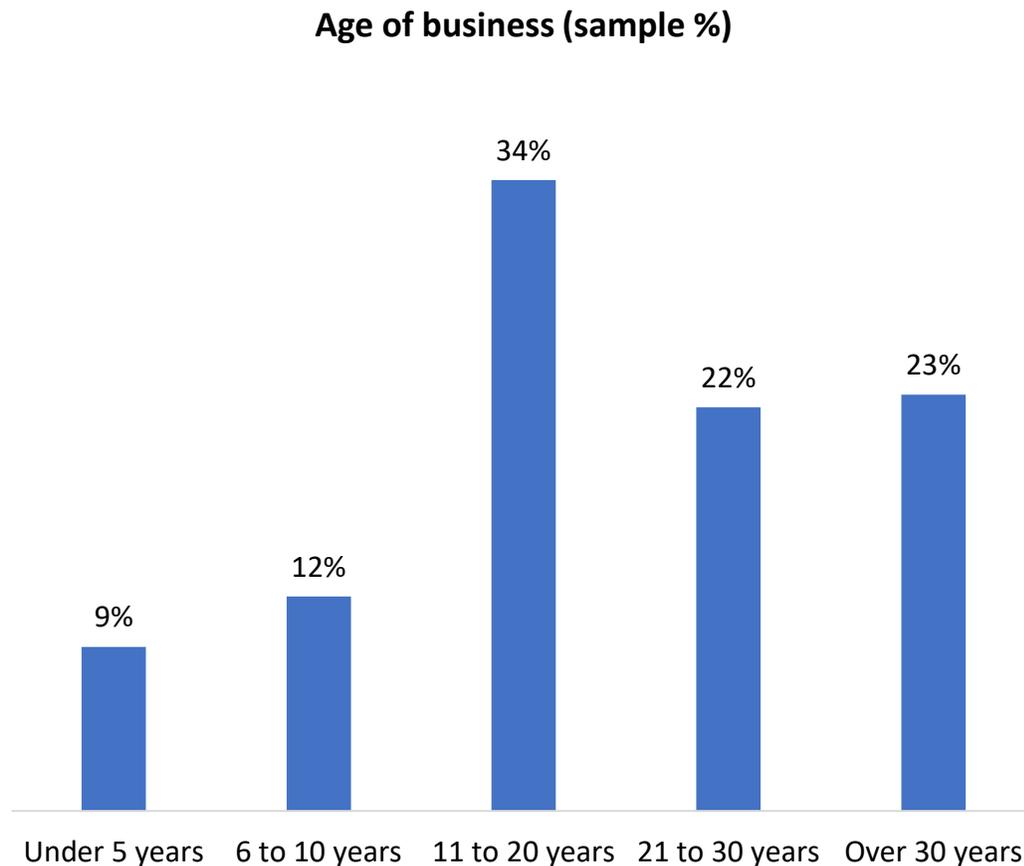
## Business size: The majority included in the database sample are micro businesses (under 5 staff)



- Two thirds of operators are micro in size (under 5 staff) enterprises.
- Diving, kayaking and wildlife sectors have a higher portion of small businesses (6-19 staff) than other activity sectors.
- Five sectors feature large businesses with most of these being in the cruise/boat sector.

NOTE database sample = 164. Only those with information on the website could be included

## Business age: The majority in the sample have been in operation for over 10 years

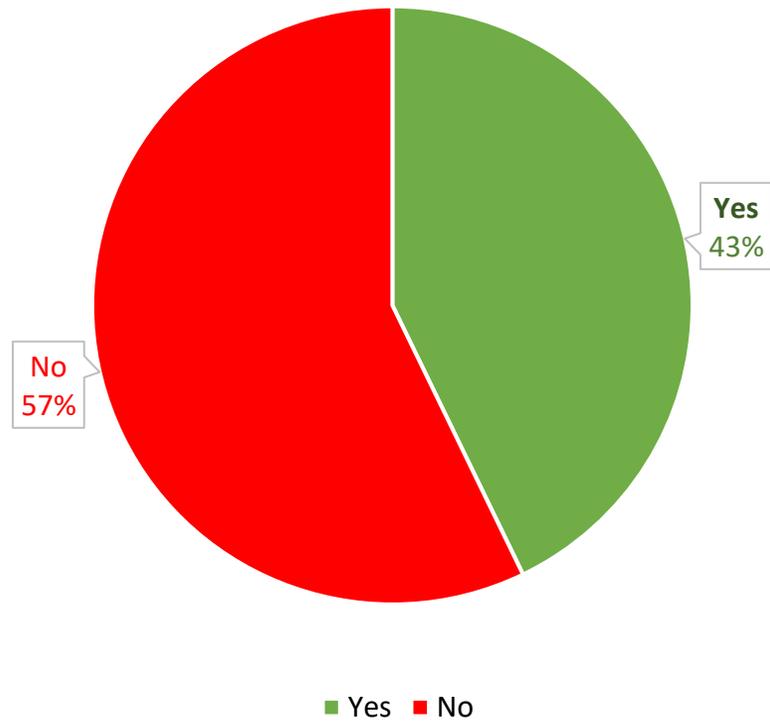


NOTE database sample = 145. Only those with information on the website could be included

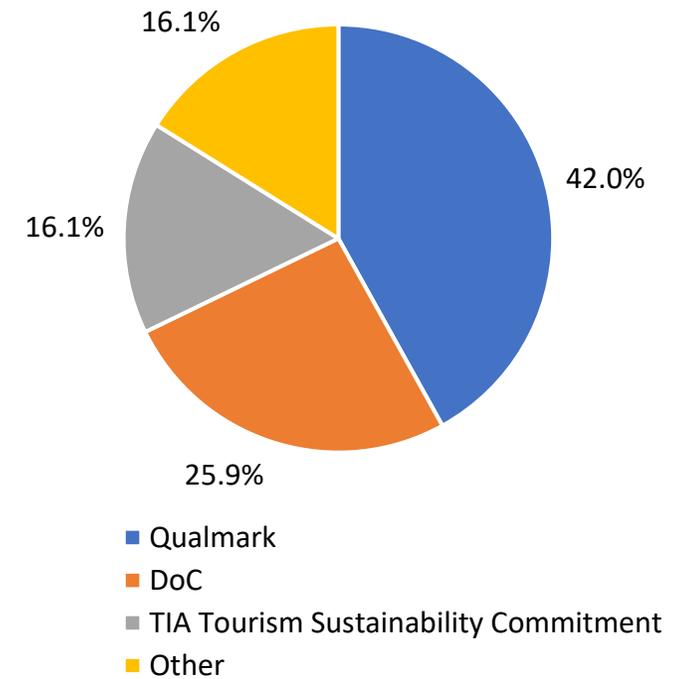
- Fewer than 1 in 10 of businesses in the sample are new (under 5 years old).
- One third of businesses are between 10 and 21 years old.
- Over three quarters (79%) of the sample businesses are over 11 years old.
- Almost a quarter (23%) are over 30 years old.

# Accreditation: Fewer than half of the operators show accreditation on their website

Sustainable tourism programme or accreditation shown on website



Sustainable tourism programmes and accreditations



# Activity sectors



# Scenic cruise: The Bay of Islands and Marlborough regions are host to the most cruise/boat operators



## Scenic cruise (Boat/Cruise): primary activity operators

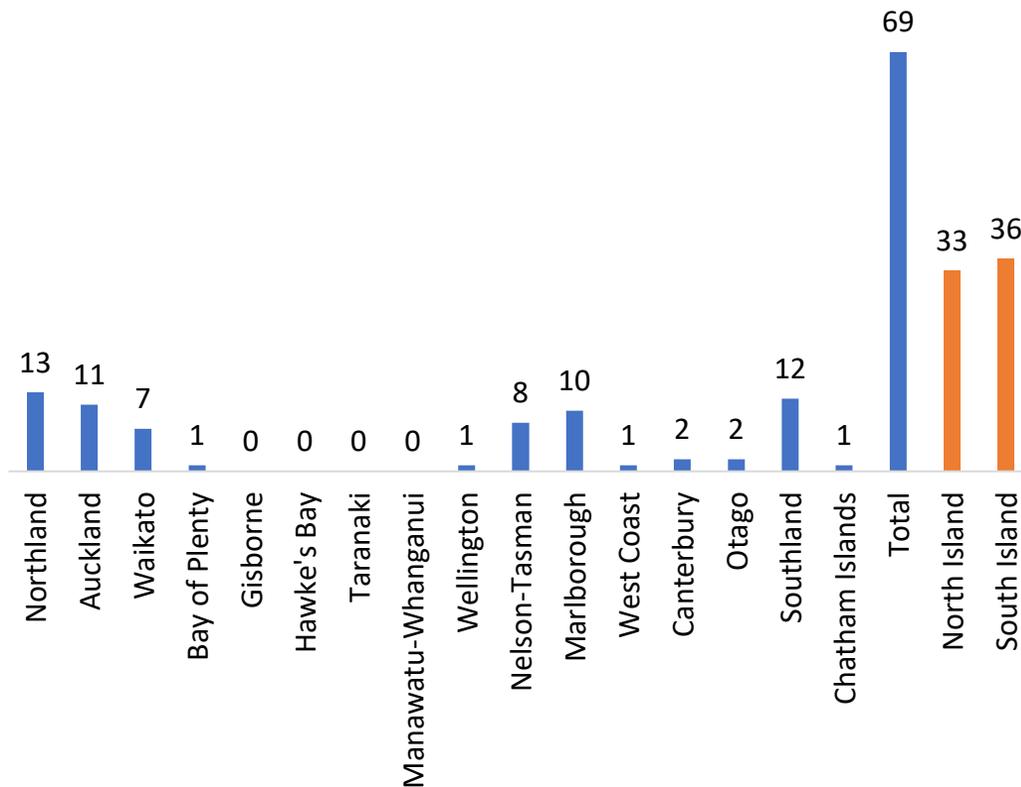


- Scenic cruises are typically on yachts (sail or motor powered) but can also be on smaller vessels. They range from day trips to multi-day trips where the focus is on enjoying the scenery and being on the water, often with guided commentary of the local marine area/stories/food. Several operators offer meals aboard and stops at beaches for swimming/snorkelling. In some cases learn to sail is included in the experience.
- Scenic cruises in the North Island are mostly centred around the Bay of Islands in particular Paihia and Russell (n=10), Auckland's Hauraki Gulf (8), and the Coromandel (6) especially from Whitianga.
- The Nelson-Tasman (n=8) region and the Marlborough Sounds (=10) followed Fiordland (6) and Milford Sounds have the most scenic cruise operators in the South Island.

# Scenic cruise (cruise/boat): four regions account for over 50% of operators: Northland, Auckland, Marlborough and Southland



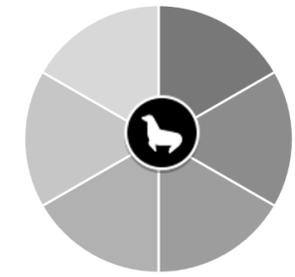
Number of operators – Cruise/ boat



- 69 operators are spread across the North and South Islands.
- Northland, Auckland and the Waikato have the most cruise operators in the North Island.
- Nelson/Tasman, Marlborough and Southland have the highest numbers in the South Island.

**Cruise/boat** = Small to medium sized boats and/or yacht cruises / sailing experiences usually with a scenic cruise focus. Excludes large cruise ships.

# Wildlife: South Island wildlife operators cluster around areas where wildlife is easily viewed and are located along the east coast

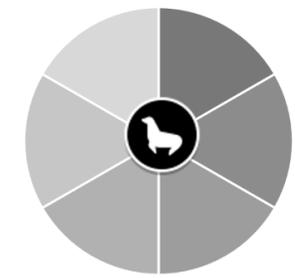


## Wildlife: South Island primary activity operators/types of wildlife



- Wildlife operators primarily focus on viewing Aotearoa's pelagic seabirds and marine mammals from boats, kayaks, and planes/helicopters.
- Dunedin and the Otago Peninsula and along the Catlin's Coast to Bluff have (n=13) operators focused on yellow eyed penguins, New Zealand fur seals and the Royal Albatross.
- Canterbury's 16 operators are split between Akaroa the Banks Peninsula (n=8) and Kaikōura (n=8). Akaroa's operators focus on dolphin viewing, including rare Hector's dolphins, Pohatu penguins, New Zealand fur seals and general marine wildlife.
- Kaikōura's operators mainly focus on whale watching. In particular the Kaikōura area has multiple ariel operators (helicopter/planes) who focus on viewing whales. There are also operators who focus on sea bird viewing including the Royal Albatross by boat and kayak operators that focus on viewing New Zealand fur seals.

