

Navigating the Future of Tourism in New Zealand
Otago Tourism Policy School 2025
A contribution from Glenys Shearer (Coughlan) March 2025

contributed in the memory of John MacDonald - an outstanding tourism leader
who's life was celebrated here in Queenstown on March 28 2025

I regret that I am unable to join you at this year's Otago Tourism Policy School and, as someone who has looked to the work of Visit Scotland and Failte Ireland as examples of best practice models for tourism development, I am especially disappointed that I will not get to meet Rob and Paul in person and to learn from the discussions that you will share with those in attendance.

New Zealand has been considered as a global leader in tourism development and marketing for well over 100 years. But that position has been systematically eroded - largely as a consequence of existential forces well beyond our control BUT, having delivered a series of provocations at the past two Policy Schools, I would argue that our response to these existential challenges has been inadequate. We have all chanted the mantra of 'build back better' - writing more strategies and then putting them on the shelf.

Since my very early days in strategy with Air New Zealand, I have been an advocate of the school of thought that argues that the best strategies are used more as a compass than a road map.

At last year's Tourism Policy School I proposed seven points of navigation - the pou or goals , or compass points - by which the development of tourism could be guided as we give life and real meaning to 'building back better". Doing more, not writing more.

The compass points built on the work of the Tourism Futures Taskforce's 'We are Aotearoa' and TIA's 'Tourism 2050', along with referencing the work of a wide range of global thought leaders like Mariana Mazzucato and her moonshot thinking, and including the work of Sir Peter Gluckman and the Centre for Informed Futures who champion the idea of defining the future states or outcomes that we aim to realise. This approach assumes that if we can build consensus around the desired future states, then we can focus on what needs to be done to get - e.g. will new policy settings, partnerships, investments or revenue generating initiatives be required to get us to where we want to be?

With this Government's renewed focus on the contribution that Tourism can make to New Zealand's economic growth agenda - growing our export earnings, driving new inward investment, promoting the Māori economy, stimulating regional development and providing meaningful employment , then, it is more important than ever that Central Government (elected members and it's agencies), Local Government (elected members and management) and the multitude of large and small businesses and their representative bodies that together make up 'the industry', agree on what exactly it is that we are setting out to deliver - the points of the compass that we choose to navigate by or, using the Visit Scotland model's language - a 'National Accountability Framework'

The **Seven Points of the Compass** that were promoted at the 2024 OTPS are:

1. The Industry is Thriving

- the conditions for businesses and people to thrive and prosper are in place individually, locally, nationally and internationally.
- we are focused on, driving productivity gains, up-skilling and advancing our workforce and our 'in market' partners - improving remuneration, profit margins and the return on invested capital (from both public and private sources)
- our reputation for hosting and contributing to world class events is driving unprecedented levels of demand, and we are securing opportunities to showcase New Zealand science and innovation across these events.
- we are achieving significant gains in addressing the challenges of managing seasonality and regional dispersal- delivering improvements in the utilisation of our physical assets and better employment opportunities for our people.
- the Maori economy is soaring and,

2. The Industry is enlightened by understanding and embracing mana whenua's values and cultural practices

- Te Whakarae Maori - manaaki, tiaki and aroha - sit at the heart of our visitor offering and we are honouring the lessons of te ao Maori – not only in the delivery of our visitor experiences and the narratives that we share, but in the design and development of our visitor infrastructure and the public infrastructure upon which the industry depends, and in the relationships we share with the environment.

3. The Environment is Regenerating and our Footprint on the Environment is Reducing

- we are focussed on the sustainable management of our environmental assets, addressing the real costs of utilising them, applying appropriate management protocols and reinvesting revenues in regenerative and restorative initiatives
- our ecosystems, habitats and biodiversity is healthier, and the visitor experience is enhanced by the quality of our natural environments
- we are advancing the uptake of breakthroughs in contemporary science, managing waste and measuring our environmental performance against new metrics as we seek to support the sustainability of our environments

4. Our Communities are Empowered and Actively Engaged

- the principles and projects that were embedded in the development of regional DMPs are being repurposed as part of regional development plans and integrated into Local and Regional Government planning processes and aligned with a national visitor planning and destination development or national accountability framework
- the revenue sources and co-investment schemes are in place to support this work
- our community engagement tools enable us to demonstrate respect for the needs of host communities and to reflect their aspirations in our development plans

5. Our Visitors are Enriched at every Touch Point and our Brand Value is consistently enhanced

- the experiences and knowledge that is shared between our customers, our local communities and mana whenua create enduring value for all
- we are using state-of-the-art technologies to bring new dimensions to the visitor experience while reducing our footprint on the environment, and addressing any unintended impacts caused by tourism on local communities
- we are focussed on actively engineering the lifetime value of our visitors to tourism and all other related sectors across the New Zealand economy . We have created the Tiaki Club and we have loyal and committed followers who continue to connect with and contribute to our causes and to the success of other export industries from their homes
- the desirability of spending time experiencing New Zealand and exploring the regions of New Zealand is being amplified and entrenched across all of our target market segments -international and domestic

6. The Industry is Enabled and Informed by deep data and emerging technologies

- the visitor economy is underpinned and informed by the quality, timeliness and depth of data and insights that it is able to access and analyse, and by advances in technology needed to inform market development initiatives , manage visitor flows in real time , measure economic returns and guide the rollout of new initiatives.
- The data is of sufficient quality that it is used in the scoping, definition and development of New Zealand's infrastructure pipeline.

7. New Zealand's Visitor and Support Infrastructure is world-class and sought out by leading Investment Partners

- we know that for the contribution of tourism to be sustainable that we must demonstrate an understanding of what it takes to compete in in global and local capital markets and also how best to leverage public and private partnerships.
- we have a very clear understanding of the nature and cost of the visitor infrastructure that is required to optimise the visitor experience and to provide a compelling return on invested capital
- we understand the vital interface between purpose built visitor infrastructure and public support infrastructure that is shared with local communities - and how best to structure partnerships that will contribute to the provision of shared infrastructure
- international investors, developers and operators are competing for positions in New Zealand's tourism industry.

These are lofty aspirations but so too were the aspirations of the early navigators who journeyed the great oceans of the world to make landfall here, with only the stars to guide them.