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Closing the Gaps – He matai tapoi Maori barriers and impediments short report

**prepared for the Office of Tourism and Sport and Te Puni Kokiri
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ba'rrier¹, n. Fence barring advance or preventing access; (ancient chariot-races) barred starting-cells; (foreign towns) gate at which customs are collected; (tilting) the lists of enclosing palisade, also railing parallel to which but on opposite sides, tilters charged reaching their lances across; any obstacle, boundary, or agency that keeps apart. [ME & AF *barrer*, OF *barriere* f. Rom. **barraria* (*barra* BAR¹) later assim. to F spelling.]

imped'iment, n. Hindrance, obstruction, esp. *just cause or ~*; *~ (in one's speech)*, stammer; (pl., also L *impedimen'ta*) baggage, esp of army. Hence ~AL (-en-) a. [f. L *impedimentum* (as prec., see –MENT)]



INTRODUCTION

The **Stafford Group**, together with independent consultants: Hinurewa te Hau of Paewaho Consultants and Dr. Alison McIntosh of Lincoln University (together, the **Project Team**), was commissioned to perform a study of the level of participation in the New Zealand tourism industry by Maori.

As part of the Study, the Project Team was to provide – among other things – a short report to the Office of Tourism and Sport (the **OTSp**) and Te Puni Kokiri (the **TPK**) (the **Short Report**) that:

- used the data collected in phase 1 of the Study process (detailed in the Proposal from the Group dated 14 April 2000 and set out at Annexure A);
- identified barriers and impediments that are unique to Maori and which inhibit Maori involvement and performance in the tourism industry; and
- invited comment and feedback.

IDENTIFIED BARRIERS AND IMPEDIMENTS

The barriers and impediments unique to Maori and which inhibit Maori involvement and performance in the tourism industry identified in phase 1 of the Study process are set out in this section of the Report. Specifically, the barriers and impediments identified during the course of the:

- literature review;
- structured interviews of Maori tourism operators;
- structured interviews with members of the finance and investment community (based primarily in Auckland and Wellington);
- structured interviews with representatives of various government agencies and Maori organisations and with representatives from regional and economic development agencies in various regions;
- business survey of tourism businesses in New Zealand; and
- inbound tour operator survey of operators based onshore and offshore,

are set out on the following pages.



1. THE LITERATURE REVIEW

The Project Team reviewed literature from a number of sources in phase 1 of the Study process. Barriers and impediments identified¹ during the course of the review are set out below. They are not listed in any particular order of priority but have been categorised as follows:

1. general barriers and impediments; and
2. barriers and impediments peculiar to Maori;

The barriers and impediments have been described as they were reported in the literature reviewed (see the bibliography at Annexure B) and do not necessarily represent the opinions of the Project Team.

1.1 GENERAL BARRIERS AND IMPEDIMENTS

- **(a lack of data)** There is a paucity of research data on Maori tourism and Maori tourism businesses, yet Maori feel *over-researched* and as though they have given advice for little return. For instance, the attitude of Maori to all forms of tourism development is largely unknown. Many tourism businesses have been unable or unwilling to disclose information on the total number of Maori employed in their businesses or on the performance of their businesses generally.) Publicly funded research is slow to produce the data needed to guide Maori tourism development. In the result, it is difficult to plan for increased participation by Maori in the tourism sector.
- **(a lack of promotion)** There has been limited promotion of Maori tourism product (Tourism New Zealand is only starting to address the role of Maori culture in its *Brand NZ Strategy*, for instance). Moreover, there has been minimal consultation with Maori over the promotion of Maori culture in the tourism industry. Without adequate and appropriate promotion, it will be difficult for visitors to find a Maori presence in the range of New Zealand tourism experiences. Moreover, there will be little incentive for greater participation by Maori in the tourism industry.
- **(a lack of regional tourism organisation or Local Government support)** Regional tourism organisations often tend to concentrate on a more generic approach to their region rather than identifying and assessing the opportunities for Maori tourism product.

There is no Local Government funding support for regional Maori tourism organisations. In the result, there is often a low level of trust shown by Maori toward Local Government and regional tourism organisations.

- **(a fragmented tourism industry)** The fragmented nature of the tourism industry does not provide an incentive for greater participation by Maori within it.

¹ Dr. Alison McIntosh and TheStaffordGroup



- **(a tourism industry mind-set)** The tourism industry mind-set is perceived to be rigid and impenetrable. By way of illustration, there are difficulties associated with aspects of the tourism industry's attitude to Maori tourism product. Traditional Maori performing arts are perceived as neither high quality nor professional and *marae* visits are seen as problematic (particularly if *maraes* are not accessible because of a *tangi* or because of perceived legal risks).
- **(use of Maori tourism product)** The use of Maori tourism product by the tourism industry has been narrow and superficial (AMTF, 1996). There is a perceived need to promote contemporary images of Maori that show how Maori live today.
- **(inadequate Government initiatives)** It is argued that attempts to grow Maori tourism from a centralised bureaucracy have failed. It is also argued that there has been inadequate or inappropriate Government funding of tourism, generally, coupled with a lack of policies to support and encourage Maori participation in the tourism industry.
- **(uncertainty about access to non-financial resources)** There is uncertainty over the control of New Zealand's conservation estate.
- **(limited access to financial support)** There is a lack of capital for investment in the tourism industry generally and a lack of access to capital for Maori investment in tourism specifically (see below).
- **(lack of understanding by non-Maori of Maori culture and other issues)** There is perceived, among Maori, to be a lack of understanding of Maori values, culture and issues by non-Maori (including tourists and tour operators). For example, tourists can infringe the values associated with Maori heritage and cause offence to Maori people and, often, tourists don't stay long enough to learn anything about Maori concerns.)