# Wildlife: The Bay of Plenty, Hawkes Bay and Auckland account for the majority of wildlife operators in the North Island

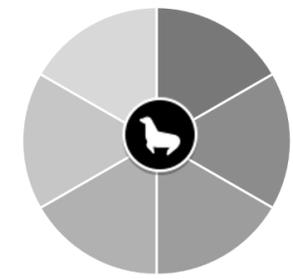


## Wildlife: North Island primary activity operators/types of wildlife

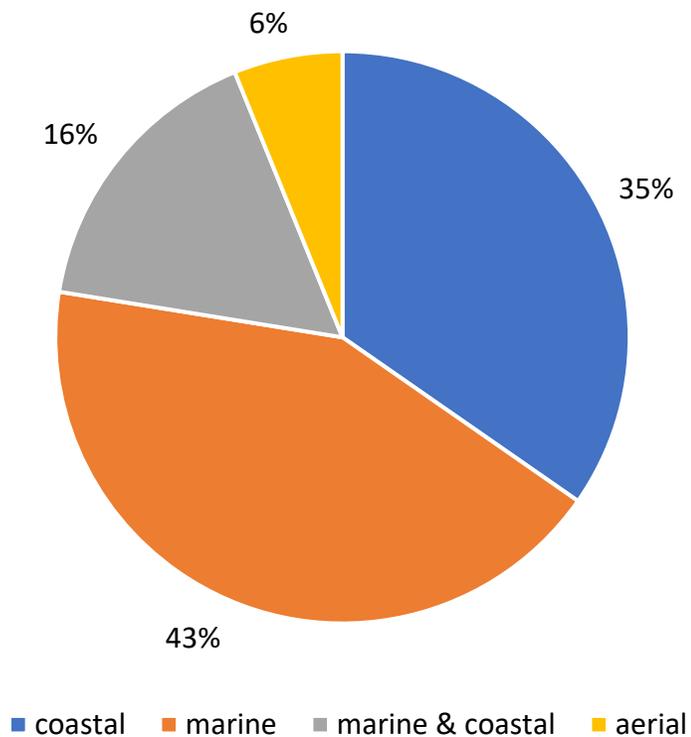


- The Bay of Plenty operators offer cruises aimed primarily at viewing dolphins (x4) but also offer the chance to see orca, humpback and pilot whales, blue penguins, fur seals, gannets and other seabirds.
- Cape Kidnappers in Hawkes Bay has the largest and most accessible mainland gannet colony in the world. All three of the wildlife operators are built around this attraction.
- In New Zealand's largest urban centre there are two wildlife operators who focus on dolphin viewing (n=2) and one operator that focuses on marine and coastal wildlife more generally.

# Wildlife: The majority of operators either focus on marine wildlife or coastal wildlife, 16% focus on both

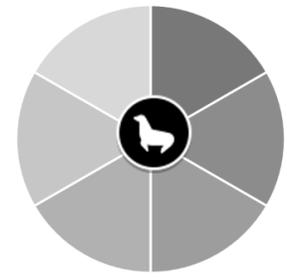


Operator setting – wildlife primary activity

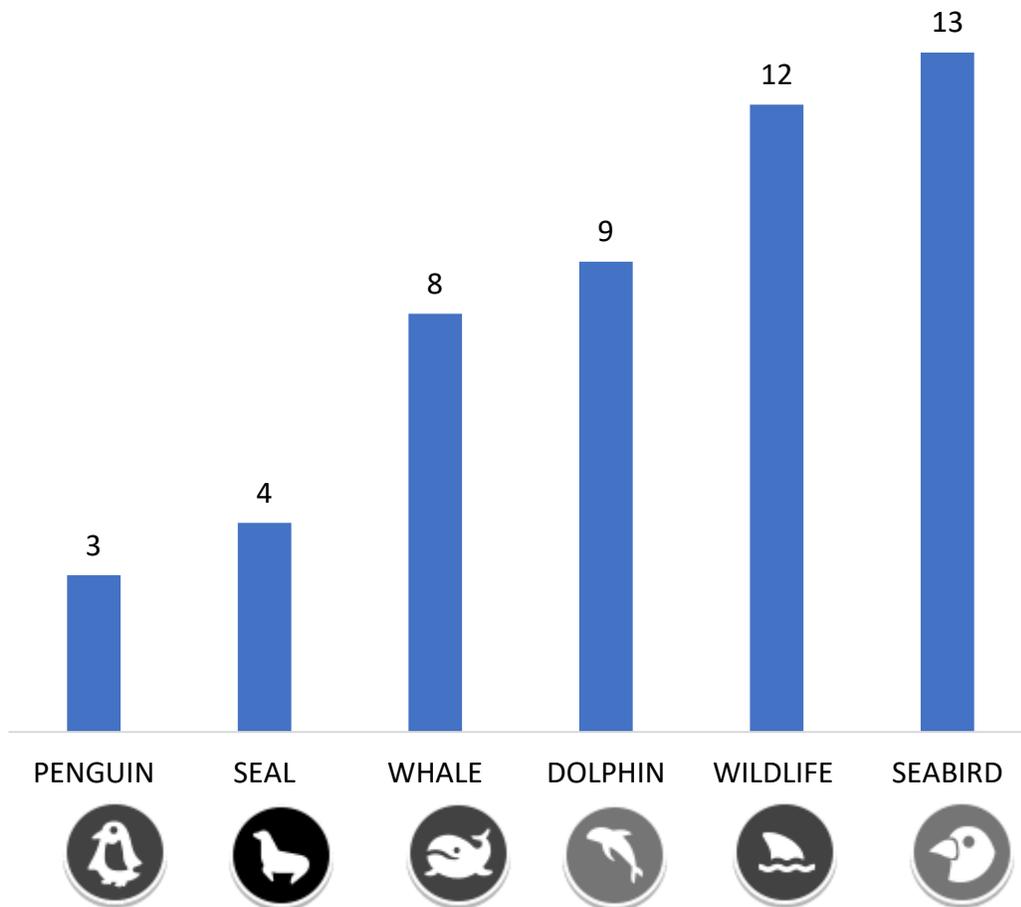


- Coastal and marine wildlife are important foci for ecotourism operators.
- There are slightly more operators focussed on marine wildlife settings than coastal settings.
- In Kaikōura especially a number of operators (planes and helicopter) focus on viewing whales from the air.
- A smaller percentage of operators view both marine and coastal wildlife.

# Wildlife focus: Dolphins and whales are the main attraction for wildlife operators

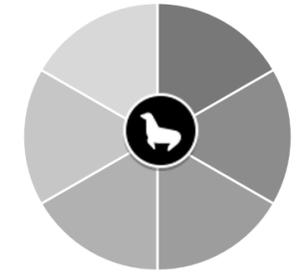


Split of wildlife – number of operators

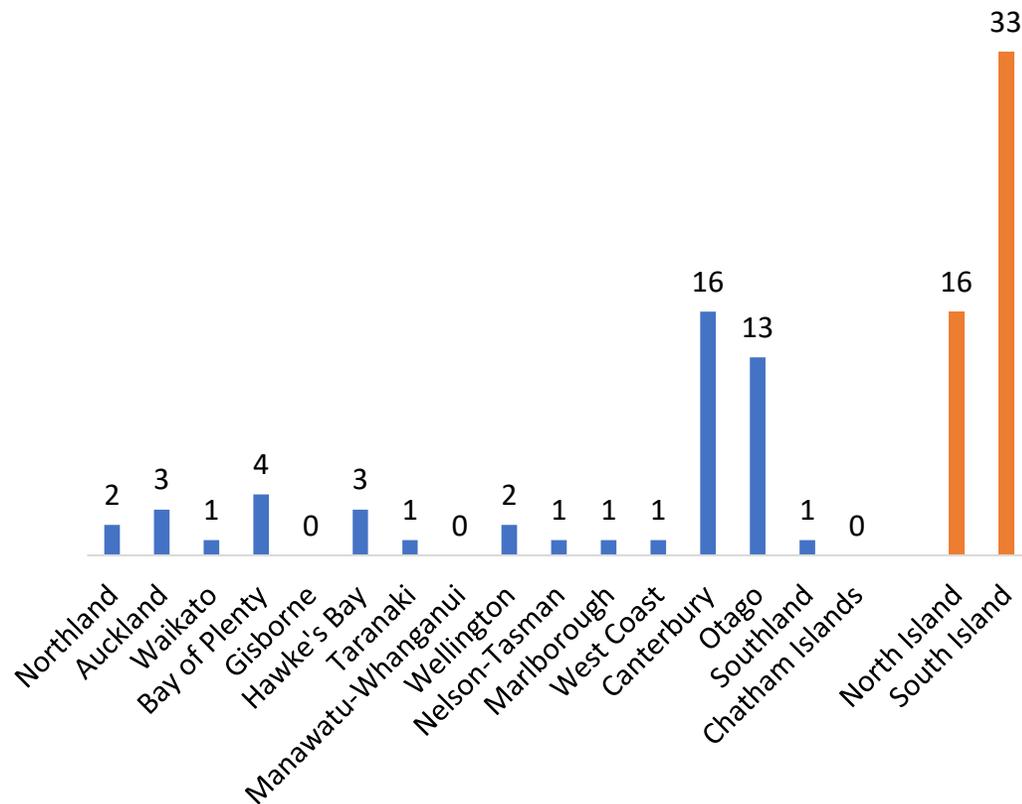


- Dolphins and whales are the main attraction across wildlife operators with 17 operators focusing on this.
- Seabirds including albatross and gannets are also popular wildlife focusses. In this category 4 operators include albatross viewing and 4 include viewing gannets.
- Where no one or two species are singled out in the wildlife category some examples include marine mammals, sea birds and sea lions or general marine life above the water.

# Wildlife: Canterbury and Otago have the most wildlife operators



Number of operators – primary activity Wildlife



- The South Island has more than double the amount of wildlife operators found in the North Island.
- Canterbury and Otago account for 88% of wildlife operators in the South Island.
- The Bay of Plenty has the most operations in the North Island aimed at viewing wildlife.

# Kayak and SUP: Tasman Bay and Golden Bay have the most operators whose primary activities are kayak/SUP



## Kayak/SUP: operators primary activity

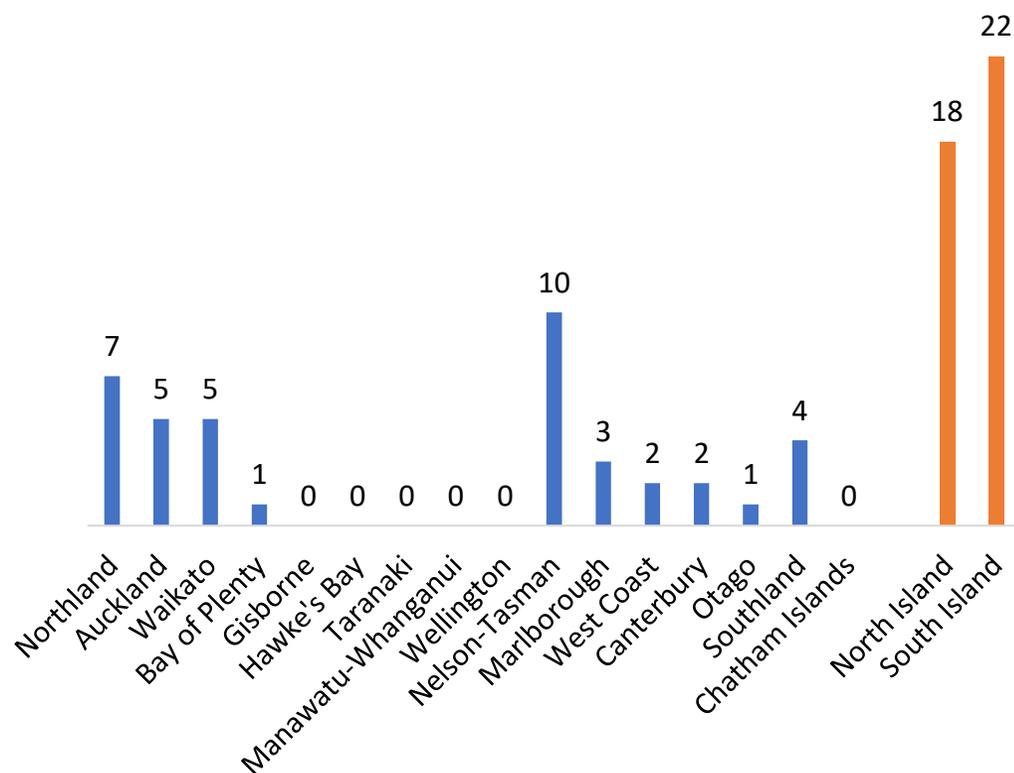


- Guided kayak tours focus on the marine and coastal environment, the local history and stories of the region while teaching safe boating skills. Often kayak operators rent kayaks for self guided tours and teach kayaking skills. A number of operators also offer the same experience on stand up paddle boards (SUP).
- Kayaking tours range from half days to multi-day expeditions. In Auckland one operator offers see through kayaks to view marine life under the water.
- Tasman Bay and Golden Bay host the most sea-kayak operators in New Zealand with 10 operators. Some of these operators also offer kayak and walking experiences in Abel-Tasman national park.
- The North east coast from Whangaparoa to Auckland's Hauraki Gulf hosts the most sea kayaking operators in the North Island.

