

BASELINE FINDINGS – MARINE AND COASTAL
ECOTOURISM, NATIONAL AND REGIONAL PICTURE:
PART 2: Operator interviews and survey

Report for Sustainable Seas National Science Challenge project

Growing marine ecotourism (Project code 2.4)

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Introduction – Baseline Report 2

Baseline Findings Report Part 2 provides a picture of Aotearoa's marine and coastal ecotourism (MCET) sector.

Operator interviews and a national survey of operators reveal the current context and the sector's aspirations for the future.

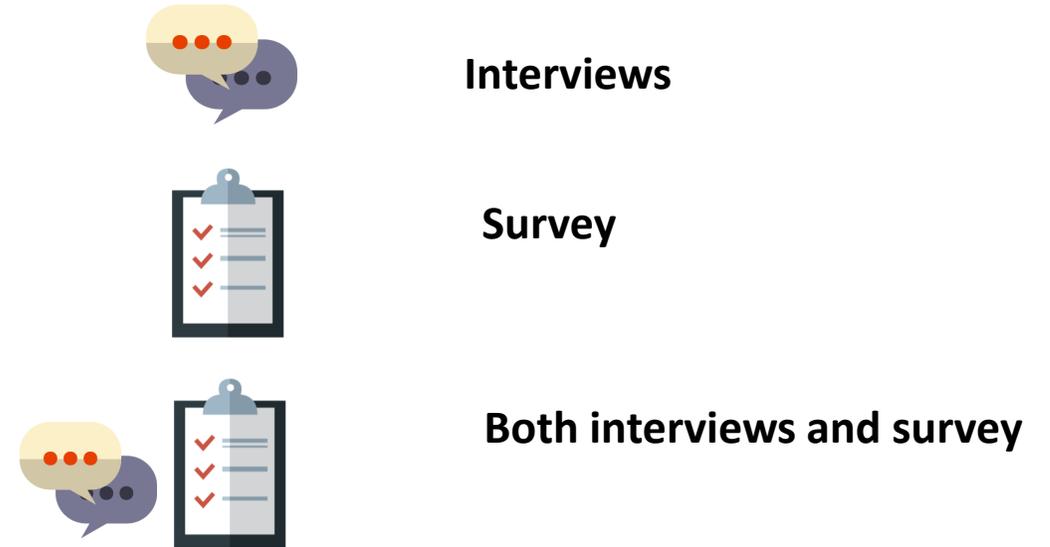


How to use the report

The report is divided into themed sections - with blue pages indicating the start of each section.



The icons on the top right-hand side of the page indicate the data source.



A red outline highlights findings from Māori owned MCET businesses

Executive Summary



Focus and approach

The United Nations Environmental Programme [UNEP] (2020) stresses that investing in nature-based solutions for sustainable tourism is critical to the global recovery of tourism. The UNEP also emphasises that healthy marine environments are intrinsically linked to the successful and sustainable development of marine and coastal ecotourism activities.

New Zealand is looking to transform tourism to a more sustainable model prioritising regenerative tourism via the \$10 million Tourism Industry Transformation Plan. A key focus of the plan is to address the environmental challenges caused by tourism. The Parliamentary Commissioner for the Environment argues that tourism in Aotearoa should contribute to conservation. Yet among national plans for sustainable tourism and an industry ‘reset,’ marine ecotourism is largely left out of the conversation.

Baseline Report 2 presents a picture of the marine and coastal ecotourism (MCET) sector in Aotearoa New Zealand. Drawing on a nationwide survey of marine and coastal ecotourism operators listed on the MCET database (93 responses) and 28 business interviews in mid-2021, the report provides insights on the following:

- Insights from operators on what MCET means to them – moving towards developing a values-based definition of MCET that works for Aotearoa
- Aotearoa New Zealand MCET operator characteristics – size and scale
- Business challenges and opportunities, current and future
- Operator perspectives on the development of sustainable MCET in New Zealand.

Interview and survey findings are synthesised throughout the Executive Summary. In the body of the report logos on the top right-hand corner signpost the data source.

Key findings

- MCET is a values-based low impact sector - many operators actively pursue low impact business models.
- Education is an imperative for MCET. Most operators are closely linked to schools.
- A definition of MCET that works for Aotearoa is needed to better reflect the role of mātauranga Māori and the mahi that goes on to support te Taiao including marine and coastal conservation and restoration activities.
- Indigenous values and mātauranga Māori have a strong role to play in planning and management of MCET.
- MCET is a diverse sector and has been heavily impacted by COVID-19.
- The sector is relatively fragmented. Enabling and supporting collaborations between operators and among wider stakeholders involved in coastal and marine governance can strengthen the sector.
- There is a need for improved MCET-specific planning and management and for operators to be brought into decision-making processes.
- Sustainable development of MCET is reliant on strong marine protection and many operators play an active role in initiatives that support conservation. Some operators are actively involved in marine and coastal research.
- There are opportunities for a more coherent, joined-up and better resourced policy and regulatory environment.

MCET is a values-based low impact sector

The research highlights the following core values that operators identified when asked what the term marine ecotourism means to them, and how they define it. Five strong themes emerge:

- *Actively caring for the environment*; success is seeing wildlife and ecosystems thriving. Operators are driven by a motivation to help to protect and restore the moana.
- *Giving back to people and place*; being embedded in and contributing to local communities and livelihoods - a key success factor is if the local community feel the operator adds value.
- *Running a low impact operation*; actively implementing and looking to improve sustainable business practices.
- *Delivering inspiring and enjoyable experiences*; that raise awareness of marine issues and ignite a passion for ocean conservation. Operators measure success by return visits, positive word of mouth and customer reviews.
- *Taiao is central to successful MCET* that takes place in the rohe of mana moana who are kaitiaki of the moana, in particular the pātaka. Successful MCET privileges mana moana and is informed by mātauranga Māori with relationships that are underpinned by tikanga and shared aspirations to restore the mauri of the moana for future generations.

Operators stress that **none** of the above values can be realised unless a business is financially viable. A financially sustainable business platform allows operators to do what they love daily – raising visitor awareness of marine conservation while adding value to local communities and marine environments.

These core values reflect the dominant themes to emerge from the interviews but of course there is variation across the sector. Some operators are, for example, not comfortable with the term ‘ecotourism’. A key concern with the term is the potential for mis-use and green-washing. There is a strong sense that operators who claim to be doing ‘ecotourism’ need to be held to the promises they make.

Education is an imperative for MCET

Education is vitally important to MCET and a key part of what ‘marine ecotourism’ means to operators. Many operators that we spoke to share knowledge with visitors and locals about the marine environment and how to protect it. They do this by raising awareness of issues – from how to interact responsibly with nature, how to be safe on the water, the environmental pressures on marine ecosystem and what individuals can do to help. MCET operators play a critical role in enabling those who would otherwise not have access (such as people in low decile schools and disadvantaged groups) to experience the marine environment.

All of the Māori operators surveyed noted that education was part of their tours and 85% of operators surveyed work with schools – from day trips, through to marine academies linked to NZQA subjects. Many also provide employment pathways into marine industries. Māori operators share cultural stories and tikanga to visitors and locals on their tours. Many operators see the next generation as the torch bearers and feel passionately about passing on knowledge to them to continue the work to support coastal and marine environments. A number of operators call for more support and guidance to link into educational initiatives in their region and are well placed to connect to new curriculum topics such as mātauranga Māori and tourism NCEA subjects as well as current outdoor education topics.

MCET supports marine research – enabling and facilitating marine science and supporting monitoring and enforcement. In several cases visitors participate in the research. Over half of the operators surveyed work with conservation groups – both land-based and marine strengthening educational and conservation linkages to the community, raising awareness of these initiatives to both domestic and international visitors.

A key element of success for operators is if people walk away with a greater appreciation of marine conservation. The best-case scenario is seeing a ripple effect - with a passion for conservation ignited through immersive and educational experiences with marine and coastal environments.

A definition of MCET that works for Aotearoa is needed

For mana moana operator interviewees, MCET links to expressions of kaitiakitanga and tino rangatiratanga. Operators are driven by a sense of duty to pass on a healthy environment to the next generation. Some Māori operators interviewed state that this is an ancestral obligation. Māori have a unique connection to the moana and whakapapa to the creatures within – and some Māori owned operators state that the term ‘marine and coastal ecotourism’ struggles to account for this deep relationship.

There are broader concerns from both Māori and non-Māori operators that the term ‘ecotourism’ can, and often is, misused for 'greenwashing'. Several operators are wary of the term and do not use it, while others - especially in the dive industry for example - see the benefits of using a well-known term to describe the activities they offer. The term ‘marine and coastal ecotourism’ and its definition needs to better reflect mātauranga Māori and the unique context of Aotearoa New Zealand to enable effective policy-making: this is a focus for the next stage of this Sustainable Seas research project.

One operator noted that customers themselves can help to uncover greenwashing in the sector. While visitors are increasingly looking for ‘eco’ credentials, they are discerning and know if operators are not authentic. These visitors can share their thoughts through online reviews and word of mouth to call out greenwashing. Therefore, it also makes business sense to be true to the values of MCET.

There is a feeling among several operators that while sustainable tourism schemes are important tools, existing accreditation schemes don't always reveal occurrences of greenwashing and need to be strengthened by providing more accountability especially when it comes to environmental and social responsibility. Respondents suggest that there needs to be better communication between government organisations. For example, one operator notes that the Department of Conservation (DOC) and Qualmark (quality assurance organisation run by Tourism New Zealand) could share information that would strengthen this. Several operators also highlight that the cost of existing schemes could be lowered for smaller operators who are unable to afford subscriptions despite running a sustainable operation.

Prioritising indigenous values and knowledge systems (mātauranga Māori) is essential for the responsible development of the sector

Indigenous values, and mātauranga Māori have a strong role to play in planning and management of MCET from local through to global spheres. There are good examples throughout the country of partnerships and collaborations between mana moana and operators working together on shared aspirations for a better marine environment.

In best practice MCET te Taiao is critical and the voice of whānau/hapū /iwi as kaitiaki of the moana particularly regarding pātaka is recognised and supported. There are further opportunities to enhance the sector through education and communication by enhancing collaborations between all stakeholders involved in MCET. For example, raising the awareness of marine pollution among visitors and the role of customary tools such as rāhui. These opportunities must be unlocked following tikanga (the right way of doing) and recognise the rights of mana moana including protecting intellectual property and upholding tino rangatiratanga.

Many operators aspire to engage with mātauranga Māori primarily with regards te Taiao and how their businesses can be informed by local mātauranga. One third of survey respondents currently work with iwi organisations, and 74% indicate that they would welcome the opportunity to collaborate with iwi/other iwi in developing marine/coastal experiences.

There are strong messages from both Māori and non-Māori operators relating to protecting the marine and coastal environment for future generations. The concept of te Taiao and protecting the marine environment is central to defining the sector. Many operators feel the need to deliver on the promise of ecotourism and will strive to be as low impact as possible, via boat design (e.g., as low impact as possible, including investigating in low carbon alternatives); trip design (e.g., reducing impact on marine mammals, incorporating education and litter picking); implementing sustainable business practices (e.g., using local suppliers and environmentally friendly products), and; participating in carbon offset schemes. Over three-quarters of those surveyed are part of Qualmark New Zealand's national sustainable tourism and quality assurance scheme.

MCET is a diverse sector and has been heavily impacted by COVID-19

Most (74%) marine and coastal ecotourism operators surveyed are micro businesses with fewer than five staff. Larger operators are also part of the sector with 15% of those surveyed employing over 19 staff in the high season. For the twelve months from June 2020 to May 2021 nearly two thirds (65%) of survey respondents had fewer than 2,000 customers while 18% had over 10,000. Most operators (76% of survey respondents) operate all year around but reduce staff levels over the winter months.

COVID-19 has had a significant impact on the sector, with 69% of operators reporting a loss in revenue, and 68% a loss in customer numbers from June 2020 to May 2021 compared to the year of 2019 (January to December). The domestic market has helped to support the industry during the border closure and several operators have looked to diversify revenue streams using approaches including growing links with schools and developing educational programmes. Strengthening a focus on the domestic market is an opportunity that many operators have taken due to the pandemic. Several operators have enjoyed and welcomed the opportunity to engage with Kiwis and found positive reception among domestic visitors to MCET. Operators call on central and local government for more targeted support for small businesses to assist during this uncertain time.

While COVID-19 has provided an opportunity to rethink strategy, there is a caution from operators that New Zealand may well see a flood of visitors once borders open and a quick return to publicly unpalatable 'overtourism'. Several operators comment that a 'responsible' reopening for tourism means adding value to communities and the environment, giving back is critical and MCET operators can be seen as leaders in the field.

Enabling and supporting collaborations can strengthen the sector

Many participants seek business advice and identify other operators in the sector as the best source for this. Relatively few operators, however, say they share information about running a business with others. The findings signal a lack of cohesion and networking across the sector. While some sub-sectors such as diving have well-formed networks, many operators lack this type of association. There is no leadership body for MCET or indeed ecotourism in New Zealand, with some operators often feeling disconnected from one another. There are opportunities for the profile for MCET to be raised within the tourism system and for success stories to be shared.

There are opportunities for MCET to link to shared aspirations of mana moana in the protection of marine environments. Key opportunities exist to build cultural capacities among operators, especially around tikanga related to the marine environment where MCET takes place.

Some Māori operators point out that there is a fine line between acknowledging and privileging mana moana in the local area by marine ecotourism operations embedding cultural dimensions in their operations and crossing the line of commercialising stories without intellectual property rights.

Need for improved MCET-specific planning and management

Coastal and marine ecotourism is a complex sector characterised by a wide range of activities, diverse regional contexts and a variety of regulatory settings. This complexity must be considered when planning for the sector and when accessing local and operator knowledge and expertise. For example 'blanket' rules for wildlife viewing apply in the same way to large diesel powered vessels as they do to a small fleet of kayaks. In another instance the lack of compatibility of safety regimes was raised with an operator telling us that despite being approved under Maritime New Zealand Marine Operator Safety System and having Dive Supervisor qualifications they were also required to get Adventure Activity Operator certification at significant extra cost making it uneconomical to offer diving tours with the "cost exceeding return".

MCET businesses and associated models are well placed to participate in discussions around sustainable/ regenerative tourism concepts but are largely missing from government and Regional Tourism Organisation activities aimed at achieving a tourism industry reset; most of these discussions focus on land-based rather than marine and coastal activities.

Being on the water almost every day, MCET operators have considerable knowledge of their local marine environments - sometime spanning several decades often with research databases to back up observations. Such a legacy of knowledge is a vital resource for decision-making. For example, many mentioned that they would like to be involved in planning for marine protection in their local area - communicating concerns on the affects of both commercial and recreational fishing on areas that are home to marine taonga species.

Around half of those surveyed say they are already involved with national, regional, or local planning initiatives for tourism and/or coastal or marine policy. A clear majority of survey respondents (87%) also indicate they would like to be more involved in decision-making that affects the coastal and marine environment. The desire for engagement stems from concerns that decisions are often made around the marine environment that directly effect MCET business but there is limited consultation or effort made to learn from operators' strong understanding of issues that affect their local marine area. Suggestions for targeted engagement include meetings/hui, email or social media.

Sustainable development of MCET is reliant on strong marine protection

MCET is intrinsically linked to marine protection. Two-thirds of marine ecotourism businesses surveyed utilise marine reserves while just over one fifth (22%) operate in marine protected areas. Strengthening marine protection is vital to the sustainable development of the sector. The full ecosystem must be considered when it comes to marine protection - it is vital to look wider than a single species, or just the marine environment, what is happening on land must also be factored in as it flows and links back to the sea.

Several operators highlight that if the marine resource/ecosystem is not well protected, it is very difficult to sustain a marine ecotourism business. Many operators say they play an 'unofficial role' in protecting the environment for example being "the eyes" on the ocean and reporting illegal fishing. A number of operators work alongside DOC and some contribute to marine science - gathering data, maintaining databases, and enabling marine and coastal research.

There is concern expressed by operators in some areas about overfishing. Operators observe a decline in species and attribute this to more stress on the marine environment caused by increased users, commercial, recreational and charter boat fishing, and pollution from land. In areas where marine protections have been introduced, operators have observed a species 'bounce back'.

Other operators reflect on broader marine rhythms that cause changes in the marine environment but also note the lack of accessible data to understand why these variations occur. Privileging and prioritising mana moana's unique insights into these locally specific rhythms is important if MCET is to support the blue economy. Here mātauranga Māori can provide unique perspectives and insights into changes in marine environments over time. A flexible and adaptative management approach is needed for marine decision-making that acknowledges the gaps in our understanding of New Zealand's marine biodiversity.

Opportunities for a more coherent, joined-up and better resourced policy and regulatory environment

The regulatory environment for MCET is fragmented, with operators having to deal with several organisations - often with overlapping mandates. Nearly all operators (93%) require permits and/or licences to run their businesses. Operators pointed to opportunities to consolidate regulations and information that relate to MCET, and to the need for government departments involved in MCET to work more closely together.

Operators highlight the need for DOC to play a more active role in the oceans, just as they do on the land, and for the government to resource the enforcement of existing marine regulations. Several interview participants also see opportunities for wider awareness raising on how to protect marine environments, including educating recreational boaters on good boat behaviour around marine mammals, and raising awareness of sustainable fishing practices.

Respondents highlight the cost of compliance as a significant challenge to business; especially adventure activity audits. While operators agree safe operations are vital this audit cost is a burden for small businesses struggling during the pandemic.

Several MCET operators suggest consolidating regulations that apply to MCET into a 'one stop shop' (online resource). They highlight that there are opportunities to share information to support new businesses and also raise awareness of best practice in the sector. A centralised resource of this nature could provide examples of benchmarking, best practice and sustainable approaches to MCET. Sharing information tools and examples can also help to build a sense of cohesiveness across the sector.

Aims and method

A white bird, possibly a booby, is captured in flight over a vast, blue ocean. The bird is positioned in the center-right of the frame, with its wings spread wide. The water below is a deep blue with gentle ripples, and the sky above is a lighter, hazy blue. The overall scene is serene and natural.

Aims

Baseline Report 2 provides information on the marine and coastal ecotourism (MCET) industry in New Zealand. The purpose of the report is to provide a baseline understanding of the opportunities and challenges relating to the sector. The report focuses on survey and interview findings with marine and coastal ecotourism operators across the country and conducted from May to June 2021.

The report provides a national picture of the size and scope of the marine and coastal ecotourism sector in Aotearoa, specifically it looks to address the following questions:

- What does 'marine and coastal ecotourism' mean in the Aotearoa New Zealand context?
- What does 'success' look like for operators in the sector?
- How many engage with iwi Māori in their business?
- What is the size and scale of the current marine and coastal ecotourism sector – the number of employees, annual turnover?
- 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 from the perspective of MCET operators.

This report adds to the findings in [Literature Review](#), [Baseline Report 1](#) and other resources related to the operator database:

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

sustainableseaschallenge.co.nz/map-nz-marine-ecotourism-operators

Operator Database **Dashboard**: sustainableseaschallenge.co.nz/data-dashboard-nz-marine-ecotourism

Method



- 1. An online database** of 303 marine and coastal ecotourism operators was collated between February 2021 to June 2021 using online information. The marine operator database was drawn from publicly available lists. See [findings – part one](#).
- 2. Operator Interviews:** Interviewees were shortlisted from the database to provide a sectoral and geographical spread across the country. Twenty-eight interviews with marine ecotourism operators provide insights into their knowledge of, and experience with MCET. Interviews ran from May to June 2021.
- 3. Operator survey:** sent to the 303 operators identified from the online database and ran over a two-week period from 16 to 30 June 2021. The survey was designed to respond to and verify key interview findings. Ninety-three MCET operators responded - a response rate of 31%. All questions were voluntary. It should be noted that businesses that were permanently closed were asked not to complete the survey, and these may have been included in the original database. Businesses who did not identify with the term ‘marine ecotourism’ may also not have been captured by the survey.

Method



Interviews

Semi-structured interviews covered four areas:

- Knowledge of and experience with marine ecotourism
- Business opportunities and challenges relating to marine ecotourism
- MCET's contribution to environmental protection and local community development
- Identification of MCET 'best practice'

Selection of sample: Geographical coverage: aim for at least one operator from each region. More weighting given to those with a stronger 'eco' focus like wildlife/dive and interaction with nature. Interviews focussed on "marine" ecotourism rather than coastal to reflect the database (mostly marine focus).

Analysis: Interview data was thematically analysed and organised in NVivo software. Strong themes are presented in the report.



Survey

The online survey was structured around the following areas:

- Information about the business
- Impact of COVID-19 on the business
- Staffing
- Business requirements
- Planning and policy
- Relationships and networks (including working with iwi/other iwi)
- Useful resources

Analysis: Descriptive analysis of the quantitative data and thematic analysis of qualitative data was undertaken. Operator characteristics were cross-checked with the operator database from which the sample was drawn, this revealed a very close match in location, age and size (staff) of business.

Good regional coverage and a wide range of activities

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's 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.

**Data not clear on database (web audit) on the number of Māori owned business

There is diversity in experience and activities offered with several focussing on learning outside the classroom with school groups



The majority (15) of interviewees are owners of the business, a smaller number are Managers/CEOs/ Founder. Just under half of the interviewees had experience in tourism prior to starting in their role. Several interviewees have wide ranging experience in marine ecotourism, with some starting their roles over 30 years ago.

Among the owners there is an almost fifty-fifty split between those who had bought an existing business and those who had started a new business.

A variety of ownership structures characterise the businesses represented in the interviews. Several are sole traders, but many other structures exist: charitable trusts, iwi-owned, council-owned and larger publicly listed registered companies.

A wide range of visitor experiences are offered (under the water, on the water, on the coast). Some operators also provide other services such as ferry services, accommodation and hospitality (cafés).

Many operators provide learning experiences outside the classroom for school children, with a focus on the marine environment and conservation activities.



Towards a values-based definition of marine and coastal ecotourism

International perspectives and the New Zealand context

Several international definitions of ecotourism exist. Typical characteristics of ecotourism include: learning, interpretation, low impact activities that minimise negative environmental and socio-cultural impacts, community engagement and control, supports conservation, and upholds the rights and beliefs of indigenous people (Seek & Sellier, 2019). Garrod (2003) developed a definition of marine ecotourism which resulted in the following elements being identified as important:

- An emphasis on sustainable management of marine ecotourism operations
- Educate tourists about the natural marine environment and its conservation
- Provide benefit to communities and the environment
- Promote the conservation of a species or habitat.

While there are several overlaps between the international perspectives of ecotourism and the findings, international definitions do not fully account for the Aotearoa setting. Marine and coastal ecotourism is context specific and incorporates a diverse range of activities on and under the water, and along the coast in different rohe of mana moana. Many operators shared wider perspectives related to connecting local people with nature and contributing to well-being. The majority of operators also stressed the importance of designing an inspiring and fun experience. Some operators did not identify as “marine ecotourism” businesses but preferred instead to adopt more sub-sector specific descriptions.

View the [literature review](#)

Operators were identified based on 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** 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

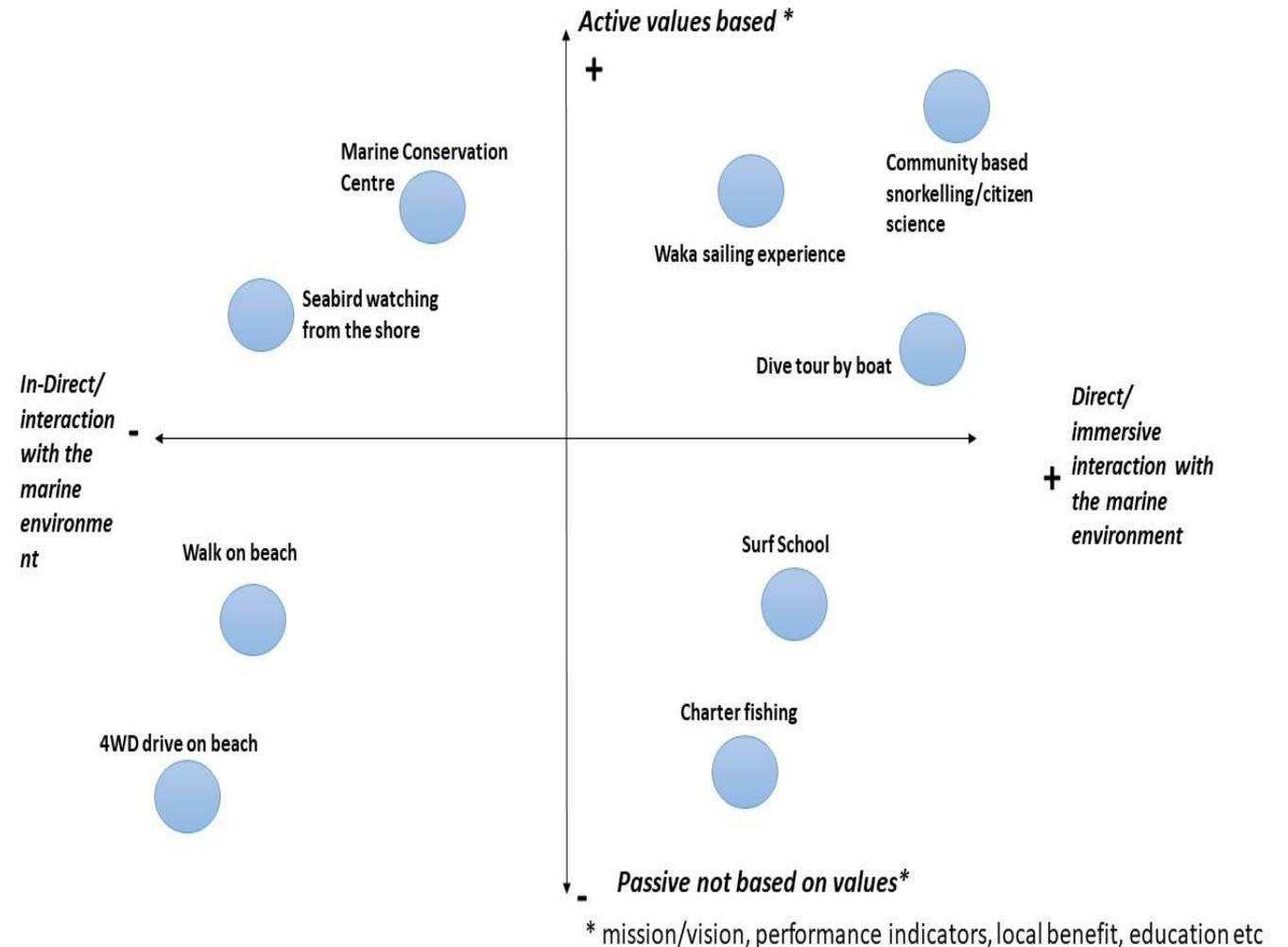
Excludes:

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

MCET can be seen as a continuum

Marine and coastal ecotourism activities can be visualised as sitting within the intersection of two continuums. 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.

While the database was built on conservation values based on a non-consumptive approach (excluding fishing), taking a continuum approach allows sustainable and cultural fishing to be 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.



Operator perceptions of the term 'marine ecotourism'



Operators were asked what the term 'marine ecotourism' means to them and if they identified themselves as marine ecotourism operators.

What does the term marine ecotourism mean to you?

- Sharing knowledge, a passion for and raising awareness of the marine (and coastal) environment
- Low impact "light touch" operation
- Engaging responsibly with nature
- A conduit to connect people to experience the marine environment
- Active focus on marine conservation
- Holistic focus incorporating a care for people, place and culture
- Creating a meaningful and enjoyable customer experience

Do you identify as a marine ecotourism operator?

- 19 interviewees identify as being 'marine ecotourism operators'
- 6 do not identify as being 'marine ecotourism' operators
- Concepts of Manaakitanga and kaitiakitanga were put forward by some Māori operators as better descriptors of what they do
- There is some wariness around the term 'ecotourism' due to 'greenwashing' in the early 2000s, coupled with a lack of accountability back then. Some operators felt that the term 'ecotourism' has dropped off the radar and become dated with new terms such as sustainable and responsible tourism replacing it
- Operators with activities on the coast don't always identify with the word 'marine' for their business

Scrutinise current MCET definitions to avoid misuse



Several operators caution that the term 'ecotourism' is often used just for marketing purposes or 'greenwashing' and that you have to be true to core values to be truly successful - you have 'to walk the talk'.

"I'm wondering if ecotourism should be promoted or not. It can be whitewashed, 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."



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

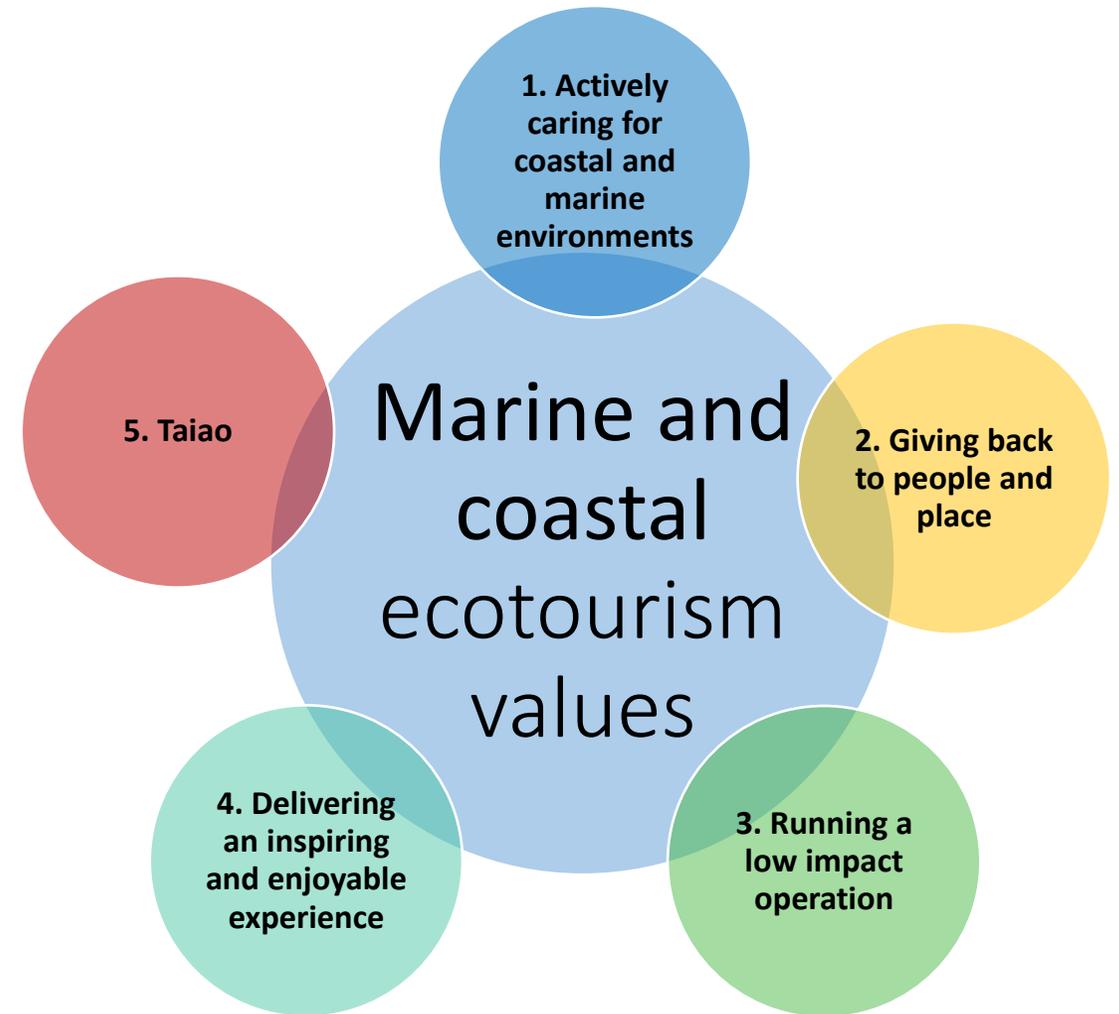


Operators were asked what the term 'marine ecotourism' means to them and how they define success.

The diagram on the right reflects the strongest themes to emerge from these interview questions with the majority of operators in consensus around the values that underpin marine and coastal ecotourism. The values listed are holistic and interconnected and taken together they represent the essence of coastal and marine ecotourism based on operator feedback.

Each theme is numbered to represent its relative significance across operator feedback. Actively caring for the environment ranks top in terms of operator feedback with giving back to community and place following as the second most significant theme to emerge.

"If you're doing ecotourism, you're doing things in a way that leaves very little footprint on the environment. It's about being true to that philosophy, but also making sure that you've got a way that you can get people to connect with that, winning hearts and minds."