That perceived lack of understanding results in conflicts over heritage management and ownership issues. It has also led, arguably, to an overly simplistic dependency on a marketing-led ideology of tourism rather than a concern and understanding of Maori cultural issues. Importantly, the perceived lack of understanding has resulted in a view that Maori do not have the *right image* for employment in the tourism industry.

It has been reported that non-Maori are often apprehensive in dealing with Maori. This has been attributed to the uncertainty non-Maori have about what Maori business principles are or to ignorance about Maori institutions. Overall, there is an inherent conflict between non-Maori and Maori values.

- **(barriers to entry)** There is a variety of miscellaneous barriers to entry into the tourism industry, including:
 - the number of formal requirements (for instance, obtaining accreditations and planning permission and meeting health and safety requirements);



- the high cost of rents and rates;
- the difficulties faced by SMEs in tourism generally (Deloitte 1995; Page *et al.*, 1999);
- the unresolved issues concerning ownership of land and resources;
- the fact that tourism is a growing but mature industry and the fact that opportunities for new entrants are linked to continuing, satisfactory rates of growth (outside Maori control); and
- the fact that tourism is dominated by *big players* which makes business *start-ups* difficult.

1.2 BARRIERS AND IMPEDIMENTS PECULIAR TO MAORI

- **(marginalisation of Maori)** Maori are economically marginalised and this has led to an undercurrent of bitterness and anger.
- **(negative perceptions of tourism)** Tourism is perceived, by Maori, to have provided little commercial benefit, whereas other industries are seen to offer better returns on investment. Indeed, turnover in Maori tourism businesses is reportedly low². Moreover, there have been a number of failed Maori tourism enterprises.

There are also negative perceptions of the impacts of tourism on:

- Maori culture and values (including: language; *mana whenua* (relationship to the land); *mana atua* (relationship to God); *mana tangata* (the status of the people); *tapu* (sacredness); *papatuanuku* (the loss of connection with the land) and the *Europeanisation* of Maori);
- privacy;
- the use of sites that are usually reserved for traditional use;
- the environment;
- cost of living (there is a perception that tourism brings an increased cost of living with attendant risks of increased dependency upon welfare and increased crime rates);
- heritage and sacred space;

² The structured interviews with Maori tourism operators revealed that turnover averaged between \$50,000 and \$350,000 per annum.



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- Maori stereotypes (there is a perception that some Maori experiences have been manufactured by non-Maori entrepreneurs and those experiences have become stereotyped, commoditised and bastardised);
 - the respect and sense of belonging of younger generations to *Iwi* groups (as opposed to a connection with a commercial group); and
 - the individual's responsibilities to a *hapu* or an *Iwi* group.

There is concern about the seasonality of employment in the industry and the often monotonous work required.

There is also a negative perception that tourism is becoming increasingly *institutionalised*.

- **(lack of consultation of and lack of decision making by Maori)** It has been argued that there is a history of legislated control and manipulation of Maori that has led to a lack of consultation and an exclusion of Maori from decision-making processes. Decision-making processes usually reflect Western priorities and values that overlook the Maori way of debating issues or the fact that Maori need to work in partnership or collaboration rather than being *consulted*.

Maori are particularly concerned, for instance, about their inability to take part in planning for and managing the effects of tourism under the *Resource Management Act*. A survey by MfE (1998) found just over half of Maori organisations surveyed said they were inadequately notified of the resource consents that affected them).

There are few or insufficiently strong links between Maori and tourism industry decision-makers or organisations. There are few, if any, indigenous tourism networks: indeed there appears to be an insufficient number of Maori tourism enterprises that can, together, form strategic alliances.

Issues of lack of networks, lack of skills, shyness and the gender of advisors all affect the access by Maori into the tourism sector.

There has also been, arguably, an exclusion of Maori from administrative and management functions at national and regional levels. In any event, Maori are poorly represented at a professional level in the tourism industry (there is a shallow pool of skilled people in Maori communities who are able to take on the responsibilities of progressing tourism development programs).

- **(presence of racism and discrimination)** Racism and discrimination present, together, a barrier and impediment to increased participation by Maori in New Zealand's tourism sector.



- **(negative media coverage)** Confrontational media coverage of Maori participation in the tourism industry has created a state of unease. The coverage has been described, variously, as patronising, controlling, paternalistic, stereotyping and negative in relation to Maori business ventures.
- **(low levels of confidence)** Maori have historically favoured leasing sites to third parties rather than developing them for tourism purposes. The lack of confidence of Maori and an accompanying discouragement of individual initiatives is evident from the number of Maori dependent upon welfare. This low level of confidence is often coupled with perceptions of Maori, that they are: not motivated; not keen to offer leadership; have a lack of vision; are apathetic and have a lack of commitment or drive. In addition, there is reportedly a reluctance to accept risk in personal and business situations and in relation to assets.
- **(limited skills base for the tourism industry)** There is a skills shortage among Maori wishing to participate in the tourism industry. At best, modest business skills generally exist among Maori in, for instance, financial management and marketing areas. There is a lack of education and training resources for Maori interested in tourism business management. This skills shortage is perhaps accentuated by the low number of Maori continuing to tertiary education and the low number of Maori proceeding to gain formal qualifications in tourism.

