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# Summary Report Developing marine ecotourism for a sustainable blue economy: a literature review

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## Summary report for Sustainable Seas National Science Challenge project 2.4 *Developing marine ecotourism*

This is a summary report for the report *Developing marine ecotourism for a sustainable blue economy: a literature review*.

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For more information, visit:

[www.sustainableseaschallenge.co.nz/growing-marine-ecotourism](http://www.sustainableseaschallenge.co.nz/growing-marine-ecotourism)



### About Sustainable Seas Challenge

Our vision is for Aotearoa New Zealand to have healthy marine ecosystems that provide value for all New Zealanders. We have 60+ research projects that bring together around 250 scientists, social scientists, economists, and experts in mātauranga Māori and policy from across Aotearoa New Zealand. We are one of 11 National Science Challenges, funded by Ministry of Business, Innovation & Employment.

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***Ecotourism is responsible travel to natural places that conserves the environment, sustains the wellbeing of local people, and involves learning and interpretation. Marine ecotourism sees this experience taking place in the marine environment.***

## Ecotourism is crucial to growing a successful blue economy in New Zealand.

If marine ecotourism is to contribute to healthy marine environments and deliver benefits to host communities, it must be managed carefully. To achieve blue economy outcomes, marine ecotourism must be viewed as an integral part of the overall tourism system and be factored into ecosystem-based management (EBM). It is essential that host communities and operators are engaged with marine ecotourism development processes and inform measures of what constitutes success for the sector. It is also vital that a clearer picture is generated of the definition, size and shape, and development trajectories of marine ecotourism globally and nationally.

Drawing on over 170 sources (academic, online, policy, reports) the literature review examines five key themes relating to the sustainable development of marine ecotourism:

1. defining the sector;
2. the relationship between marine ecotourism and blue economy;
3. the potential for ecosystem-based management;
4. the nature and extent of marine ecotourism in New Zealand; and
5. the current management regime of marine ecotourism in New Zealand.

This summary report covers some of the main highlights to emerge from the broader literature review.

## Marine ecotourism is well situated to contribute to the blue economy post Covid-19

Prior to Covid-19, coastal and marine tourism was projected to become the largest segment (26%) of the global blue economy. Current forecasts show that demand for marine ecotourism will grow, with interest in nature-based holidays and coastal destinations rising. Alongside increasing demand, experts on the blue economy predict a future trend in marine tourism is the scaling up of ecotourism activities and experiences.

## Marine ecotourism is an important part of the New Zealand visitor experience

In 2019 nearly a quarter (24%) of visitors viewed seals in their natural habitat and 14% viewed dolphins. The country's beaches, coastlines, and marine reserves were also the most visited environments during the 2020 summer by domestic tourists. Despite marine ecotourism's importance to the visitor experience relatively little is known about the sector. The last national stock-take of ecotourism activities in 2004 identified rapid development of marine ecotourism activities and provided a good benchmark but has never been updated. To fill this gap a new national database of marine ecotourism operators will be delivered in 2021 by this National Science Challenge project – it will be easy to both access and update.

## Diversity makes the sector difficult to define

A lack of clear definition and understanding of New Zealand's marine ecotourism sector has meant that economic evaluations of the sector tend to range from substantial overestimates (reflecting an overly broad definition) through to significant underestimates (too narrow in their definition). The sheer diversity of tourism activities that happen in and under the water and on the foreshore and coastline makes it difficult to define the sector. The literature review argues for an approach that emphasizes a continuum of activities that reflects sustainable development values and intensity of interaction with the marine environment.

## A lack of information impedes effective decision making and management

Policy and governance of marine ecotourism has languished since the failed New Zealand Ocean Policy initiative in the early 2000s and there is no management framework to support achievement of best practice. A lack of reliable and consistent information on marine ecotourism industry characteristics and related impacts, impedes effective decision making and policy development at a national scale, hindering initiatives and investment that could aid a 'blue recovery' in the wake of Covid-19.

## Marine ecotourism can contribute to a regenerative future

There are calls for regenerative principles to be applied to build a more sustainable tourism system, and well-managed marine ecotourism has a significant role to play in this process. Marine ecotourism businesses in Aotearoa and globally are adopting quadruple bottom line (social, economic, environmental, cultural) approaches to their operations. For instance, profits from Blue Penguins Pukekura in Otago go towards ecological restoration and promoting breeding success. The operation is linked to local schools where students learn about local kororā (Little Blue Penguin), native plants and take part in habitat restoration. Visitor numbers are restricted so that the business stays within the carrying capacity of the local ecosystem. In Auckland, Arawai (Paths Across the Water), takes visitors on an ocean-going Māori waka hourua (a double hull canoe). The enterprise integrates a mātauranga Māori approach that embraces and sustains cultural heritage, environment and the wellbeing of residents.

Marine ecotourism operations often partner in ocean conservation, with visitor derived revenue directly financing conservation science. Several New Zealand marine ecotourism operators have partnerships with the Department of Conservation to research and monitor marine mammals. In Australia, in response to Covid-19, the national government invested AUD 3.2 million and repurposed 300 marine ecotourism staff on the Great Barrier Reef to focus on in-water conservation and to monitor reefs. In Europe coastal and marine ecotourism operators have been enlisted to see how they can provide early warning of environmental threats such as harmful algal blooms. Marine ecotourism also increases the conservation awareness and values of visitors, creating advocates for ocean conservation.

## Next steps

To transform tourism, inclusive models and policy frameworks are required. Cross-sectoral interaction must be factored into planning a blue economy, unfortunately decision-making silos can hinder this process. Uncoordinated governance sees a disconnect between those who market tourism and those responsible for the management of common pool natural resources, leading to unsustainable development of the tourism system. An EBM approach to ocean management can facilitate enhanced inter-sectoral decision making. It is also vital to consider the needs of non-human actors in this process.

To achieve a more holistic view of marine ecotourism and how it can achieve sustainable development objectives it is vital we study local cases where tourist, operator, community, and environment interface. Research generated at the local scale supports national level initiatives and is essential to better understand how the marine ecotourism sector contributes to the blue economy and community wellbeing in Aotearoa.

When developing marine ecotourism policy, appropriate policy instruments and indicators need to be based on local community priorities and insights into development requirements. Likewise, operators must not be viewed as simply stakeholders, but rather as active participants in shaping policy and disseminating best practice. It is the need to build a deeper understanding of the local context of marine ecotourism development into blue economy initiatives that drives the coming phase of this Sustainable Seas project.



Find the full report *Developing marine ecotourism for a sustainable blue economy: a literature review* at:

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