MCET are values-based businesses, but financial viability is also critical



“If you want to be successful in marine ecotourism it's not about the bottom line... if you're going into it just to make money it's not ecotourism”

Operators comment that marine ecotourism can be seen as a **philosophy and a way of life centred around Taiao**; extending beyond running a commercially viable business to **giving back to people and place**, and **actively caring for marine environments**. Ways that these values are expressed are by the **sharing of knowledge** and a **passion for marine conservation by delivering inspiring experiences and running a low impact operation**.

While success in MCET is often described as being beyond 'making money', **having a financially viable business** is obviously very important in the eyes of operators: this is the platform that allows broader goals to be achieved.

The following pages explore the 5 core values that emerged in more depth.



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
- By getting people out (on the water, under the water, on the coast) it enables operators to teach people how 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

Operators are a conduit to the marine world supporting local wellbeing

Several MCET operators express that they actively care for the marine world by being a **conduit between people and their marine environment** “main role is to expose New Zealanders to water”. As one operator notes, this is intrinsically **linked to the wellbeing** of local populations “from a social point of view it's an amazing resource [the marine reserve] but not many people know about it – it enhances wellbeing”. For example, an operator has created a safe area for snorkelling in a marine reserve which can be enjoyed by the general public (bring your own snorkel or rent via the operator) and/or via a guided tour. Others work closely with schools and vulnerable people, for example disadvantaged youth and homeless people by providing free trips.

Linking children to their local marine areas is another benefit operators talk about “we raise awareness to the kids (via school programmes) of what they have on their doorstep and raise awareness of the conservation of their environment”. Many MCET provide opportunities for kids to experience the water, learn about conservation, and can link this to the curriculum - building capacity for the next generation in a Blue Economy “take the kids out to the proposed marine mammal sanctuary so kids are following the whole government process through the curriculum so it's pretty cool for them to be following a policy that could affect their future 11-12-year-olds, they can see themselves making a difference”.



Actively caring for coastal and marine environments

Enabling people to experience the marine world

There is an educational imperative to MCET

Operators show people how to be safe on/in the water and to engage responsibly with nature. Several interviewees consider that the more people connect to the marine world on their doorstep, the more they may engage with, and care about the ongoing health of the moana. By connecting people to the marine environment via MCET they learn **how to engage with nature responsibly and how to be safe in/on and near the water**.

In general, the presence of MCET operations in the community is a way to **enable access to and a deeper experience of the marine world** on the water, under the water, or on the coast. For example, operators provide the means to get under the water (lessons, snorkel and scuba hire) or on the water (for example kayak hire/lessons/tours). The presence of operators in communities also highlights both the issues facing marine wildlife and the benefits of marine protection to communities - environmentally (regeneration of biodiversity) and economically via economic linkages that tourism brings, and how this contributes to marine protection.

Many operators talk about 'paying it forward' and enabling people to experience the marine world. One example is by providing **free trips** to the broader local community as a way of giving back. Others are integrated in school curriculum enabling local children to experience the marine environment “**year 4 students get a free trip as part of school curriculum**” and some offer free trips for locals to raise awareness of local marine and coastal issues “**we’ve celebrated [conservation event] by taking as many locals as we can out at no charge. That’s about education**”.



Actively caring for coastal and marine environments

Enabling people to experience the marine world

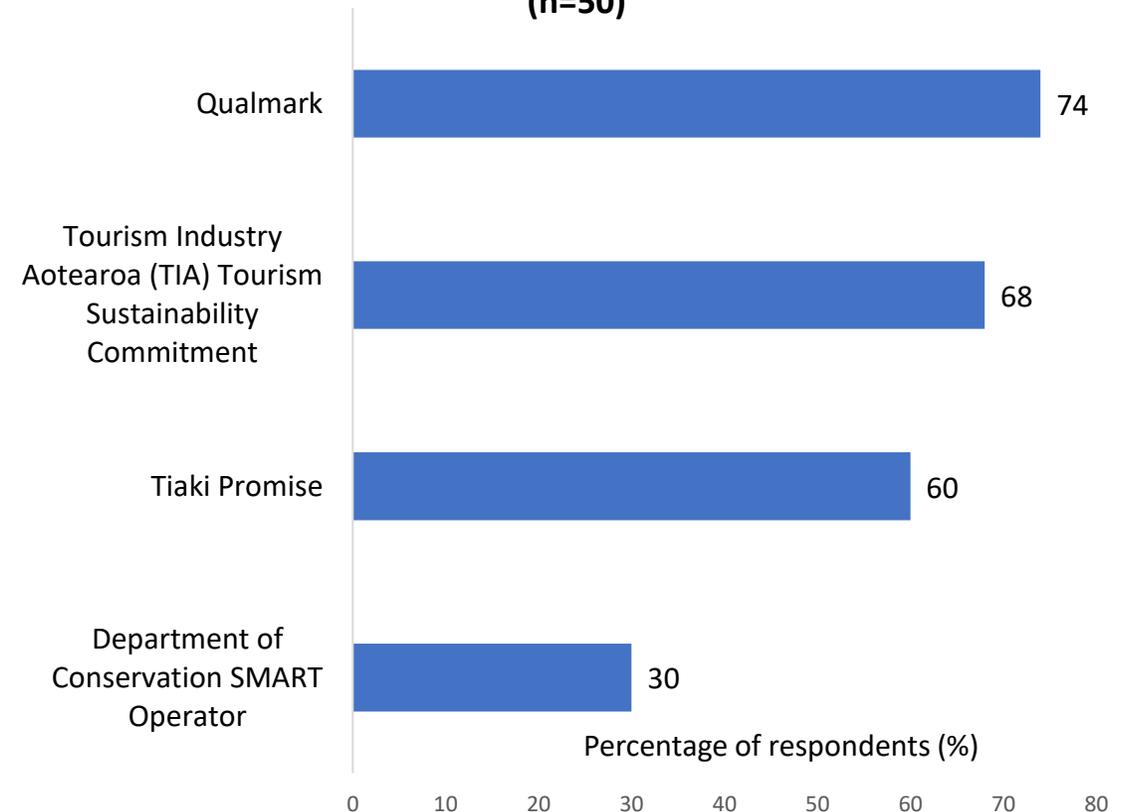
Sustainable tourism schemes: Nearly three-quarters of those respondents subscribe to Tourism New Zealand's Qualmark sustainable tourism accreditation scheme



Actively caring for coastal and marine environments

- Almost three quarters (74%) of respondents 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%) 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%.

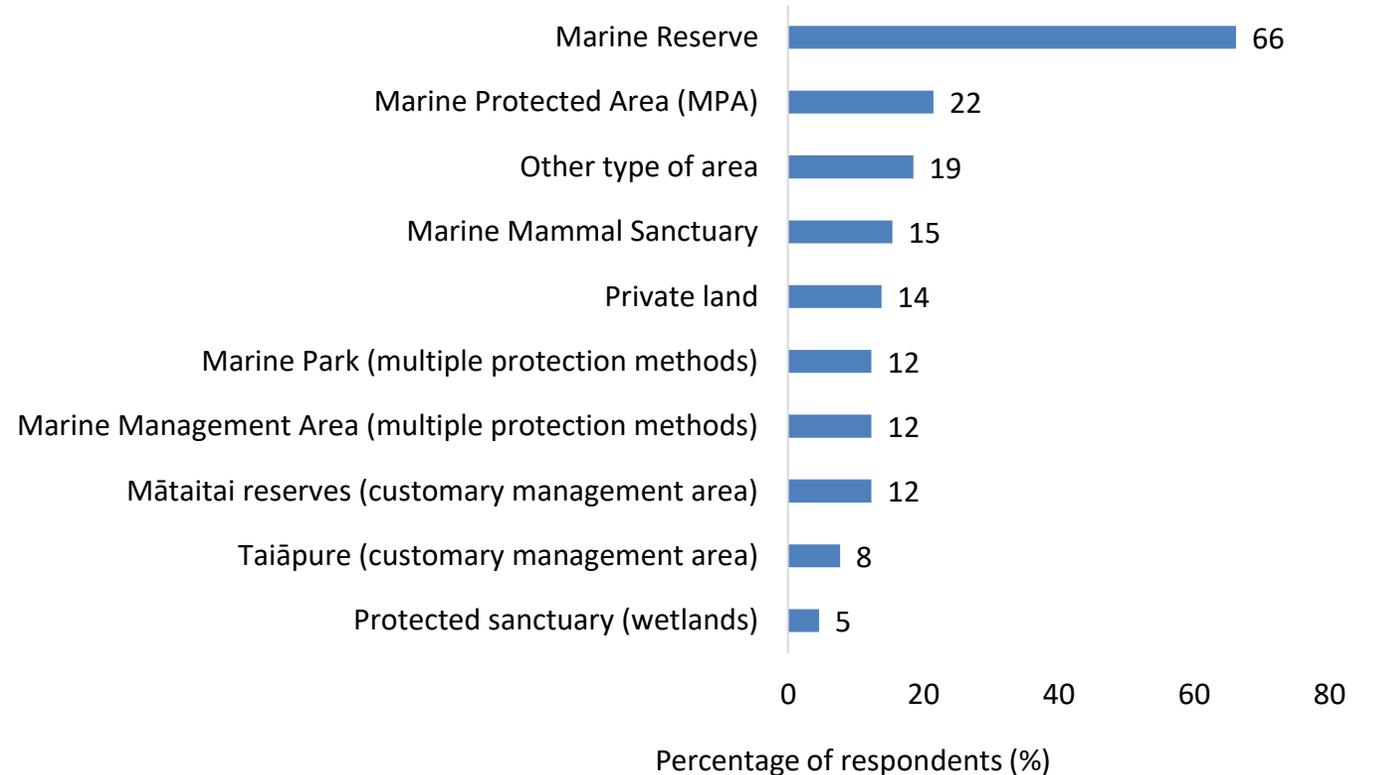
Marine protection: Marine reserves and marine protected areas (MPAs) are vital operating zones for many marine ecotourism operators



Actively caring for coastal and marine environments

Two thirds of marine ecotourism operations offer visitor experiences in marine reserves, 22% in marine protected areas.

Do any of the visitor experiences you offer occur in the following areas? (n=65)



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

Operators have a sense of duty to care for the environment

Operators share a **sense of duty and responsibility to pass on a healthy marine environment for the next generation**. This is a key motivation to get into MCET and is the driver to 'keep them going'. Several comment that the work they do “**makes them feel good because they care about it (marine protection)**” and that “**it's more of a passion than a business, you spend more to make less but you feel better**”. Most have experienced first-hand the negative changes in local marine environments and the difference that marine protection can make which further motivates them to protect marine and coastal areas via MCET.

One operator states for them ecotourism is about “**conservation (improving it) restoration of native bush and native species**”. Another states “**for us on the ecotourism side is protecting the reef we have in front of us for future generations going forward and educating people around some of that**”.

Echoing this, an operator comments that “**how our staff act on the water, and engage with the marine mammals we work with, and ensure that they are still available to future generations is important. Those things are precious to us.**” Another reinforces the sense of duty to care for the environment for the next generation “**we want our kids to have the same kinds of opportunities we have had.**”

The health of the ocean is intrinsically linked to the success of MCET. Marine protection is not only driven by a deep care and concern for the environment, but also makes good business sense “**the office that we work in is the ocean, if the health of that environment isn't where it needs to be, who's going to want to visit it? – that's what it comes down too**”.

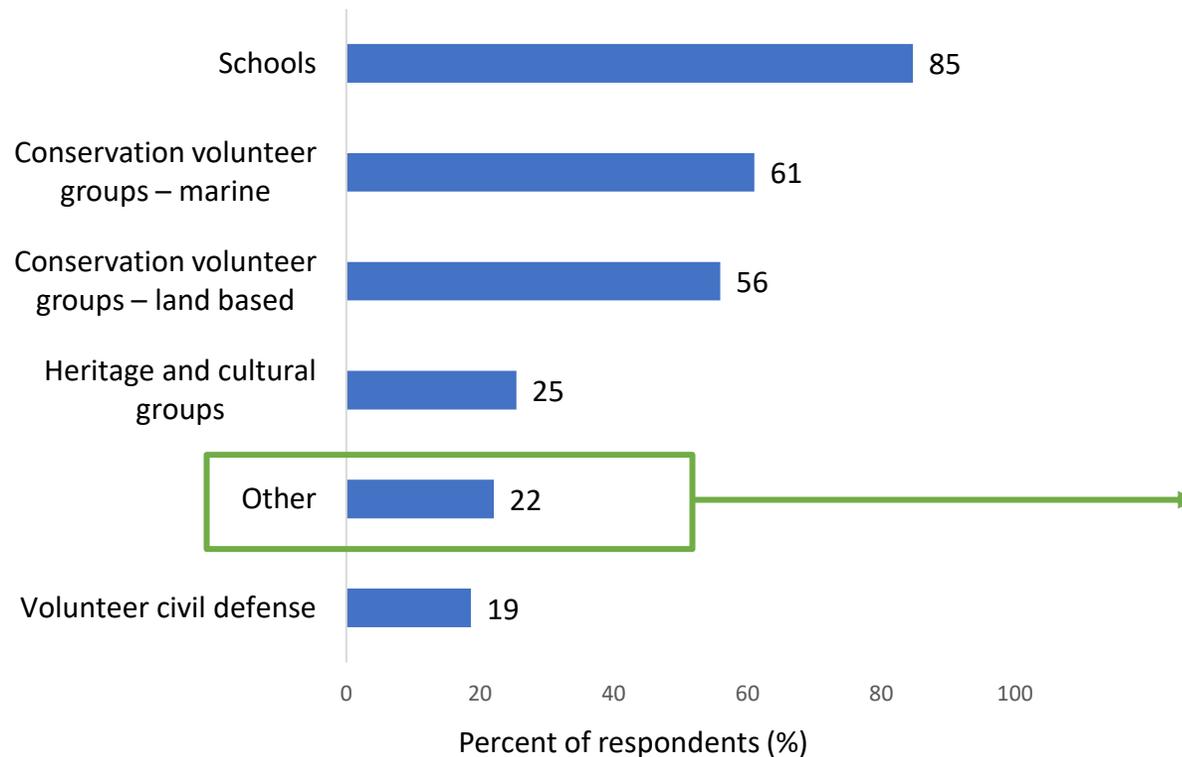


Links to education are key - 85% of respondents interact with schools and over half work with conservation groups



Actively caring for coastal and marine environments

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



- Other (please specify)**
- At risk youth, animal welfare groups
 - Local hapu
 - We look after penguins at [name] Beach
 - Local community association; local volunteer-led tourism marketing body; DOC as member of Conservation Board
 - Clients - everyday divers
 - FENZ SAR RSA District and Regional Promotions
 - Chambers of Commerce ratepayers etc
 - EMR, Pest control, local tourism organisation
 - Yacht Clubs
 - Coast Guard, Search and Rescue
 - Sir Peter Blake Trust, Local beach clean-up days, Maui dolphin day
 - All sorts of community organisations

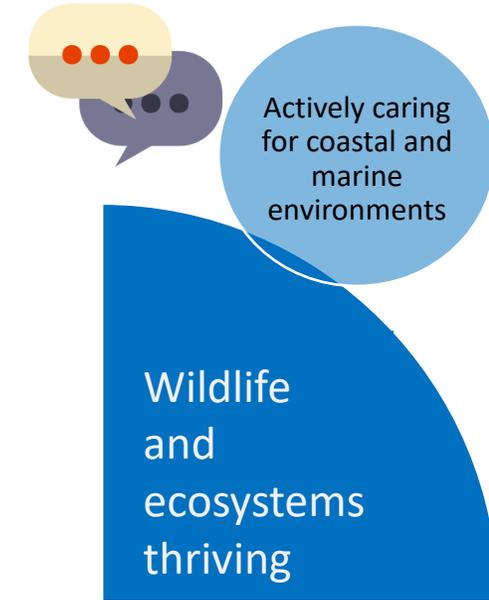
Note: Multiple responses, therefore total does not add up to 100%.

Operators work to see wildlife and ecosystems thrive via research

Success for many operators is seeing wildlife and ecosystems thriving. Twelve operators perceive that their operations directly impact this by **contributing to, conducting and enabling scientific research** with one operator noting that success for them is seeing “wildlife thriving because we understand more via research” and another saying that their “aim is to do good science education and good things for our rohe”.

In many cases, operators gather data to assist with research. As one operator comments “data is gold”; another operator shares that they “have a big database of what's happened over the past 20 years - we just document everything - sharks, whales, seals and dolphins.”

Additionally, some MCET operators contribute to science by **enabling and promoting citizen science**. For example, on one tour visitors are actively involved in doing research while on the trip; on another, apps are promoted where data can be collected by visitors and shared to citizen science datasets. Several also **enable marine research** by working with scientific projects, providing vessels for researchers to use, “the crew provides commentary; marine science experts conduct biological studies and passengers are invited to join interactive research activities”. In one case, a marine ecotourism operator's data (sightings of marine mammals in shipping channels) was used to inform regulation to protect marine mammals.

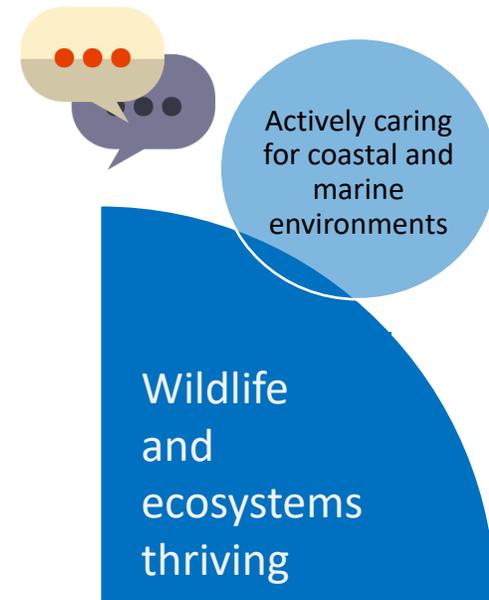


Operators take part in restorative activities on water and land

Many operators are actively involved **not only in marine conservation but also the restoration of native habitats on land** including conservation islands “we don’t limit ourselves to marine projects, but we do tree planting, control of invasive plants, and the sea-based things of supporting projects with dolphins, or sea birds”.

In some cases, portions of **visitor fees are invested in local conservation**. An operator notes that “we’re working with [local school] on a reforestation project, and our customers can make a contribution, and our team can get involved, which helps with wellness.” **Safeguarding habitats** for instance by participating in predator free initiatives and creating habitats for penguins is another way that operators perceive that they contribute to ensuring wildlife thrive. Several operators were heavily involved in the creation of marine reserves and marine protected areas, and many continue to strongly advocate for the further protection of marine environments. The primary focus of one coastal operator is the protection of wetlands and waterways and “giving back more than we use/take”.

Nine operators shared examples of how they contribute to restoration by **picking up litter on the coast and in the water**. Others “look for and collect microplastics and flotsam and jetsam along the way”. Several initiate and/or take part in community beach clean-ups. Many dive operators participate in the Professional Association of Diving Instructors (PADI’s) Project Aware Dive Against Debris Scheme which doubles as a citizen science project by recording what is found. This data has been successfully used for ghost net removal initiatives. See the following page for details.



Several dive operators take part in PADI Project Aware Initiatives - these are a good example of an MCET sector linking global and local initiatives to achieve impact

The Professional Association of Diving Instructors (PADI) is an internationally recognised dive training centre with 6,600 dive centres globally and 30 in New Zealand. From the marine ecotourism sub-sectors identified in this research, diving is the only one to have a global structure such as PADI that is embedded across the industry. The PADI Aware Foundation is a 'Not for Profit' organisation that focusses on **“local action, global impact”**. For the past 30 years PADI has focussed on mobilising a network of dive operators and divers around the world to focus on critical marine conservation issues. Several dive operators in New Zealand take part in the initiatives. **The global structure has enabled impactful projects at scale and allows for resources to be channelled into community led efforts.** Two current projects are underway globally and in New Zealand

Dive Against Debris: the goal is to reduce ocean debris by 50% across participating countries by 2030. This involves the largest underwater citizen science project documenting items removed from the across 19,428 coastal land and seafloor sites across 86 countries between 2011 and 2018. To date, over 70,000 divers have removed over 2 million pieces of debris and aided over 10,000 entangled marine species. Several dive shops in New Zealand are active participants.

Shark and Ray Species Conservation: This initiative seeks to reverse population decline for commonly encountered species by 2030 and by extension supports responsible shark and ray tourism with associated best practice guides developed in collaboration with other conservation organisations. The initiative focusses on citizen science (recorded sightings) and advocacy. So far, the initiative has helped to secure international trade restrictions on 38 species and pledges to end overfishing of 28 species around the world.

Concentrating on a limited number of key issues over a specified timeframe creates momentum and impact for initiatives. Another three initiatives are in the pipeline:

- **Climate change:** Achieve carbon neutrality across the PADI network and fund seagrass and mangrove habitats to offset carbon
- **Coral reefs:** restore 5% of coral reef habitats through citizen science and funding
- **Marine protected areas:** Protect 30% of the ocean by 2030 through partnerships, collaboration and adopt a dive site. Adopt a dive site aims to encourage scuba diving leaders to encourage ownership of their local underwater areas and advocate for marine protection.

“when you look at the millions of divers that [PADI] have trained over the years...we get that huge collective of marine protection orientated people singing from the same hymn sheet and doing some good work”

www.padi.com/aware



Raising awareness of environmental issues is a major part of MCET



Actively caring for coastal and marine environments

Twenty-four operators state that they share a passion for the marine world and inspiring others to be advocates for conservation in Aotearoa and beyond. This is a key element of what 'marine ecotourism' means to operators. Seventeen operators talk about **raising awareness** of ocean issues including an appreciation for the marine biodiversity that exists beyond "the big-ticket items - for some reason people have an emotional response to seeing a whale's tail - but there are other marine species to be appreciated." MCET operators share knowledge to enable responsible interactions with nature "we're educators of the general public; so that people learn to interact responsibly with marine mammals." Several see the **next generation as being the torch bearers** "they're the ones that will take it forward, and ultimately deal with it".

Sharing knowledge and passion –inspiring others

Raising awareness to promote the protection of marine areas is a strong theme "we educate, tell stories, develop knowledge and awareness to promote protection" and another said that on tours they are "really portraying to locals and people visiting about protection of that ecosystem". Another talked about having "an educational aspect, which can sometimes be a challenge, but we try to give visitors a lasting message". While another operator shared an example of how they raise awareness by "encouraging people to be selective in the e.g. fish they are buying and eating".

The immersive experience highlights issues in an impactful way for visitors "it's not a ride on a gondola... where people hop on and off, we are taking people back to the way it was... showing what is here and what could be done elsewhere... showing what the baseline could be".

MCET creates momentum for marine protection

Most operators feel MCET is about **igniting a passion for marine conservation**. One operator takes 8,000 people a year on island tours while giving commentary about the ecosystem and unique geology and mentions “**the ripple effect**” that this creates. The ripple effect reaches beyond the individual to, for instance, children who tell their parents about good boat behaviour around marine mammals, or about how everyday actions can improve the environment. By passing on knowledge, operators hope they can **create ambassadors for marine protection**. As one operator notes “**there’s the positive impact on people, hopefully they take away a lasting impression, some may not do anything different, but it does open conversations, and it does give some people a different perspective**”.

Another comments that MCET operators “**act as a mouth-piece for marine life, we promote conservation. At the end of every tour, we point to the ‘choice’ everyone has to extend guardianship to what happens on land, in backyards.**” MCET is “**about the customer experience and creating an opportunity through a fun enjoyable experience to become champions and advocates to protect the environment and learn about the marine environment.**”

For some “**success is that people get off the boat and understand a little bit more about the world that they live in –not just our area, but just generally taking a bit more care**”. For the majority of operators MCET links closely to conservation and means “**giving back more than you take. Not numbers and dollars and profit margins, but how you can create meaningful change for people.**”



Actively caring for coastal and marine environments

Sharing knowledge and passion – inspiring others

MCET leads to positive flow on impacts for the marine environment

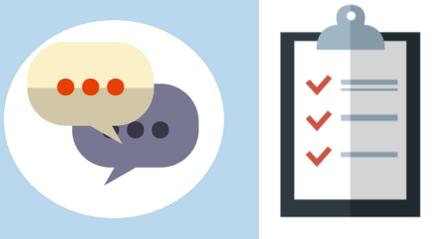
Actively caring
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and marine
environments

Interviewees were asked to describe the impacts they consider their business has on the marine environment. Tangible examples provided link to living the values that underpin MCET in Aotearoa. These four impacts reflect how marine ecotourism operators perceive they actively care for marine and coastal environments. Some survey responses also reinforced themes to emerge in the interviews.

Impact	Details
<p>1. Conservation, restoration and rehabilitation - coast, land and water</p>  	<p>18 operators in the interviews refer to being actively involved in conservation - from regularly taking part in ocean and beach clean-ups, to safeguarding habitats for coastal and marine life. Some invest financially by reinvesting some of their fees into conservation or by providing customers the opportunity to donate to local initiatives. Four operators were actively involved in creating marine reserves/protected areas in their region and many actively advocate for the protection of marine ecosystems. This was also a strong theme in the survey.</p>
<p>2. Raising awareness of ocean issues and how to be responsible</p> 	<p>Raising awareness of ocean issues and how to be responsible is a key positive impact that MCET operators perceive they have on the marine environment. By having people experience marine life and ecosystems it is hoped that people go away with guardianship in mind and that they in turn share the message with others.</p>

Enabling and enacting marine science is a key impact

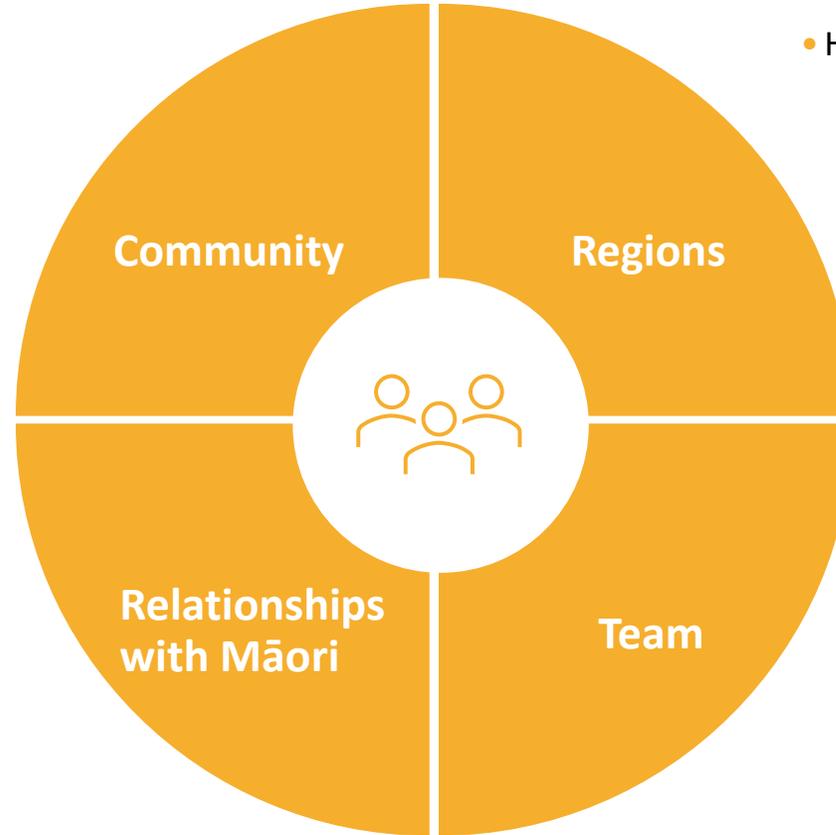
Actively caring for coastal and marine environments

Impact	Details
<p>3. Marine science</p> 	<p>Many operators contribute to marine science, conducting baseline survey work, monitoring of marine life, and collaborate with DOC. In one case, the research was used for regulation to better protect marine mammals.</p>
<p>4. Eyes on the ocean to aid with enforcement</p> 	<p>Being out on the water most days of the year marine ecotourism operators offer “another set of eyes I guess for them often reporting issues” and can report illegal fishing issues. Another notes that their presence in the area as a MCET helps to deter illegal fishing “if we don't go out and have a presence in our area, the area will be fished”.</p>

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

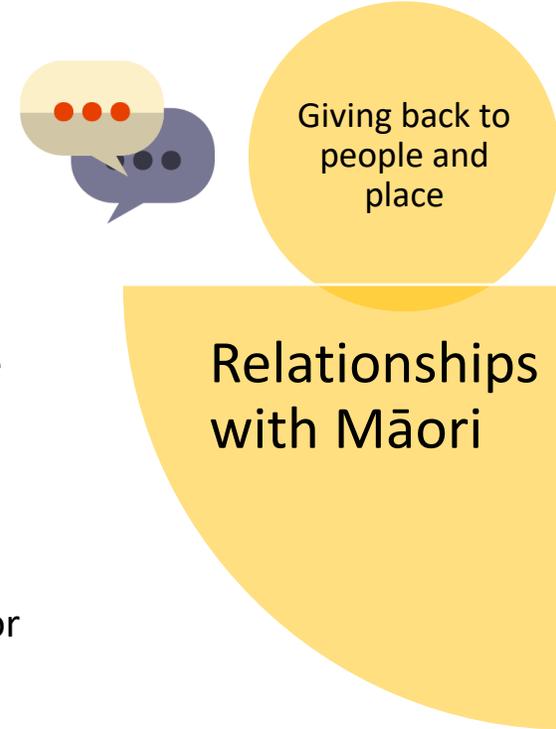
- Building a strong cohesive team that's engaged and want to stay on is important to operators
- Taking care of your people, your team is an important part of MCET

Mana moana as bedrock for MCET

Aligning with successful Māori businesses was a theme to emerge. Several operators highlighted the path that others had taken and say this as an inspiration to follow. Building relationships with mana moana is important for MCET for example, an operator talked about taking an international perspective on ocean protection (30% by 2030) and actively engaging with local iwi on those conversations, and what that might mean for local marine protections “discussing and seeing opportunities for bridge building.” Another operator added that “iwi engagement is a success factor” with another saying that having a “solid relationship with iwi and the cultural aspect” is a success factor for them. While some operators acknowledge this as integral to success, in some cases there is a lack of awareness, capacity or knowledge of how to go about building partnerships and meaningful relationships with iwi in culturally appropriate ways.

Partnerships - both formal and informal - are happening between Māori and MCET operators. For example, a dive operator is supporting a rāhui by undertaking surveys of the seabed. Another has a formal agreement with a Māori tourism operator via an MOU. One operator reflected that having meaningful relationships with iwi could be an aspect of the Tourism Industry Association (TIA) Sustainable Tourism Framework which incorporates economic, environmental, community and cultural dimensions “we need to find a way of making sure that the experiences we offer are authentic, but regulators are more aware of responsibilities under Schedule 4 of the Treaty. We want to do it and we have to do it and it’s a good thing.”

Several operators believe that creating meaningful relationships with mana moana is key to success in MCET. As one Māori operator notes “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.”



Models of collaboration Māori and non-Māori operators

While there are some examples and models of collaboration in place around the country that upholds integrity of mana moana and links shared aspirations for the protection of the marine environment, this remains a complex and dynamic area. Some comments from Māori operators highlight a fine line between acknowledging and privileging mana moana in the local area via MCET operations embedding cultural dimensions in their operations, and ‘crossing the line’ by commercialising stories without due acknowledgement of intellectual property rights. As one Māori operator noted, the stories can only be told by those iwi that they belong to, this particular operator also highlights that embedding cultural dimensions is a strategic business decision for the organisation “all of our (new) products will have a strong cultural component to it, which is a new direction, [the iwi] is proud of its stories but it's also because it's a path to employment for its people, because ultimately only a [person of that iwi] can tell those stories.”

Building trust and meaningful relationships with mana moana is key for collaborations that honour the place of iwi and work together to safeguard the marine environment. One non-Māori operator shared an example of working with local kaumatua to be able to tell the history of where they take visitors “we’ve had lots of kaumatua involvement with that, and Māori and research on it, so that story, that bit of the kōrero we do quite well – we would have been shut down if we didn’t do that well”. Other Māori operators mention the need for collaboration with non-Māori operators in their local area “Collaborate around ways to improve – not a competitive relationship; work together to achieve [name of iwi] whakataukī (duty of care for our children)”.

Another Māori operator reflects on how marine ecotourism could build local capacity to understand how to protect their moana “from a tourism perspective, the business opens lots of opportunities for conversations and the building of local knowledge. Locals always want to look after their back yard, and the more knowledge we can pass on, the easier it becomes for people to manage their own needs and understand how to look after their back yard.”