It has been reported that recruitment for jobs in Maori tourism businesses is often conducted on an informal basis. In the result, there is a risk that staff members are not skilled and there is a risk of race or gender discrimination.

- **(limited knowledge of the international visitor market)** Many Maori communities are experienced in hosting domestic visitors (Maori and other New Zealander visitors) interested, say, in a *marae* experience. They are not necessarily, however, experienced in hosting overseas visitors for similar experiences³.
- **(limited commercial acumen)** There are few Maori in tourism businesses and few with the necessary knowledge and skills base to start businesses from *scratch*. Without commercial acumen, it is difficult for Maori to plan business operations (by way of feasibility studies; marketing plans; strategic and business plans). It is also difficult to establish or join business networks to obtain support services or investor attention.

There is a perception that Maori have difficulties in adapting to non-Maori (or European) commerce and industry standards. By way of illustration, there is a perception that the asset holding framework (trusts, Incorporations) is slow to change or adapt to new opportunities and there is a perception that Maori traditions, social structures and cultural patterns do not lend themselves to good business management or skilled and professional performances.

³ The structured interviews conducted with Maori tourism operators revealed that, on average, the international visitor market constituted up to 80% of the total visitor market for Maori tourism businesses.



There is also a perception that there are unrealistic expectations about the amount of work involved in the establishment and operation of tourism businesses. There is also a perception that Maori often fail to respond to change.

The tension between the norms of traditional, *Iwi* based leadership and those necessary for business have been often reported. It has also been reported that there is often a failure to recognise the need to put young people in positions where their knowledge, ideas, outlook and enthusiasm can influence policy.

- **(governance and cultural issues)** Management of tourism businesses by *Iwi* (as opposed to individuals and *whanau*) has not, traditionally, been successful: there is often a lack of overall cohesive leadership among *Iwi*. There are often conflicts, divisions and rivalries between tribal groups and between rural and urban groups that inhibit individual and group initiatives.

The preservation of cultural integrity can deny Maori people the *benefits of development*. A need has been identified for acceptable *kawa* (or protocols) and cultural integrity versus acceptable profit levels.

There is often tribal disapproval of non-local *Iwi* wishing to set up cultural tourism centres in another tribe's area.

Capturing the potential economic benefits from tourism use of resources is reliant on Maori owning the land. Given the multiple ownership of Maori land (or businesses) can lead to time delays in pre-development decision making; difficulty in raising capital and increases in the complexity of statutory processes (for instance, obtaining *Resource Management Consents*). There is also the issue of fragmented ownership of *marae*. Conservative attitudes and fears of land loss bind Maori assets to a policy of preservation and conservation.

There is a reported need to create robust organisations and effective management systems. They need to embody effective, collective as opposed to individual approaches to decision making.

- **(issues concerning the preservation of Maori culture and the protection of intellectual property rights)** There is a perception that tourism can and has, in some cases, lead to:
 - a loss of control over *taonga*;
 - a lessening of the *mauri* of artefacts;
 - a loss of *mana*; and
 - a lack of control over what is or is not authentically Maori.



Retaining ownership of the intellectual property rights connected to Maori cultural product (art, music, dance, etc.) is an issue. There is seen to be limited protection (including via intellectual property rights) against the inappropriate use of Maori images in tourism marketing and merchandising etc.. In the result, there are often *whi* restrictions on the use of tribal intellectual property for personal gain by entrepreneurs.

- **(limited use of new technology)** There is, reportedly, a low level of information technology use by Maori tourism operators. Given the world-wide trends in tourism, the low level of information technology use puts Maori tourism businesses in a non-competitive position on the world stage. In turn this will lead to a disincentive for greater participation by Maori in New Zealand's tourism industry.
- **(perceived limited tourism product opportunities)** There is a perception that there are limited tourism product development opportunities for Maori. By way of illustration, it is believed that opportunities in rural areas relate only to niche markets (for instance: cultural tourism; farm-stay and *marae* stay markets). If this perception holds true, the result will include limited full-time, part-time and seasonal employment (Page *et al*, 1999).

In addition, much of the physical asset base (land and landscape) is dedicated to agricultural rather than tourism use.

There are also restrictions on Maori offering full tour packages (for instance there will be interpretation of sacred places but no accommodation offered).

- **(increasing competition)** Maori tourism operators are facing increasing competition from both Maori and non-Maori tourism operators.
- **(Maori standards and guidelines)** There are no service or management standards for specific Maori tourism operators. Nor are there any guidelines that have been determined tribally or pan-tribally. There are no standard quality controls or monitoring processes that have been decided by Maori for Maori. And there is no Maori tourism strategy that communicates Maori values and beliefs.
- **(geographic isolation)** Many Maori groups are geographically isolated from the main tourist pathways. Visitors to New Zealand only perceive Maori tourism to be evident on the North Island. There are also access difficulties for *free-and-independent-travellers* and *travellers-visiting-friends-or-relatives* wanting to stay on a *marae*.
- **(limited product range)** There is the potential for duplication of Maori tourism product (that is, there is a need for differentiation in product offered). (There is a perception that new product should not simply copy the Rotorua *kapahaka* style of tourism⁴.)