# Kayak and SUP: Nelson-Tasman have the most operators



Number of operators – Kayak and SUP



- The Nelson-Tasman and Marlborough region accounts for 59% of all kayak operators in the South Island.
- Northland and Auckland accounts for 66% of all kayak operators in the North Island.
- All regions (excluding the Chatham Islands) in the South Island have kayak operators whereas only four out nine regions in the North Island have kayak operators.

**Kayak & SUP** = Primary focus is sea-kayaking and / or stand up paddle boarding.

# Dive and snorkel: The north east coast of Aotearoa has the most operators whose primary activity is dive/snorkelling



## Dive/Snorkel: operators primary activity

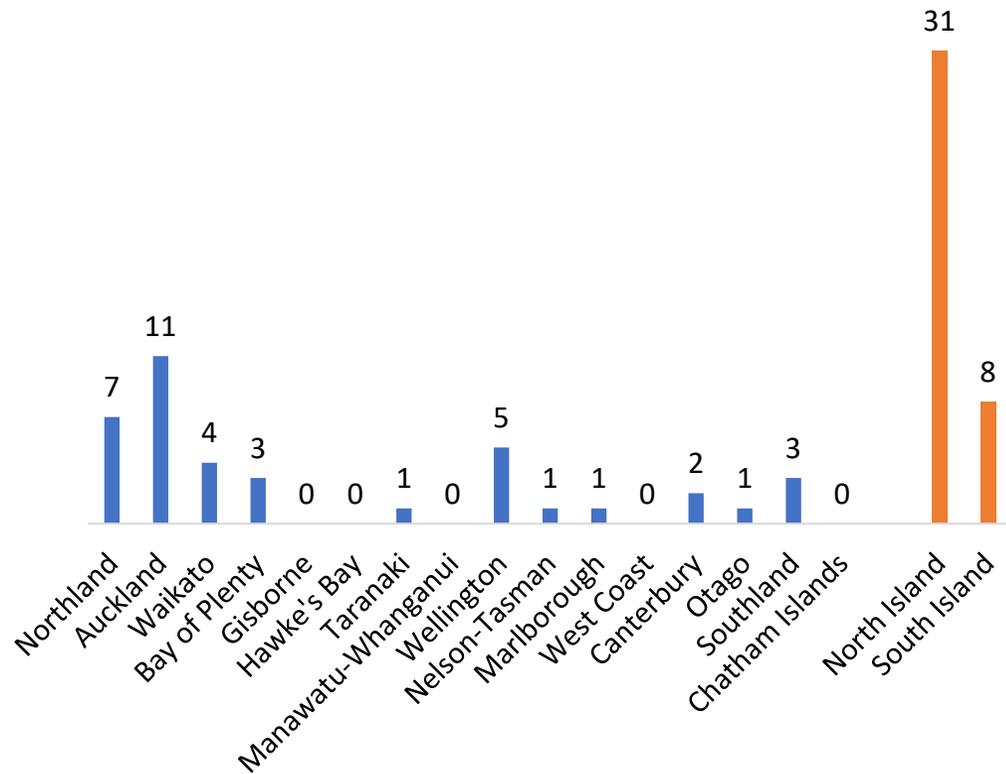


- Diving and snorkelling operators offer one or both of these core activities. Often dive operators run learn to dive courses and some take guided scuba diving trips locally, regionally across New Zealand or even overseas. A number of dive operators also offer training for entrance into professional dive industry careers (instructor/technical). Most double as dive shops, who sell, hire and service dive and snorkel equipment.
- The Tutukaka Coast down to Auckland features the most dive operators in the North Island.
- Wellington has a sizeable dive industry with 5 operators listed in the database.
- There are considerably less dive operators in the South Island, with Fiordland, Southland Christchurch, Nelson-Tasman and Canterbury being the only regions with dive operators.

# Dive and snorkel: the North Island dominates



Number of operators – Dive and snorkel



- Auckland and Northland account for 60% of dive operators in the North Island.
- There are more dive operations in Auckland than in all of the South Island.
- Wellington has a sizeable dive sector.
- Southland and Canterbury have the most dive operations in the South Island.

**Dive and snorkel** = primary focus is diving and/or snorkelling

# Surfing operators are focused in the North Island with many based on Taranaki's 'surf highway'



## Surf: operators primary activity

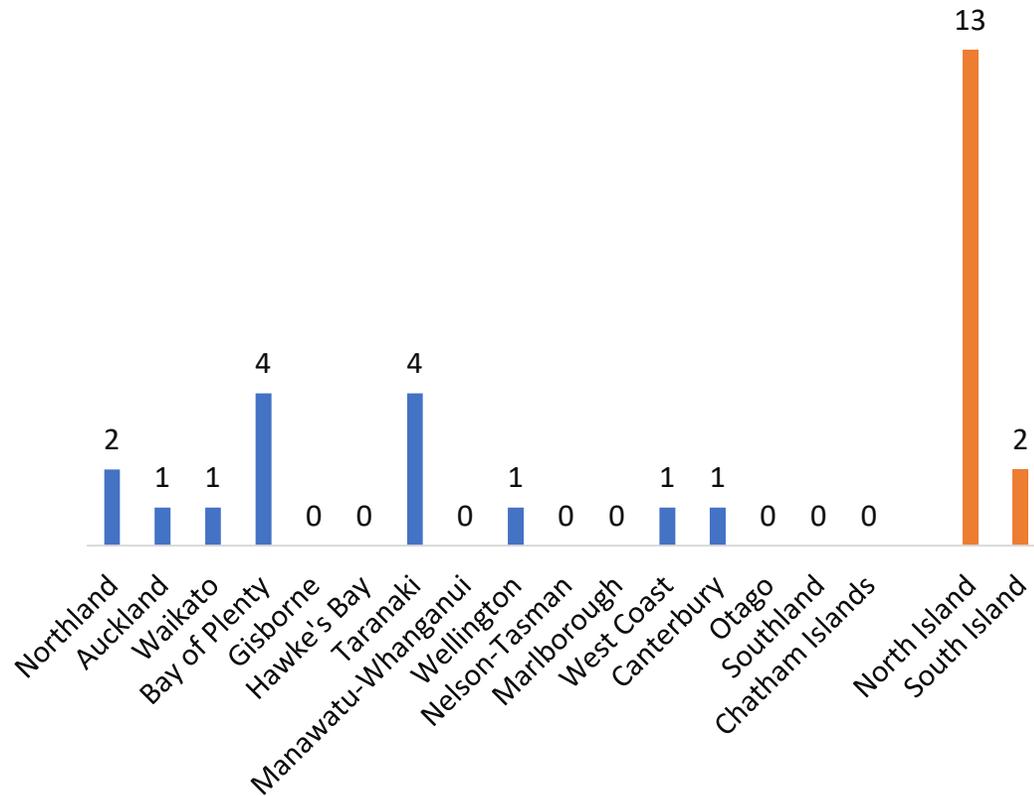


- Surf experiences are often surf schools that offer lessons, and hire for individuals and groups. Some offer local surf tours and one operator based in Taranaki offers guided surf trips across New Zealand. Others offer accommodation along with multi-day immersion courses.
- The West Coast of the North Island in particular Taranaki and Raglan host a number of surf operators.
- The Bay of Plenty is also popular with surf operators.
- The two surf operators in the South Island are located in Kaikōura and Westport.

# Surf: The majority of operators are in the North Island



Number of operators - Surfing



**Surfing** = primary focus is on surfing

- The North Island accounts for most surf operators.
- Taranaki and the Bay of Plenty feature the largest number of surf operations in New Zealand.
- The West Coast and Canterbury are the only regions with surf operators in the South Island.

## Other marine activity: A significant cluster of 'other' operator primary activities are present in Auckland



### Other marine activity: operators primary activity



Other marine activities include jet skiing experiences, kitesurfing, windsurfing, parasailing, jet boating, jet pack experiences etc.

In Gisborne a reef ecology tour is aimed at understanding the stingray habitat.

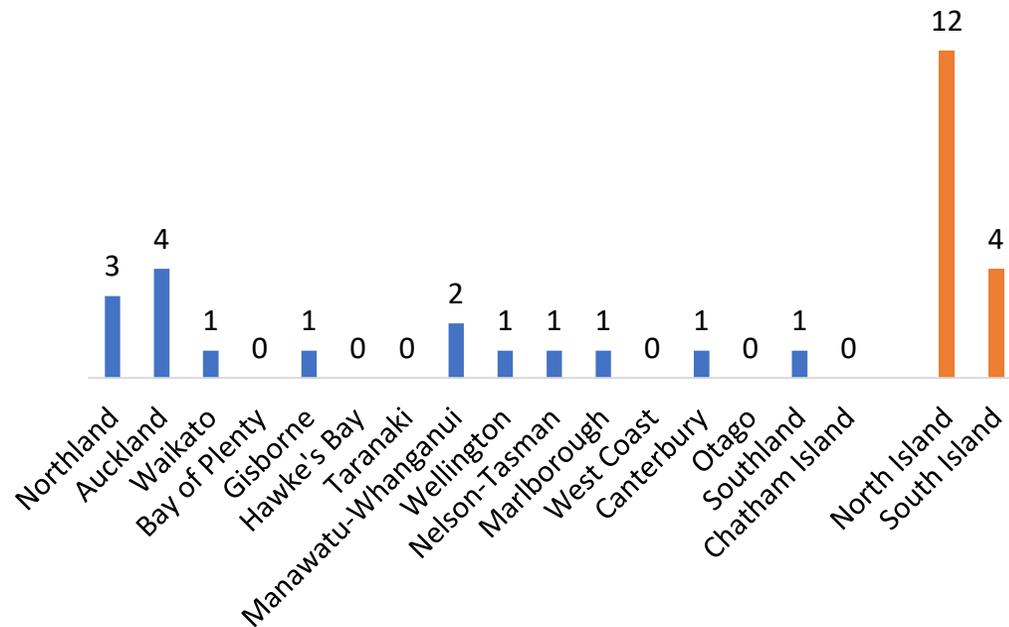
In Marlborough an operator offers Paua farm tours.

In Fiordland an operator offers tours of the marine environment by seaplane.

# Other marine activity: Most 'other' types of marine activity operators are located in the North Island



Number of operators - Other marine activities



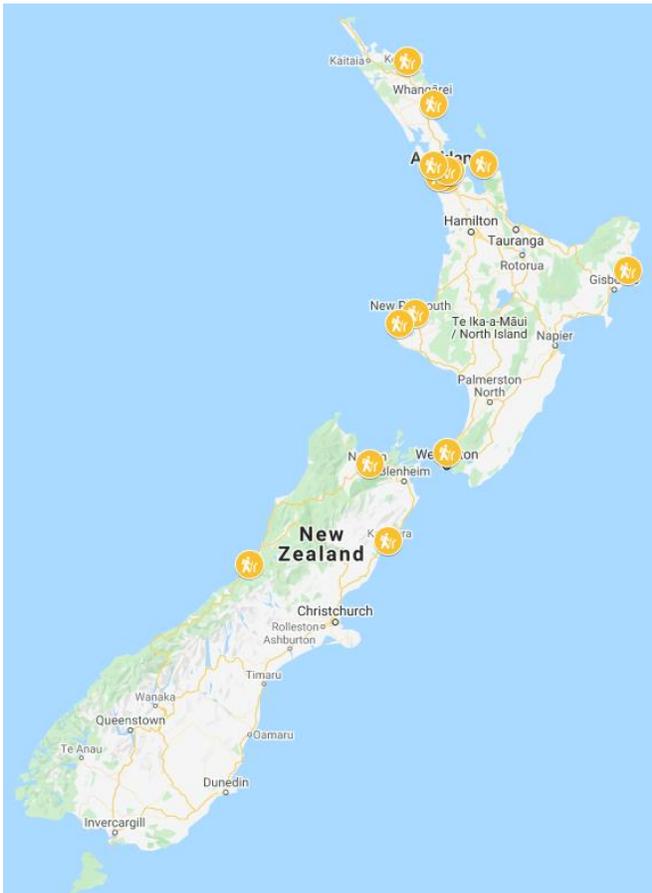
- The majority of operators offering other types of marine activity are concentrated in Auckland and Northland.
- There are three times as many operators in the North Island who offer another forms of marine activities than in the South Island.