Another example of collaboration that was shared was that customary tools like rāhui can be supported by MCET - for example, a dive operator was using their time and resources to audit the species under the rāhui and report back on its effectiveness to the iwi.



Giving back to
people and
place

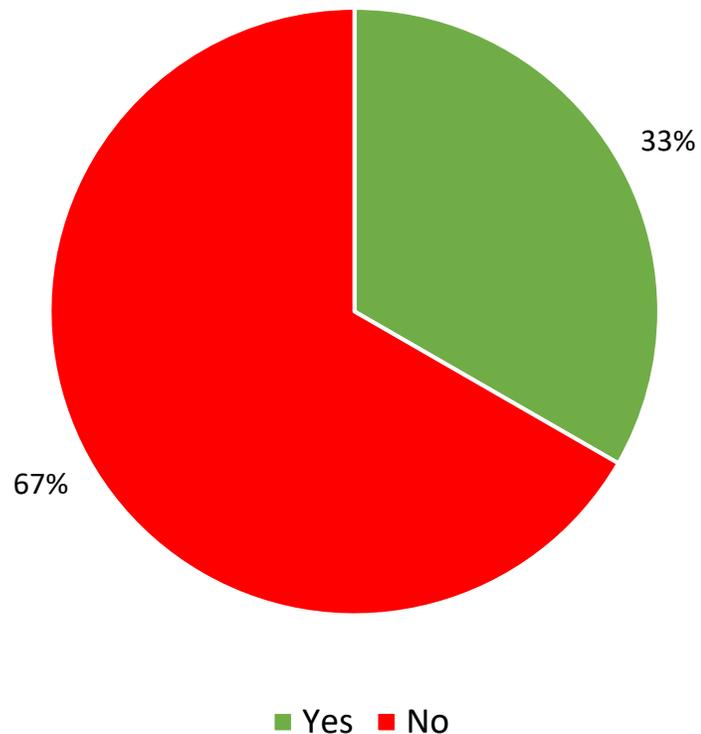
Relationships
with Māori

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

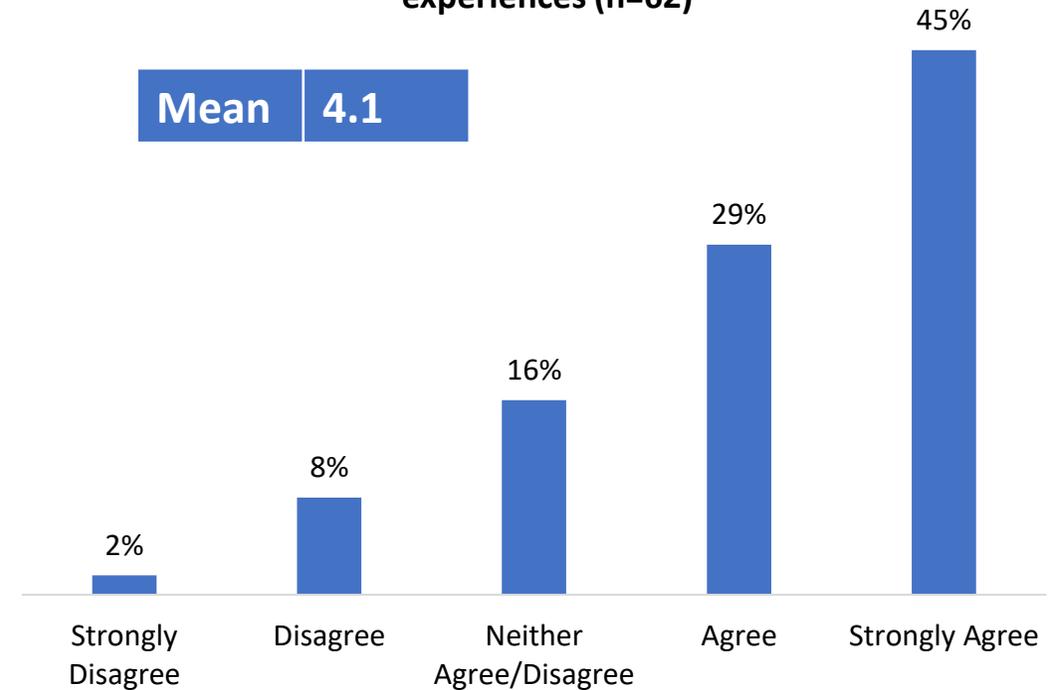


Giving back to people and place

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)



MCET creates destinations and supports economic development



Several operators highlight that MCET is as a contributor to **local economic development and local employment**. Operators in rural regions in particular perceive a key impact of marine ecotourism as **helping to create and build a destination** “the Council’s terrified that if we closed down there’d be a huge hole in the visitor and community experience.” Operators also believe that their marketing activities directly contribute to the marketing of the town and the region “we spend a lot on marketing the town” and “a lot of the businesses on [place name] are run by older people and they’re not really onto the social media game and that has been paramount for our advertising. And that has given [place name] more notice, because most Kiwis didn’t give it much thought”. One operator comments that MCET is a “huge contributor - makes [place name] a destination”.

MCET operators believe that driving sustainable economic development is a significant impact that they bring to regions “There’s bringing tourists to [location], and [location] relies so heavily on tourists that we’re helping the local economy to be sustainable. And that helps people to be employed or start new businesses.” Another operator echoes this and notes that successful MCET businesses helps to drive investment into the region “you have to be economically successful to remain in business - it’s not the crime of the century to make a profit. It’s a good thing, because you can employ people and do things in local communities, help spread messages, and invest in the regions”.

Operators also feel that MCET provides product diversity at the destination and drives local economic development by providing another activity to extend visitor length of stay with flow on benefits to other tourism and hospitality activities “this town is very well known for [type of wildlife] and people (even those who aren’t massively supportive) can see that tourism would look very different without us. The [type of wildlife] drive tourism for the town. Because the [type of wildlife] come at night, people stay overnight and eat in the restaurants, so it increases the spend”.

MCET creates local and employment pathways to marine industries



Giving back to people and place

Regions

MCET operators perceive that local employment is another important way they 'give back' to regions “We employ a lot of people, so that’s a good thing. We operate in some rural regions where we’re a relatively large employer”. Another comments that providing training - including paid internships - to local people is a way that they give back to their region “3,900 in our schools programme every year, we’ve put 102 graduates through as paid interns.”

MCET **creates pathways to employment in marine industries** beyond ecotourism such as diving professionals, boat building, professional skippers supporting employment in the wider blue economy. One operator runs a “marine training school, training with possible links to local boat building businesses” and another operator said they “support whānau – important part of the operation is to support local students through work experience placements”.

Some purposely target “kids that don’t [have boats] and they were the ones we want to target – gives them the opportunity to maybe get employment in the marine industry, wildlife conservation, cruise skippers or even professional sailors”.

One operator believes that a legacy is created from long term MCET operations in communities and regions “for 15-20 years every kid from [location] primary school goes out with them for a day – all kids at high school will have had a dive experience, several come to work with them (washing, then work on snorkel boats) then move on to dive boat and have and become dive masters, some now skippers, approx. 50 previous staff are now working in the super yacht sector”

Adding value to local communities is a key success factor

Reflecting on what 'marine ecotourism' is to them, operators convey that giving back to their local community is a vital part of MCET "a business focused on marine conservation and education that gives something back to people and community as well as to the ecosystem".

Interviewees stress the importance of embedding yourself as part of the community and gaining community support as the key to success. As one operator notes "this is our community and we love it, so we like to support the community as much as we can, so success for me is contributing to the community. We put \$30,000 into the building of our hospital; we sponsor pretty much anyone that asks. I like to think we're good community players and success is that the community thinks of us like that". Another operator comments that they like to be seen as leaders in the community "we are a leader in the community, and we see this is our responsibility" while another emphasises the importance of being "a good community player" and "I like to think we're good community players and success is that the community thinks of us like that".

Marine ecotourism operators are **actively involved in their local communities** including in more formalised networks such as the local business networks, marketing groups and business associations. One operator reflects that they provide more than a business, they consider themselves a key anchor point in the community - "It is more than a business – an education and training facility, an essential part of the economy, we are an extended whānau – it is stable and a base for staff and ex-staff...the business is an anchor point"

A MECT business owner believes that they "transform and serve communities and provide community services e.g., the importance of the ferry service. We are embedded within the community". A further operator states that the community seeing and understanding that you add value is key to success "[name of place] is a small community and if people don't like what you're doing, you won't succeed".



MCET can provide an alternative economic base for communities

Operators were asked to comment on how important they believe marine tourism is to their local community.

Most operators see marine tourism as important to their community, some perceive it is key “to iconic attraction status” and a big part of the local economy. However, five operators consider it has a low level of importance with “most people not giving it a second thought”, and two saying it would likely be considered important if people stopped to think about it, but it probably would not be considered “a head liner” for the region. Most operators have noticed changes in domestic from international tourism in their local area and two operators note a change from fishing economies to tourism over time.

“The community is looking towards sustainability for the future. I’ve noticed a big change. Imagine what my grandparents would have seen. Older long-time fishing families, generations. If I’ve seen a drastic change in my time – if you look back at older generations. Is it getting worse? We need to change before it’s too late. Marine tourism businesses have a role to play here.”

Some operators perceive they have played a role in helping to shift local attitudes in traditional fishing communities from sceptics to better understandings of the positive role that marine reserves can play in local marine protection and economic development “Our local community has always been a fishing village, so a little controversy about the marine reserves but we are noticing a change in that. People are becoming more aware. Older fishermen families – now have to work so much harder to get the same quota. So they understand ideals around protection and not taking everything – the marine reserve has changed attitudes (that it’s not ok to take everything)”.

One operator commissioned a marine tourism economic impact study to provide data to compare MCET against the fishing industry and provided this as evidence as an alternative economic base for the rural community.



Giving
back to
people and
place

Community

Operators give back in time, finances and support for local initiatives including marine learning for local children

Reflecting the importance of giving back to people and place, operators **support local community organisations and initiatives**. For example, eight operators mention that they support local charities and organisations through donations and free trips “we work with charities, for example we did free trips for homeless people and free trips for kids at a children’s hospital” and another an annual “golden oldies tour”. Some donate tours as raffle tickets or contribute vessels for charity events “we make contributions to local schools giving them the vessel to use to fund raise, sponsorships for local organisations.” Other tangible examples of giving back to local places are operators supporting police and coastguards and working with DOC by helping to monitor marine reserves or in one case training marine mammal rangers.

In many communities MCET operators are integrated into the school system via outdoor education classes with some saying that they “discount heavily for school groups (half price) to give them the opportunity to learn about the [type of wildlife] and fish life.” Linking to low decile schools provides opportunities for kids who might not otherwise have the opportunity to get on the water “we link to schools – especially low decile in [place name]. This is not self-interest, but I think we have a massive positive contribution through our activities, but I don’t think the community use what we have. We put through an enormous number of schools at all deciles.” Another operator noted: “half a day teaching about marine reserves, biodiversity, and what they can do to help protect it, then we take them out and show them it. It’s great to be able to work with the school groups because otherwise some of them wouldn’t have this opportunity.”



Conflicts over resource use can cause tensions in local places

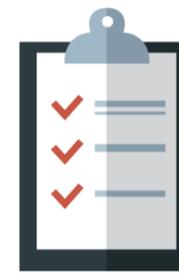


While there are notable positive impacts associated with MCET in the minds of operators and generally a sense that they get a good level of community support, eight operators point to possible negative local perceptions or resistance to MCET. There are some locals who don't support marine reserves due to an inability to fish. Others observed a resistance to those perceived as making money off a free resource, such as local wildlife and beaches **“some don't want you in their town making money from their beach”**.

Although bringing more people to a place is generally viewed as a positive impact, triggering local economic development, some operators point out that **“some people don't want more people coming here”**. This was especially true in 2019 when tourism in some regions put pressure on local infrastructure. Another operator noted that **“we all have an impact, and we should probably be a little critical of that and ask around to see if people are happy with what we're doing. We actually think they are happy with us though!”**



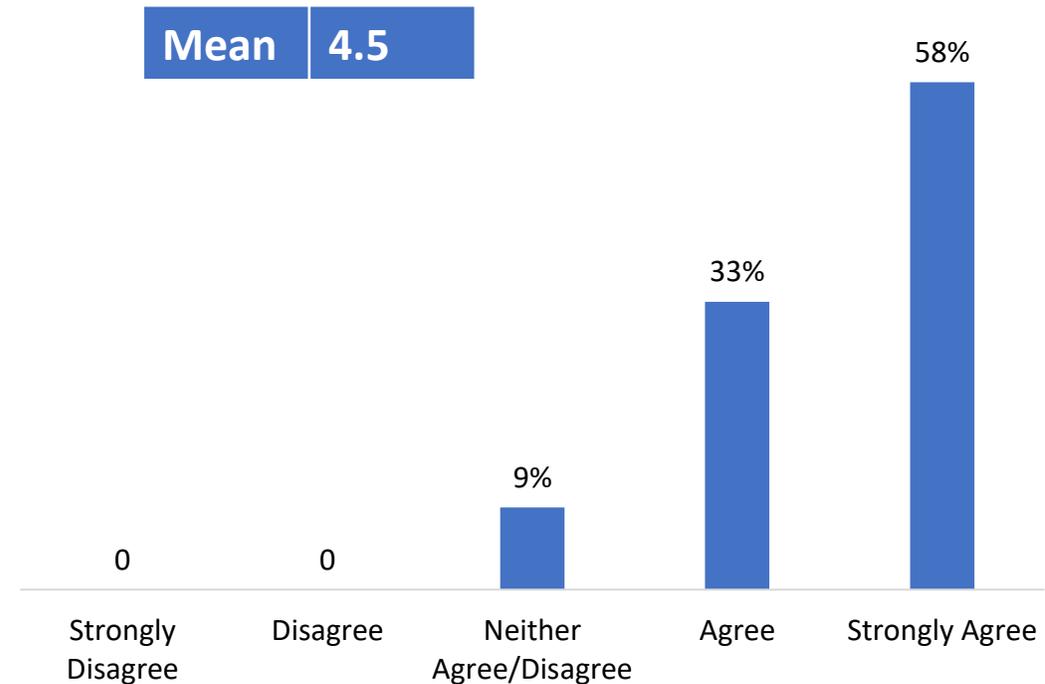
Most (91%) respondents feel strongly connected to their community



Giving back to people and place

- Over 90% of operators agree or strongly agree that they ‘feel strongly connected to the local community where they operate’.
- No respondents disagree (or strongly disagree) with the statement.

I feel strongly connected to the local community where I operate this business (n=64)

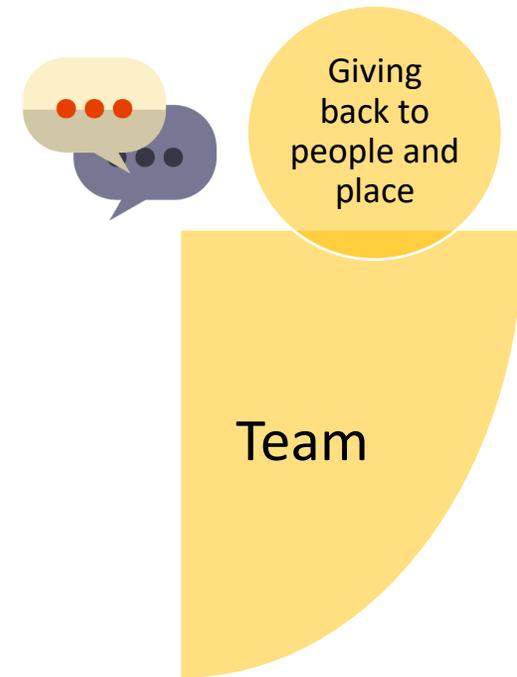


Engaging and looking after team members is an important part of MCET

Providing residents with work where they are engaged and feel like they are making a difference is another way MCET operators perceive they give back to people and place.

Giving back to people is important to operators, particularly in terms of developing a strong cohesive team that is engaged and wants to stay on. This is an important element of what the term 'marine ecotourism' means to them. "It's for the staff and the people where we source things, it's not just about the [type of wildlife] and the fish".

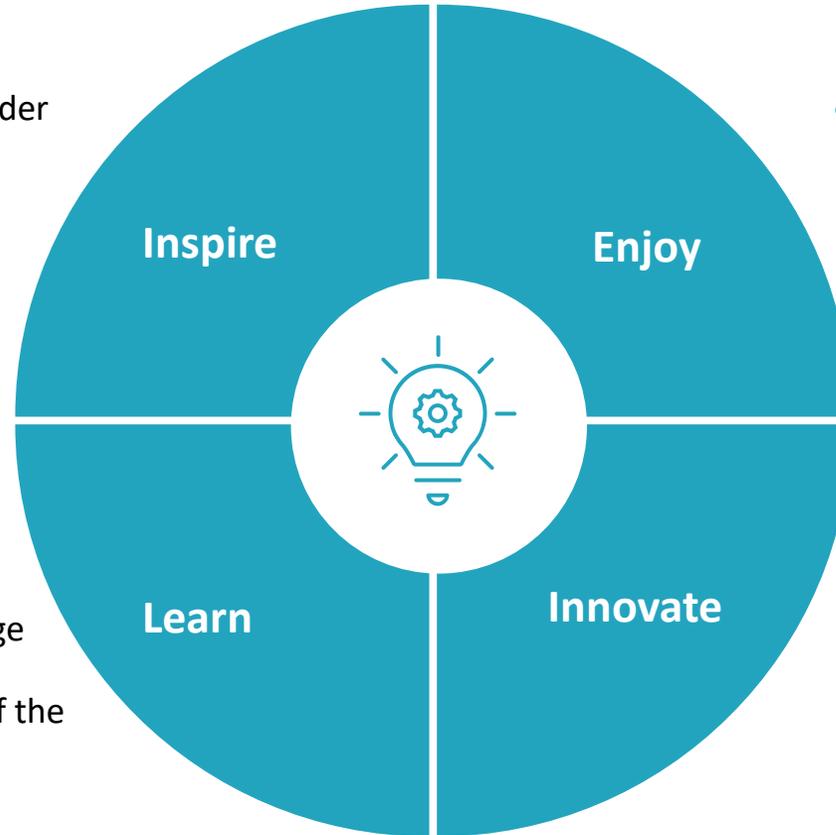
Looking after their people [staff] reflects the values of operators and supports them to deliver an outstanding customer experience. This is another key element of MCET that operators are proud of "the whole thing is a team effort; it starts from management and goes down to the cleaners. We have an open engagement with staff and are hands on. We've developed a culture that is then apparent to customers. We get many plaudits for friendliness and professionalism, and we pride ourselves on that."



3. Delivering an inspiring and enjoyable experience is a strong theme that is key for MCET

- 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

Creating an experience where visitors learn and leave inspired is a core part of MCET



MCET operators connect people to marine and coastal environments via well planned and managed experiences that enable people to responsibly engage with nature. These interactions plant seeds of conservation in the hearts and minds of visitors. Sixteen operators discuss the need to design and deliver an inspiring and fun visitor experience as a core element of what MCET means to them. Success is often gauged in the customer's response to having a whole new world under the sea opened up for them. The value for the operator comes from seeing this awe and wonder in others and instilling a passion for the ocean (learning how to and wanting to protect it).

Storytelling is vital to delivering a great customer experience. For operators to understand whether this has been achieved, a key barometer of success is positive word of mouth, returning customers and reviews on various platforms. **"I'm driven less by money than by storytelling. I'm not a great businessman. So, success means ongoing demand for our tours, which means that we're doing something right in terms of guest experiences and storytelling."**

Several operators noted that limiting visitor numbers creates a more meaningful experience, while more people in larger vessels creates a **"disconnect between that tourism experience and what you are doing"**.

Delivering a joyful and meaningful experience that leads to learning and being inspired about marine conservation is important to MCET **"it's about the customer experience and creating an opportunity through a fun enjoyable experience to become champions and advocates to protect the environment and learn about the marine environment."** Operators being knowledgeable about the subject matter (e.g., pelagic birds) and/or the local area and its history is key to delivering this experience, for some mana moana operators this includes sharing iwi stories with visitors.

Delivering an inspiring and enjoyable experience

Inspire

Learn

Opportunities exist to focus on regenerative product development

Delivering a **safe experience** for visitors is paramount to the whole MCET experience. This is something operators plan for and manage.

Designing an enjoyable experience that **creates lasting memories** for visitors is another success factor: “success for us is for our clients to go away having got something from the experience and taking away some really great memories and we have kept them safe as well”. The **team** are a key component to delivering this memorable experience.

Some shared that MCET must be **innovative** in what it delivers, including adding “**multi-dimensional**” elements and “**exciting activities**” to the experience. Opportunities exist to focus on regenerative product development, creating experiences where customers can have fun, enjoy their time on the water in a safe environment, learn and then also contribute to marine and coastal conservation.

Delivering an inspiring and enjoyable experience

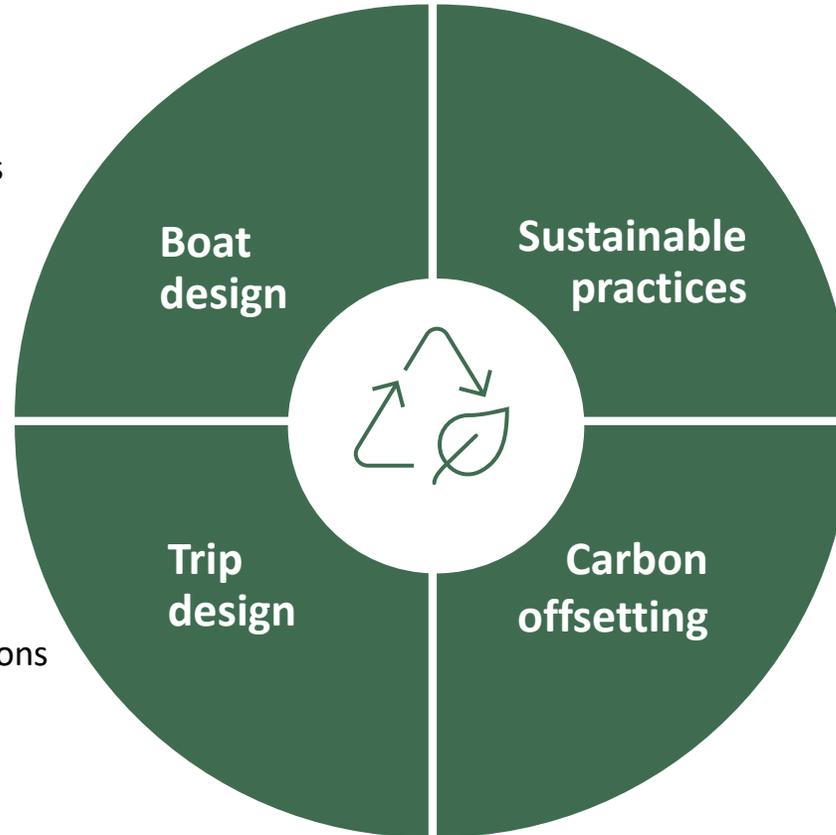
Enjoy

Innovate

4. Running a low impact operation is a core value that underpins MCET

- 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

Running a low impact operation is a key value of MCET

Eighteen operators believe it is important to ‘walk the talk’ and live up to ecotourism concepts by running a “low impact” business. They mention notions of “giving back more than you take” and being “net positive”. The view of “net positive” reflects a recognition that no business has zero impact (“even the manufacture of kayaks being a plastic good has an impact on the environment”) but having a “light footprint” and actively working to mitigate negative impacts is a focus for operators.

Ten operators said that the sustainable practices they implement include carbon off-setting schemes, eco-friendly products for cleaning, recycling/reusing, reducing waste-stream, and using local and ethical suppliers.

“Attention to minimising impact of cleaning/maintenance of boats, reducing waste stream.”

Four operators link to carbon off-setting schemes to mitigate the negative impact on the environment of using diesel-powered boat engines. Acknowledging MCET often requires the use of diesel, they comment “we give people the opportunity to offset their emissions, and we’ve just been blown away by the uptake of that. That money used to go to the [conservation trust], now it goes to the local school, and they’ve been given some land by the Council to reforest.”



Running a low impact operation

Sustainable practices

Carbon offsetting

Design to minimise impact



Boat design: Running diesel powered boats and road transport is another area ripe for mitigation activity, with several operators introducing new and more efficient boat designs and investigating electric boat technology. Operators highlight that they intentionally look at boat design such as jet propulsion boats to minimise noise and disturbance. Having wastewater facilities within the boat and not pumping this into the sea was another design feature that boats use. “We have a specially built boat where the noise is directed above the water rather than underneath. That helps protect the mammals, but people might think our boat is noisy above water. It’s a compromise. It cost us more, but we want to be seen as the most environmentally sustainable boat on the harbour.” Low impact forms of propulsion are also used - for example paddling and sailing.

Trip design: Other approaches adopted by operators include limiting numbers on tours and/or the number of tours, running a structured tour (i.e., using the same route to minimise impacts on wildlife). “We do try to minimise everything that we do, including cutting back on the number of trips that we do”.

Perceptions of the negative impacts of MCET raised by 10 operators stem from simply being an additional presence in the water with marine mammals “from the [type of wildlife]’ point of view, we’re interacting with them” however following regulations and “good boat behaviour” can mitigate these impacts. Many operators also regularly undertake rubbish clean-ups while they were out on tours - on the coast and on the water.

Many operators stress that by educating clients about how to interact responsibly with marine habitats, and advocating for the marine environment, they are creating a positive impact ‘legacy’. “It’s not greenwashing, it’s real, and hopefully it means that when people get home they’re thinking about, for example, what they do with their plastics”

Running a low
impact
operation

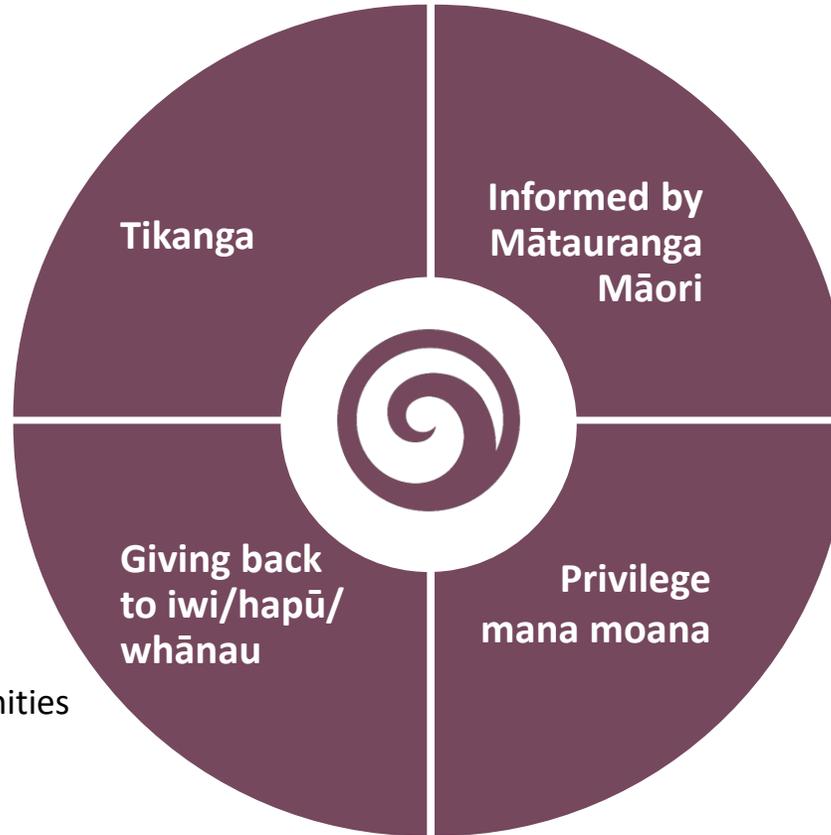
Boat
design

Trip
design

5. Te Taiao is critical for MCET in Aotearoa – raised by 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

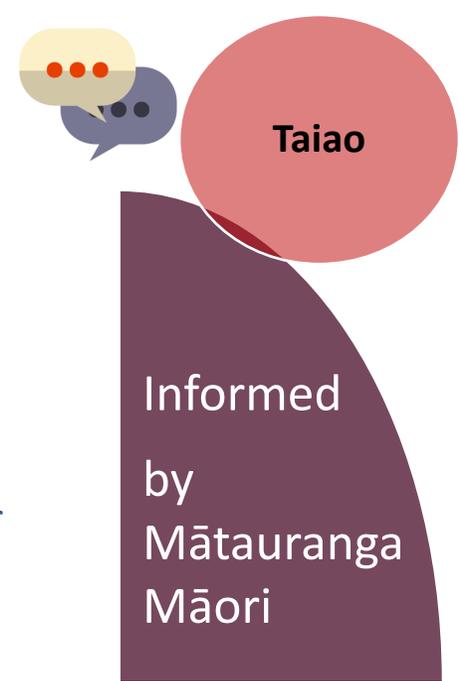
Mātauranga Māori is important to inform the MCET sector

Some Māori operators signal that there are opportunities to build on current efforts by MCET businesses that run low impact activities and deliver benefits. There is much to be gained by building expertise to embrace whakapapa knowledge and developing relationships based on shared aspirations with mana moana who have “an ancestral obligation” to work towards a sustainable resource for the future.

Māori MCET operators highlight that mātauranga Māori is integral to their role as kaitiaki of the marine environment. One operator commented that some MCET operators may lack knowledge and ‘expertise’ and notes that it is important to embrace whakapapa knowledge and develop relationships with the kaitiaki. “It is important for any marine activity no matter what it is to be engaging with Māori and haukainga, mana moana and kaitiaki of those pātaka, of those taiapure, of those customary fishing areas. All of the coastline are customary pātaka, customary fishing areas that belong that have a whakapapa to whanau, hapū and iwi...It is an ancient relationship that goes back to the beginning of time. The knowledge that is hidden inside of each of those whanau whakapapa captures the knowledge around those marine environments and the many different creatures that inhabit those environments is far beyond the understanding of modern-day science.” **Whakapapa** for this operator **goes deeper than ‘protection’** and describes a **reciprocal relationship** with the moana and the creatures within.

Mātauranga is context specific and is held in the pakiwaitara (narratives) of local iwi/ hapū/whānau. Some mana moana operators see the opportunity to develop new products in their business that incorporate mātauranga Māori as a strategic decision while others manifest this by empowering their people for example by incorporating Te Reo Māori and kapa haka as a way of engaging staff while improving the visitor experience. Other operators emphasise opportunities to critically examine western ways of managing fishing and build knowledge and awareness of how to understand, use and conserve wild food resources based on local mātauranga.

Some Māori operators do not identify with the term ‘ecotourism’ and used Māori concepts such as **sustaining/restoring the mauri** of the moana to better explain what they do.



Māori are kaitiaki of the pātaka and wider ecosystem that depends on it

One operator believes that having relationships with iwi that privilege mana moana's role as kaitiaki of the pātaka is key to the success of MCET in Aotearoa "if we talking about our pātaka our taia pure and anything happening along our coast of Aotearoa, in terms of Māori. You're talking about people conducting operations and activities in pātaka, in areas that are treated as cupboards as storehouses. Of food, of sustenance and long term. And they have been the kaitiaki of those pātaka forever in a day".

Another Māori operator echoes these statements about being kaitiaki of the pātaka and emphasises their concern about over-fishing from commercial and recreational sectors (including charter fishing). Specifically, this operator comments that "we can't rely on quota management systems because we are seeing fish stocks depleting. We need to stop trying to feed 50 million people on our fisheries and focus on 5 million. Because if we don't stop, we won't have a fishery to rely on. If we can all admit there's a problem, we've shown we can change it." The same operator also mentions "respecting the wild food resource" and "fishing sustainably, including changing the areas we fish in, not taking more than we need, and fishing seasonally".

With Māori being kaitiaki of the pātaka and the ecosystem that it connects to, some non-Māori interviewees made reference to the "balancing trick" between full marine protected areas and the general culture in New Zealand of "catching a feed from the sea" which is perhaps different to other parts of the world - "we understand and we appreciate that in New Zealand it is part of the culture it is part of the ethos and also from a mana whenua point of view there's certain rights that pertain to that as well – it's an interesting balancing trick (relating to marine protection access and fishing)". This echoes statements from some Māori, and non-Māori operators alike, that the current quota system for fishing drives attitudes of entitlement rather than creating a sustainable system of resource management.

Another Māori operator discusses the concept of kaitiakitanga as being a better way to describe what they do rather than ecotourism "it's (ecotourism) a term used at [name of business] but would prefer use of Kaitiakitanga" – this extends beyond the environment, to their iwi/hapu and wider community. The same operator expressed that success for them was an expression of Manaakitanga, Kaitiakitanga, and Tino Rangatiratanga.