⁴ According to the interviews with regional economic development agencies.



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- **(limited access to financial resources)** The bulk of Maori assets is often locked into community and group based investment. Coupled with the often, limited access to financial resources to fund Maori tourism enterprises, Maori have a dis-incentive from participating in the tourism industry. (The limited access to funds has been attributed, in part, to the less flexible commercial lending criteria for land trusts.) Without access to funding, many ventures often prove too costly and too difficult to operate (for instance, there are insufficient resources for engaging expert assistance). (The bulk of new positions created in tourism is centred on hotel and other accommodation facilities; Maori often lack the capital to invest in these developments.)

There is little encouragement of joint ventures between Maori and non-Maori within the private sector.

- **(control of Maori tourism businesses by non-Maori)** Where resources are controlled by non-Maori, Maori involvement in the tourism industry tends to be lower in terms of quality of jobs (Cukier and de Haas, 1998).

There is concern about foreign ownership and the resultant lack of local control.



2. STRUCTURED INTERVIEWS OF MAORI TOURISM OPERATORS

The Project Team⁵ conducted structured interviews of Maori tourism operators in phase 1 of the Study process. Barriers and impediments identified after the interviews are set out below. They are not listed in any particular order of priority. Barriers and impediments have been described as they were relayed to the Team and do not necessarily represent the opinions of the Project Team.

- **(low levels of education)** The Maori tourism operator interviewees indicated that most Maori staff had no tourism qualifications (on average, less than 40% of Maori staff – including owners and operators held such qualifications). The interviewees also indicated that most Maori staff had no tertiary qualifications. The low levels of education in aspects of the tourism industry were seen as a barrier or impediment to participation in the industry by Maori.
- **(employment patterns)** Interviewees indicated that there was a preference, among Maori tourism operators, to employ Maori staff. Of the young staff employed, most tended to move on after a short term (2 months to 12 months). The high rate of turnover presents an impediment to the growth of Maori tourism businesses insofar as *handing on* businesses to or training the next generation.

There is concern, among Maori, about the lack of security associated with employment in the tourism industry. There is also concern over the seasonality of much of the available work.

- **(issues relevant to availability and pricing of Maori tourism product)** A potential barrier to increased participation in the tourism industry by Maori is the current availability of product (not always seen as reliable) and the high prices charged for product (an issue, particularly, for the domestic visitor market).
- **(issues relevant to capitalisation of Maori tourism businesses and access to funding)** There are concerns over the under-capitalisation of many Maori tourism businesses. The interviewees also identified the fact that Maori are not usually in a financial position to look at *start-ups* in the tourism industry.
- **(inadequate support)** There is a perception that there are insufficient, approachable and affordable sources for: professional guidance; marketing networks; financial advice or legal advice.
- **(lack of representation at a government level)** A major impediment or barrier identified by the interviewees was the lack of representation of Maori interests at a government level.

⁵ Ms Hinurewa te Hau.



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- **(a lack of guidelines for Maori)** The lack of standard and clear guidelines for the objectives of Maori in the tourism industry was identified as a barrier or impediment to participation in the industry.
 - **(absence of positive messages)** The absence of stories about Maori success in the tourism industry was perceived to constitute a fundamental barrier or impediment to participation by Maori.
 - **(the fact of the *tall poppy syndrome*)** The tall poppy syndrome – reportedly ever-present in the Maori community – was seen as an impediment or barrier to participation in the tourism industry (among other industries) by Maori.



3. STRUCTURED INTERVIEWS WITH MEMBERS OF THE FINANCE AND INVESTMENT COMMUNITY (BASED PRIMARILY IN AUCKLAND AND WELLINGTON)

The Project Team⁶ conducted structured interviews with members of the finance and investment community (based primarily in Auckland and Wellington) in phase 1 of the Study process. Barriers and impediments identified after the interviews are set out below. They are not listed in any particular order of priority. The barriers and impediments have been described as they were relayed to the Team and do not necessarily represent the opinions of the Project Team.

- **(perceptions of tourism investments generally)** There was a general view that tourism projects were *high risk* and that there were few *bankable* projects. There did not appear to be any view that Maori tourism projects presented higher risks or were less bankable than non-Maori projects. Nevertheless, the attitude to investing in tourism projects presents a barrier or impediment to increased participation by Maori in the tourism industry.
- **(the approach of Maori to lending institutions)** There is a view that Maori are reticent about approaching the banks for financing. If this is true, the attitude of Maori toward the funding institutions is, itself, a barrier or impediment.
- **(the lack of assistance sought by Maori)** Interviewees suggested that Maori applicants for investment funding were often ill prepared for their approaches to lending institutions. By way of illustration, it was suggested that Maori needed to prepare feasibility studies, understand common lending requirements and have business plans in place etc.. Without that information or assistance, it was argued that Maori were *put-off* approaching institutions for funds and, thereby, limited from entering the tourism or other industries.

Coupled with the above concerns were the concerns about the lack of education of Maori groups, particularly in commercial practices.

In addition, there were concerns about the lack of joint venture approaches for financing, that is, approaches made by Maori groups together with investment or business partners.