**Other marine activity** = Where the focus is on another type of marine activity that does not fit into one of the main categories.

# Coastal tour: Coastal tours often connect people to the heritage of coastal areas



## Coastal tour: operators primary activity

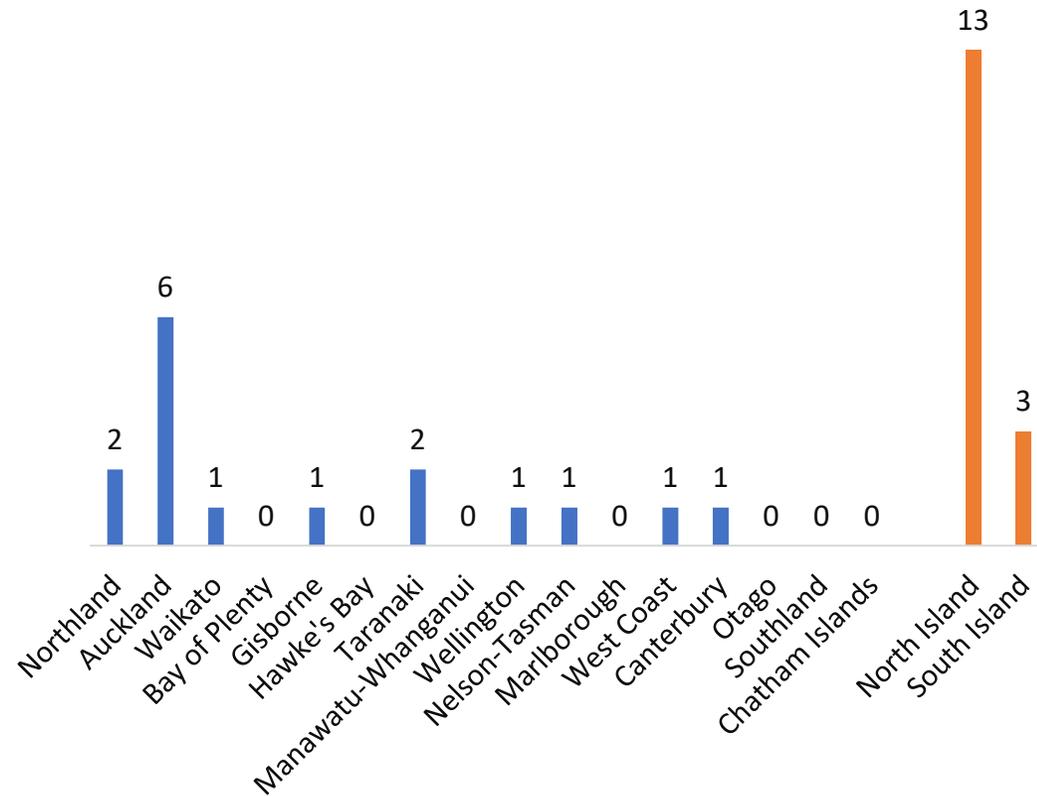


- The majority of coastal scenic tours involve transportation and low impact activity such as walks and/or cycling along coastal walkways and or beaches.
- Sometimes coastal tours highlight and focus on specific features such as e.g. the Pancake rocks and at Hokitika, hot water beach in the Coromandel or historic wharves in Gisborne.
- A number of operators offer guided tours that offer a coastal experience including local stories, lighthouses, and engaging with fresh seafood and learning about coastal and local harbour areas.

# Coastal tour: The North Island dominates this sector



Number of operators - Coastal tours



- There are considerably more coastal operators in the North Island than in the South Island.
- Thirty-eight percent of all coastal tour operators are in Auckland.

**Coastal tours** = focus on coastal areas including beaches but exclude where the primary focus is on wildlife

# Marine learning: Most of New Zealand's operators are in the North Island



## Marine learning: operators primary activity

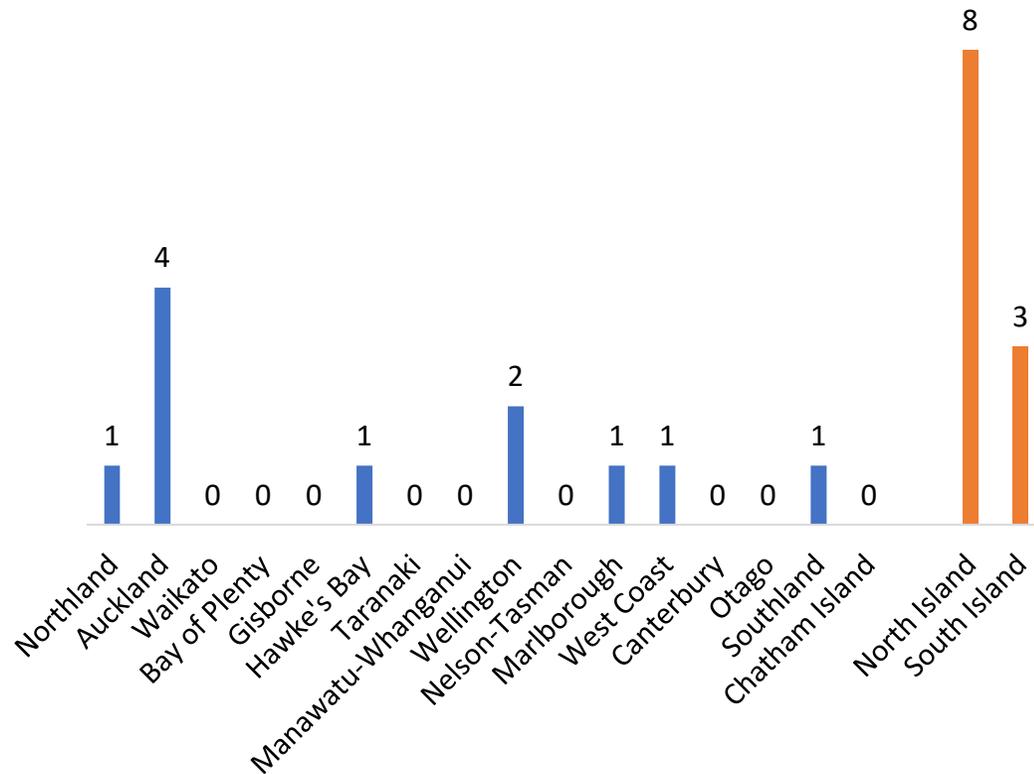


- Marine learning activities typically are shore based and focus on learning about the marine environment often in an aquarium which may double as a wildlife rehabilitation centres / marine discovery centres. The focus is on interpretation and education about the local marine environment. These also include maritime museums and other types experiences focussed on providing education around marine issues.
- Aquaria are located in Marlborough, Auckland and Hawkes Bay.
- The North Island hosts most New Zealand's marine learning operators (n=8).
- The underwater observatory in Milford Sound is marine based and must be accessed by boat.
- In Auckland and Northland sailing trusts focus on youth education about the maritime environment.

# Marine learning: The North Island is home to most marine learning experiences



Number of operators - Marine learning experience



**Marine learning** = Where the primary focus is on learning about marine environments or maritime activities

- There are almost three times more marine learning operations in the North Island than in the South Island.
- Auckland is home to the most marine learning operators in the country including well known attractions such as the New Zealand Maritime Museum, Sea Life Kelly Tarlton's Aquarium and lesser known learning experiences offered by the New Zealand Sailing Trust who offer youth development programmes and sailing experiences, and Goat Island Marine Discovery Centre which is linked to the Institute of Marine Science at Auckland University.

# Waka tours are culturally immersive experiences



## Waka tours: operators primary activity

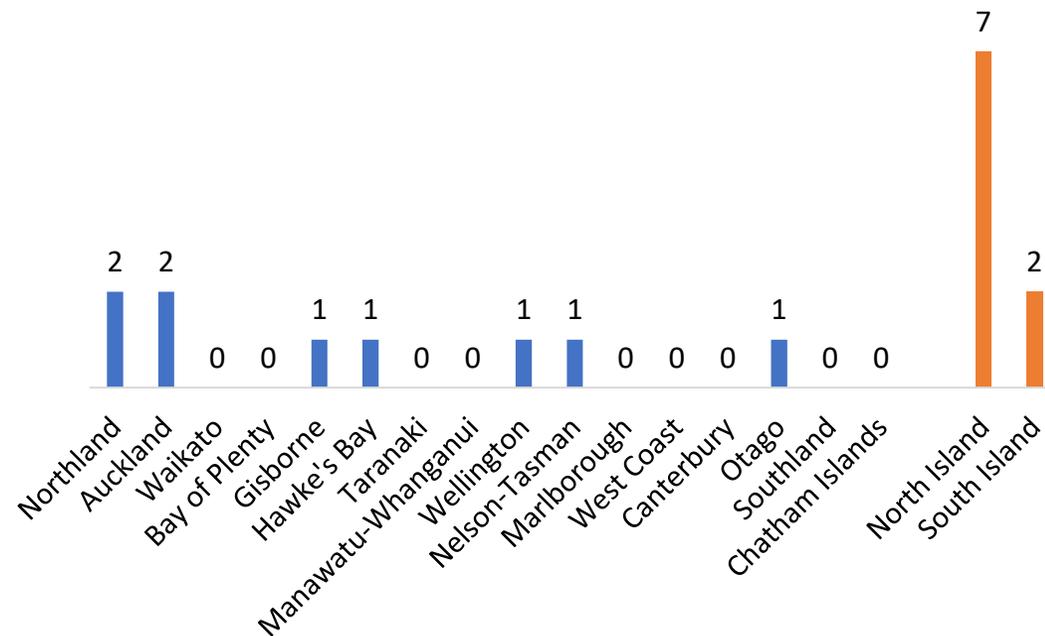


- Waka tours are predominately Māori cultural experiences that often include a deeper immersion into mana moana tradition and culture.
- Tours often take place on replicas of traditional waka and include learning about traditional sailing and wayfinding skills.

# Waka tours: The North Island dominates cultural Waka tours



Number of operators - Waka tours



- Auckland and Northland make up over half of all Waka tours in the North Island.
- Nelson / Tasman and Otago are the only regions in the South Island that offer Waka tours.

**Waka tours**= traditional Waka sailing and Waka Ama tours

**Various activities:** Operators in this group are concentrated on the east coast of the North Island and the top of the South Island



**Various activities: operators primary activity**

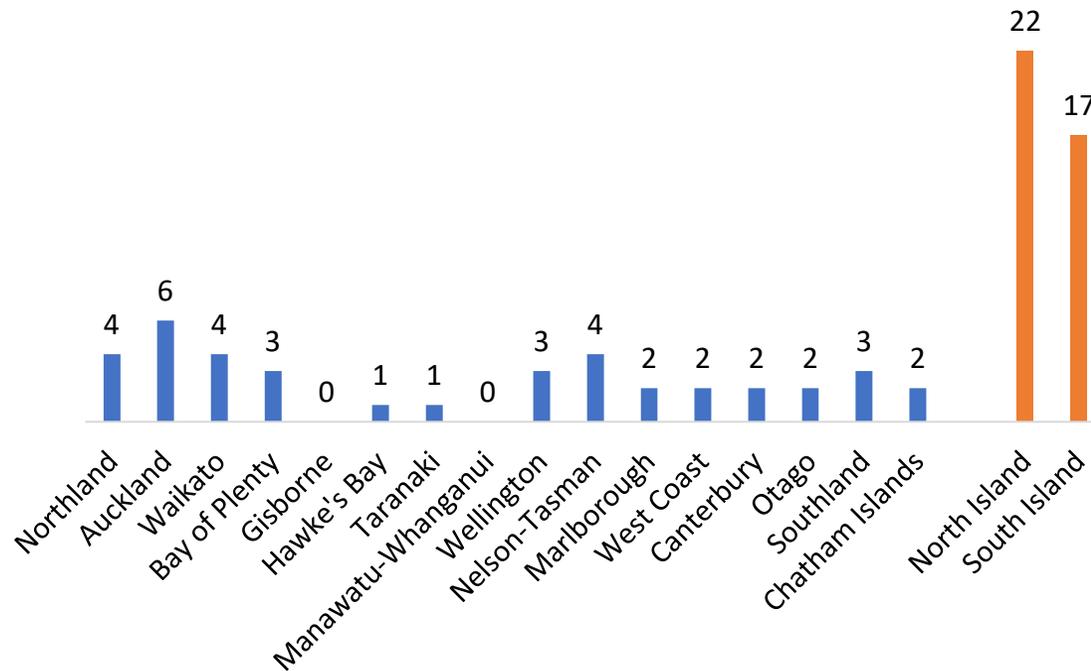


- Operators who offer various activities often offer a mix of some of the following activities kayaking, stand-up paddle boarding, surfing, sailing, windsurfing, coastal walks and snorkelling. There are also operators who may offer scenic tours, dive charters and fishing with no particular main focus apparent on their website.
- Activities are often packaged together, or are separate with the option to hire equipment, have lessons and/or guided tours.
- The Eastern Seaboard of the North Island from the Bay of Islands to the Bay of Plenty, see the most operators who offer a variety of marine and coastal ecotourism activities.