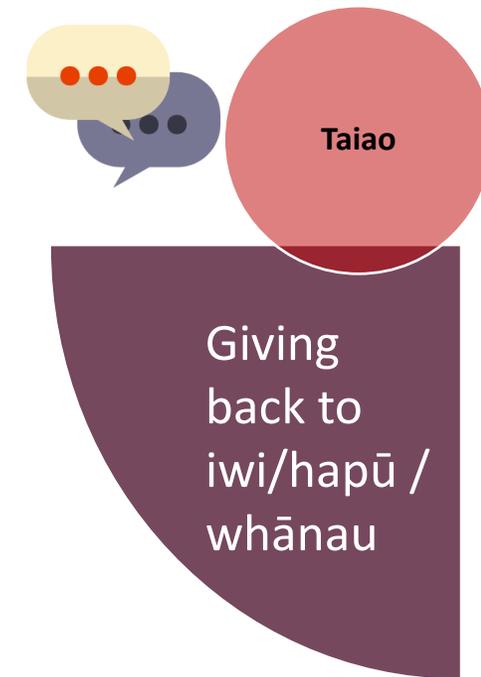
Taiao

Privilege
mana
moana

For mana moana operators giving back to iwi is a key principle

A key part of marine ecotourism for iwi owned businesses is giving back to the iwi, including pathways into employment training and skills development for their community. Beyond giving back to the iwi for one operator, giving back to the wider community is also important including employing local people, supporting the elders in the community, and opening up business to the younger generation by linking to schools - “**Founding principle is that we should be a benefit to the community. Support food banks, wood for elderly over winter**”. For large operators, both Māori and non-Māori, the presence of marine and coastal ecotourism enables opportunities for people and becomes an anchor point in the community.

Another Māori operator, while not mana whenua of the local area, notes they are inspired by and follows the path of a successful iwi owned marine ecotourism operator who built their business on being very conscious of their impact on the environment and having strong community connections. For this operator - and reflecting wider comments from both Māori non-Māori operators - success is “**to be commercially viable but not at the cost of the ecosystem**” they want to be able to “**pass on the environment as we found it for future generations**”.



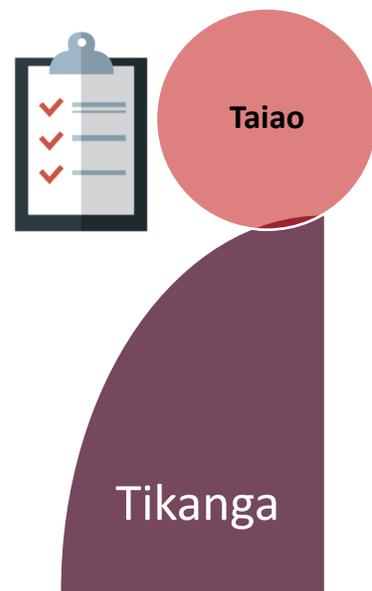
Mana moana can share tikanga relating to operating in the marine environment

Survey responses from Māori operators reflected interview themes of, in some cases, a lack of cultural capacity of non-Māori operators and how this could be strengthened through the sharing of tikanga. As one Māori observed tikanga wasn't practiced by others “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”.

Another operator talked about sharing tikanga including the importance of spiritual aspects that relate to places where MCET takes place, for example they talked about the importance of the urupa along the river that affects the wairua (spirit) of the water source and another talked about how marine ecotourism could be used to “highlight how important the wai is to us. How important Tangaroa is to very existence, the existence of humanity”.

Another operator (mana moana) noted that they are happy to share their knowledge and tikanga about the marine environment where they operate with others yet they were cautious about it not translating into others replicating their stories (their IP). “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.” Its important when building relationships that these are based on reciprocity, tikanga, and that have accountability processes that protect the rights and the IP of mana moana.

One operator in the survey chose to share that they had sought the blessing of local hapu prior to starting the business showing the importance of building relationships with mana moana for a successful MCET business.

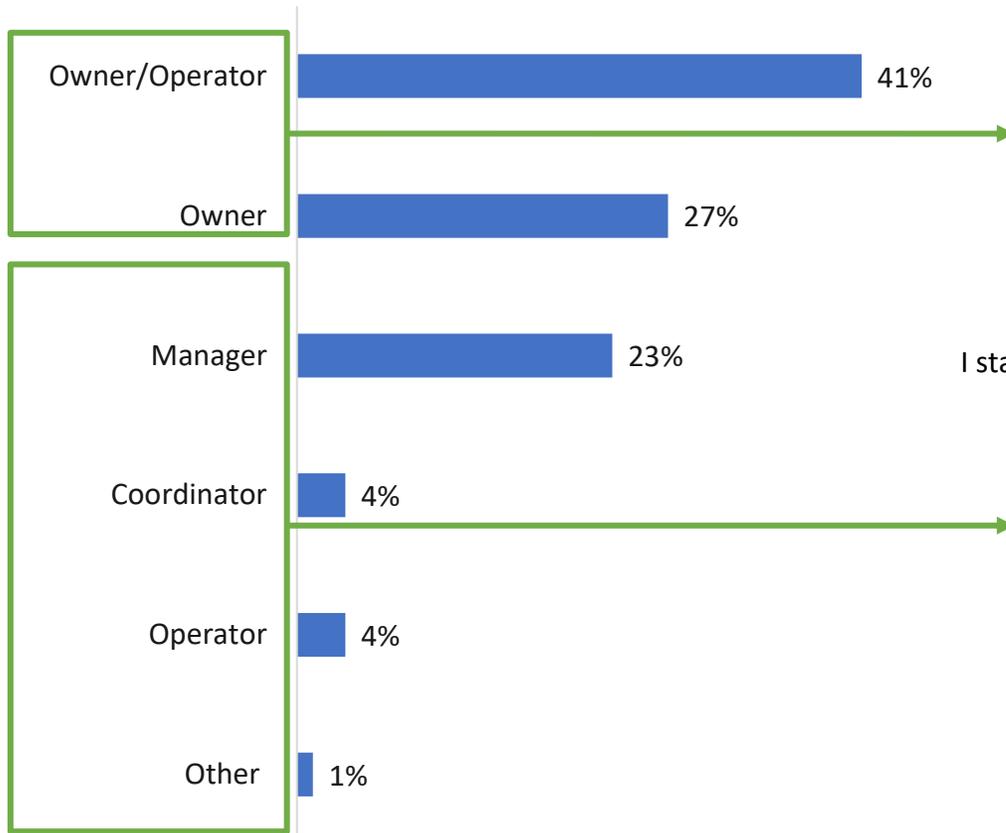


Marine and coastal ecotourism operator characteristics

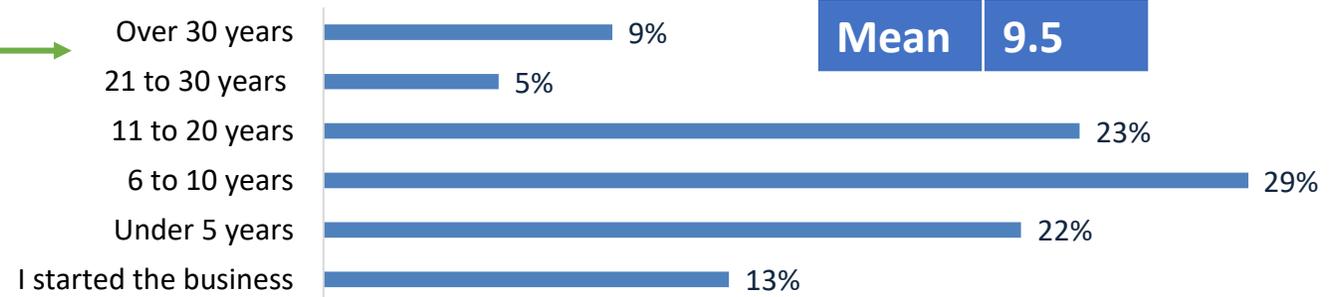
Most survey respondents (68%) are the business owner and have been in their role for an average of 9.5 years. Others (non-owners) had been in their role for an average of 5.8 years



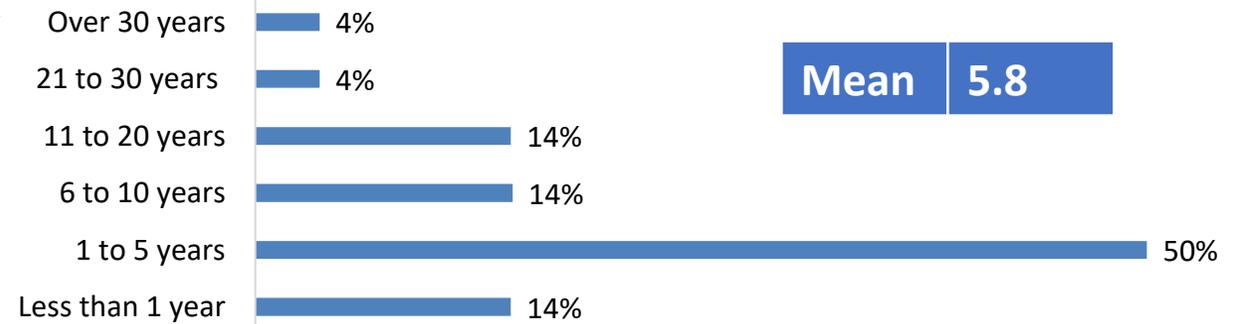
What is your role in this business? (n=85)



How long have you owned the marine and/or coastal tourism business? (n=56)



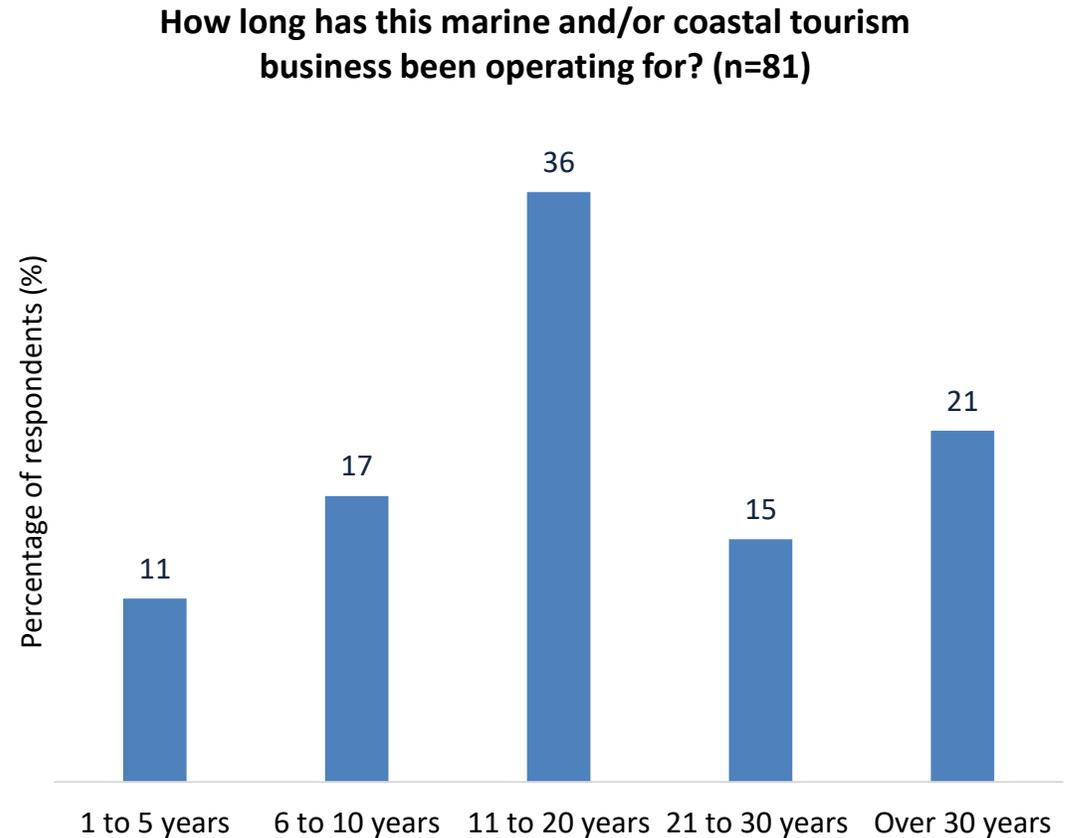
How long have you been in your role? (n=27)



Over 70% of respondents have been operating for over 10 years



- Over a quarter (27%) have been operating for 10 years or less
- More than one in five businesses have been operating for over 30 years
- These findings are consistent with the findings from the database sample

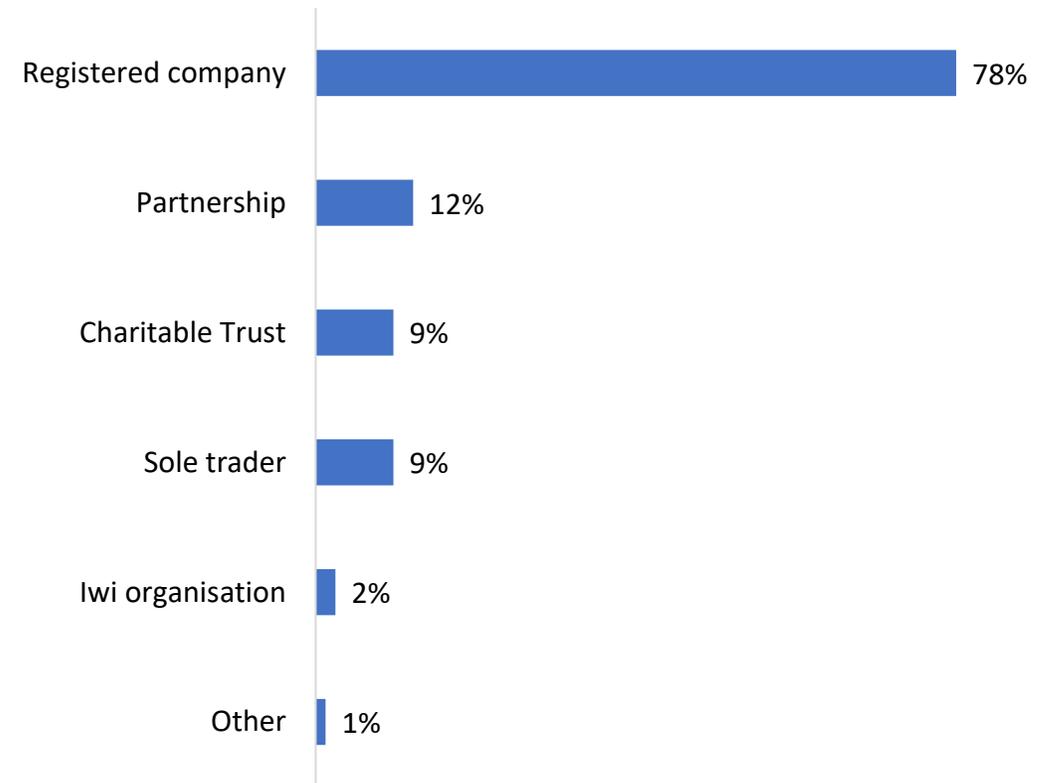




Most businesses are registered companies

- Most (78%) businesses are registered companies
- Eight businesses have a charitable trust status
- Two businesses are iwi owned

What is the structure of the business (n=85)?

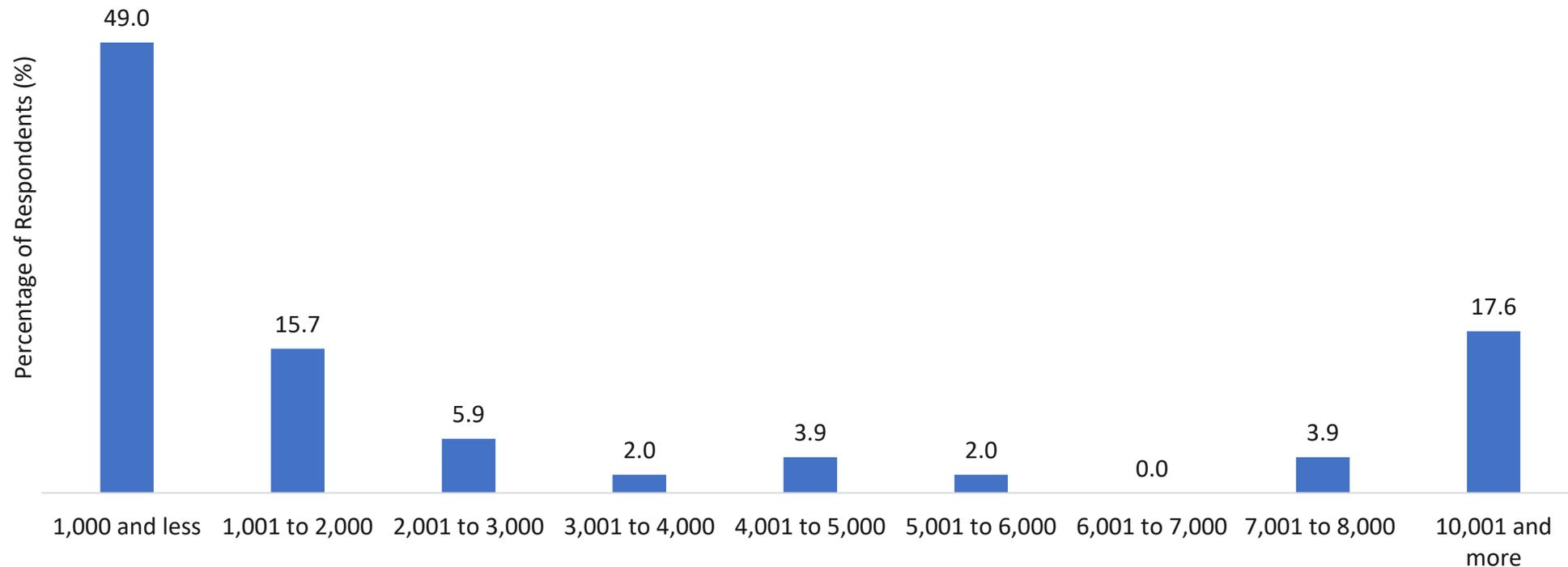


Note: Multiple responses, therefore total does not add up to 100%.

Nearly two-thirds (65%) of businesses had 2,000 or fewer customers (June 2020 to May 2021). Nearly 1 in 5 operators had over 10,000 customers in the same period



Approximately how many customers did your marine and/or coastal tourism business have over the past 12 months (June 2020 to May 2021)? (n=51)

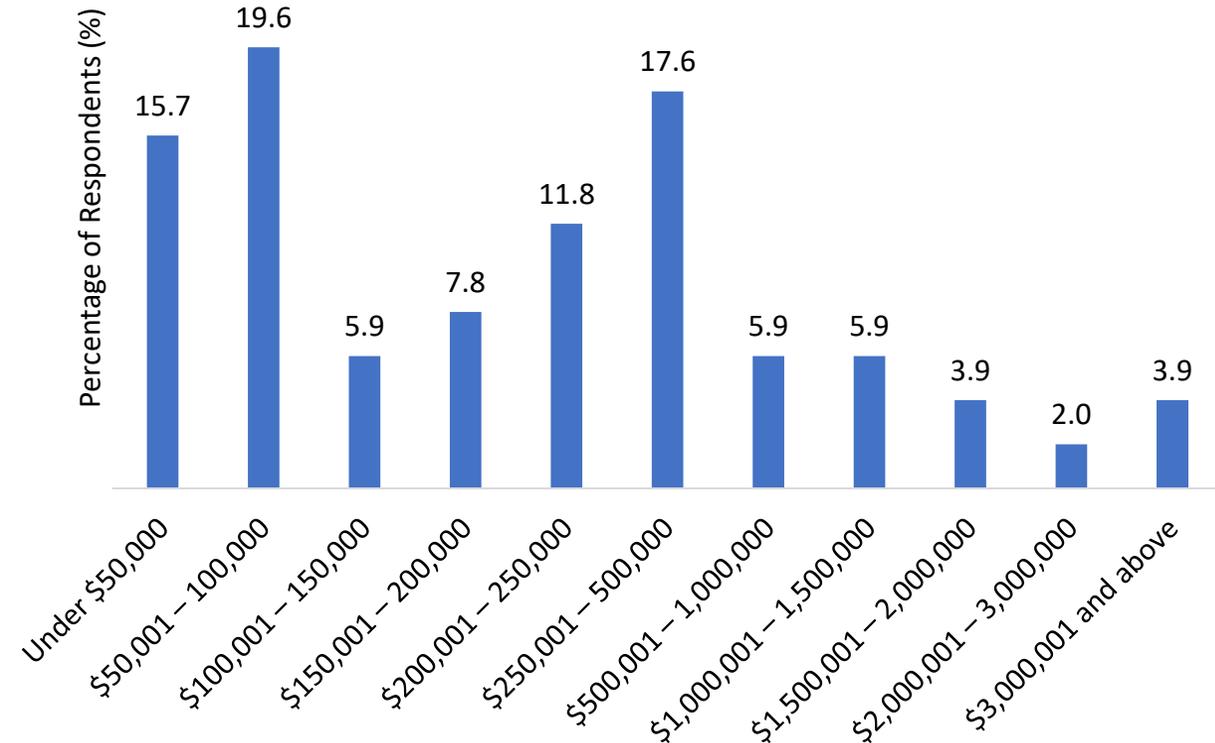


Turnover varied greatly among marine and coastal ecotourism operators from June 2020 to May 2021



- 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)

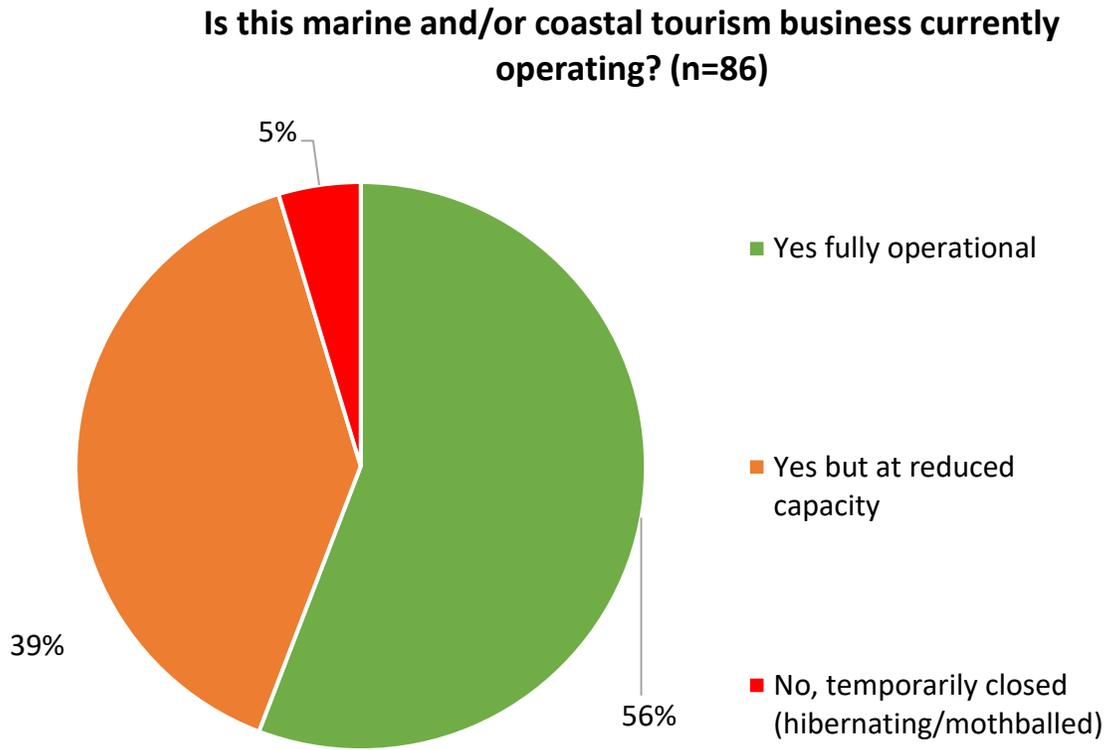




Over half of businesses surveyed are fully operational and 39% are operating at reduced capacity

Over half of marine and coastal ecotourism operators surveyed are fully operational despite the challenges of COVID-19, while 5% are temporarily closed. Thirty-nine percent are operating at a reduced capacity.

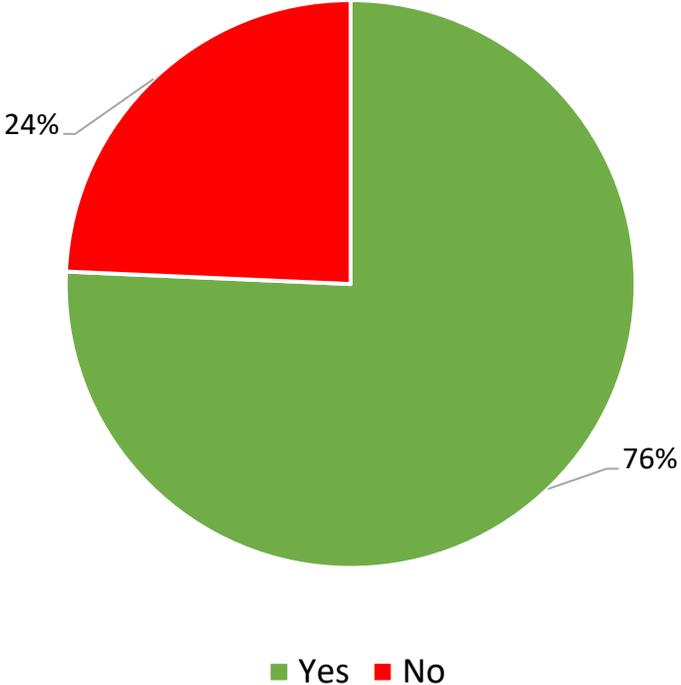
NB: Businesses that were permanently closed were asked not to complete the survey



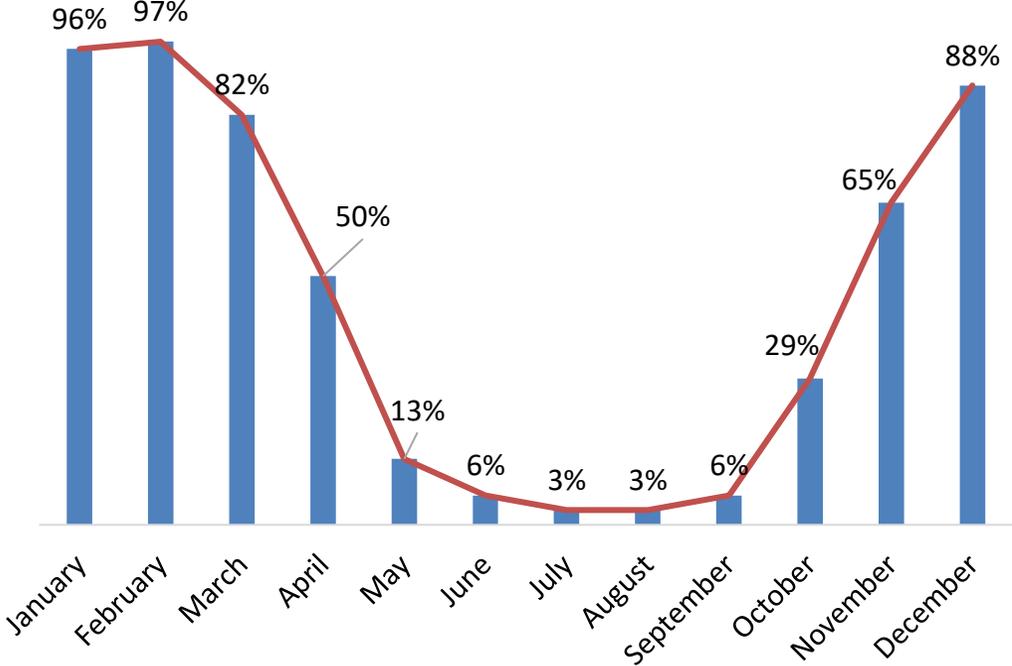


Three quarters of MCET businesses operate all year round, nearly all consider the summer months to be high season

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)

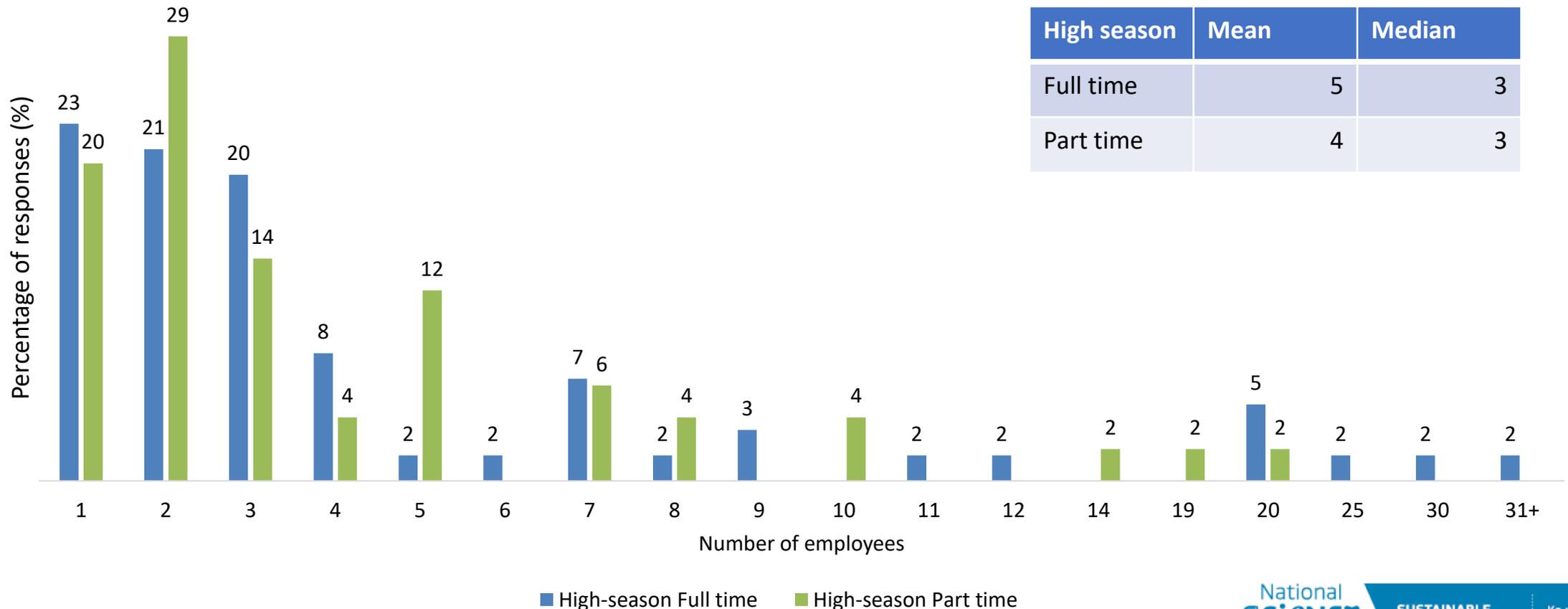


Note: Multiple responses, therefore total does not add up to 100%.