- **(the governance of Maori groups)** It was suggested that the decision making process adopted by Maori groups was, in itself, a barrier to gaining funds and – in turn – starting up in the tourism or other industries. Specifically, it was suggested that there was often no delegation of authority to one decision maker (it was recounted that on occasion 10 or more *Iwi* representatives together attended meetings at a bank). It was also suggested that there was often no corporate or other *European* structure within which decisions are made. These factors were argued to lead to inordinate delays in progress.

It was also suggested that there was often a lack of advice from experts and if advice was made available, it was seldom heeded.

⁶ TheStaffordGroup.



All these *governance* factors were felt to compromise the ability of Maori to have a higher level of participation in the tourism industry.

- **(lack of transparency)** Those lending institutions interviewed commented on the lack of transparency in accounting practices of many Maori groups. There was general support for *public accountability*. For instance, it was recounted that often funds were shifted between accounts on an as needs basis rather than building up or maintaining accounts for separate profit centres (the institutions were concerned to see the progress of their investments).
- **(choice of venture)** It was indicated that the ventures chosen by Maori groups were often not a good *fit* with the expertise or experience of the group. During the course of the interviews with members of the finance and investment community, reference was often made to the example of *Tainui* having purchased the *Warriors*.
- **(a lack of commercial perspective)** Tied to the issue concerning a lack of transparency, the members of the finance and investment community interviewed commented on the lack of commercial perspective often held by Maori groups. Specifically, there was some concern about the lack of interest in a traditional return on investment concept and the overriding interest in securing income to fund socio-economic developments for the Maori group. That is, the lending institutions were concerned about the flow of funds and the cross-subsidisation of activities.
- **(a lack of asset backing)** It was noted that, often, Maori applicants for funding had insufficient or unsuitable asset backing. Barriers and impediments to sourcing suitable or sufficient asset backing included: the over-representation in the lower socio-economic groups; the need to deal with multiple ownership of land (and the reticence of some *Iwi* groups to use Maori land as security) and *Iwi* not favouring entrepreneurial efforts of some Maori individuals. The lending institutions also noted their preference not to use Maori land as security under the *Te Ture Whenua Maori Act 1993* because of sale restrictions reducing the value of land as security, the lack of credit policy and the potential negative publicity should the institution have to sell the land upon default.
- **(a reluctance to accept risk)** The lending institutions commented on the perception that many Maori were reluctant to risk assets as security against borrowed funds. This was exacerbated by the fact that many Maori were inexperienced in approaching institutions for funding.



4. STRUCTURED INTERVIEWS WITH REPRESENTATIVES OF VARIOUS GOVERNMENT AGENCIES AND MAORI ORGANISATIONS AND WITH REPRESENTATIVES FROM REGIONAL AND ECONOMIC DEVELOPMENT AGENCIES IN VARIOUS REGIONS

The Project Team⁷ conducted structured interviews with representatives of various government agencies and Maori organisations and with representatives from regional and economic development agencies, in various regions, in phase 1 of the Study process.

Barriers and impediments identified after the interviews are set out below. They are not listed in any particular order of priority. The barriers and impediments have been described as they were relayed to the Team and do not necessarily represent the opinions of the Project Team.

- **(lack of information on Maori participation in the tourism industry)** Interviewees identified a clear lack of data on Maori participation in the tourism industry. While some Maori representative organisations kept databases on the number of Maori tourism businesses in particular regions, regional and economic development agencies rarely kept any data whatsoever. In the result, it is difficult to plan for increased participation by Maori in the tourism sector. Moreover, it is difficult to match market opportunities with local Maori expertise and skills or investment in plant and infrastructure.
- **(a lack of training and support)** A high percentage of interviewees identified the lack of training (business training; affordable *Maori styled* education and education generally) among Maori as an impediment to the participation of the community in the tourism sector. (It was also pointed out that *enterprise education* would have a greater chance of success if it built upon a foundation of basic educational attainment).

The interviewees also identified the lack of mentoring and other support services for Maori entrepreneurs thinking of starting up in the industry or already operating within it. Without necessary training and support mechanisms in place, interviewees argued that the prospect of sustainable Maori tourism businesses would be compromised.

- **(a lack of planning)** Tied to the issue of education and training was the issue of a lack of planning for Maori tourism businesses. Specifically, interviewees indicated that often feasibility studies were not undertaken before money and time was invested in Maori tourism business *start-ups*. It was pointed out that while people needed to be self-motivated to start a business, once having established an idea there was a need to be able to plan for success.

⁷ TheStaffordGroup.



With appropriate feasibility studies and other planning documents, there would be less risk that Maori entrepreneurs would not be prepared for the time lag before a *start-up* business starts to build a profile and gain commercial success.

- **(a defeatist attitude)** Some interviewees identified the need for a shift in attitude by Maori to a *can do* and *motivated* attitude.



5. BUSINESS SURVEY

The Project Team⁸ conducted a survey of tourism businesses in phase 1 of the Study process. Barriers and impediments identified from the survey results are set out below. They are not listed in any particular order of priority. The barriers and impediments have been described as they were recorded and do not necessarily represent the opinions of the Project Team.