## Various operators offer two or more distinct activities with no primary focus

Number of operators - Various activities



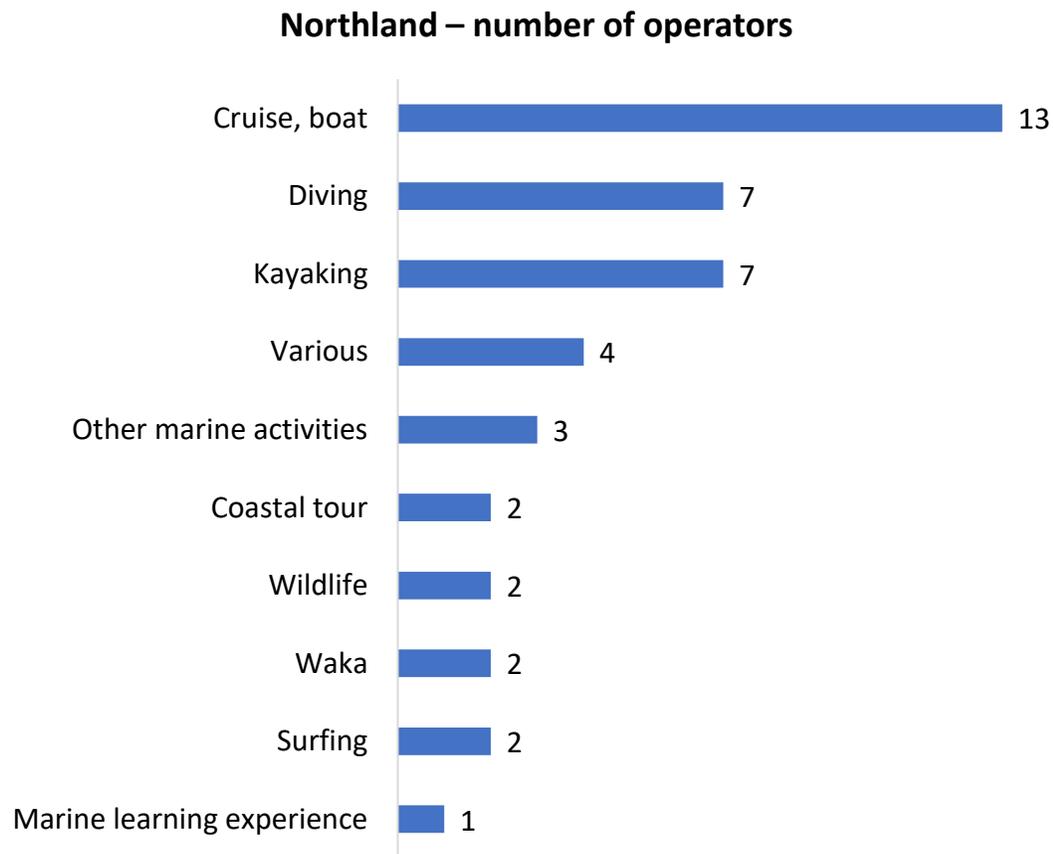
- 39 operators across New Zealand offer a mixture of distinct marine and coastal activities as part of their ecotourism business.
- More operators in the North Island run mixed marine and coastal activities than in the South Island.

**Various activities** = Operators that offer multiple different types of marine/coastal activities

# Regional profiles

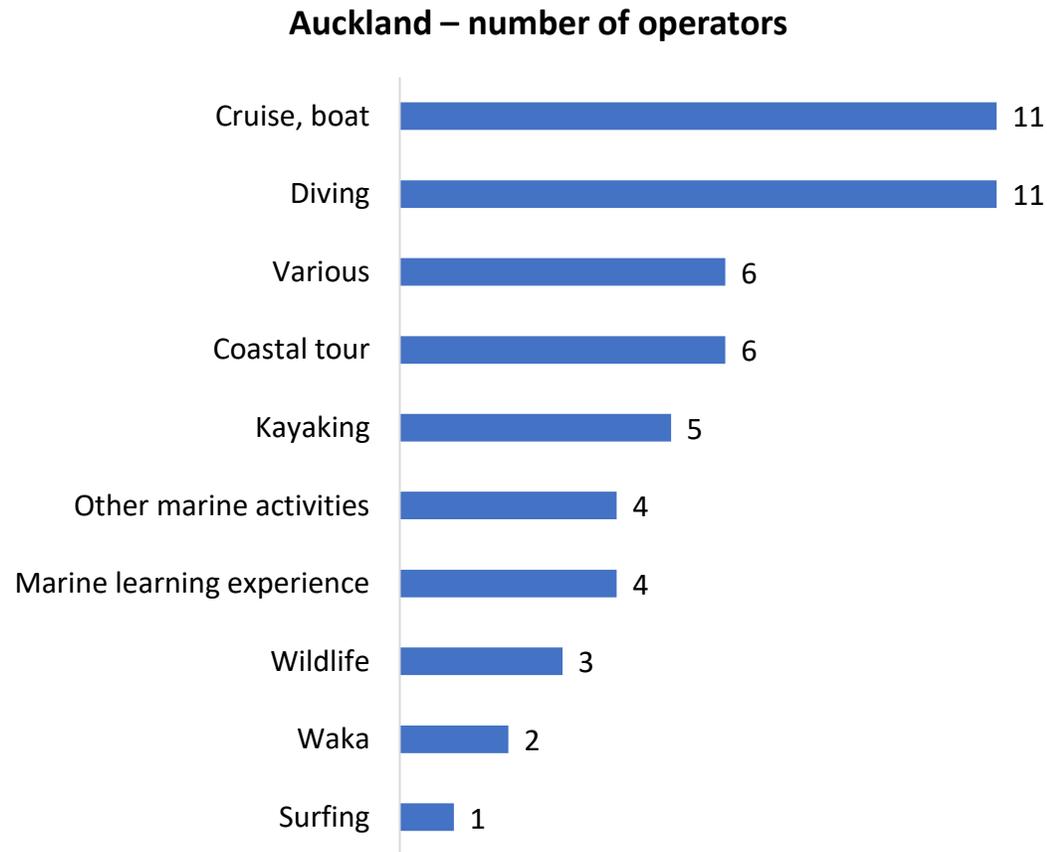
The background image shows a wide, deep fjord with steep, dark mountainsides. The water is a deep blue-grey color. A small white boat is visible in the distance, centered in the lower half of the frame. The sky is a pale, hazy blue.

# NORTHLAND features operators whose primary activities represent the full marine-ecotourism spectrum



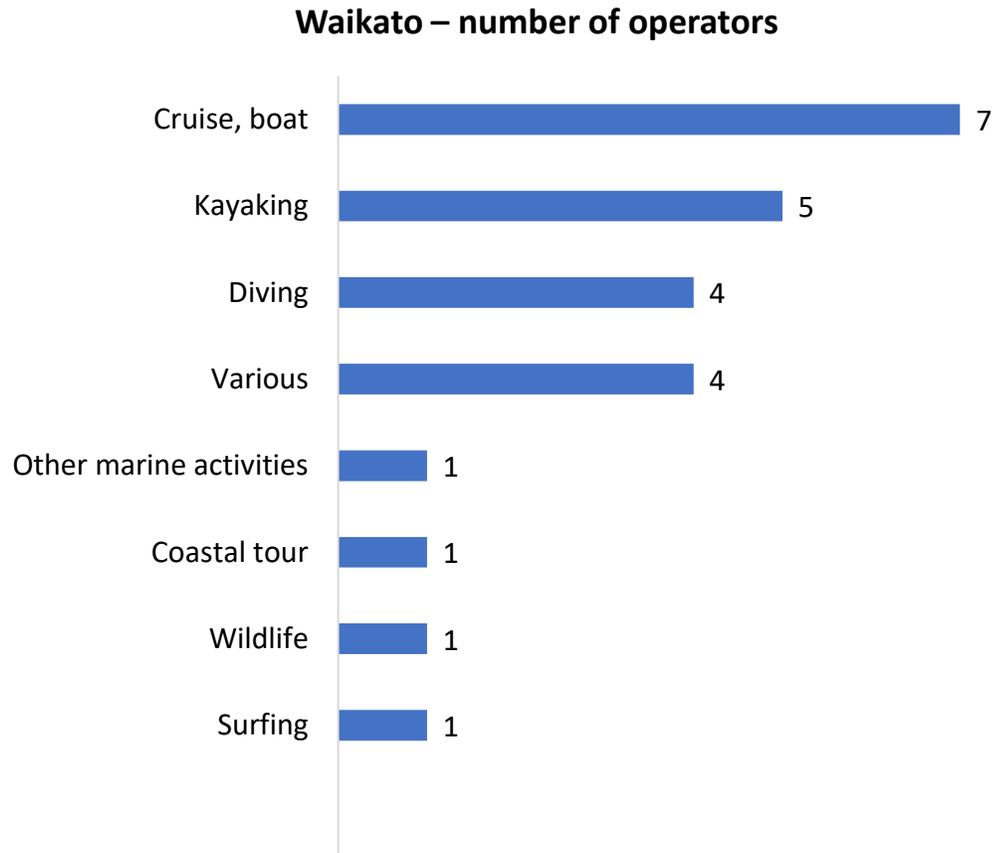
- Northland has 43 marine and coastal ecotourism operators the second highest after Auckland of all regions across New Zealand.
- Cruise boat in Northland have the most amount of operators (n=13) of all regions of New Zealand with the Bay of Islands area accounting for most.
- Diving and kayaking have an equal amount of operators.
- Northland has operators in all 10 activity categories.
- Notably Northland has two waka tour operators.

## AUCKLAND: A diverse set of experiences, dive dominates along with scenic cruise/boating



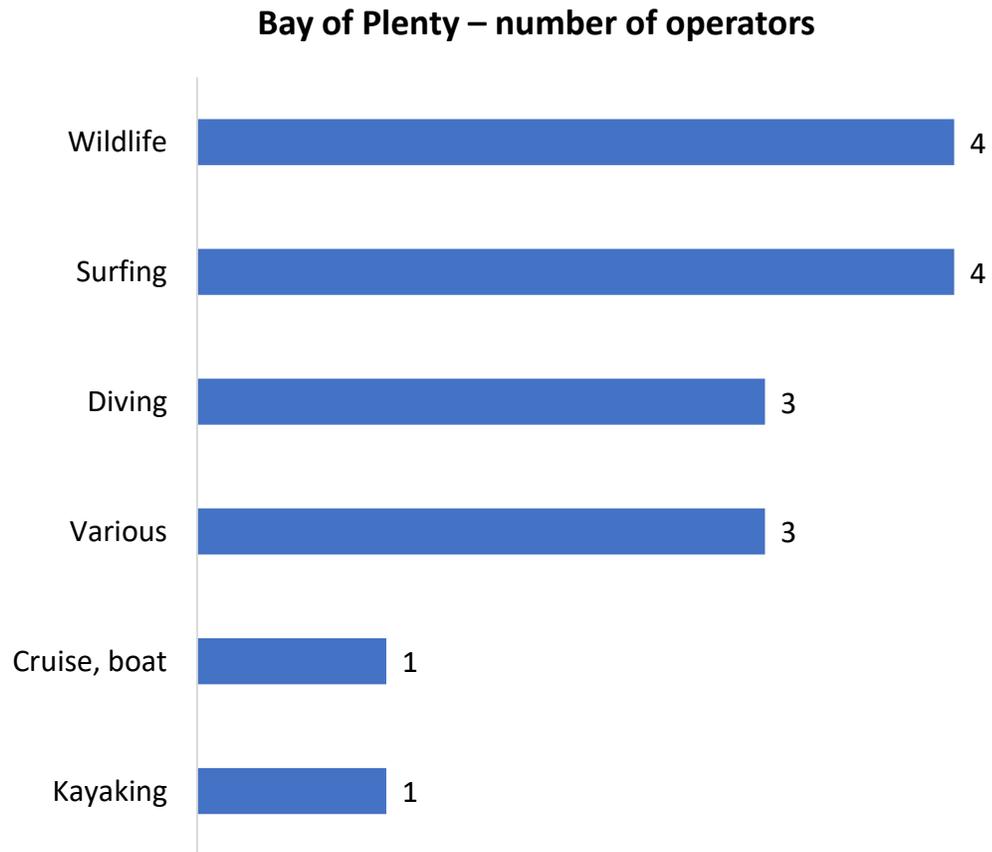
- Auckland has more marine and coastal ecotourism operators (n=53) than any other region in New Zealand.
- The number of operators whose primary activity is dive matches the number of operators whose primary activity is cruise/boat (typically a motor yacht of cruise, yacht or catamaran).
- There are four marine learning experiences in the region 40% of the country total.
- Two waka tour operators are in the region.
- Auckland has operators across all of the primary activity categories.