HIGH SEASON - On average businesses have 5 full-time staff and 4 part-time staff. The median for both full and part-time staff is 3



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)

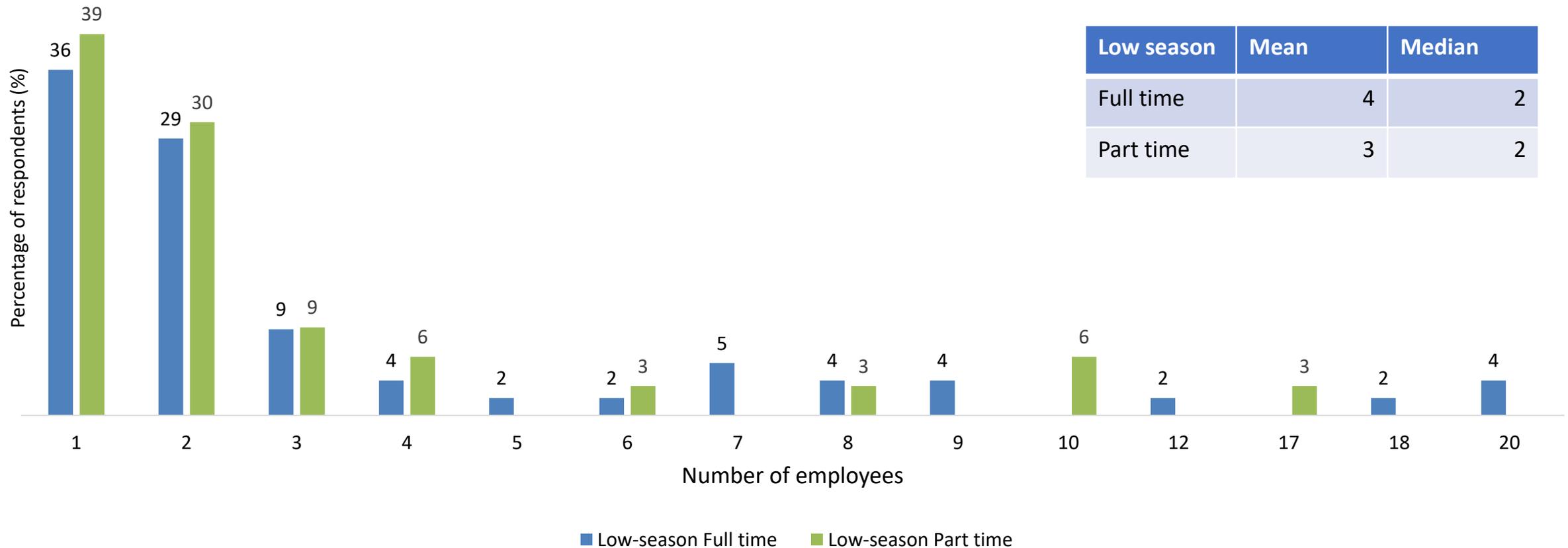


High season	Mean	Median
Full time	5	3
Part time	4	3

LOW SEASON: The average number of full-time staff is 4 (part-time 3)



LOW 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)



Low season	Mean	Median
Full time	4	2
Part time	3	2

Operators set up where they are local to the area and/or because of the natural beauty and wildlife potential



Interviewees were asked why they chose to set up in the location they did. The two reasons most cited are that they are local to the area or have family ties and because of the environmental quality and biodiversity including the presence of marine/coastal wildlife “I doubt I would have done this anywhere else in NZ. Water clarity, marine life”.

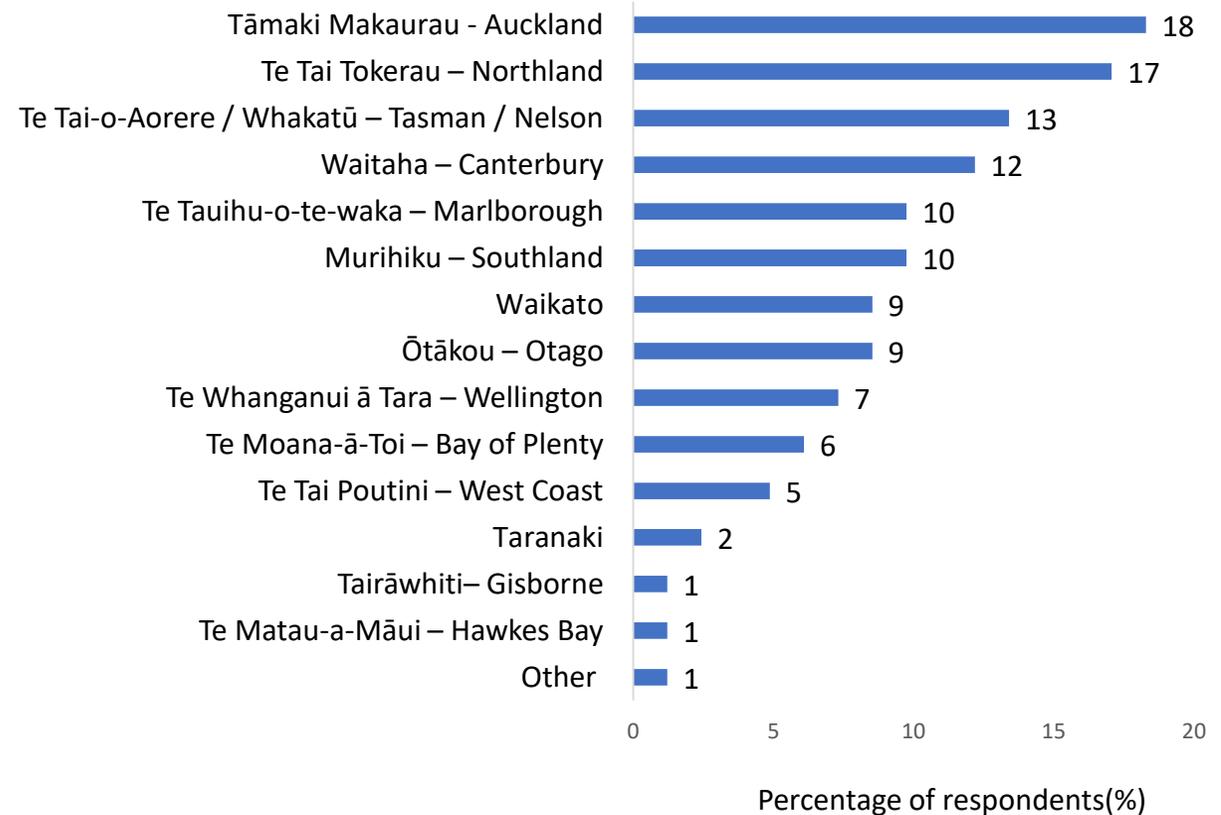
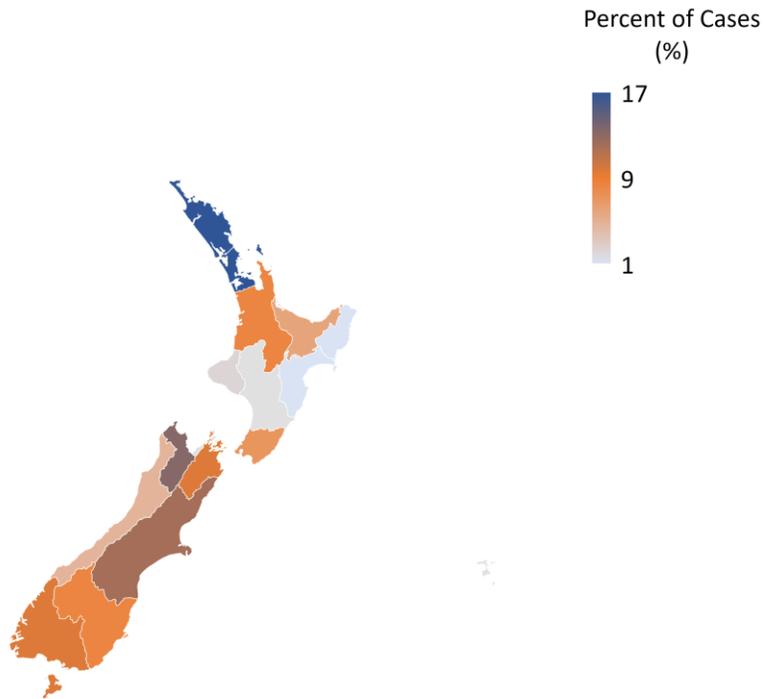
Others acquired an existing business in the area or chose the area because there are good marine protections such as marine reserves. Additional reasons cited are that they liked the area and wanted to settle and start a business, that there is a temperate climate, and good marine facilities available.



Over a third of operators (35%) surveyed are based in Tāmaki Makaurau - Auckland and Te Tai Tokerau – Northland. This is consistent with the database sample



Where does this marine and/or coastal tourism business currently operate? (n=82)



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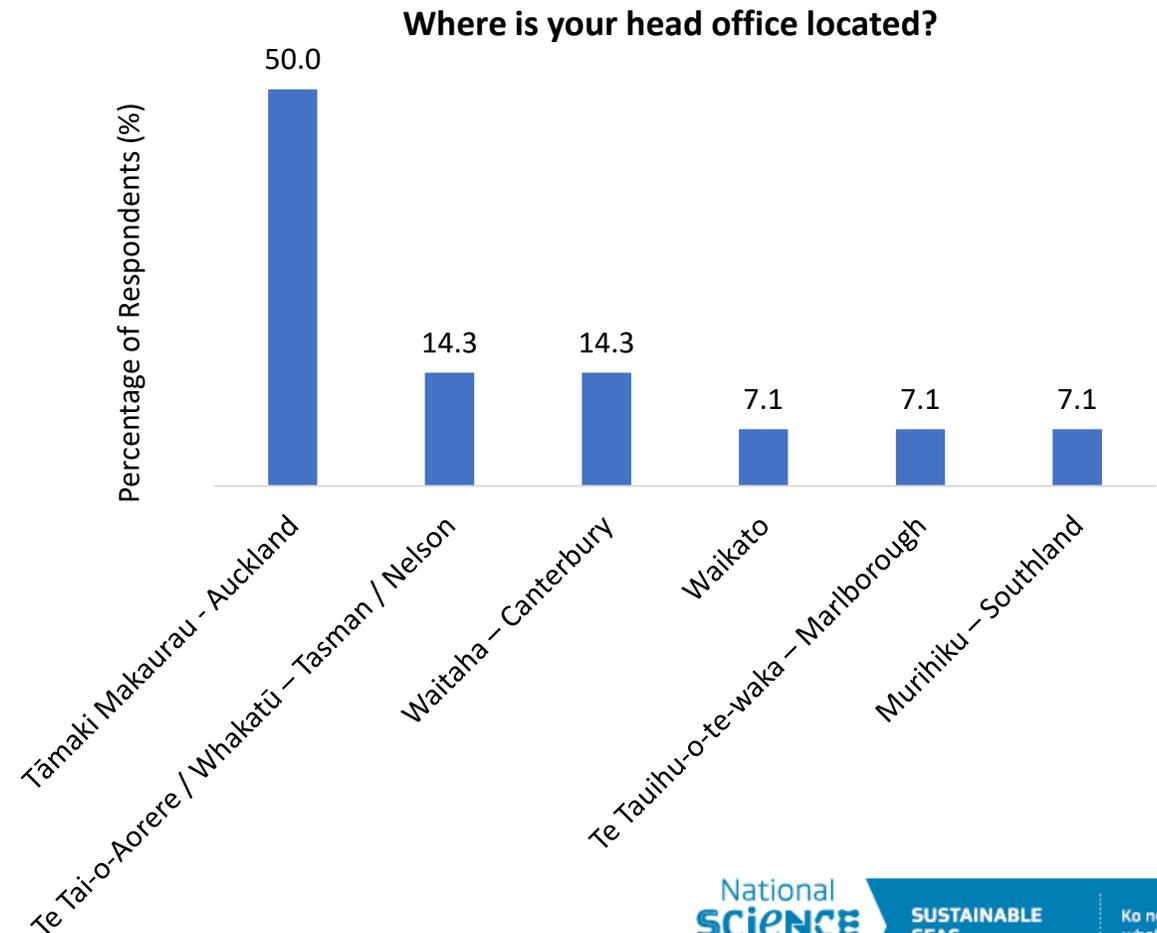
Note: Multiple responses, therefore total does not add up to 100%.

Half of those who operate in multiple locations are based in Tāmaki Makaurau - Auckland



Those operators (n=14) who chose multiple locations were asked to identify where their head office was located.

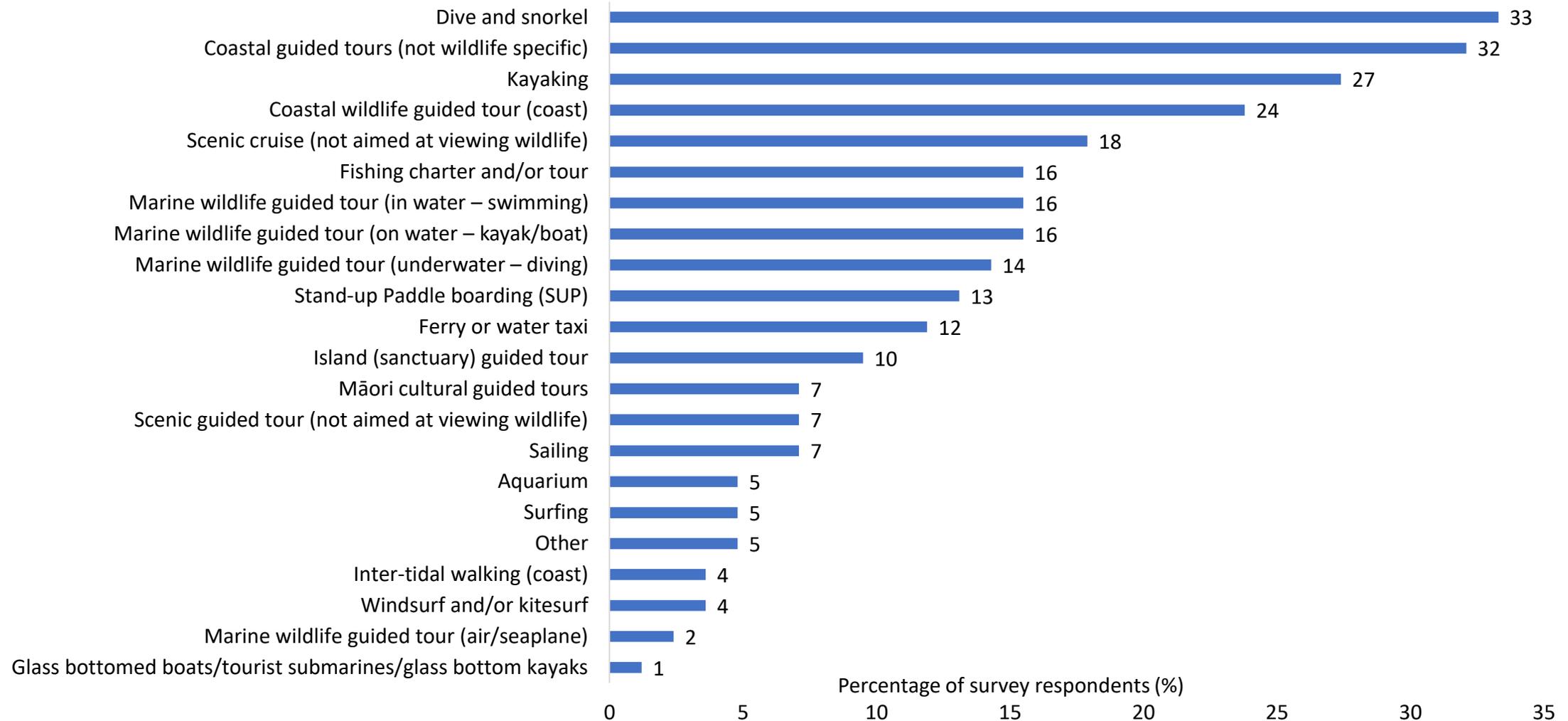
- Half have a head office in Tāmaki Makaurau - Auckland
- Other locations included Murihiku - Southland and the Waikato



Dive/snorkel and coastal tours (aimed at viewing wildlife) are the most commonly offered activities in the sample



Type of marine and coastal activity offered (n=84)



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

Diving/snorkelling and kayaking are the main focus of businesses that indicate they offer multiple activities in the survey

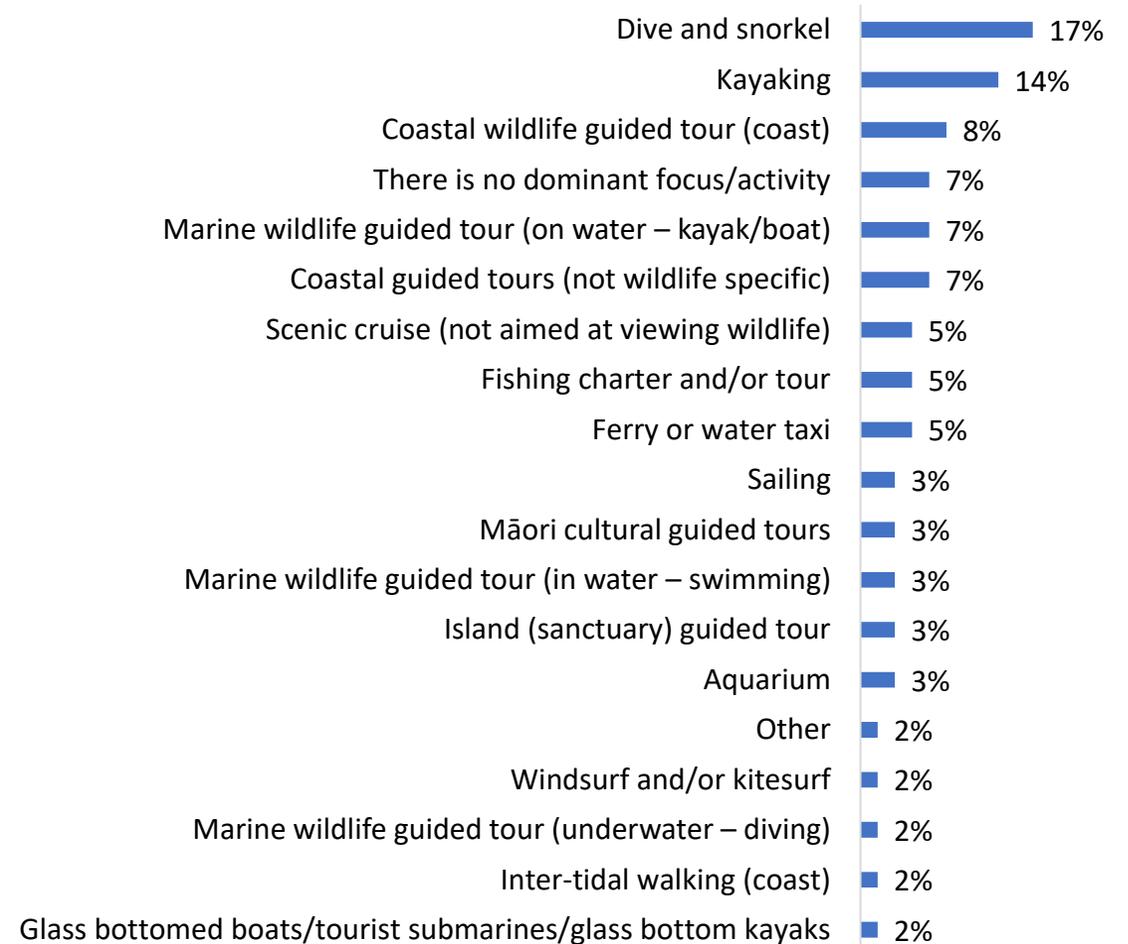


When asked what type of marine and coastal activity they offered, over three-quarters (78%) of respondents selected more than one activity. These respondents were then asked to select what they considered to be the main focus of the business.

For businesses who have more than one activity as a focus, dive and snorkel (17%) and kayaking (14%) were the two most frequent activities that were considered the main focus.

Seven per cent of operators did not consider any activities to be dominant. For others that offered multiple activities, coastal tours focused on wildlife (7%), and scenic cruise (7%) were their main focus.

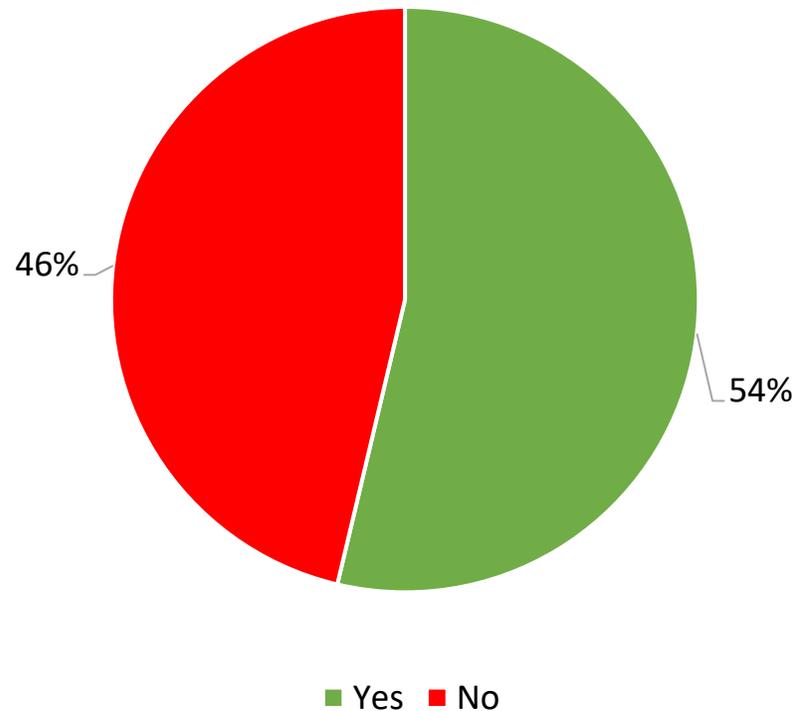
What activity do you consider to be the main focus of the business? (n=59)



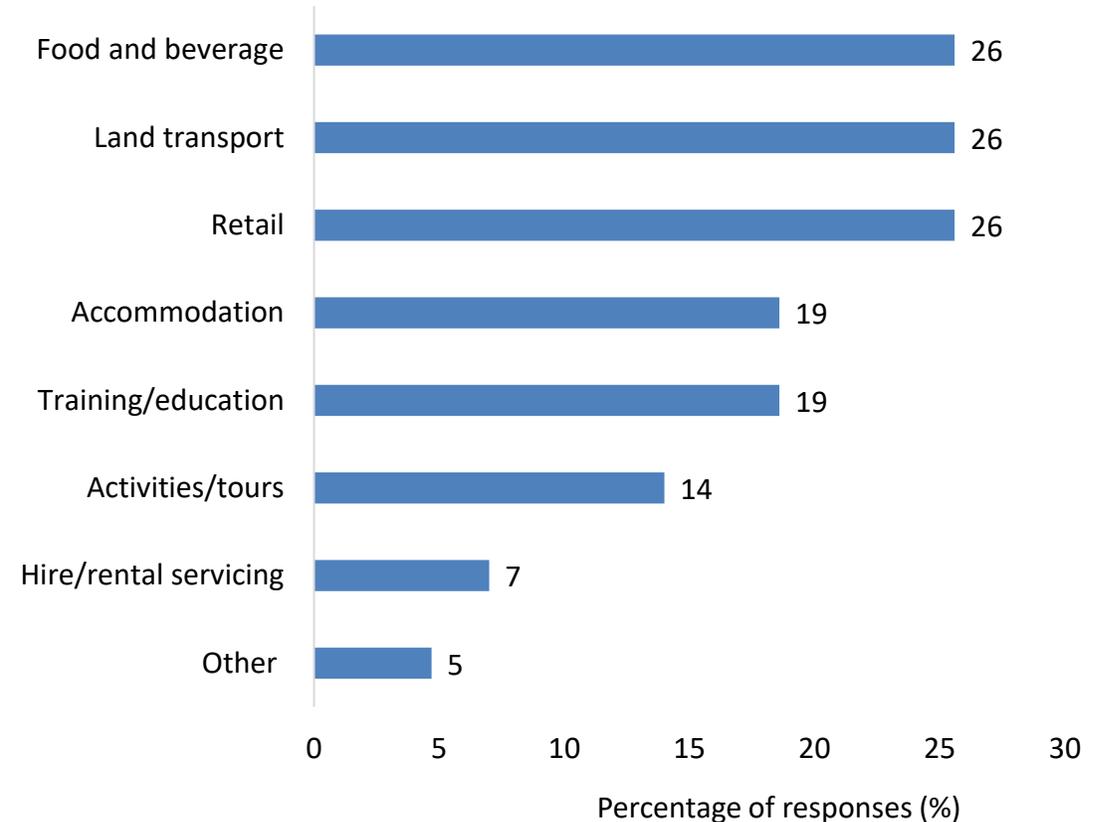
Over half of respondents provide other services in addition to MCET experiences, with food and beverage, land transport and retail being the most common



Do you provide any other business activities? (n=82)



What other activities do you provide? (n=60)

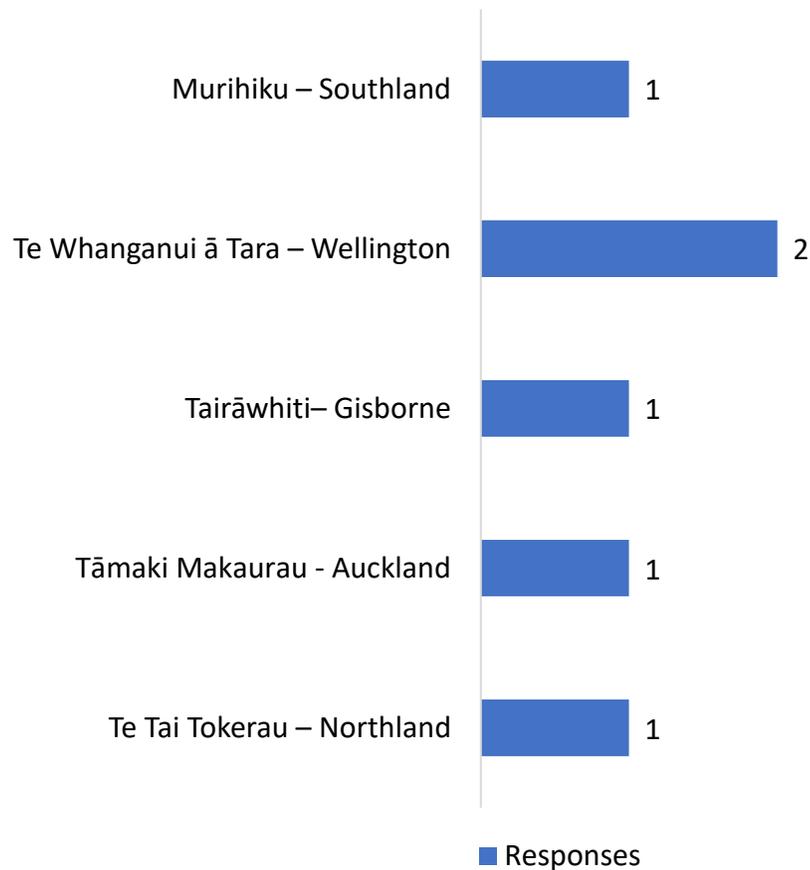


Note: Multiple responses, therefore total does not add up to 100%.

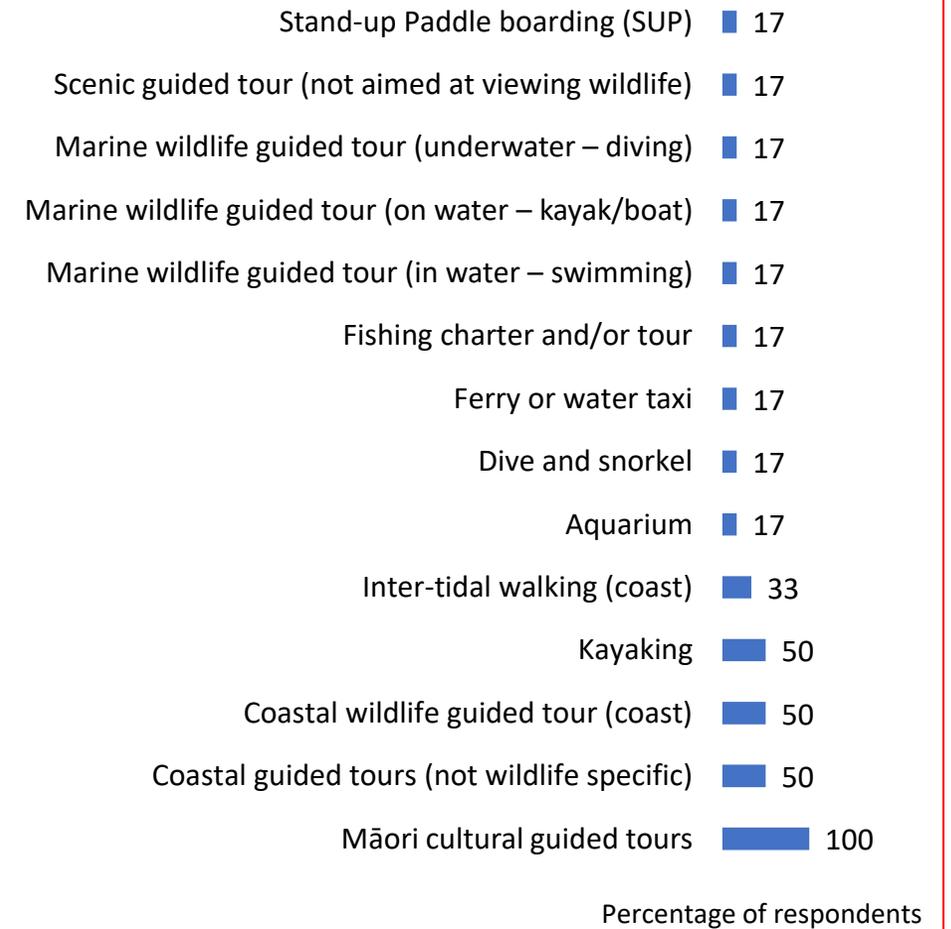
Māori operators in the survey are mostly located in the North Island



Where do you operate? (n=6)



What visitor activities do you provide? (n=6)

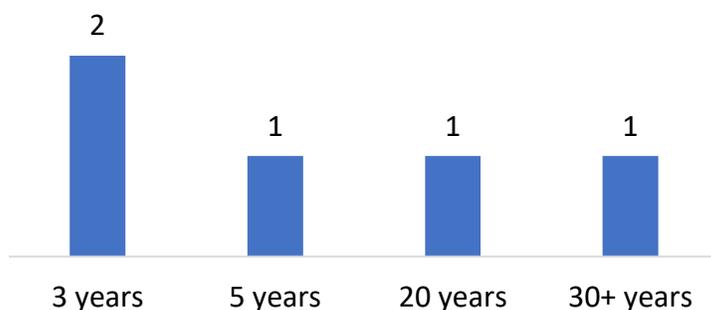


Note: Multiple responses, therefore total does not add up to 100%.

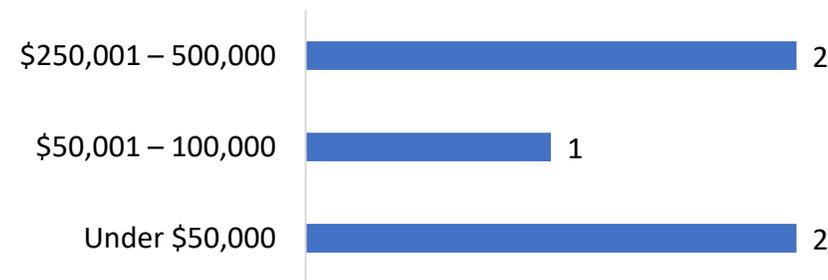


Māori businesses are diverse in size and age

How long has the business been operating? (n=5)



Approximate annual turnover (n=5)



How does the turnover compare to the past 12 months? (n=5)



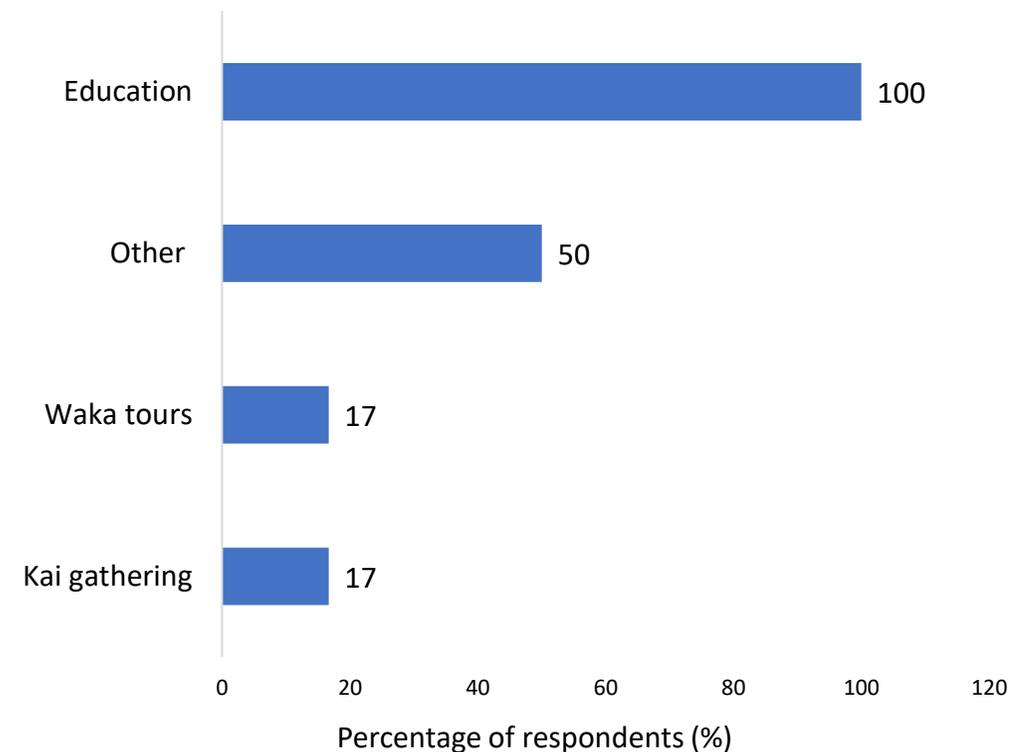
Staff	High season		Low season	
	Part-time	Full-time	Part-time	Full-time
Mean	4	1	2	1
Median	5	1	2	1

The survey highlights that education is a core component of Māori cultural guided MCET tours



- For the six operators who run marine/coastal Māori cultural guided tours, the main focus is education with all operators indicating their tours included this component
- Three responses to 'other' included historical and cultural tours specific to the area, walking tours and cultural engagement with a conference/function centre, and tikanga
- Fewer Māori cultural tour operators focussed on kai gathering and waka tours than education

What types of activities do your Māori cultural tours include? (n=6)



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

Business challenges and opportunities



Greatest opportunities 2019

Expansion and diversification opportunities abound

Businesses were in good shape prior to 2020; research participants indicated that the greatest opportunity at this time was to expand and invest in the business. Operators invested in new boats, bought other businesses, expanded to new sites, developed new products and invested in conservation and research activities. This indicates a degree of business confidence among operators prior to the onset of the COVID-19 pandemic.