- **(limited ownership examples)** Of the tourism businesses surveyed, a high percentage (83.3%) indicated there was no Maori ownership of the business whatsoever. Of those surveyed, only 2.9% tourism businesses were 100% owned by Maori. The limited ownership examples may present a barrier or impediment to increased participation by Maori in the tourism sector.
- **(lack of tourism or related education qualifications)** The tourism businesses surveyed indicated that more Maori than non-Maori employees had no tourism or related education. Without appropriate knowledge or qualifications, Maori will have little motivation to participate in the tourism industry.
- **(listed barriers and impediments)** In addition to the above, the respondents indicated the following barriers and impediments to Maori participation in tourism. It is worthwhile noting, however, that only 23.5% of the tourism business respondents felt that there were barriers and impediments to Maori participation in the tourism sector.

| | |
|-------------------------------------|-------|
| Maori attitudes and professionalism | 33.3% |
| Maori lack of education | 25.0% |
| Maori ability | 25.0% |
| Maori willingness to participate | 20.8% |
| Lack of commitment | 16.7% |
| Lack of understanding | 8.3% |
| Areas, geographic location | 8.3% |
| Lack of funding for Maori | 4.2% |
| Language barrier | 4.2% |
| Tribal factions | 4.2% |
| Lack of support and assistance | 4.2% |
| Inability to work together | 4.2% |

⁸ TheStaffordGroup.



6. INBOUND TOUR OPERATOR SURVEY

The Project Team⁹ conducted a survey of inbound tour operators, both on and offshore, in phase 1 of the Study process. Barriers and impediments identified from the survey results are set out below. They are not listed in any particular order of priority. The barriers and impediments have been described as they were recorded and do not necessarily represent the opinions of the Project Team.

- **(interests of the inbound market)** Of the respondents to the survey who did not sell tour packages containing Maori tourism product, 50% said their clients were not interested in the product and 50% said their clients preferred natural environmental product.
- **(perceptions of Maori product, its range and its promotion overseas)** Of the respondents surveyed, only 32.1% rated Maori tourism product as *good*. 50% of the respondents rated the product as *satisfactory* or *poor*. Again, 32.1% of the respondents rated the range of Maori tourism product offered as *good* while nearly 43% rated the range as *satisfactory* or *poor*. Only one quarter of the respondents felt that Maori tourism product was well promoted overseas. These and similar perceptions present a barrier and impediment to growth of the Maori tourism sector.

⁹ TheStaffordGroup.



7. MEETING WITH THE MAORI TOURISM BUSINESS COMMITTEE

At an October, 2000 meeting held with Maori Tourism Business Committee (MTBC) members and representatives of the OTSp and the TPK, each member of the MTBC was asked – by the Project Team¹⁰ - to identify the 5 key barriers and impediments to participation by Maori in the tourism industry.

A summary of the barriers and impediments identified is set out below. The barriers and impediments are not listed in any particular order of priority. The barriers and impediments have been recorded as they were relayed and do not necessarily represent the opinions of the Project Team.

Maori are not a part of the tourism industry decision making process. Things should not be presented as a *fait accompli*.

Maori technology and finance skills are lacking.

There is no clear picture, among Maori, of what the tourism industry entails.

The promotion of Maori tourism product and Maori needs to be better handled (particularly via *Brand New Zealand*). There is a need to change consumer demand.

There is a shortage of good mentors for Maori wishing to participate in the tourism industry.

There is too much dependency by Maori on grants.

There is insufficient statistical data on the participation by Maori in the tourism industry.

There are bad images and perceptions associated with Maori tourism product and these need to be changed, both on-shore and off-shore.

There is a lack of access to capital by Maori wishing to participate in the tourism industry.

There are uneasy relationships between Maori and the tourism industry and Government.

Maori are not sufficiently networked within the industry.

The quality of available education is not high enough.

There is insufficient recognition of Maori business (and especially Maori tourism business) success.

There is a lack of recognition of the need for self-determination by Maori. Maori need to take *ownership* of the process of change before they will participate at higher levels within the tourism industry.

¹⁰ TheStaffordGroup



APPENDIX A – EXTRACT FROM THE STAFFORD GROUP PROPOSAL

Phase 1 – determining the extent of Maori involvement in tourism

literature review

The Project Team will review:

- available literature on the work being undertaken by the Maori Sub-Committee of the Tourism New Zealand Board of Directors;
- available literature relevant to the Study (to provide base data and information for the Study: a list of some of the documents that will be reviewed is set out in the appendix to this Proposal);
- statistical information from Statistics New Zealand on, among other things, Maori tourism and various related business development areas;
- relevant information available on the Internet (to determine comparative examples from other countries); and
- information available from regional business and tourism development agencies.

structured interviews and surveys

The literature review will be complemented by information gathered from structured interviews and surveys conducted in the tourism sector.

It is proposed that **structured interviews** be undertaken in those cases where the information to be gathered is likely to be commercially sensitive etc.. Specifically, structured interviews will be conducted with:

- Maori and non-Maori tourism operators;
- members of the finance and investment community (based primarily in Auckland and Wellington);
- representatives from regional and economic development agencies in various regions; and
- representatives of various government agencies and Maori organisations¹¹,

to determine, among other things, the extent of involvement of Maori in the tourism industry. Specifically, the Team will look at the employment levels, investment levels, business ownership levels, tourism product availability, demand and supply issues and performance levels and success.