## WAIKATO: Scenic cruise/boating and kayaking account for half of operators



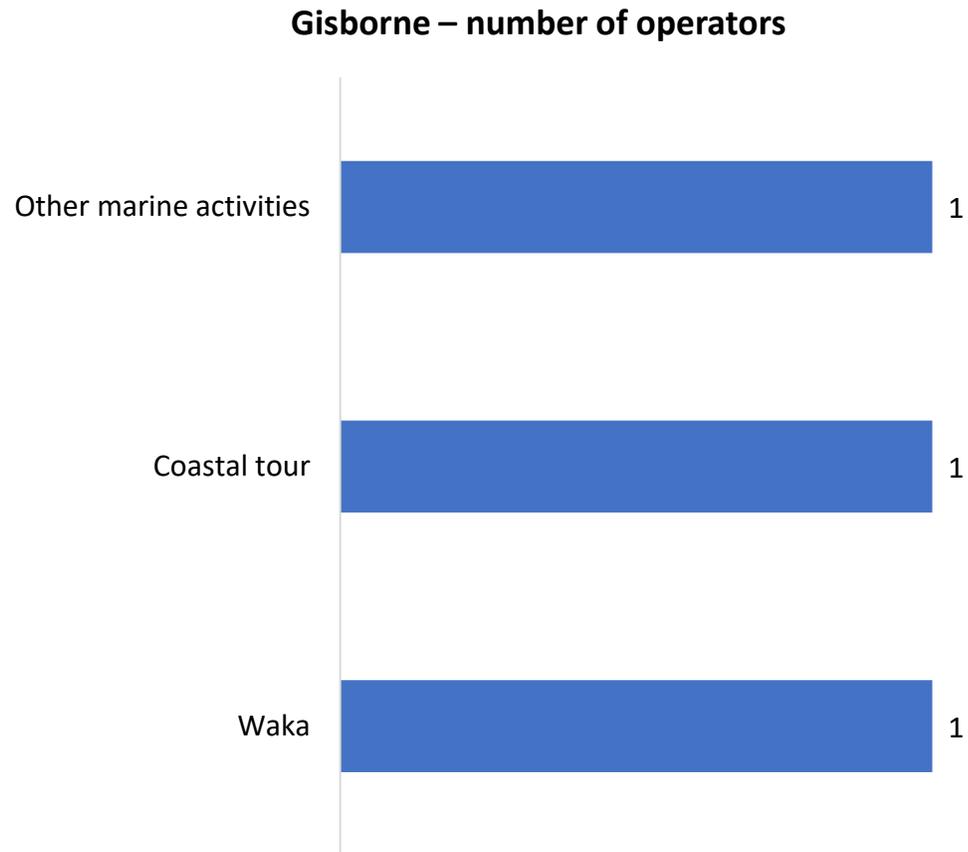
- There are 24 marine and coastal tourism operators in the Waikato, concentrated in the Coromandel and Raglan areas.
- Cruise/boating activities followed by kayaking are most prevalent primary operator activities in the Waikato, particularly around the Coromandel Coast.
- The dive sector is sizeable for the region.
- Operators who offer various experiences are also prevalent.

## BAY OF PLENTY: Wildlife and surfing make up half of operators



- There are 16 operators in the Bay of Plenty.
- Wildlife and surfing are the two most prevalent primary activities offered by marine ecotourism operators in the Bay of Plenty.
- There is only one cruise and one kayak operator.

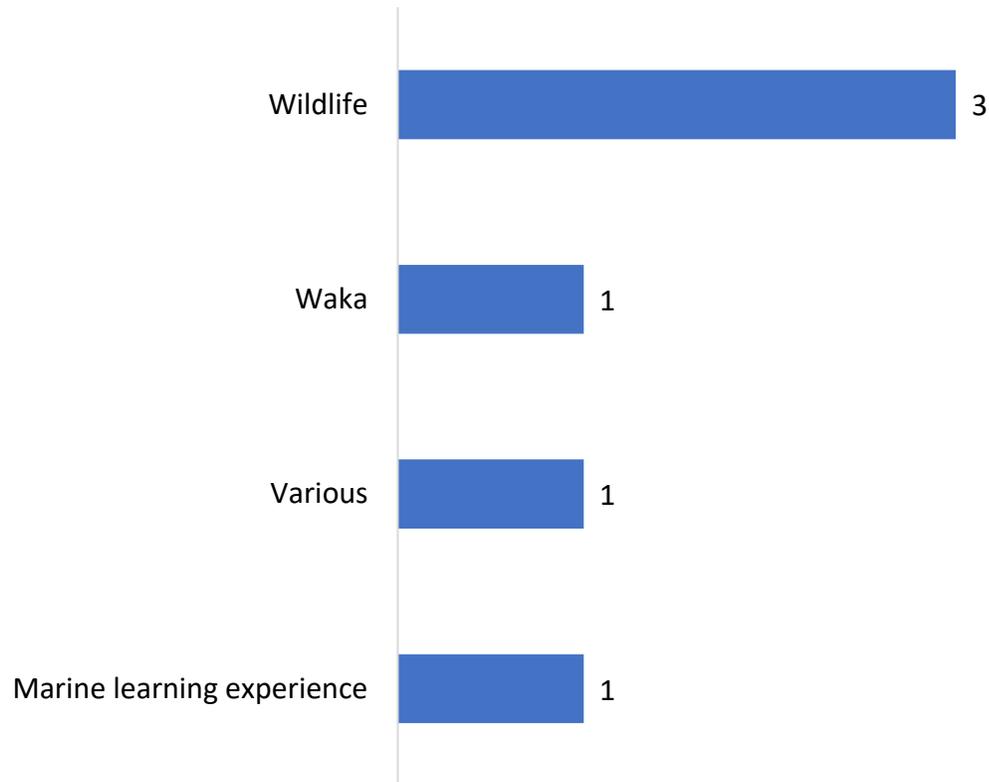
## GISBORNE: All three operators in Gisborne identify as Maori



- There are fewer operators in Gisborne compared to other regions in New Zealand.
- All three of the operators identify as being Māori owned on their websites.

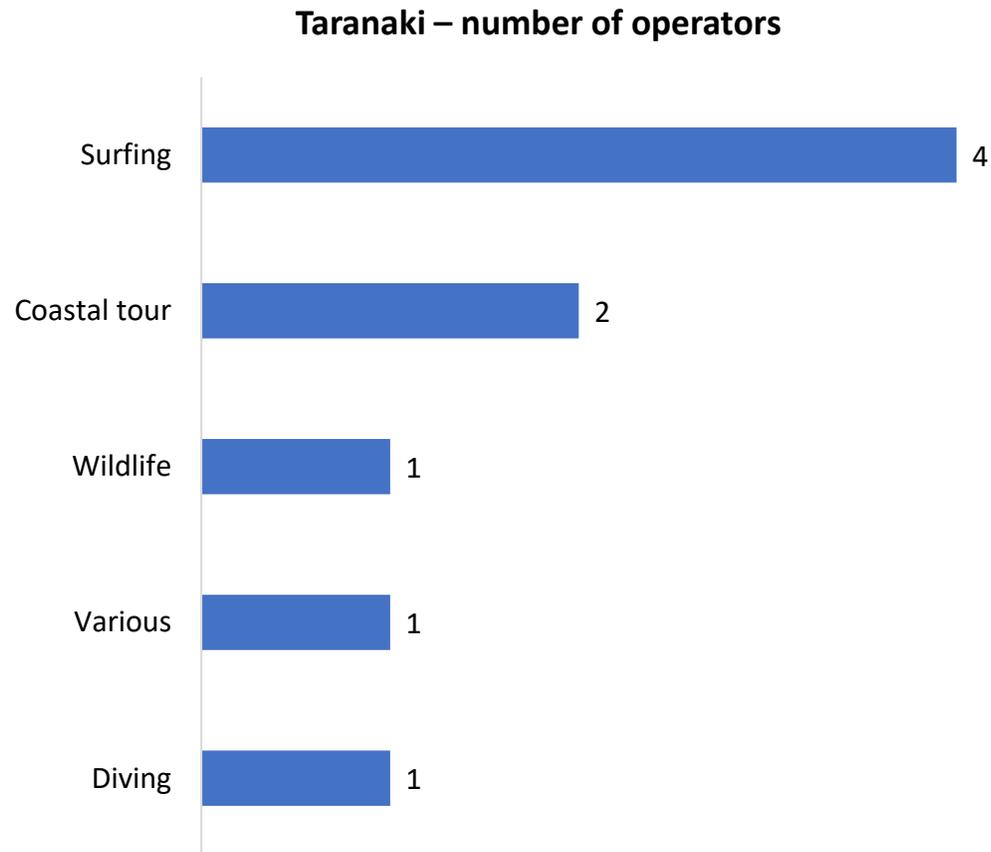
## HAWKES BAY: Wildlife dominates as a focus with Cape Kidnapper's gannets the focus of a number of experiences

Hawkes Bay – number of operators



- There are six operators in Hawke's Bay.
- Wildlife around Cape Kidnappers is a key draw for wildlife operators who are the most prevalent in number.
- The National Aquarium of New Zealand is based in Hawkes Bay.
- Hawkes Bay also has a waka cultural experience.

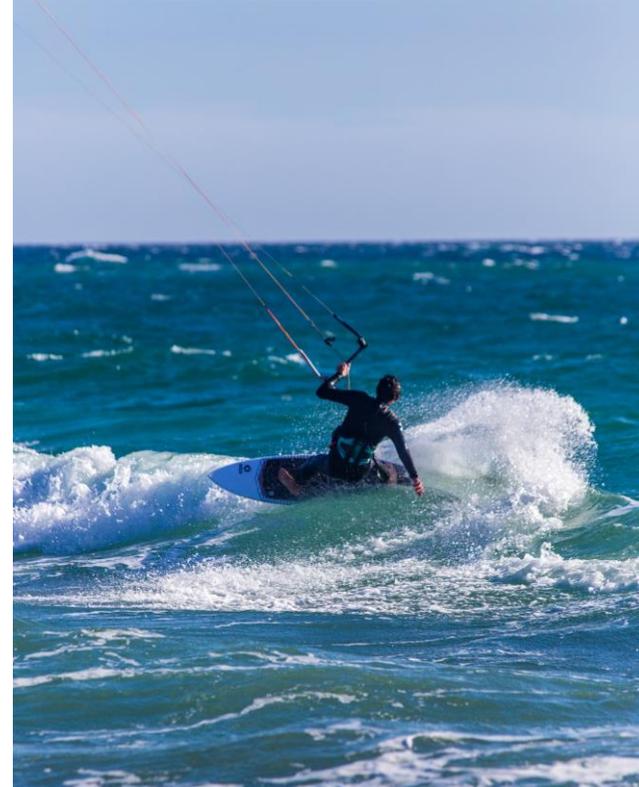
# TARANAKI: Surfing is the main operator activity



- There are nine operators in Taranaki.
- Taranaki's surf highway makes it a popular region for surf operators.