Larger businesses looked to expand ecotourism activities across some of their other marine-based business - for example adding more interpretation and research activity to sightseeing tours. “There were opportunities to host more people, so we were thinking about how to grow those winter opportunities to get better asset utilisation. Also starting to develop more products in the areas where we operate.”

While some chose to expand in a buoyant tourist market, others focused on enhancing and investing in their existing product. One operator had previously catered to a very busy backpacker market and had moved “full circle” to smaller interactive groups. Others were actively pursuing growth opportunities.

For some investments were not focussed on business expansion, but on opportunities to give back “we had good revenue, so we had opportunities to do more research, more use of existing dataset.”

Greatest Challenge 2019

Struggling to meet demand and community tensions rise over growing visitor numbers



On the flip side **the rapid growth in tourism** was also the greatest challenge in 2019. Rapid growth strained staffing and capacity “we were swamped with business and were fatigued”.

Growing visitor numbers also put a strain on community relations “tourism was growing so fast that people outside of tourism were getting frustrated with ‘over population’ of international visitors in small places”. For some the number of cruise ships in local communities and their perceived impact on marine mammals had local people saying, “enough is enough”.

Two operators noted that the number of visitors on tours “detracted” from the experience. Another said that they were reaching their peak and didn’t want to expand further “we wanted an individualised experience, not a cattle truck mentality”. Others struggled to upscale at the pace needed to meet the demand.

COVID-19: raised awareness of the domestic market. Government support for tourism businesses receives some criticism.



Eighteen businesses commented that the greatest opportunity that COVID-19 brings is **tapping into the domestic market**, with operators noting that Kiwis are out to explore their own backyard and tick off “their local bucket list”. Several operators enjoy the opportunity to engage with domestic visitors “we get appreciation back from New Zealanders” and another said that “I expected (Kiwis) to be less into the conservation ideas but I’ve been excited to share our message and people have been really receptive”. COVID-19 has **raised awareness of the importance of the domestic market** with some noting that these visitors are more evenly distributed throughout the year enabling a more sustainable business model.

Conversely, four operators note the challenges that the domestic market brings, including the “challenge of keeping price accessible to domestic tourists and maintaining the viability of the business”, and that demand had been low which some felt was compounded by a lack of marketing support of MCET by their Regional Tourism Organisation.

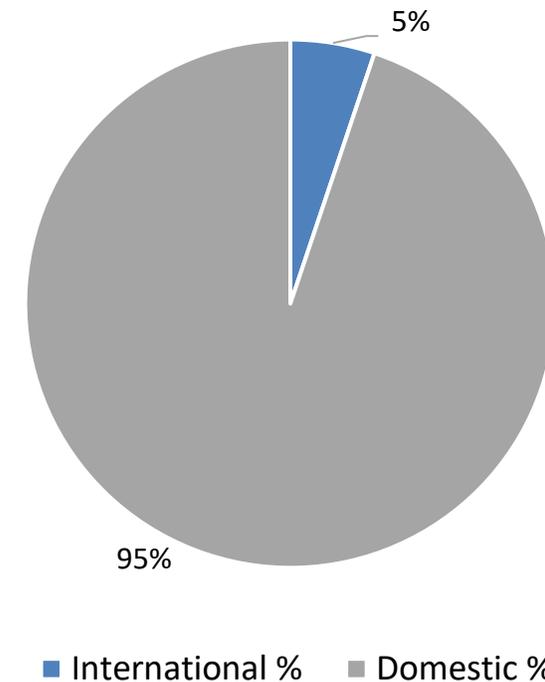
Some operators also noted that they were **concerned for the mental wellbeing of their staff** especially during lockdown and “the doom and gloom”. While government financial support was offered to operators under the **Strategic Tourism Asset Protection Programme (STAPP) only a select few got the funding** leaving some operators with “survivor's guilt” and others who didn’t receive it struggling to “compete against a well-resourced (by the state) competitor”. Others noted that “some companies should have been allowed to fail rather than being artificially supported”.



COVID-19: The domestic market keeps operators afloat

- Operators depended heavily on the domestic market from June 2020 to May 2021 while international borders were closed
- Despite border closures there was still a small number of international visitors (5%) recorded

What was the approximate split of customers for your marine and/or coastal tourism business over the past 12 months (June 2020 to May 2021)? (n=64)





COVID-19: Businesses suffered in 2020, but one silver lining of COVID-19 is the chance to plan strategically and experiment with new business models

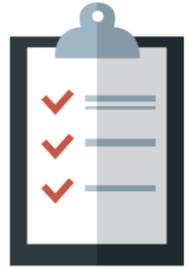
The greatest challenge attributed to COVID-19 is a loss of business due to **lockdowns and lack of international visitors** as well as attempting to run a business in a time of **ongoing uncertainty**. The loss of business has seen operators go into “**survival mode**” and several have had to let staff go. However, as tough as the downturn is, it has brought time to plan and rebuild strategically “**without it we might not have slowed down and thought about what we’re doing**”.

Several initiatives focussed on integrating a philanthropic approach to strengthen the business model by giving back more to the community. Several operators are shifting focus to engage with schools and “**marine explorer programmes**” often looking at ways to link to low decile schools. Others took the opportunity to consider how to make their operation more sustainable going forward, for example aiming to achieve zero emissions. Some look at it as an opportunity to promote staff engagement with meetings/hui to hear from the front line on how to improve the visitor experience.

Other innovative strategies emerged “**we decided to offer tours with no fixed price, pay what you want...and spend what you’ve saved on other businesses to help others. We were blown away. It worked really well. Kept our spirits up and helped tremendously with advertising.**”

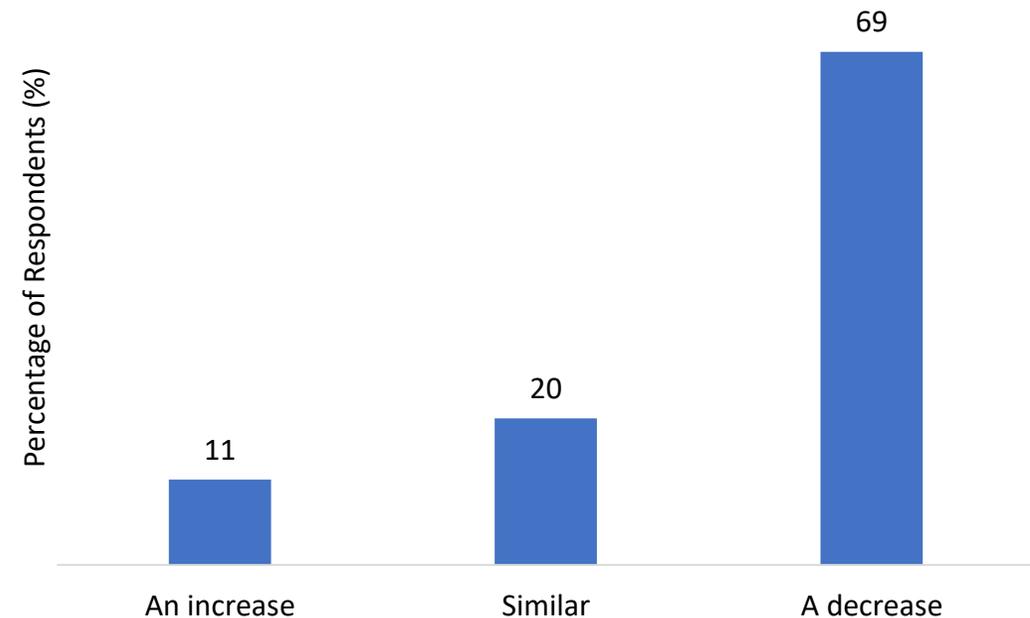
Another silver lining was reduced concerns in the local community about high visitor numbers/over-tourism. Several operators also observed that marine life also flourished during the three-month break brought by the first lockdown with one operator reflecting that the (first national) lockdown was “**good for the ocean, but not so good for the wallet**”.

COVID-19: The majority of operators surveyed saw a decrease in turnover from June 2020 to May 2021



- A decline in business turnover is clearly linked to the effect of COVID-19 on customer numbers
- Over two thirds of operators (69%) saw a decrease in turnover of their business from June 2020 to May 2021
- One in five operators had turnover similar to 2019
- Only 11% saw an increase in turnover

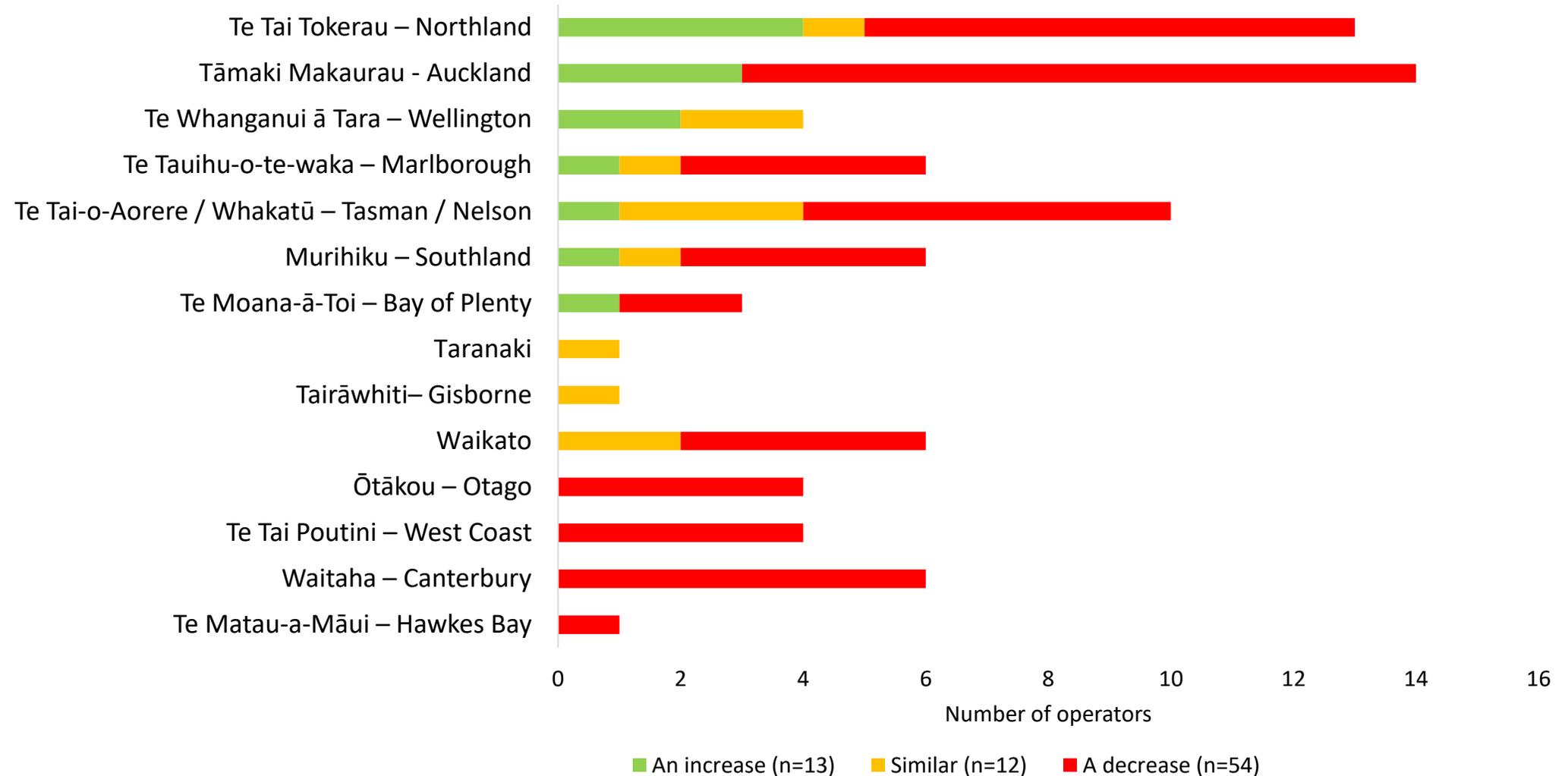
Looking at the past 12 months (June 2020 to May 2021), how does the turnover of your marine and/or coastal tourism business compare to January to December 2019? (n=61)



COVID-19: All regions struggled with visitor declines from June 2020 to May 2021 – operators in Otago, West Coast, Hawke’s 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?



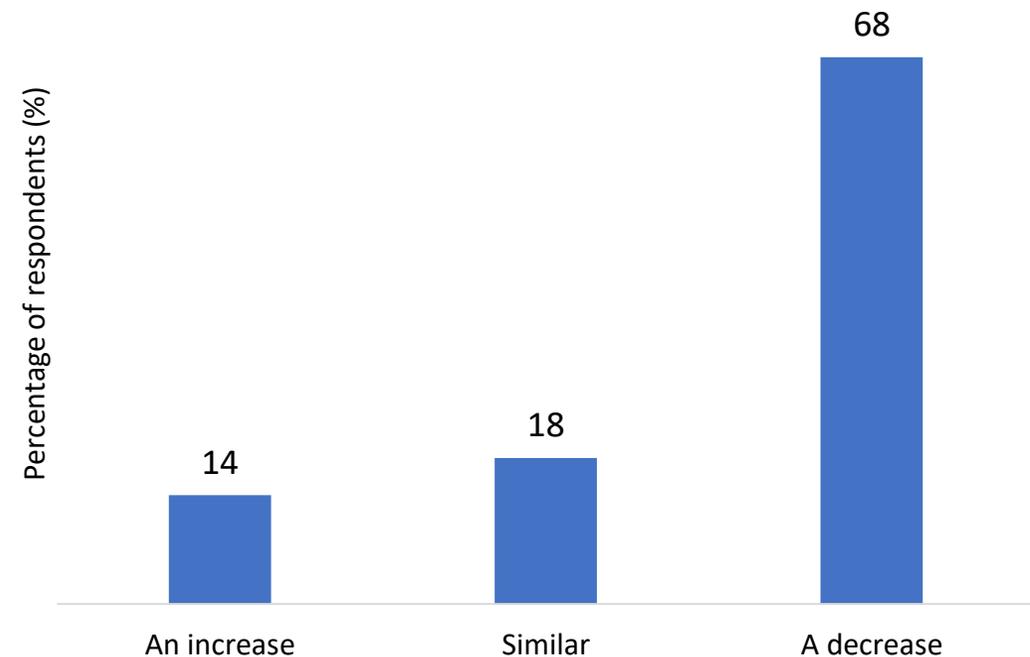


COVID-19 caused a decrease in customer numbers for most operators

Survey respondents were asked to compare customer numbers for the period June 2020 to May 2021* to January to December 2019.

- Over two thirds (68%) of operators saw a decrease in customers over the past 12 months compared to pre-COVID-19 levels
- Interestingly 14% (n=9 operators) experienced an increase compared to pre-COVID-19
- Almost one fifth (18%) had a similar number of customers compared to 2019

Looking at the past 12 months (June 2020 to May 2021), how do your customer numbers compare to January to December 2019? (n=66)



*The period of June 2020 to May 2021 was chosen for comparison to avoid inclusion of the national lockdown from (March - May 2020).

Future outlook : Adapting the business focus to giving back more



Looking beyond 2022, some operators reflect that New Zealand will be seen as a “desirable destination” possibly attracting a higher value visitor (domestic and international) giving operators the chance to look at “high value low volume” strategies. A few express concerns that “a flood” of visitors could lead to a “return to worse” with operators wanting to make up for lean years but “at what cost to the environment where we all live and our communities”. Several operators do not want to go back to the unsustainable nature of tourism in 2019 with operators reflecting on community attitudes saying that there “is lot of pressure to not go back to the status quo” and operators focusing on the necessity for “sustainable growth”.

For interviewees, **business adaptation** is the greatest opportunity – implementing new strategic plans that focus on not expanding beyond pre-COVID-19 levels but looking to develop the business to “be as sustainable as possible”. Operators highlight opportunities such as adapting **to the domestic market, creating new or updated experiences** (e.g., higher cultural component to tours, package development with local businesses) and **engaging more with the education sector**.

Six operators note a new opportunity is to **increase collaboration** with iwi, local community, government, international organisations and other tourism businesses “everyone seems to be talking together now about the whole environment– iwi, government etc. I remember 15-20 years ago when I first started in the industry it wasn’t like that”.

Continuing uncertainty in 2022 will be an ongoing challenge for operators with no-one knowing “how the world will look” and what implications this will bring in terms of staffing, scheduling. One operator points out it is unlikely COVID-19 or indeed other pandemics will be a thing of the past and that the government should not be planning as such “COVID could happen at any time. Don’t put everything back into the international market, look at things that are good for the local market that would also appeal to international visitors.” Despite the enduring challenges COVID-19 poses, the **ongoing opportunity is to give back** “we want to keep giving back more and more”.

Business challenges: from 2019 to 2022 and beyond

Business challenge	Details
<p data-bbox="180 347 308 382">Staffing</p> 	<p data-bbox="665 347 2293 589">10 operators noted sourcing and retaining experienced qualified staff as an ongoing challenge especially given the fact that MCET is largely seasonal “go gangbusters in the summer from Jan-March but the rest of the year quietens off but is still quite sporadic”. This challenge is magnified with COVID-19 creating a lack of access to international workers including those who would usually be on working holiday visas.</p>
<p data-bbox="180 621 631 656">Compliance process and cost</p> 	<p data-bbox="665 621 2293 961">Overly complicated compliance processes are seen as an ongoing challenge, with those operating in protected areas requiring a lot of red tape to be navigated. In addition, different regional councils have varying compliance processes which adds another layer of complexity. The cost of compliance is a strain on operators. A blanket cost was also raised with some small businesses reflecting that they would pay the same as a multi-million-dollar company. The survey also highlighted that a blanket approach to regulations was felt to be ineffective and there was a lack of coordination between the different regulators who operators deal with.</p>
<p data-bbox="180 996 529 1072">Poor weather, climatic events</p> 	<p data-bbox="665 996 2293 1232">Working in the open sea and the outdoors is unpredictable while “this is the nature of working in nature” poor weather often leads to the need to cancel trips especially for those operators who are more susceptible to the elements such as kayaking. Two operators observed that this seems to be an increasing challenge as extreme weather becomes a more frequent occurrence due to climate change.</p>

Staffing: Finding skilled staff is a challenge for operators



The main challenge highlighted by interviewees and reinforced in the survey is finding qualified staff for work that is often highly skilled and largely seasonal. Despite being skilled work, wages are low with some operators attributing this to the customer expectations about the price of MCET experiences.

“Specialist skills and qualifications are required, but customers have expectations of low price point for activities.”

“The Dive industry is low wage, but high responsibility.”

MCET requires not only technical skills but the ability to relate to tourists and deliver a great customer experience, “finding someone with both sets of skills can be very challenging”.

Low pay coupled with the seasonal nature of the work makes it difficult to retain staff. Some strategies that operators employ to mitigate this challenge include hiring and training local staff, trying to find seasonal/casual workers alternative employment locally in the off-season, creating online training to upskill staff remotely, and employing young people who can work casually as they progress through their education for example between school/university terms.

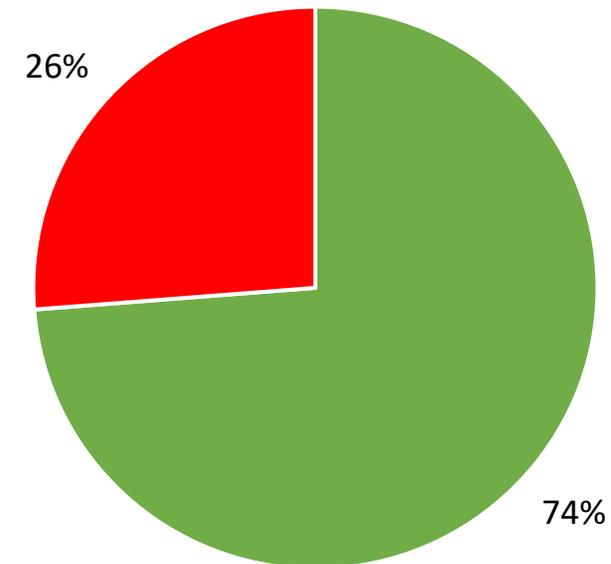
Staffing: The survey confirmed that recruiting and retaining staff is a challenge for most businesses



Survey respondents were asked if they faced challenges in recruiting and retaining staff.

Almost three quarters (74%) of businesses surveyed face challenges recruiting and retaining staff reinforcing interview findings.

Do you face challenges in recruiting and retaining staff? (n=61)



■ Yes ■ No



Staffing: Seasonality and the lack of availability of skilled and experienced staff were the top challenges when recruiting and retaining staff

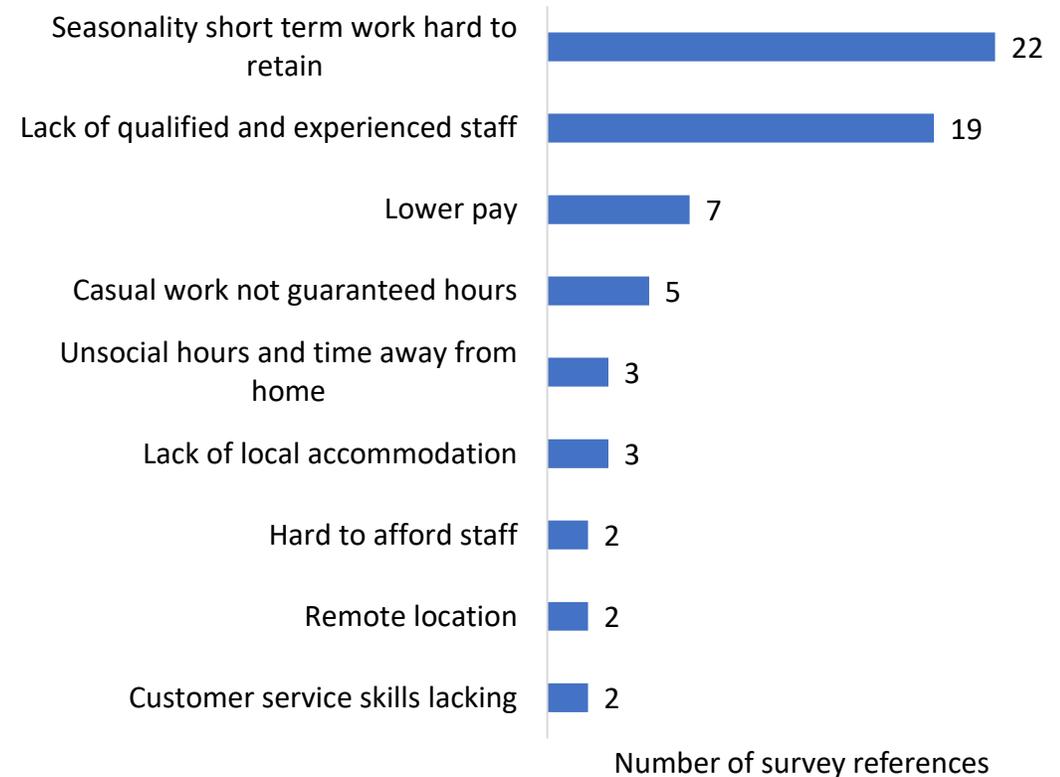
Respondents were asked what challenges they faced when recruiting and retaining staff.

The seasonal nature of much of the work is the biggest challenge highlighted.

“Seasonality makes it difficult to keep staff attached to the business.”

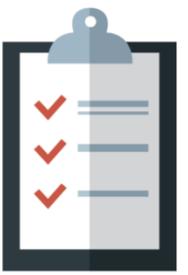
Operators said that in the past, this gap was filled by international travellers looking for short-term work while travelling in New Zealand. The sudden removal of this labour source due to border closures poses a major challenge for these businesses.

Challenges faced in recruiting and retaining staff



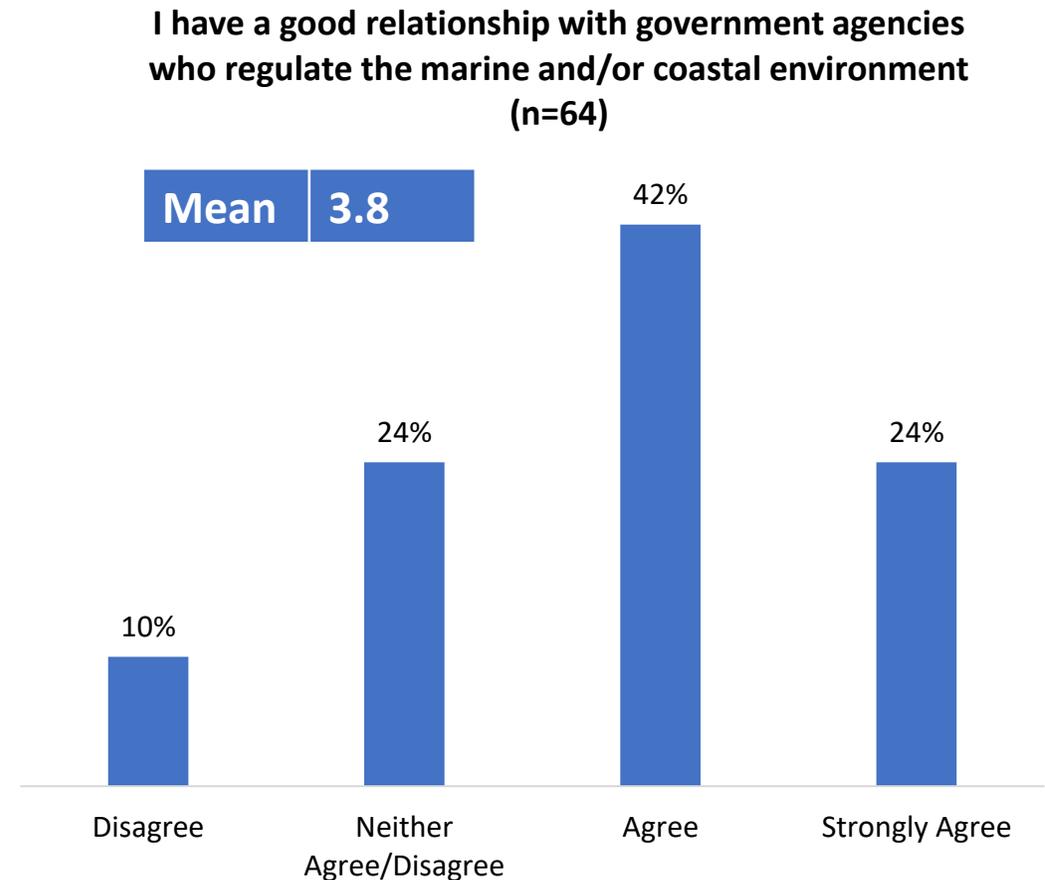
Ongoing business challenges from 2019 to 2022 and beyond

Business challenge	Details
<p>Negative community perceptions of tourism</p> 	<p>Several operators noted that in 2019 in some places - especially during ‘peaks’ - there was resistance to tourism, and that locals “would not want to go back to that (2019 levels)”. An operator noted that opening the international border could face “a public perception hurdle” with Kiwis becoming accustomed to having the country to themselves. Going forward “sustainable growth” should be looked at including a “change in the rapid growth of cruise ships”.</p>
<p>Geographic isolation</p> 	<p>A few businesses operating 'off the beaten tourism track' find their location a challenge; attracting people to visit the region is an ongoing issue.</p>
<p>Increase in marine users</p> 	<p>A few operators noted that an increase in marine traffic poses challenges both from a safety perspective (with no training needed to be on the water among recreational traffic) but also the impact this has on marine life – “anyone can buy a boat, it's getting busier” - it's something that needs to be “managed well”.</p>
<p>Environmental degradation</p> 	<p>A lack of environmental protection leading to degradation of environments is an ongoing challenge. Cumulative effects see the pressures on the land leading to silt in the water from forestry and new coastal housing developments. Overfishing is also a concern including the unknown impact of recreational fishermen out to ‘catch the quota’ rather than only what they need to feed their whānau.</p>



Two-thirds of marine ecotourism operators surveyed agree with the statement: “I have a good relationship with agencies that regulate the marine environment”

- Two-thirds of those surveyed agree that they have a good relationship with agencies that regulate the marine and coastal environment, with almost one in four (24%) strongly agreeing with the statement.
- A further 24% were neutral and 10% disagreed that they had a good relationship with government agencies that regulate the coastal and marine environment. No respondents strongly disagreed.





Compliance process: the high cost is a burden

Survey respondents were asked if they had any further comments about current regulations and around one third (32%) chose to comment.

The main theme to emerge is the **high cost of compliance** especially the money required to **meet adventure activity regulations**. While many operators acknowledge “regulations are important to avoid cowboys from operating” several stressed the high cost is a burden on small business.

“The Adventure Activity Operator audit cost appears excessively expensive. It has the effect of putting smaller operators out of the market, irrelevant of how safe their operations might be. If you have good systems and a good culture in place, there should be no additional operating costs in meeting the criteria, but the audit cost itself has forced numerous operators to either close their doors or adjust their operations so the regulations do not apply to them - which often paradoxically results in less safety provision.”

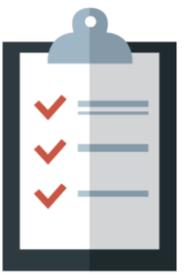
“We are already a heavily regulated industry so have hefty costs associated with this. e.g. we have recertification this year and safety management system implementation audits which will cost a lot- just so we can stay open and continue what we are doing.”

Operators said that these costs either need to be passed onto the customer (one operator noted this was hard with the domestic market not willing to pay) and/or are reflected in low wages.

The time it took to administer the paperwork was the second most cited cost of compliance including increased inspections.

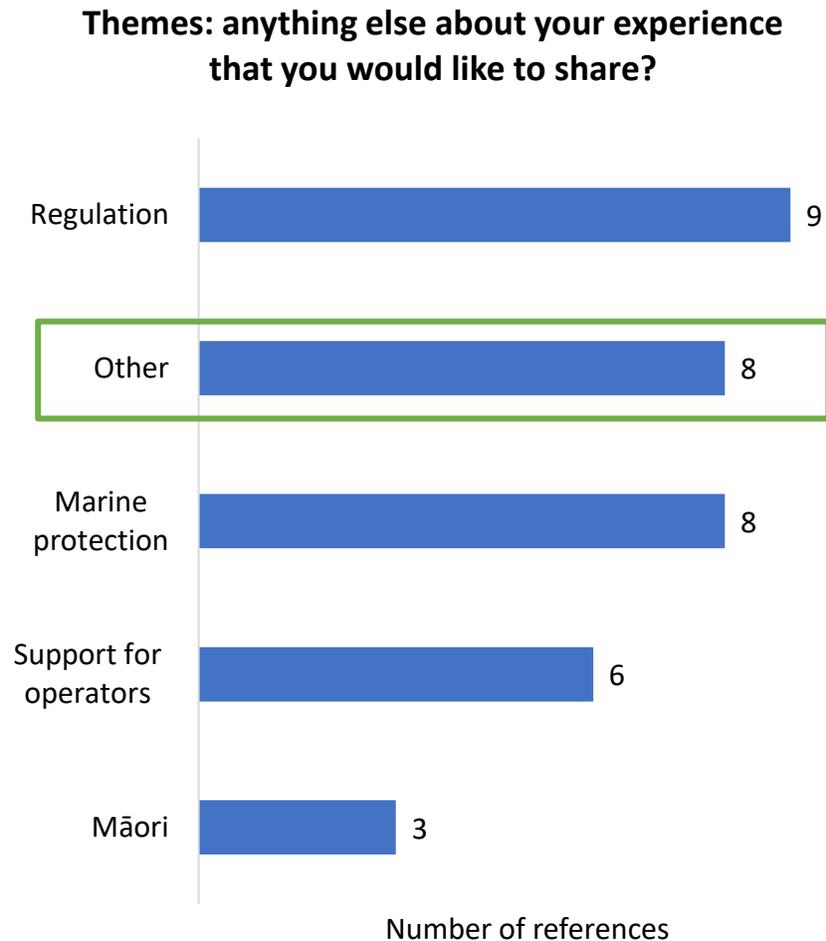
Others in the survey noted that **recreational craft need more attention and regulation** - “Most commercial operators are respectful of marine mammals, it's actually the recreational skippers that cause the biggest danger to them, lacking experience and understanding.”