¹¹ including the Maori Tourism Development Board, the Tai Tokerau Maori Tourism Association, the Te Ara a Maui, Te Waka Wai Tapoi, Te Runanga O Ngati Porou and New Zealand Maori Tourism (formerly, the Aotearoa Maori Tourism Federation).



In all, it is proposed that a number of structured interviews will be conducted by the Team (the sample size will be decided in consultation with the OTSp and TPK and the Advisory Panel). The interviewees and the question format will be decided in consultation with the OTSp, TPK, the Advisory Panel and the Maori Tourism Business Committee.

It is proposed that a short-form, faxed questionnaire survey be undertaken to determine: the level of employment of Maori and the levels of business ownership by Maori in the tourism industry and to determine the number of Maori students and graduates of tourism related training courses (the **business survey**). It is proposed that the survey be conducted with tourism business operators and with representatives of training and education facilities¹² in the Country. The Group proposes a sample size of 500 (to be representative of the some 14,000 tourism businesses in New Zealand). The form of the survey questionnaire will be decided in consultation with the OTSp, TPK, the Advisory Panel and the Maori Tourism Business Committee.

It is also proposed that a short-form, faxed questionnaire survey be undertaken to determine the views of Maori tourism held by inbound tour operators based onshore and offshore (the **inbound tour operator survey**). It is proposed that the survey be conducted with a sample of operators (the sample size will be decided in consultation with the OTSp and TPK and the Advisory Panel). The sample will be chosen with the assistance of the New Zealand Tourism Board so operators that offer or package Maori tourism product can be targeted.

Together, the structured interviews and two surveys will be designed to elicit:

- further information on the level of Maori tourism investment and business development in tourism;
- the marketability of current Maori tourism product;
- the strengths and weaknesses associated with Maori tourism product;
- issues associated with marketing to domestic visitors and trade;
- issues associated with marketing to international visitors and trade.
- details of current and likely barriers or impediments to Maori involvement and performance in the tourism industry (item 2 in the Terms of Reference);
- data on the employment of Maori in tourism operations (including details on the level of “decision making” positions held by Maori), on the training courses etc. available and the number of (and forecasts for) Maori graduates; and
- opportunities for Maori involvement in the tourism industry (item 3 in the Terms of Reference).

At the conclusion of phase 1, the Team will have base line data for estimating the extent of Maori involvement in the tourism sector (item 1 in the Terms of Reference). It will also be in a position to make a preliminary assessment of the success of Maori business development initiatives in the

¹² including the Aviation, Tourism and Travel Training Organisation



tourism and various other sectors of the economy. And it will be able to provide an overview of the demand (including trends) for Maori tourism product among domestic and international visitor markets.



APPENDIX B – BIBLIOGRAPHY FOR THE LITERATURE REVIEW

| Title | Author | Reference | Abstract |
|---|-------------------------------------|--|---|
| Maori Culture & Heritage Tourism in New Zealand | Hall, C.M; Mitchell, I & Keelan, N. | Journal of Cultural Geography 1992 12 (2) | Discusses some of the processes by which Maori Heritage may become more accessible to travellers. |
| Report : Maori Tourism in New Zealand | Zeppel, H. | Tourism Management 1997 18 (7) p.475 – 478 | Report on the 2 nd Annual Maori Tourism Conference & Trade Show 1997 – addressed issues of Maori economic development. |
| Research Report: Maori Tourism | Barnett, S. | Tourism Management 1997 18(7) p.471 – 473 | Traces Maori involvement in NZ tourism and answers question what is Maori Tourism? |
| Tourism and the Maori of New Zealand | Hall, C.M | In: Butler, R & Hinch, T (eds) p155 – 175 1996. Tourism & Indigenous People. Int. Thompson Business Press, London. | An overview of Maori involvement in Tourism, its implication, Maori claims & Maori & Pakeha conflict. |
| Tourist Experiences of Maori culture in Aotearoa. | McIntosh, A. Smith, A & Ingram, T. | University of Otago, Dunedin pp 13 Research Paper # 8 2000, ISBN: 0-478-06873-7 | Segmentation of visitors to 3 Maori attractions in NZ. Identifies motivations for visiting Maori attractions. |
| Visitors to the Maori Arts & Crafts Institute, Rotorua – a study of Perception & Images – Interim report. | Ryan, C. | Waikato Management School, University of Waikato. February 2000. | Visitor perceptions & satisfaction of visit to Arts & Crafts Institute. |
| Maori Myths, Beliefs & Values: Products & constraints for NZ Tourism | Kearsley, G; Carr, A & McIntosh, A. | Proceedings of Tourism Industry & Education Symposium, Jyvas kylä, Finland, Sept 23-26 th 1999. Pp 18. | Maori mythology as a basis for cultural preservation, tourist product development and resource management in NZ. |
| Maori Heritage: Visitor Management & Interpretation | Keelan, N | In: Hall, C.M & McArthur, S. 1996. Heritage management in Australia & New Zealand: The Human Dimension p195-201 | Issues in the interpretation and management of Maori heritage. |
| Authenticity & Cultural Representation. A case study of Maori operators | Walsh, B | In: Hall, CM & McArthur, S. 1996 (as above) P 202 – 208 | Details research conducted to explore the packaging of Maori cultural ritual by Maori for tourist consumption. |
| Maori Cultural Performances & Tourism | Tahana, N & Oppermann, M. | Tourism Recreation Research 23(1) 1998 p23-30 | Examines the extent to which Maori cultural performances have been changed over time. |