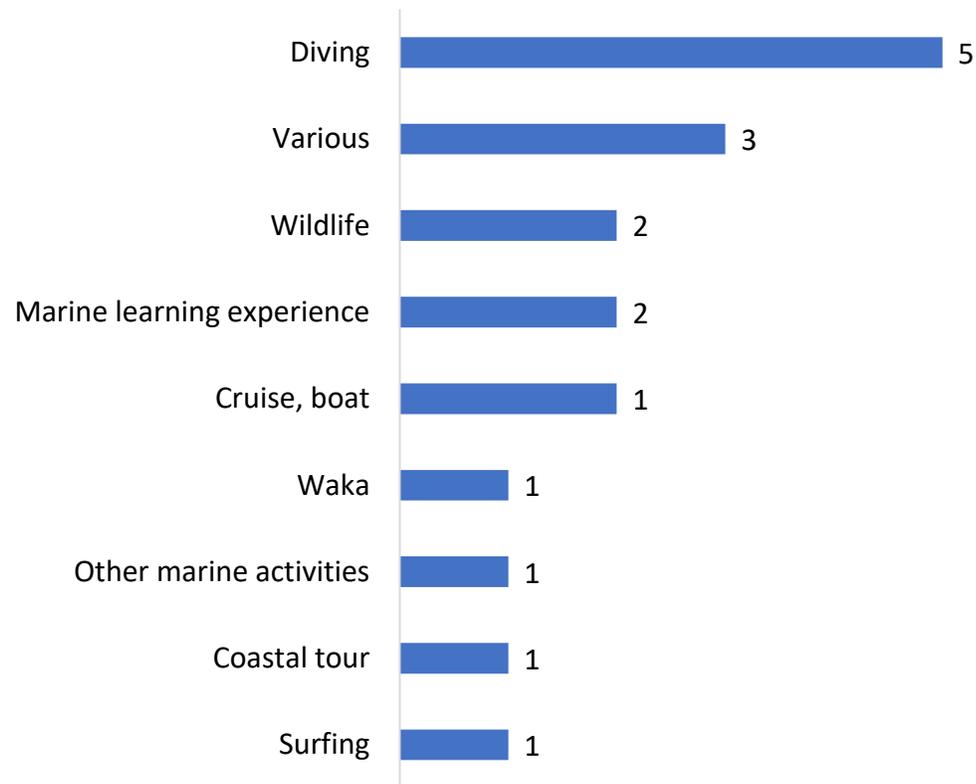
## MANAWATU-WHANGANUI has very limited marine ecotourism activity

- Manawatu-Whanganui features only 2 operators in the database - the smallest number of marine and coastal activities across Aotearoa's regions.
- Operators offer 'other' types of marine and coastal ecotourism activities (jet ski, kitesurfing).



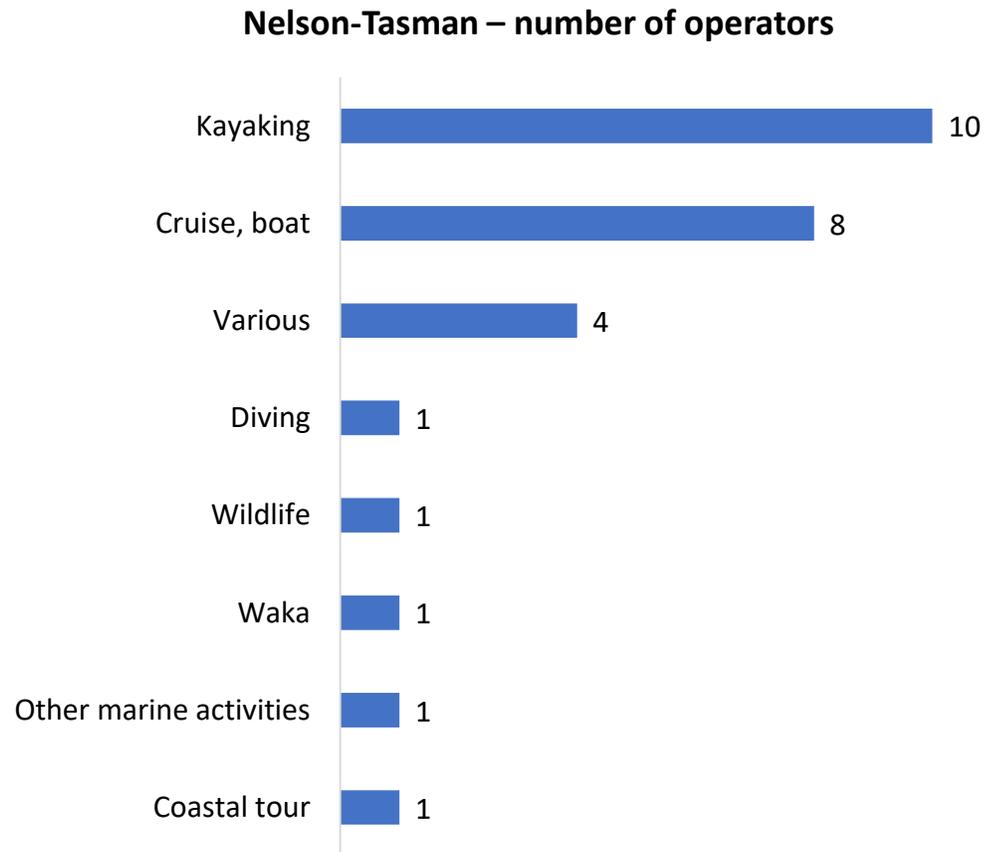
**WELLINGTON** offers a diverse array of offerings with diving the dominant activity.

**Wellington – number of operators**



- There are 17 operators located in the Wellington region.
- A wide variety of activities are offered by operators in Wellington.
- Diving is the prevalent activity (n=5).
- There are two marine learning experiences.

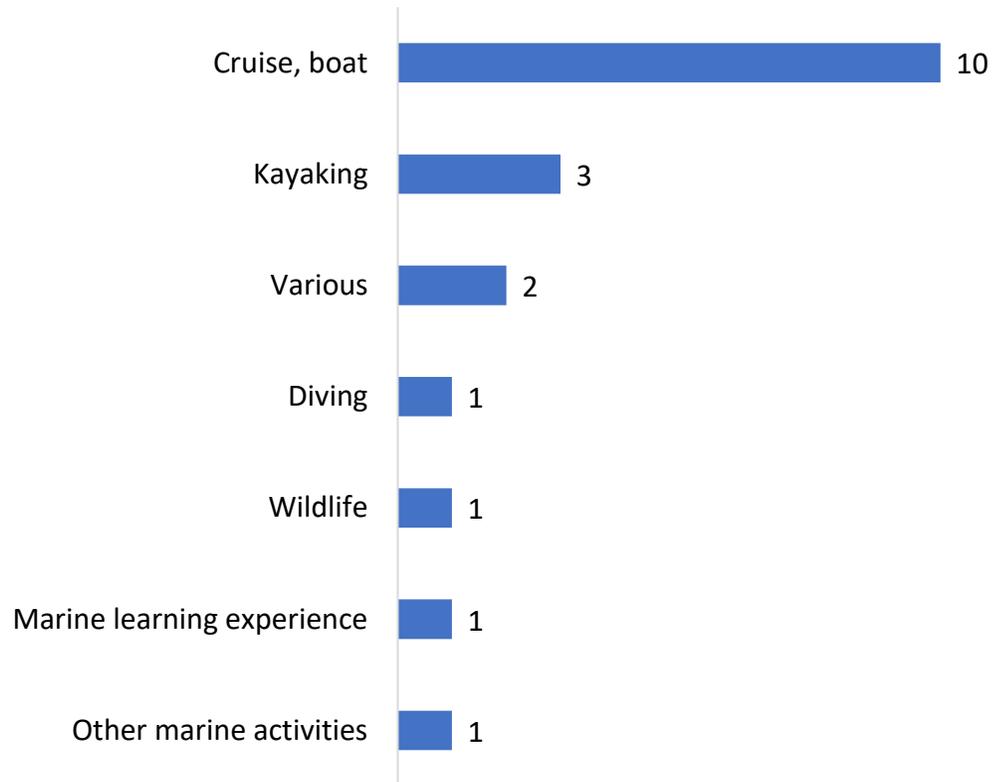
## NELSON-TASMAN: Kayaking and scenic cruise/boat are the focus for two thirds of operators



- Nelson-Tasman is a region with some of the most marine ecotourism operators in the South Island (n=27).
- Kayaking followed by cruise/boat account for two-thirds of the primary activities for operators in the Nelson-Tasman region.
- One of only two South Island waka cultural tour operators is located in Nelson-Tasman.

# MALBOROUGH: The Marlborough Sounds supports 10 Cruise/boat operators

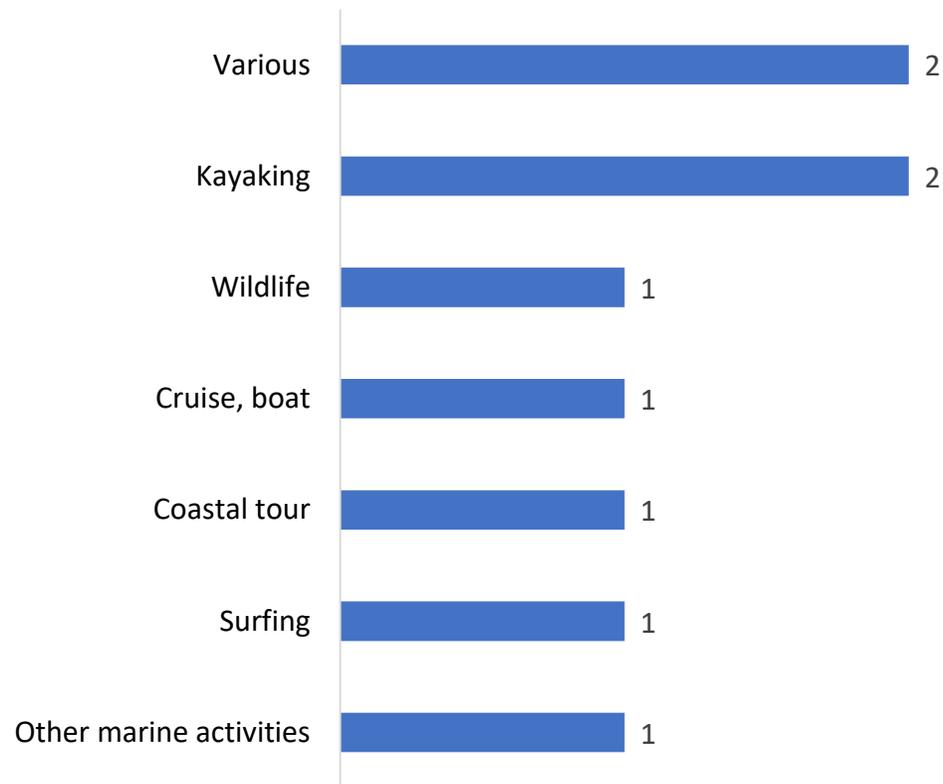
**Marlborough – number of operators**



- Marlborough is home to 19 operators.
- Cruise, boat activity is a primary focus of operators in Marlborough (52% of operators).
- Marlborough is home to one of only two marine learning operators in the South Island.