Compliance process: regulation, marine protection and support for operators are the three main themes respondents emphasized when asked to share further thoughts on their experience in MCET



Operators were asked if they had anything else that they would like to share about their experience of MCET and 20 chose to share their thoughts.

Themes raised revolved around, regulation, marine protections, support for operators and Māori related topics.



- Other (please specify)**
- Council should provide greater access to the water
 - Create change (e.g. a Marine reserve) rather than documents
 - Do it for the love of it not for profit
 - Local market can support
 - Maritime NZ should have had more focus in the survey
 - Minimal collaboration between operators
 - There are ups and downs of being an operator

Compliance process: a blanket approach to regulations is ineffective and sometimes unfair



Another theme to emerge from operators is that current regulations are **not fit for purpose**, with a blanket regulation approach to marine mammal watching putting small operators at a disadvantage. One operator pointed out that a small kayak operation and a large motor yacht/diesel launch are subject to the same rule for wildlife viewing with noise and disturbance differences not being taken into account “**there is no separation between activities even though there is an obvious fundamental difference in the way these vessels interact with the coastline and marine ecosystem**”. Others also point out that regulations do not cover the impact recreational boaters’ have on wildlife and a couple of operators feel that those operating without permits are not held to account.

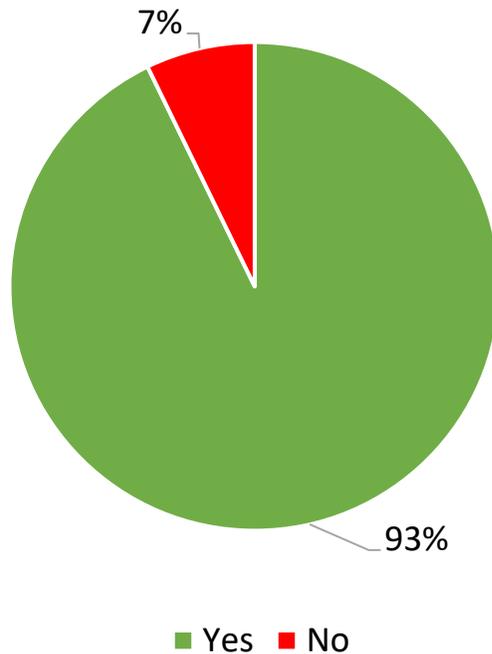
Three operators highlight that **current regulations are restrictive** to business’ future planning, with one operator highlighting the business risk of not knowing if a concession will be renewed, and the potential for other regulatory restrictions to emerge without due consultation and time for them to plan for them.

Another operator raised the need to **regulate visitor numbers**: “**any discussion around the future of tourism must for me include discussion about controlling the number of visitors, the environmental impact of numbers and a willingness to charge visitors for using facilities**”.

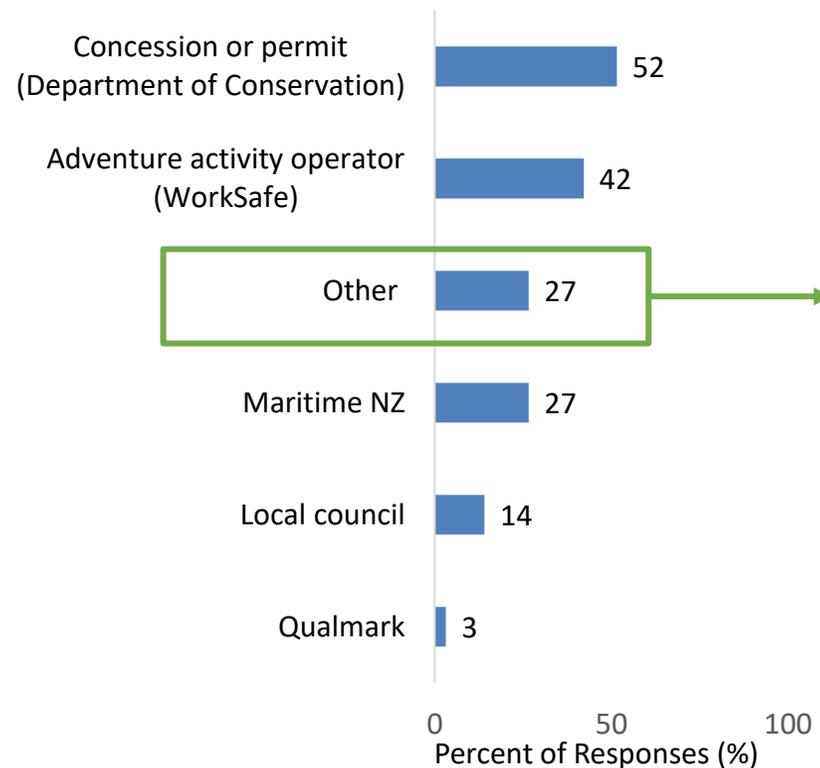
Almost all operators (93%) need a permit to operate their business - with a large number having concessions or permits with the Department of Conservation



Do you have any permits, accreditation or licenses to operate your marine and/or coastal tourism business? (n=69)



What permits, accreditation or licenses to operate your marine and/or coastal tourism business? (n=64)



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

- Other permits, accreditations or licences**
- MPI
 - Zoo Aquarium association Australasian accreditation
 - Air Fillers
 - Air Testing
 - Instructor certification and COC for Occupational Diving
 - MOSS
 - PADI
 - Annual Vessel Survey
 - ISO
 - Commercial building
 - Commercial Vessel Licence
 - Nzoia Sea kayak guiding awards
 - Service licenses
 - Medicals
 - NZ Underwater Association licensing costs
 - Local by law licenses
 - Auckland Harbour master
 - Street trading
 - Pest free warrant
 - RYA recognised training centre
 - Tourism Industry Aotearoa
 - Waka Kotahi
 - Maritime Transport Operator
 - Boat survey
 - Skippers licenses
 - Adventure Mark

Compliance process: a lack of coordination between regulators

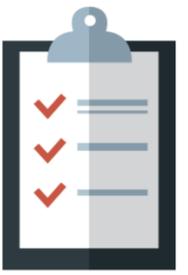


There are a variety of regulators across MCET at the national level including: the Department of Conservation who issue permits, concessions and warrants; Maritime New Zealand who issue Marine Operator Safety Systems, and Marine Transport Operator Licences. WorkSafe also regulate adventure activities. At the local level permits may also be required by local Councils to operate.

Two operators note that a **lack of coordination between** these **bodies** leads to business being “overregulated” – “I’m regulated/audited by up to 6 different organisations”.

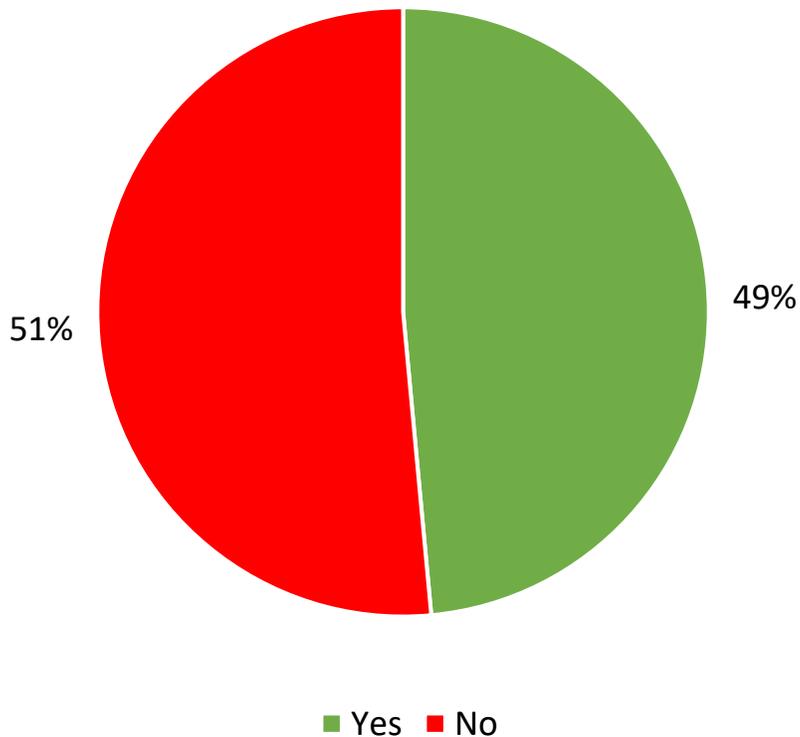
One operator stressed the need to **consolidate regulations and licences** -“All of the licensing and regulations need to be rolled in to one. We are paying out so many different fees to so many different governing organisations and many cover off the same things. We feel like everyone has their hand out”. Another suggests that **audits should be simpler** and a further operator points out an **inconsistency in health and safety regulations across the regions** -“There are often large inconsistencies between different regions in terms of health and safety regulations (for example who can rent a kayak or paddle board in one place can't in another).”

One operator highlighted that a lack coordination between government agencies is hindering the positive development of the sector and holding back accountability of sustainable tourism initiatives. “I know they have given Qualmark Gold to operators that break the rules - DoC are trying to prosecute them but they’ve got a silver or gold.”

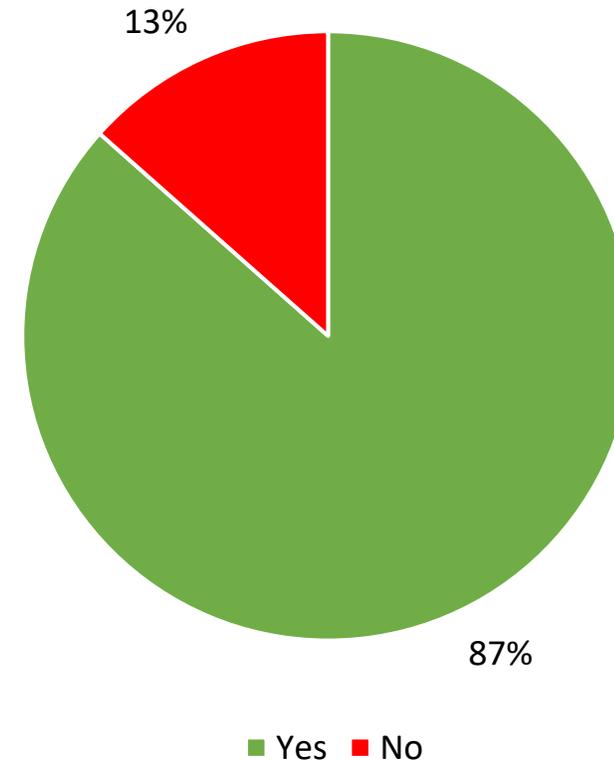


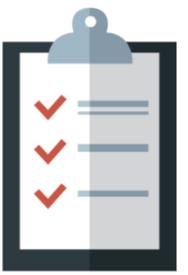
Decision making: Half of those surveyed are already involved in planning initiatives for tourism and/or coastal and marine issues. Most (87%) want to be more involved in making decisions that influence the coastal and marine environment

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)





Decision making: Operators want to be actively engaged in decision-making rather than being consulted as part of the general public

Operators were asked how they would like to be more involved in decision-making that affects the marine environment where they operate - 41 provided comments.

The strongest theme to emerge is that **operators want to be more informed about what is happening and be included as key stakeholders in the decision-making process where their voice can be heard.**

“To be consider as a stakeholder and to be consulted with”

“Emails we get are telling us not asking us”

Five operators stress **engagement should happen early, prior to public consultation.**

“There seems to be a distinct lack of getting industry players in the process at the front end - more have to react once a document is out for public consultation”

“More robust public governance of DOC particularly would be beneficial - at best, current systems allow only advisory inputs that can have little effect on policy-making”

“Be involved in decision making regarding best practice for wildlife viewing and for health and safety policies enforced through external parties e.g. Harbourmaster/DoC. We have to comply with their rules even though we pretty much always understand the complexities of the issues involved far better than the people creating policy”



Decision making: Operators want to be aware of, and participate in, decision-making that will impact their business

Several operators highlight that new legislation, regulations and initiatives relating to the marine environment can directly impact on business and the environment, and stress in the survey that it is essential that they are considered as key stakeholders and engaged as such.

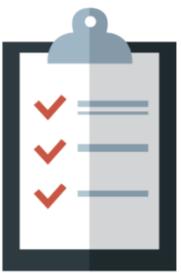
“Regular updates and opportunities to submit relevant information as we share the same operating grounds/areas as tourism business and would impact similarly.”

“As kaitiaki of our area any decisions made on marine environment may have an impact on our business and our environment.”

Respondents state that it is sometimes hard to know who is doing what, and that they prefer direct engagement as the general media for communication. Suggestions for more targeted engagement include meetings/hui, email or social media.

Consistency across the sector was also mentioned twice, with different standards and compliance processes in use in different places: “Consistency across the sector is important - standards, compliance and being businesses not accredited or signed off by any authority”. A Māori operator suggested that they could participate by giving input into the design of policy as treaty partners and to bring a mātauranga Māori perspective.

“Can provide input into design and as treaty partners offer Te Ao Māori and apply mātauranga Māori principles.”



Decision making: Operators have a deep understanding of their local environments and can add value to marine protection and planning

Marine and coastal ecotourism operators are at the coalface, they are interacting with their local marine environment every day and act as eyes on the ocean across the country.

Having more of a say in the protection of the marine environment, for example in the planning for marine protected zones is the second strongest theme operators highlight as a way they would like to be more involved in decision-making.

Operators often have a sense of the implications of policy on the day-to-day e.g. health and safety and wildlife interactions and management so early engagement can be beneficial for all parties especially thinking about unintended consequences of actions. Often decisions made directly affect their business, so operators stress that they want to be informed about things such as changes to marine legislation/ marine areas.

Several **would like an opportunity to engage in creating marine protected zones.**

“Would like more say about protecting the marine and coastal environment overall, not just from a DOC/ tourism perspective.”

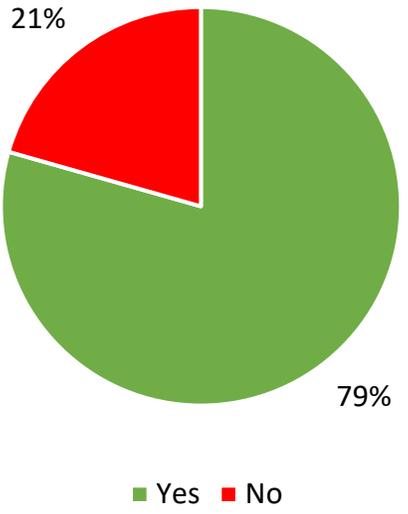
“As a long term operator in our region we would welcome being part of any polices, initiatives and have ourselves insured that we are speaking to local iwi, council, Ministry of Fisheries {now MPI} and the Department of Conservation around the protection of the reef for future generations.”

“Unsure exactly how, but I am interested in actively protecting our harbour water quality and by strengthening our catchment. I can see us/our business and school camps as being useful on the front line e.g. planting, surveying, water testing, monitoring and so on.”

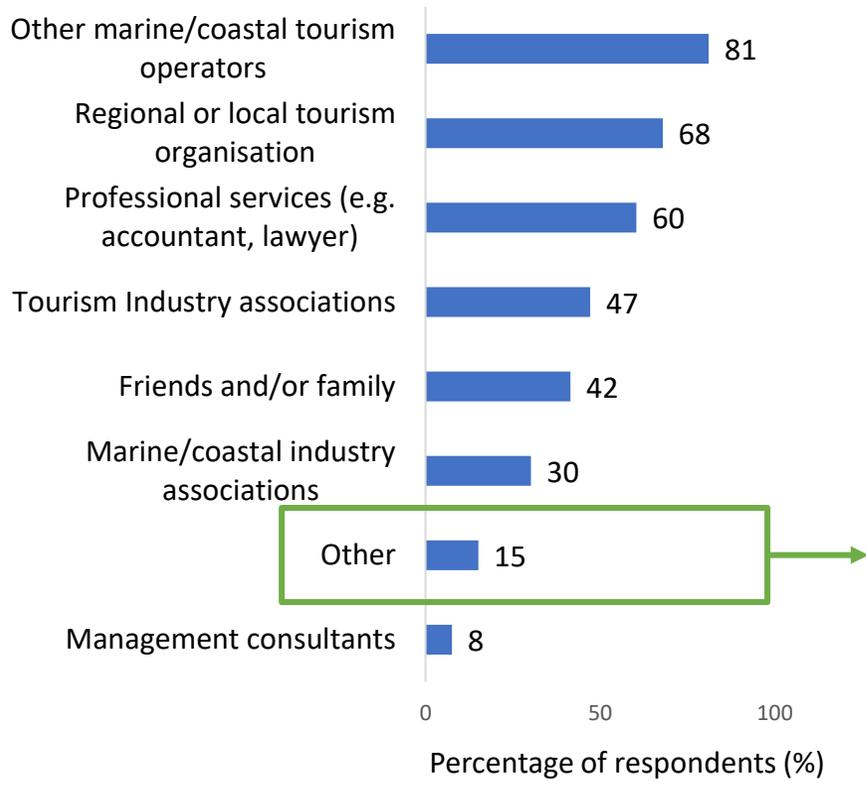
Collaboration: The majority of survey respondents seek business advice - mainly from other operators. There are opportunities to share information



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

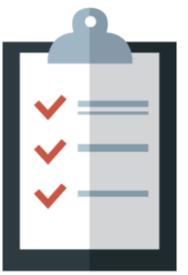


Who do you go to for business advice? (n=53)



Other (please specify)
Many various avenues
DOC, Adventure Activities Auditor
International organisations
Previous business owners
Waka ama New Zealand, Water Safety NZ, Coastguard Boating Education
Other tourism/youth development charities
Iwi
DOC, iwi

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



Collaboration: The experiences of other operators represent valuable advice and can enable the sharing of best practice across the MCET sector

Experienced operators who can provide practical insights to others is the most helpful source of business advice.

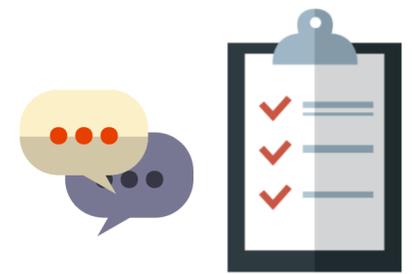
National level organisations are not mentioned as sources of business advice and two operators made reference to an over-emphasis on the economic side of sustainability - “Unfortunately, most larger industry organisations or MBIE-led initiatives are still underpinned by the presumption of economic growth as a primary goal.”

There is a lack of evidence from the interviews of operators collaborating with one another – with the sector appearing to be fragmented. A number of operators find it difficult to identify another marine operator in New Zealand who represents best practice as well as notions that these operators do not feel part of a ‘sector’ of MCET.

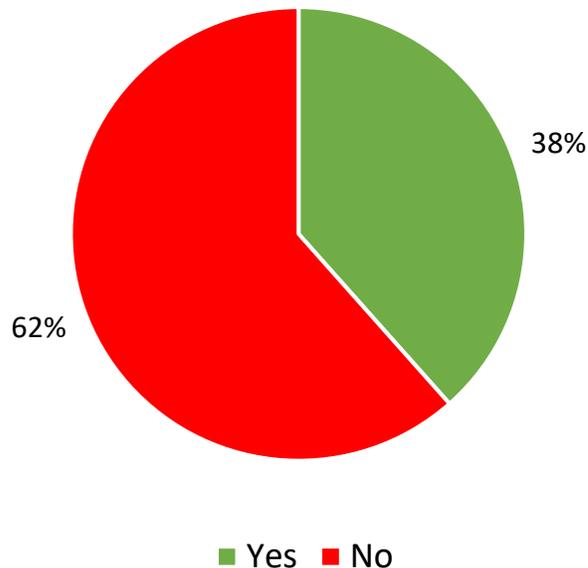
Who is most helpful when it comes to business advice?



Collaboration: Operators are more likely not to share information with others. This highlights that collaboration can be strengthened



Are there any organisations that you share information and resources with about running a marine and/or coastal tourism business? (n=65)



Who do you share information with?
Council
DOC
Dunedin Host
Environment Southland
Council
Local trust/groups
Māori tourism
Maritime New Zealand
Ministry of Primary Industries (MPI)
City Council, Regional Council, Zoo & Aquarium
Association Australia
Other operators
Other replanting projects and conservation organisations
Royal Yachting Association. Coastguard Boating Education
Similar service industries
TIA, Sustainable Seas, DoC, WWF, Universities , Council, RTO's etc.
RTO
Tourism New Zealand. Maritime New Zealand. Marine Transport Association
World Cetacean Alliance

For those that do share information - local government, not for profit organisations, international organisations, other tourism bodies, research institutes, regional and national tourism organisations, and central government – DOC, Maritime NZ are they main groups.

A person with long blonde hair is seen from the side on a white boat, looking out at a large whale breaching the ocean surface. The whale's dark back and dorsal fin are visible above the water, creating a splash. The background shows a vast blue sea under a clear sky with distant landmasses on the horizon.

Developing marine ecotourism



Advice for new operators

Interviewees were asked what advice they would give to someone looking to set up a MCET business in New Zealand. The following was advice offered:

- Be true to the values of MCET
- Do your homework and due diligence
- Have a passion for it
- Find a niche in the market
- Set up where there is marine protection
- Design and deliver on the experience you promise
- Expect to work hard
- Be innovative
- Commit to continuous improvement and learning
- Be part of the community
- Investigate the availability of skilled staff





Advice for new business – operate by the values of MCET

Interviewees were asked what advice they'd give to someone looking to set up a new marine ecotourism business. The strongest themes to emerge are **being true to the values of ecotourism (giving back to people and place and being advocates for the marine environment)**. Clear warnings were given about **not “greenwashing”**. “Do not take shortcuts - ultimately if you are greenwashing you will be caught out and won't be successful”. Another stressed that “it's about what you value and what you give back”.

Operators emphasised that it is vital to be holistic in thinking about all aspects of sustainability – look after the environment, your community, your people (staff) and to “be a custodian”. Further advice is to **involve yourself in the local community** - “get their approval” and “connect with the community” and “talk to locals for advice”.

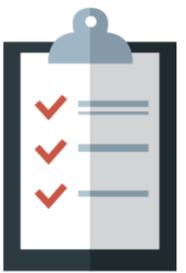
Doing **due diligence** before starting up is key advice operators give to those venturing into MCET. The biggest part of this is “doing the sums”, **investigating the cost of compliance** and thinking **how to deliver a safe experience**. It's important to **deliver on the experience you promise** - “Know your product, charge enough and don't under value the experience, deliver the experience you promise”. An operator said its important to “do your homework business wise, but also operation wise. What are you taking people to see? How many are there? How often is it there? What are the sensitivities? What do you need to do to respect the species and the environment and what can you do to encourage your guests to do that?”

On the marketing side it is vital to know your market, investigate demand and have a clear goal. **Find a niche in the market** and be clear on where you fit was further advice communicated. It is also vital to factor in the **availability of qualified staff**.

Several interviewees also noted that the business is a lifestyle, it's about living a passion and passing this onto others, “it's about love not money”. You need to be prepared to **work long hours, continuously learn and improve and look to be innovative** in what you offer.

It is also seen as critical for operators to “set up in a place where there is legislation to protect the ecosystem the business depends on and be active in supporting this.”

Supporting the sector



Operators in the survey and in the interviews were asked what could further support the sector as a whole. The following was offered:

- Collaboration and information sharing (e.g. with other operators, Māori, DOC, Local Councils, MPI)
- Better integration, networking and leadership for the sector
- Funding and support for marine ecotourism (e.g. esp. during continued uncertainty of international tourism in 2022)
- Legislation, standards & enforcement for marine protection (e.g. resource rangers on MPAs, revise national marine mammal legislation to bring up to date and consider context)
- Infrastructure for healthier marine environments
- Learning outside the classroom with schools
- Improving sustainable tourism accreditation– accountability and reducing costs for small operators to subscribe
- Provision of useful resources in one easily accessible location



Image: Courtesy of Dive! Tutukaka



What can be done to support the sector as a whole?

Interviewees were asked what more could be done to support the MCET sector as a whole. Many found this difficult to answer, mainly because there was **not a unified sense of being part of a 'sector'** with operators reflecting on the diversity within MCET (diving, kayaking, wildlife viewing for example – on, in and under the water and along the coast), the differing geographical and environmental contexts across Aotearoa, and the diversity of regulatory environments. Each operator has a different operating context that brings varying challenges and opportunities. Operators stressed that due to this it would be difficult to provide national level 'one size fits all' good practice frameworks.

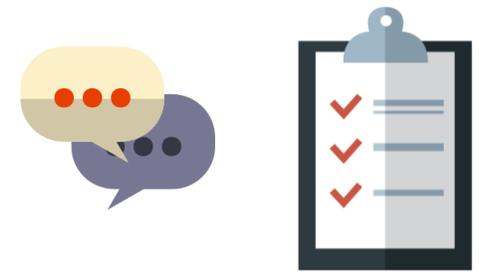
Operators put forward a number of suggestions of how to support and improve the sector. **Collaboration and information sharing** is the strongest theme mentioned by almost half of interviewees, followed by **legislation and enforcement of marine protections** and **actively creating healthier marine and coastal environments**. **Funding and support for marine ecotourism operators** is another strong theme, followed by better **integration and networking**.

Others note that **linking to marine education** can help to strengthen the sector for example linking to existing programmes such as Experiencing Marine Reserves and other educational marine initiatives by making the process easier to connect operators into educational initiatives including school programmes/curriculums.

Resources for small business including toolkits, cases and resources where operators can go to get practical advice on how to improve their operation and link to funding are other ways the sector can be supported.

Operators told us **sustainable tourism schemes** can be improved by **strengthening accountability** and reducing the risk of greenwashing. Participation can be enhanced by making these the schemes less expensive for smaller operators to access.

Collaboration and information sharing is a key way to responsibly develop MCET



Findings reveal that collaboration between MCET operators and between all of those involved in marine protection is seen as important to support the sustainable development of the sector. One operator reflected on a similar framework that has had success in land-based initiatives and that could be replicated in the marine space - “A little bit like what’s happening with Predator Free 2050, it’s got an aspirational goal, and a year target, and then collectively across the country there are lots of projects, on different scales, that might add up to that goal. I think if there was the same thing in the marine environment, that might be another way of winning hearts and minds, making sure people are doing things for the right reasons, and making us all feel pretty good about living in our country.”

Some operators reflected that it is “important to work in partnership with DoC” and another suggested that **Regional Tourism Organisations could play a role in kick starting collaborations** between operators in their areas in a strategic sense “[name of Bay] could be the centre of water activities. We (the operators) will help seed it and show others it can work. Let the operators join in. None of us are big enough to be able to kick it off the ground to begin with.”

There are also opportunities for operators to learn from iwi/hapū/whānau and collaborate on shared aspirations for the protection of local marine and coastal areas.

Need for integration: addressing marine protection issues is challenging due to complex multi-stakeholder issues. Certification frameworks need to be strengthened



Several operators while talking about the importance of improving marine protection, reflected that change is slow due to the marine environment being a complex place with multi-stakeholder issues and fragmented governance models.

Some noted a disconnect between MCET businesses and the governance of the marine environment, with the only department seeming to link the two being the Department of Conservation. For example, one operator noted a disconnect between DOC and Qualmark in terms of **accountability of sustainable tourism standards** and expressed concern that Qualmark audits don't "cut through greenwashing". Some also said that the **cost of the scheme is off-putting** for smaller operators who, none the less, are doing all they can to operate sustainably.

The Tourism Industry Aotearoa (TIA) framework for sustainable tourism is seen as a good starting point and a good voice for the overall tourism industry raised by several, however, some MCET operators raised the issue that don't feel recognised for the work that they contribute to in terms of conservation, and the contribution they make to research within the wider ecosystem and tourism sector.



Sustainable tourism certification: Costs are a barrier to participation and a lack of accountability is a concern

Operators were asked in the survey if they had any comments about sustainable tourism schemes and 24 chose to comment.

While some took time to emphasise that such initiatives were **positive**, others stressed that with other regulatory costs they **couldn't afford to take part despite their commitment to running a sustainable operation**.

“With the uncertainties of customer numbers still looming at the forefront it is difficult to put energy and resources into this as our primary focus right now is to just survive.”

Some of those surveyed said that there was a **lack of awareness** of sustainable tourism schemes among visitors and even the local community.

“Not sure the community or visitors understand what these schemes actually mean? What are we held accountable for and why? Does the accreditation mean anything?”

A key criticism levelled is that schemes are often merely “**token gestures**” that can be misused for **green washing** and marketing. Others commented that schemes are often not robust and that operators are **not held accountable**.

“We are signed up to the TIANZ Sustainable Tourism Commitment, and are very aware of Tiaki - however, we're unlikely to overtly promote or support 'aspirational' measures such as these as they don't genuinely hold the industry or tourists themselves to account in terms of impacts and behaviours, and too often serve as greenwashing measures.”

Sustainable tourism schemes: Some Māori operators talked of standards going beyond the “norm”



Two of the five Māori operators interviewed talked about creating standards that went beyond the ‘norm’. One talked about going beyond the Qualmark standards towards regeneration and restoring the mauri, something they are looking to implement in their own business “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”

Another operator talked about how by linking to mana moana operators could implement standards that take sustainability to another level - “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?”

Collaboration and information sharing is needed to create better standards: “Each and everyone believes they are contributing in their own way to minimising their carbon footprint. But I think there is a long way to go and lot more that can be done...in terms I think it is an obligation, I think we owe it to the mana Motuhake to reach out and create those relationships, to establish those relationships to them (other MCET operators), to learn from them, perhaps learn or engage with them that may enable operations to implement the ways and means that are beyond the normal standards.”

Leadership and funding is needed to support the sector



With the sector being “fragmented in many ways” several operators called for “strong leadership” in the form of a better networked sector. The lack of an industry body for MCET (or ecotourism) in New Zealand has some operators calling for “a more integrated approach to things”.

Several operators said more **funding and support** is needed for the sector as a whole. Some called for **better promotion of MCET** with two operators suggesting that Regional Tourism Organisations/Economic Development Organisations step up on this front. “Council is best placed to do it, they get the most direct benefit (people staying longer). Need to be more proactive and help to move the industry ahead.” Another operator noted that national tourism awards do not seem to give much weight to the research and conservation work that MCET do and more could be done to highlight this within the tourism sector and raise the overall profile of MCET. There was a request for more **funding to be directed at MCET operators to build links with schools** - “More around funding for school groups and education – funding to get people (school children) out to the marine environment. From a direct ecology perspective but also to teach water safety (and swimming).”

Others argued that funding could go into **educational support for small businesses**, for example providing practical steps on how to reduce carbon footprints “not necessarily throwing money at it, just resources”. **Reducing the red tape in applying for funding** that is available is another way to help operators especially small operators with limited resources. In addition, providing recognition to operators and **reducing the cost of having the accreditation** - “Making it easier (and cheaper) to be involved in accreditation programmes like Qualmark, or somehow give recognition for those that do really well”.

There were calls to **simplify the process for operators to access existing funding** - “Small businesses need support we do it because it makes us feel good and it we enjoy it and we care about it. Maybe others would do it too if they were incentivised or they had financial support. For example trying to apply for rewards or incentives, the paperwork and red tape makes it hard. For example, trusts of sports funding we need to “show a need” and have “this and that policy” child safety policy, H&S policy, compliance makes it so hard to small businesses to get a leg up.”



Marine protections, legislation and enforcement are needed

Interviewees told us that protecting the marine environment via legislation and enforcement is needed. If the marine resource/ecosystem is not protected it is very difficult to have a sustainable marine ecotourism business – it makes for an even higher risk investment.