| Title | Author | Reference | Abstract |
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| The Implications of Maori perspectives for the Management & Promotion of Heritage Tourism in NZ. | Hall, C.M; Mitchell, I & Keelan, N. | GeoJournal 29.3 p315 – 322 1993. | Analyses the implications of Maori perspectives on the promotion, interpretation, & management of tourism resources & the implications on Tourism development |
| Supporting Economic Development through Action Research: Cluster Development in Maori Tourism in Tai Tokerau. | Phillips, P & Panoho, J. | AUT Centre for CT & Hospitality | An action based research project between a regional Maori Tourism association & a University research & development centre to develop CT in the region through networks etc.. |
| Geothermal Resources: Ownership Issues & Potential Benefit to Maori. An Economic Commentary with special reference to the interests of the Te Arawa Federation of Maori Authorities Inc. | Eden Resources Ltd, Wellington (by Chris Collins) September 1993. | Eden Resources Ltd, Wellington (by Chris Collins) September 1993. | Investigation into the tourism status & future development potential of geothermal resources – an economic commentary. Discusses Maori ownership of geothermal resources & RMA issues. |
| Report of Taskforce 2000: A Report of the Minister of Tourism | Taskforce 2000 October 1989 | Taskforce 2000 October 1989 | Proposals & recommendation for the improvement of NZ Tourism Including; support & creation of a Maori Tourism Commission. |
| NZ Tourism: Issues and Policies | NZ Tourism Council Tourist & Publicity Department March 1984 | NZ Tourism Council Tourist & Publicity Department March 1984 | Identifies the important role of tourism in New Zealand's overall economic & social development, proposes strategies & objectives & recommends policies for Government. |
| Domestic Travel Marketing Strategy. A Discourse on the present state & direction of Domestic Tourism in NZ together with recommendation to enhance the future of the Industry. | NZ Tourist Industry Federation (Publishers) NZ Tourism Council (authors). October 1984. | NZ Tourist Industry Federation (Publishers) NZ Tourism Council (authors). October 1984. | A marketing strategy and recommendations for increasing domestic tourism in NZ. |
| Progress towards closing the gaps between Maori & non-Maori. A report to the Minister of Maori Affairs | T.P.K. | 1998 T.P.K, Wellington | Provides a benchmark for measuring the degree of progress made towards closing the economic & social gaps between Maori & non-Maori; an assessment of the current state of disparities. Report shows that the gaps have remained the same or widened. |



| Title | Author | Reference | Abstract |
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| Progress towards closing social & economic gaps between Maori & non-Maori. A report to the Minister of Maori affairs, May 2000. | T.P.K. | 2000. T.P.K. Wellington | Second report in The Closing the Gaps series. Includes indicators in areas of education, labour force, income, housing, health & criminal justice. |
| Tapoi Maori: “ pūao te mano tau hāu” Māori Tourism: “at the brink of a New Millennium” | Takiora Ingram | Presentation for Tourism Seminar Series October 1999, Victoria University, Wellington. | Details development of Maori Tourism organisation & issues in NZ. Looks at barriers & opportunities for increased Maori involvement in tourism. |
| Tāpoi Tangatawhenua: Tāpoi Māori ki Aotearoa. Indigenous Tourism: Māori Tourism in Aotearoa. | Takiora Ingram | Presentation for ‘Trails, Tourism & Regional Development Conference”, Centre for Tourism, University of Otago, 2-5 December 1997. | Details Maori Tourism issues in NZ; tourism product & business development. Presents results of a survey of 70 Maori Tourism Operators. |
| NZ International Visitors Survey | NZTB | NZTB, Wellington 1995/96 | IVS survey that reports expenditure & understanding of international visitors to NZ. Includes number of international visitors who visited a Maori experience. |
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| Tourism & Maori Development in Rotorua. | Tahana, N; Te O Kahurangi Grant, K; Simmons, D; Fairweather, J.R. | TREC, Lincoln University Report #15, 2000. ISSN: 1174-670X. | An understanding of Tourism & Maori development in Rotorua; Historical account of development of Maori in Tourism, extent of current involvement and attitudes of Maori with regard to tourism. |



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| Heritage in Place | Kirby, V.G | 1997. Thesis – PhD Geography University of Canterbury. | Theoretical investigations into heritage & its connections with pasts, ideologies & cultures. |
| Evaluating the Risk of Ruin: A critical examination of new venture risk & return. | Pinfold, J.F | 1999. PhD. Massey University. | A detailed analysis of start up businesses in NZ exploring the risks & returns of new venture as well as the motivations behind the start up decision. |
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| Maori and Tourism: A Relationship of History, Constitutions & Rites. | Ryan, C. | 1997. Journal of Sustainable Tourism, 5(4): 257-277. | Describes developments in Maori tourism & the socio-political & ethical context of the history & ethical structures of Maori. |
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| AMA Project: An Investigation into a Mark of Authenticity for Maori Tourism Products & Services. | AMTF | Unpublished report to TPK from AMTF, April 1997. | Report provided to TPK with specific advice on whether any administrative or legislative changes are needed by Government to support the development and implementation of a mark of authenticity for Maori Tourism product. |
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