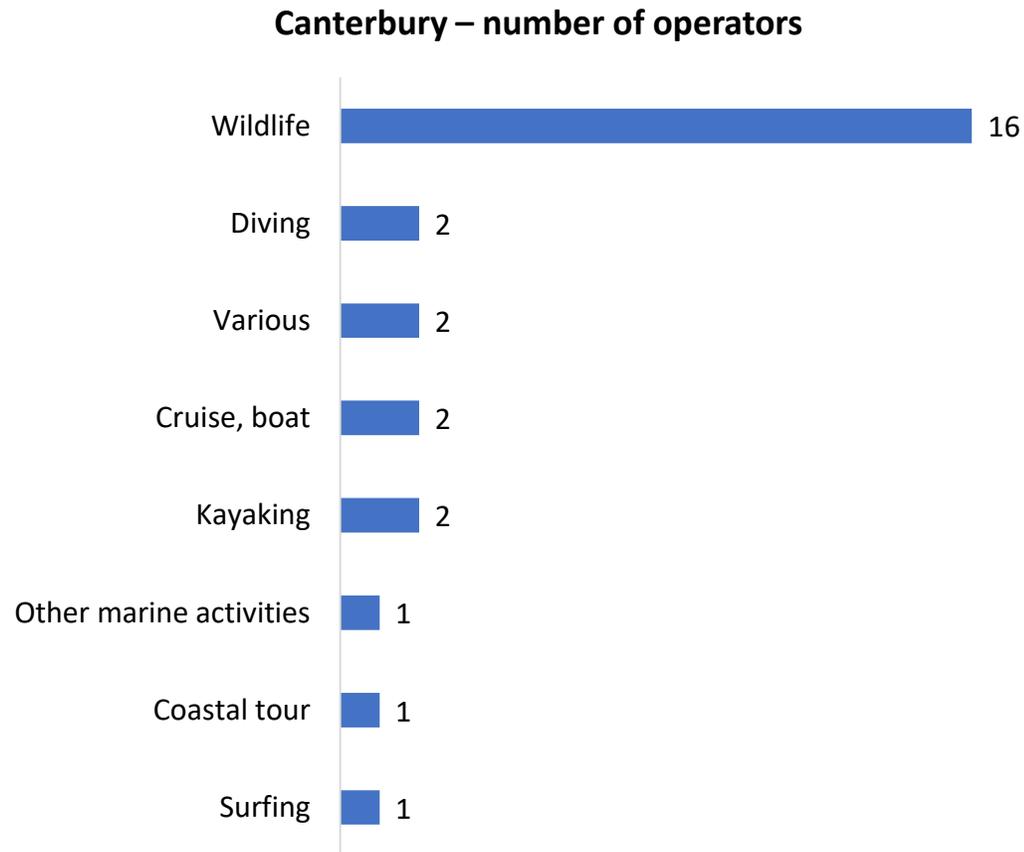
## WEST COAST: The West Coast accounts for only 5% of operators in the South Island

West Coast – number of operators



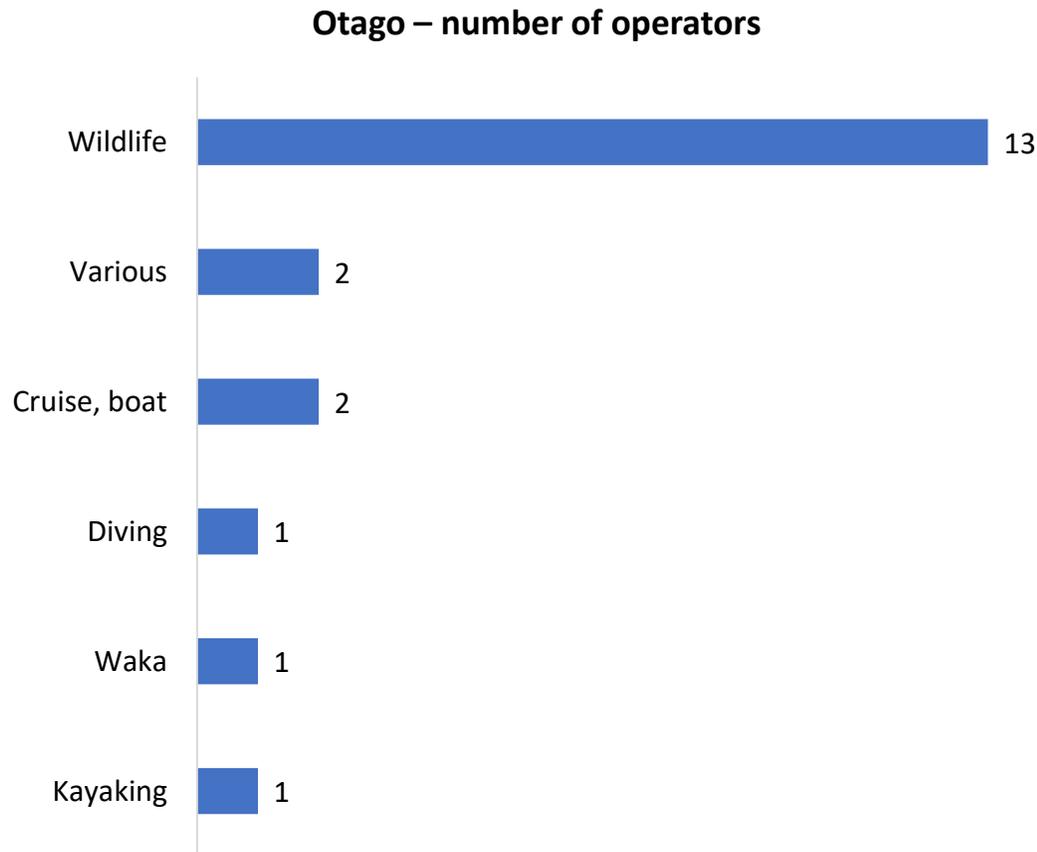
- There are 9 operators in the West Coast, accounting for only 5% of all operators in the South Island.
- Kayaking and those offering various activities account for nearly half of operators primary activities.
- There is a relatively diversity of range of marine ecotourism operator primary activities offered in the region.

## CANTERBURY: Marine mammal wildlife is the primary focus for 59% of all operators in Canterbury



- Canterbury is among the top regions for marine ecotourism operators in the South Island (n=27).
- Wildlife is the stand out category (59%) for operators in the Canterbury region due to marine mammal presence in Akaroa and Kaikōura.
- The region features at least one or two operators in a wide range of sub-sectors including one of the few South Island dive experiences.

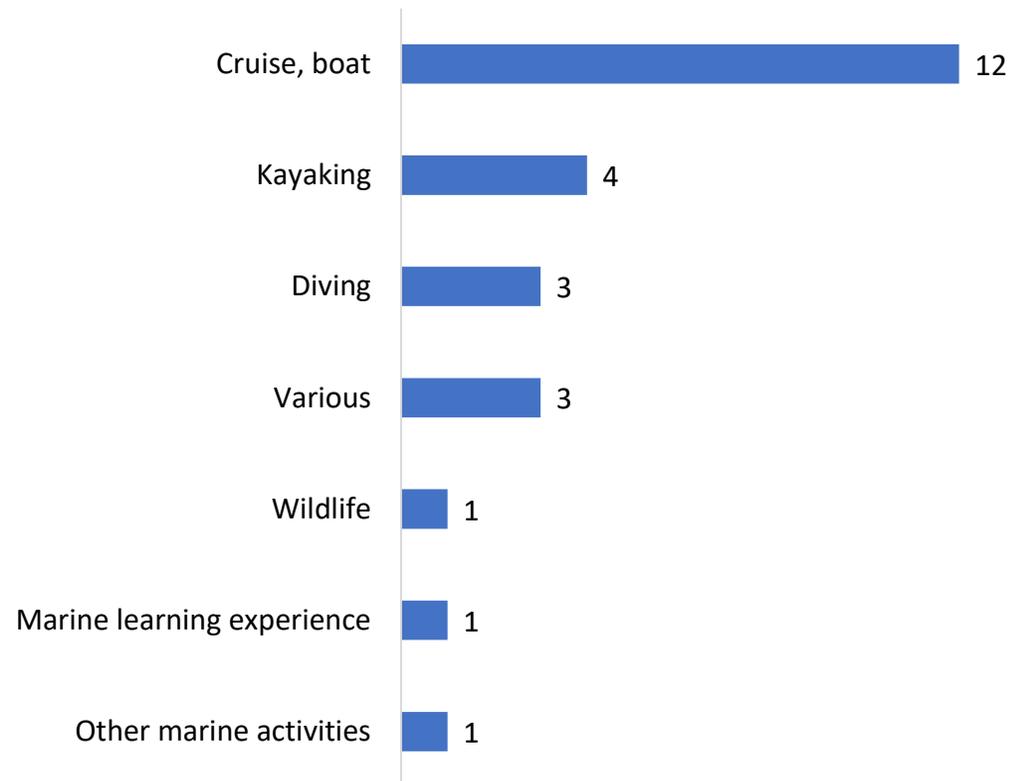
## OTAGO: wildlife is a key focus for two thirds of operators



- Otago is the fourth most popular region in the South Island for operators (n=20).
- The diversity of wildlife in Otago and along the Catlin's Coast supports the majority (65%) of marine and coastal operators.
- Wildlife includes the endangered Yellow-eyed penguins and the rare New Zealand Sea Lion.
- Royal Albatross, little Blue Penguins and New Zealand fur seals are also key attractions for the 13 wildlife operators.

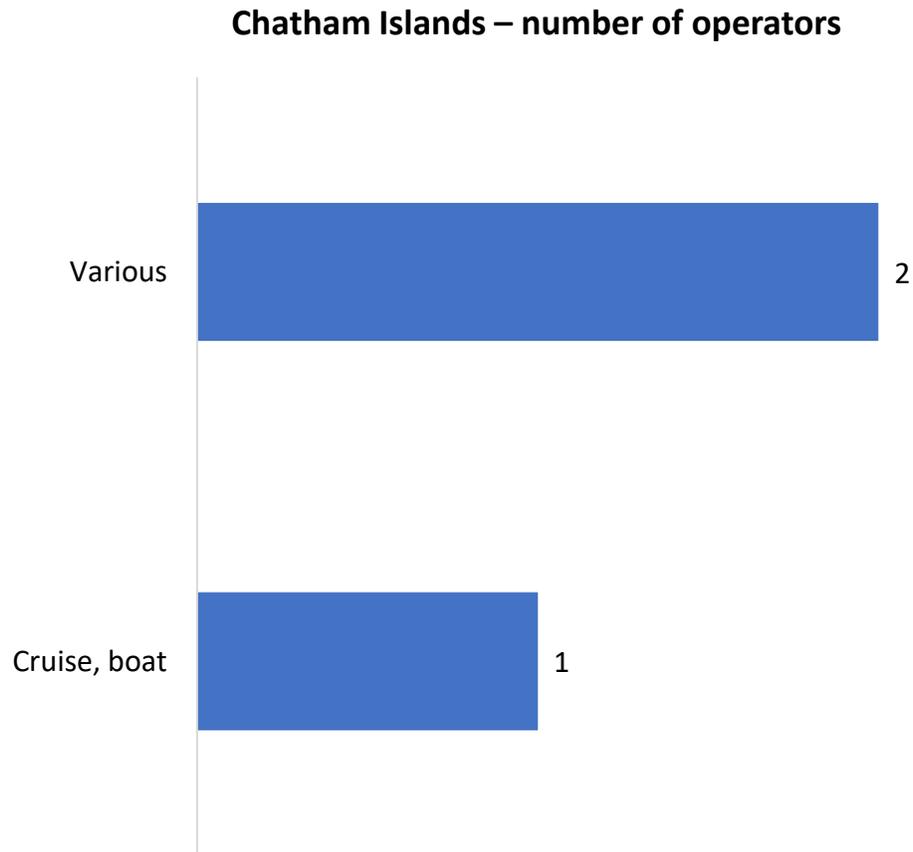
## SOUTHLAND: Fiordland and Stewart Island feature in particular operators whose primary activity is cruise/boat

Southland – number of operators



- There are 25 operators in Southland making it the third most significant South Island region for marine ecotourism operators.
- Cruise / boat as the primary activity of operators dominate, with a focus on the Fiordland Sounds and Stewart Island.
- New Zealand's only underwater observatory is found in Southland and there are diving opportunities in Fiordland and Stewart Island.
- Stewart Island features 8 operators, two of which also operate out of Fiordland.
- Three of the South Island's eight dive and snorkel operators are in Southland.

# CHATHAM ISLANDS: a small group of operators offering diverse activities



- Three operators represents a significant number considering the size of the Island's business sector.
- Two of the three operators offer a mix of different marine and coastal activities including dive, boat charters and tours of Pitt Island.

# Next Steps



## Developing and sustaining the operator database

A database needs to be updated on a consistent basis and be flexible enough to add new features over time.

The operator database is designed to be easily updated and to have additional dimensions added. A key future step is to raise awareness of the database and to encourage end-users to add additional information over time. Exploring ways to sustain and maintain this database with stakeholders will be critical if this is to become a useful and relevant resource over time. Ideally we will reach a point where the sector and operators self populate and manage content.

Forthcoming case study work will inform and strengthen the database and related resources. Hui and stakeholder engagement will bring important insights into how the database can be used, developed and sustained and also linked to wider eco-based system management (EBM) settings.

## Baseline Report 2: supporting operator survey and interviews

The database information and mapping presented informs Baseline Report 2 which focuses on gaining a deeper insight into coastal and marine ecotourism operators around Aotearoa New Zealand.

A national coastal and marine ecotourism operator survey and 28 in-depth interviews enable us to add greater detail to the broad picture of the sector provided by the database.

The database and map have also informed the selection of the case studies that will form the focus of the work in Stage 2 of the *Growing Marine Ecotourism* project.



For more information on this project, visit:  
[sustainableseaschallenge.co.nz/growing-marine-ecotourism](https://sustainableseaschallenge.co.nz/growing-marine-ecotourism)

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