The need for stronger regulation and enforcement of current rules was raised by many, especially around non-permitted operators to help to protect the marine environment - “One of our problems is illegal operators, and DOC’s inability to prosecute”. Another operator highlighted that better communication between DOC and the government agency Tourism New Zealand that runs Qualmark could see better enforcement of current rules “DoC and Qualmark should communicate, you shouldn’t have a sustainability certification if you are being prosecuted by DoC for breaking marine mammal rules”. Another operator shared a story about commercial fisheries “breaking the rules and pillaging the ecosystem” and called for more serious consequences for overfishing.

Some talked about the need to revise the Marine Mammal Act so that it is fit for purpose, less broad and generic and fully up to date. “The Marine Mammals Act is too broad for them to make prosecutions, and they lost two cases, so they’re now nervous. They seem to police those who have permits more than those who don’t. In the last few months, they have shut down an illegal operator. But I would like to see that act rewritten to better protect the environment and make it easier for DOC to do their job.” Another operator expressed that “current rules aren’t fit for purpose, national is too wide, and they are old and out of date”.

Other key legislation that relates to the development of MCET in Aotearoa is Section 4, Conservation Act – giving effect to the Treaty principles in conservation and the Ngāi Tai ki Tāmaki vs the Minister of Conservation Supreme Court judgment (2018).

Section 4, Conservation Act – giving effect to the Treaty principles in conservation was raised as a key legislation in relation to the development of MCET

Section 4 of the Conservation Act relates to giving effect to Treaty of Waitangi. The Ngāi Tai ki Tāmaki vs the Minister of Conservation Supreme Court judgment (2018) highlighted that the Department of Conservation had failed in its legal responsibilities to give effect to the Principles of the Treaty, including but not limited to the Active Protection of Māori interests. This related to the granting of marine ecotourism concessions on Rangitoto and Motutapu Islands of the Hauraki Gulf without actively giving effect to the treaty principles. In particular it related to Ngāi Tai ki Tāmaki mana whenua and customary interests on the Motu.

The Ngāi Tai ki Tāmaki judgment confirms and builds on previous jurisprudence regarding the allocation of commercial opportunities on public conservation lands and waters, including the Court of Appeal's 1995 Whales decision in Kaikoura. The judgment clarifies that DOC is required in some circumstances to consider the possibility of according a degree of preference to iwi as well as the potential associated economic benefit of doing so.

Here Section 4 of the Conservation Act gives preference and special attention to mana moana in relation to tourism concessions giving effect to the Treaty principles of partnership and active protection. It does not give exclusive access or veto rights rather it focusses on ***giving effect*** the Treaty principles.

Section 4, Conservation Act:

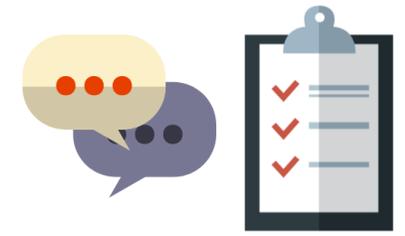
Give Effect to the Principles of the Treaty of Waitangi

Partnership: working relationships with iwi and hapū on matters pertaining to conservation plans, policies or initiatives.

Active Protection: tino rangatiratanga should also guide the relationship and substance of engagements with iwi and hapū on conservation matters

Right of redress: The of development and right of redress potentially require a degree of preference to be given to Māori and for Māori economic interests to be considered

Resources – operators looking for a one-stop shop



A “one stop shop” bringing together relevant information from the various organisations that MCET operators need to interact with, is a resource that many said would be useful “would be good to have a central place where anybody new could go to learn that stuff in one go; rather than having to go to DoC for this, and somewhere else for that and whatever. In the context of {place name} easier to help, but too easy to miss steps or not invest properly.” One operator reflected on the challenges they faced when starting up their business “we didn’t know so we worked everything out on our own. If we’d known that would’ve been helpful. We did it, but education and help would have streamlined the process.”

Interviewees noted that sharing **best practice examples** can help the development of the sector -“It’s not about the rule book. It’s about case studies to help operators enhance their operations.” Another suggested that “a resource framework is needed where operators can go and see case studies, best practice advice” and further operator shared they were “always hunting for better methodologies.”

A Māori operator in the survey reflected that Māori operators could support one another “allowing Māori operators greater access and recognition for offering a Te Ao Māori dimension to their tourism package. Creating a Māori operators forum specific to the needs of Māori operators”.

Other things sought by many was “resources and advice on how to apply for community funding and work within the education sector”. While several operators said it would be **useful to have data on the state of their local marine environment**.

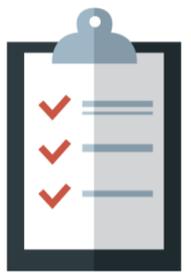
Strengthening collaboration by sharing information and best practices can help to develop and build a sense of cohesiveness to the sector



Interviewees told us that useful resources to support the development of the sector should include:

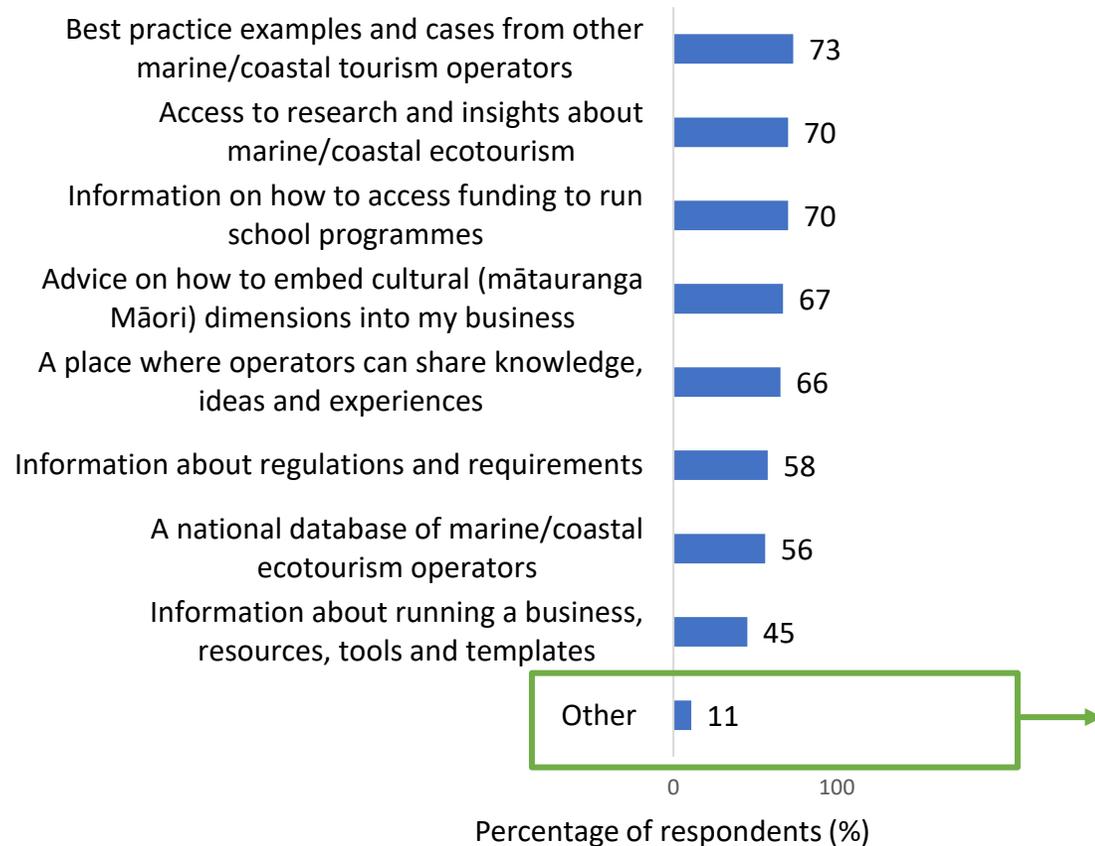
- Benchmarking cases for others to learn and to share knowledge
- “How to” guides e.g. how to embed culture and heritage in their business, how to engage customers in research activities and inspire them, how to link to school funding and community funding, how to reduce carbon footprint in the business
- Tools to help new businesses set up e.g. what is required from a regulation perspective, for example what permits and licences are required and who you need to engage with and on what matters.
- Help with Safety Management System requirements, business procedures
- Making new operators aware what help is out there for them, including tourism networks

“Whatever you create, you’ve got to create something that is useable From a sector point of view it has to be doable, manageable, and measurable – it’s got to be made easy”



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)



Other (please specify)
Wildlife database - monitoring etc
Would rather have the funding put into marine reserves and development
Development of industry standards particular to sector
Access to information on helping protection of wetlands and this environment
A place where I can find information on how to protect the environment I operate in
Database of suitably qualified potential employees
Creating a forum for Māori operators specific to needs

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

Operators pointed to six organisations that could take a lead in providing support



Organisation	What role could they play?
Local Government/Regional Councils	Support with compliance for new businesses. Through the RMA regional councils can advocate for marine protection. Opportunity to link MCET to local population wellbeing. Support MCET link to learning outside the classroom activities with local schools.
Department of Conservation	Consider limiting the amount of operators in sensitive areas via permits. Coordinate with Qualmark on sharing information about compliance. Give more attention to marine issues and resource the enforcement of marine protected areas and permits. Give effect to the Section 4 of the Conservation Act. Work closely with MCET operators in decision-making especially in regards to wildlife viewing and marine protections.
Regional Tourism Organisation (RTO)/Regional Economic Development Agency	Promote MCET as part of the offering in the region, including promotion to locals/domestic market. Small operators do not have capital to promote themselves so RTOs have a role to play in raising the profile of marine ecotourism and could play a role in brokering collaborations between groups of operators in the region.
Tourism Industry Aotearoa	Play a greater role in raising the profile of marine ecotourism as sustainable business model and offer practical support for small businesses on operating a sustainable business. Could provide more a spotlight on marine ecotourism and the regenerative aspects of the businesses for example through award schemes.
Adventure Activity Audit Organisations	Assistance with the set up of new businesses and guidance prior to submission of safety plans. Review the scale of costs of compliance for different sizes of business. Consolidate different safety licences with other agencies such as Maritime New Zealand under one roof.
Central Government	Issues with STAPP funding creating an uneven playing field for operators. Consider stronger investment domestic tourism product development that may also appeal to the international market when it returns.

Changing marine environment

The changing marine environment: what has been witnessed by operators?



Positive

1. Species bounce-back
2. Less rubbish
3. Positive behaviour changes in marine users
4. Similar sightings
5. Greater water quality
6. Better infrastructure

Neutral

1. The cause of 'marine rhythms' over time is unknown - no baseline so hard to compare
2. Different behaviour of mammals
3. More vessels
4. Fewer fishing boats

Negative

1. Reduction in species
2. More stress due to increases in marine users including recreational fishing & fish farming
3. Land pollution increase in silt
4. Kina barrens
5. Sea temperature rise
6. Invasive seaweed

Changes to the marine environment – species decline has been witnessed in most areas, but where there is protection, a notable improvement is observed



Interviewees were asked what changes they have observed in the marine environment where they operate. Seven operators pointed to an increase in species with three of those directly attributing this to marine protection “we do water searches for the police and we were doing one recently and I was amazed at the marine life outside our normal operating areas. There were yellow-eyed penguins, schools of kahawai, schools of bait fish, birds. I think this is to do with the collapse of the inshore fisheries and the creation of the Marine Mammal Sanctuary.”

Eleven operators observed a decline in species with some noting a reduction in the diversity in marine life. One operator noted that fishing on the boundaries of marine protected areas had seen marine diversity dwindle “what used to be a daily spectacular on the trip to the Marine Reserve with birds dive bombing schools of fish – this now happens rarely – the ecosystem surrounding the MPAS has been degraded – hence the importance of protection”

Five operators pondered whether things change over time due to “marine rhythms” and reflected that they did not have an explanation for why some things changed over time. “We’ve also learnt that you need to see things over a long time, and not make snap judgements”. For instance some operators notice a change in where dolphins are usually located, and an increase in sightings of whales “for the last 3 years we’ve had visits by pigmy blue whales. Is that because of some kind of environmental change?”. One operator noted it is hard to judge changes without data and especially a baseline to go from “...there is no baseline for ‘before’ (e.g. how many animals, the amount of run off in the rainy season) so its hard to say (about ecosystem changes). About a year ago, there was a rumour of reducing dolphin births, but that didn’t fit with our experiences. It’s political. And there are what I call ‘ecoterrorists’ who will do or say anything. So we say we’ll only rely on hard scientific evidence”.

Three operators noted that more research and understanding of the marine environment is needed “as you can’t do much without knowing what’s going on” and that “more research needs to be done on whether there is a problem or not”.



Changes to marine environments: more people equates to more stress on the ecosystem

Several operators say they have witnessed more stress on marine environments due mostly to **more use of the resource by people** with boats, jet skis, diving, and recreational fishing - “the problem with more people living in town now is that everyone goes out fishing and diving from here and every other person has a boat”. Another operator said that technological advances such as personal sonar and spear diving equipment means people can catch fish and other species with greater ease.

Three operators also observed waste from **increased levels of commercial fish/mussel farm** being detrimental to the local marine environment.

Another negative change seen by three operators is **an increase in kina (sea urchin) barrens** and the subsequent effect on kelp forests - “Without the snapper to eat the kina, they eat the kelp and the beds are decimated”, all three attribute this to overfishing especially of large snapper. “After speaking to the kaumatua, they have been talking about the ecosystem, killing the big snapper that regulate the kina (sea urchins), why is it that the regulations require you to only catch the big snapper?”

On a positive note, three operators noted that people’s behaviour is also changing for the better, with the “fill the freezer” mentality shifting to “just catching what you need for dinner - there's a slow pendulum of people thinking more and more about that”. Another positive change linked to a change in behaviour was four operators saying that they notice **less rubbish in the marine environment** - “People are more aware” and “people’s behaviour has changed, they're not throwing stuff over the side”.

Changes to marine environments: increasing sediment and extreme weather events impacting the moana

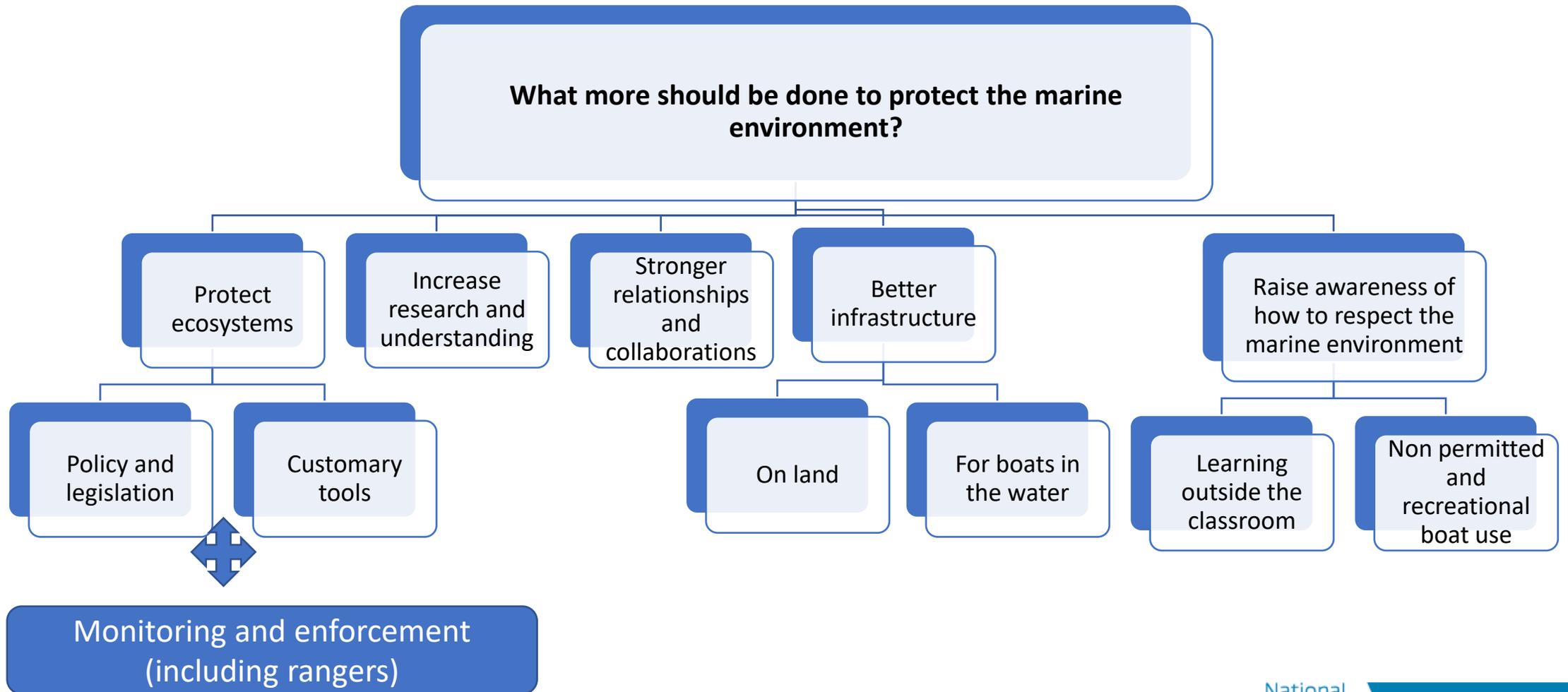


Other negative changes observed by operators include an **increase in land-based pollution** affecting the sea – including stormwater and sedimentation/silt due to housing developments, forestry and agriculture.

Others observed an increase in the occurrence and intensity of storm events, leads to increased silt flows. One operator noted that the “**biggest impact on penguins is storm events. High waves make sediment, which makes water murky, and visual predators struggle. And then whole populations start to decline. Storm events are predicted to become more common and more severe with climate change.**”

Three operators also noted a rise in sea water temperatures impacting ecosystems and leading to less fish with one operator noting “**the crayfish stocks are not like they used to be, or the number of kingfish**”.

Operators were asked: What more should be done to protect the marine environment? The following themes emerged:



Marine protection: Leverage policy and customary management tools to protect ecosystems

Operators were asked what more can be done to protect the marine environment in their local area. Marine protection was the strongest theme to emerge. This includes actively protecting the ecosystem by way of policy, legislation and enforcement. In particular **marine reserves/protected areas and sanctuaries** are the most frequently mentioned initiatives that could protect marine ecosystems - “Marine reserves are creating a good environment – they harbour [offer safe haven to] big predators. We have good examples (in the local area) but they are very small. I would like to see reserves expanded and more of them. The closer together the better – not a huge vast area between them.” Several operators that advocate for marine protected areas talked about the fierce backlash that can be engendered due to user conflicts of the resource, however one operator noted that there are “ongoing opportunities for MPAs and more flexible approaches to managing fishing and other conflicting activities.”

Five operators highlighted that **more marine protected areas and sanctuaries** would support the sector, though one operator did mention that even among the sector there was resistance due to more stringent rules around marine mammal protections - “For operators even operating within a ‘sanctuary’ is huge from marketing point of view and for marine ecotourism it just shows they're supporting it, and they can leverage off it in a huge way – it’s a win win for everybody, but they are against it, they are worried they will get fined”

Several operators voiced concerns about the impact of recreational fishing. Three comments noted people **taking more than their share from the ocean and related concerns that fishing was unsustainable.** Charter fishing boats also came under scrutiny.



Protect ecosystems

Policy and legislation

Marine protection: Leverage policy and customary management tools to protect ecosystems

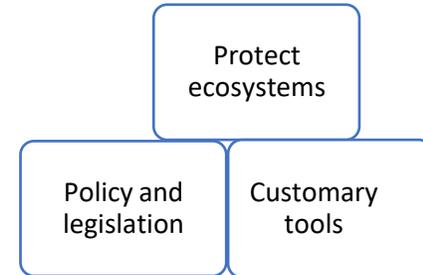


Some noted **temporary bans** on catching species using rāhui (or other moratoriums) as an effective way of protecting the ecosystem. “Around 15 years ago there was a 4 year moratorium put on the fishing of blue cod in the [body of water] and boy did they come back - when you let mother nature do its thing - they came back in spades”. Many operators said that discussions of fishing regulations should include looking at the impact of sports and recreational fishing, reviewing catch size and broader impacts. Others noted legislation related to fishing was already helping certain species “the set net ban will help Hector's dolphins”. Yet some operators pointed out that adopting a species focused approach to protection fails to account for the inter-connectedness of the marine ecosystem.

Many operators argued for a need to **focus on the health of the ecosystem** as everything is connected “there are rules to protect dolphins in terms of boating but nothing being done to protect their food sources – we focus on a species rather than the ecosystem”. Another operator noted “everything you do in the ocean ecosystem has an effect, so I like the idea of that being looked at closely and new limits established.”

Two operators said that permits for **tourism in marine areas should be capped** to prevent stress on marine mammals “more through luck than good judgement, permits were limited, so overexploitation and too many vessels haven't been problematic (as it has been in other areas of NZ)”. However, given the diversity of marine ecotourism activities it is important to look at planning that is context specific to MCET.

While legislation and policy are vital, many stressed that **monitoring and enforcement is needed** for them to have the desired effects. Several operators said that even with current protection measures there is not enough resource to monitor and enforce the regulations by DOC and the Ministry of Primary Industries (MPI). One operator noted that the lack of enforcement sees his local marine reserve “on a knife's edge”.



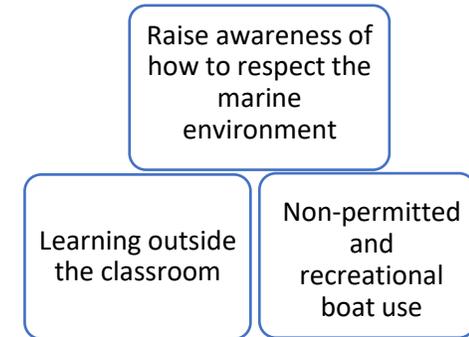
Marine protection: Raise awareness of marine users on how to protect the moana

Raising awareness among users of how to respect the marine environment and interact responsibly with nature is the second strongest theme when operators were asked what more could be done to protect the marine environment. Education is a key part of this. One way marine MCET can play a role in this is through youth and school groups via **learning outside of the classroom initiatives**.

Education and raising awareness of good behaviour among recreational boaters was also raised by operators. While acknowledging everyone's right to experience marine life, there are responsible ways of going about it which some may not know - *"We need to make sure that those interactions happen in a way that's sympathetic to the marine life. That's just education, alongside some research."*

Social media was suggested as a powerful tool to raise awareness of the importance of marine environments and our impacts on them: *"Just raising awareness of the 'why' behind issues."* Creating an understanding of the fragility of ecosystems is seen as vital by many operators because people are not aware of the ecosystem under water.

One operator suggested that an aspirational target to unite MECT businesses could be to get the country behind marine protection - *"Part of it is telling the story of why you need to do this and what the benefits are"*.





Marine protection: more collaboration between government actors and iwi is needed to ensure that the marine environment is better protected

There is a role for everyone to play in improving our marine environment, protecting and enhancing ecosystems so that marine biodiversity thrives. One operator said that individuals need to take accountability and “not leave it all up to DoC” while another stressed that the Department of Conservation “needs to step up more in the marine space but their appetite has always been low as they know it is an area fraught with challenges and high costs”.

Some operators stressed that a key to achieving results is collaboration between all parties, especially between DOC and MPI, in enacting legalisation that protects marine biodiversity. One operator noted with regard to fishing charters that there is “a lot of work to be done on marine ecology” but “when its tied up with tourism it’s a bloody hard thing to get on top of (in reference to fishing charters).” Another highlighted that the MPI seemed to be well-resourced to monitor enforcement but “has no authority in the marine reserve” to issue fines when they see breaches.

DOC and local councils are seen by operators as being best placed to action changes needed to protect the marine environment. Several operators also stressed the role of local iwi as partners in the protection of marine environments especially at the local level and in partnership with DOC - “We consider ourselves to be partners with DOC and [name of] Runanga. We have to do more work with them. We have to keep enabling and helping with research”

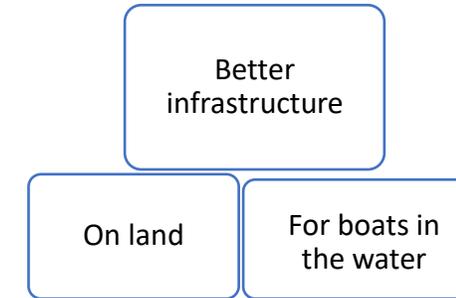
An operator mentioned the Tourism Industry Association as “good voice at a higher level” that could also potentially provide information in areas such as how to move to low impact operations.

Marine protection: Infrastructure needed for a better marine environment



Marine infrastructure was also rated as being essential to better protect the marine environment. Some operators suggested that improving facilities such as marinas to reduce the mooring of boats in rivers could improve water quality.

Another operator suggested that mooring blocks for diving could reduce anchor damage but shared that the fragmented regulatory environment makes what seems like a simple solution difficult to implement in practice - “In NZ because of the workplace Health & Safety angle it comes down to who owns those mooring blocks, who's going to maintain them, if one breaks and someone gets hurt whose fault is it? Sometimes...(don't get me wrong I'm 100% for creating safe workplaces) the amount of regulatory stuff that goes along with those decisions can actually make it difficult to protect the environment...”



Conclusions and looking ahead

A diverse sector facing challenges and opportunities

Baseline Report 2 findings reflect the results presented in Baseline 1 Report (Operator Database) in the following areas:

- There are myriad MCET activities on the water, under the water, and along the coast. MCET takes place right across Aotearoa New Zealand in different types of marine environments, with different regulations and with varying impacts.
- Concentrations of MCET are found in Auckland, Northland, Nelson Tasman, Marlborough and the Canterbury region with slightly more marine and coastal ecotourism in the North Island than in the South Island.
- Businesses are mostly micro/small (1-5 employees) with a handful of large employers. Most businesses are seasonal – scaling up over summer and dialing back over winter. The seasonal nature of the business makes it difficult to find and retain qualified staff - a challenge exacerbated by the international border closure.

The diversity of the sector highlights the need for targeted and contextualised MCET planning and management.

The COVID-19 pandemic has had a significant negative impact on business revenue and many operators have responded by adapting their business models to meet the challenges. Operators are exploring new markets and developing new products and experiences, while also planning for more sustainable and lower impact operations. There has been a shift in focus to the domestic market and education sector.

There are opportunities to use this time to engage with mātauranga Māori and seek out closer relationships with mana moana, with over three-quarters of businesses surveyed indicating a desire to do so. Currently one third already do work with iwi/other iwi Māori. The interviews highlight a desire to connect to mana moana but some uncertainty about how to go about it.

MCET has regenerative potential, but operators must ‘walk the talk’

When combined with Baseline Report 1, this Report 2 provides deeper insight into the characteristics, challenges and impacts associated with Marine and Coastal Ecotourism (MCET).

The research highlights that many operators don't feel part of a MCET ‘sector’, instead they tend to gravitate towards and identify with their own sub-sectors - for example ‘dive’, ‘wildlife viewing’ etc. When asked ‘what does marine ecotourism mean to you?’ most operators focused on a combination of the following core values:

1. Actively caring for the environment
2. Giving back to people and place
3. Delivering an inspiring and enjoyable experience
4. Running a low impact operation
5. Being centred by te Taioa

Many operators stressed that profit was not the main motivation for them. Nevertheless, in order to achieve these core goals, operators also emphasise the importance businesses being financially viable and well managed.

Some operators stress the need to be cautious about using the term ‘ecotourism’ noting evidence of greenwashing. Marine and coastal ecotourism takes place in sensitive and in many cases pristine marine environments and therefore it is paramount that MCET operators are held to a high standard to protect these places.

Existing definitions of MCET do not reflect Mātauranga Māori and need to be honed to enable better decision making

Mātauranga Māori is not currently reflected in existing definitions of marine ecotourism and this term does not appear to resonate with mana moana. Te Taiao is central to any definition of MCET and must be informed through mātauranga Māori.

The feedback from Māori and some other operators reflects the need for a definition that embraces mana moana and the Māori world view – whakapapa, and whakawhanaungatanga connections to the marine world. Models of collaboration are key to enable responsible marine and coastal ecotourism across Aotearoa New Zealand, to strengthen existing initiatives and raise standards in the sector.

The above highlights the importance of co-development at the local level to refine a definition of marine and coastal ecotourism that works for Aotearoa. At the same time there is a need to co-create criteria and indicators of success for measurement frameworks focused on the responsible development of the sector; development that will focus on shared aspirations for protecting marine biodiversity for future generations while improving livelihoods for local communities.

MCET operators want to be at the decision-making table. Eco-based system management (EBM) is well suited to meet the challenges of marine governance

The moana is a highly functional interconnected system; decisions made about the use and protection of ocean resources affect the marine ecosystem, the blue economies that rely on them, and the communities that surround them. This calls for an inclusive, ecologically regenerative, and socially just, ecosystem approach to planning marine and coastal ecotourism.

Planning and decision-making requires input from multi-sectoral parties to understand the costs and benefits of decisions, and to understand and work through marine resource use conflicts. Many operators have decades of experience and data that can aid in coastal and marine planning in local areas and there is a strong desire to share this and be involved in coastal and marine decision making.

To unlock successful marine ecotourism, mātauranga Māori knowledge that is locally based and supports aspirations for the muri of the moana is important with iwi as partners in this process. Eco-based system management (EBM) in local marine environments can play a key role in addressing the challenges raised in this report around the governance of marine environments and marine and coastal ecotourism.

Many operators caution against 're-inventing the wheel' and instead highlight that simply refreshing existing legislation and resourcing the enforcement of current regulations can help to protect coastal and marine environments and in turn support MCET. Strong calls for better communication between all stakeholders involved in marine governance reflect the underlying importance of EBM models in local places.

Suggested tools, frameworks and resources to support the sector

There are opportunities to strengthen collaboration and networking to support the sustainable development of the sector. Over three-quarters of operators seek information from others and see other MCET operators as a valuable resource, yet over half do not share information with others.

Operators consider learning from existing models of best practice as an important way to nurture and sustain the development of marine ecotourism businesses. A platform to bring together resources and tools for operators, and for best practice stories to be shared is seen by several operators as an asset to fill information gaps. Such a platform could also help to build collaboration across the sector.

Consolidating information and regulations relating to MCET can also support the sector and streamline governance. Operators are subject to a range of regulations and often deal with multiple agencies. Several businesses highlight a perceived lack of communication across agencies when it comes to marine and coastal ecotourism and lack of consistency in regulation across the country.

Operators are also looking for guidance on how to engage with mana moana in appropriate and meaningful ways.

Information and resources are needed to support operators to connect to school curricula and educational initiatives including: mātauranga Māori, outdoor education, marine and coastal education and tourism subjects. This would enable wider cross section of the New Zealand population to access, work in, and experience our marine environment – on, in or under the water and along the coast.

There is a perception that, while valuable, current sustainable tourism certification frameworks do not do enough to hold MCET businesses to account and could be strengthened in relation to environmental, social, and cultural sustainability dimensions.

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

Complex multi-stakeholder issues have been highlighted in this national baseline report and these now require further detailed investigation in the Tāmaki Makaurau and Akaroa case study settings.

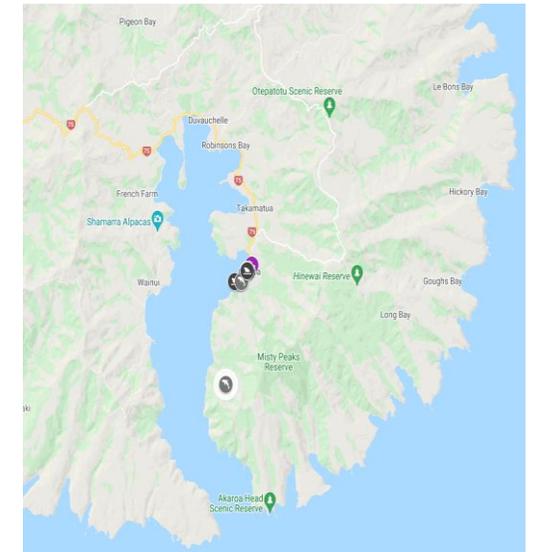
Local case-based perspectives will further inform definitions, measurement frameworks and the resources that can aid the responsible development of the MCET sector in a blue economy setting.

During the case study phase of the research we will be working with mana moana to understand shared aspirations for safeguarding a sustainable resource for the future. Leadership from mana moana will inform models of collaboration that will be a focus of the case studies.

Case study Tāmaki
Makaurau Auckland



Case study Akaroa



Related research

Related research

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

Other related research:

[Developing marine ecotourism for a sustainable blue economy: a literature review](#)

[Marine and coastal ecotourism – national and regional picture \(part 1\): Operator Database and Map](#)



Image: Courtesy of Dive! Tutukaka

For more information on this project visit:
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