



TheStaffordGroup

a. stafford & associates pty limited
acn 079 055 100
abn 34 565 120 454

p.o. box 683
woollahra nsw 2025 australia

phone
61-2-9327 5912

fax
61-2-9362 1750

p.o. box 3127
wellington new zealand

phone
64-4-499 4655

fax
64 -4-472 1899

email
stafford@ans.com.au

Closing the Gaps in Tourism – He matai tapoi Maori key findings report

prepared for the Office of Tourism and Sport and Te Puni Kokiri
December 2000



Any representation, statement, opinion or advice, expressed or implied in this document is made in good faith but on the basis that TheStaffordGroup is not liable (whether by reason of negligence, lack of care or otherwise) to any person for any damage or loss whatsoever which has occurred or may occur in relation to that person taking or not taking (as the case may be) action in respect of any representation, statement or advice referred to here.



CONTENTS

LIST OF TABLES	5
INTRODUCTION	7
1. KEY FINDINGS FROM THE LITERATURE REVIEW	8
1.1 A SUMMARY OF THE RANGE OF LITERATURE REVIEWED	8
1.2 BARRIERS AND IMPEDIMENTS IDENTIFIED	10
2. KEY FINDINGS FROM THE STRUCTURED INTERVIEWS OF MAORI TOURISM OPERATORS	12
2.1 EMPLOYMENT LEVELS	13
2.2 INVESTMENT AND BUSINESS OWNERSHIP LEVELS	14
2.3 TOURISM PRODUCT AVAILABILITY	14
2.4 THE PRIMARY MARKETS FOR THE OPERATOR'S PRODUCT	14
2.5 PERFORMANCE LEVELS AND SUCCESS	14
2.6 THE EDUCATION OF MAORI PERSONNEL IN MAORI TOURISM BUSINESSES	15
2.7 THE DIRECTION OF THE MAORI TOURISM BUSINESS IN THE NEXT 3 YEARS	15
2.8 THE EASE OR OTHERWISE OF OBTAINING FINANCING	15
2.9 WHAT THE MAORI TOURISM OPERATORS WOULD RECOMMEND BUSINESSES	16
2.10 WHETHER THERE IS A ROLE FOR GOVERNMENT	16
2.11 BARRIERS AND IMPEDIMENTS IDENTIFIED	16
3. KEY FINDINGS FROM THE INTERVIEWS WITH MEMBERS OF THE FINANCE COMMUNITY	18
3.1 THE LEVEL OF EXPOSURE OF THE BANKS TO MAORI CLIENTELE	18
3.2 THE LEVEL OF EXPOSURE OF THE BANKS TO THE TOURISM INDUSTRY IN GENERAL	19
3.3 THE APPROACH OF THE BANKS TO LENDING APPLICATIONS	19
3.4 THE APPROACH OF MAORI SEEKING FINANCE TO THE BANKS	19
3.5 THE FACTORS THAT COULD ASSIST IN FINANCING MAORI PARTICIPATION	20



3.6	SOME OPTIONS FOR INCREASING THE LEVEL OF PARTICIPATION	21
3.7	BARRIERS AND IMPEDIMENTS IDENTIFIED	23
<u>4.</u>	<u>KEY FINDINGS FROM THE INTERVIEWS WITH VARIOUS AGENCIES AND ORGANISATIONS</u>	<u>24</u>
4.1	THE INFORMATION MAINTAINED BY THE AGENCIES AND ORGANISATIONS	24
4.2	THE GROWTH OR DECLINE IN MAORI PARTICIPATION	25
4.3	THE PERCEIVED OPPORTUNITIES FOR GREATER INVOLVEMENT	25
4.4	THE PERCEIVED CHANGES REQUIRED TO EFFECT A GREATER LEVEL OF INVOLVEMENT	25
4.5	BARRIERS AND IMPEDIMENTS IDENTIFIED	27
<u>5.</u>	<u>KEY FINDINGS FROM THE BUSINESS SURVEY OF TOURISM BUSINESSES IN NEW ZEALAND</u>	<u>28</u>
5.1	THE EMPLOYMENT OF MAORI IN THE RESPONDENT BUSINESSES	29
5.2	MAORI BUSINESS OWNERSHIP LEVELS	30
5.3	ADDITIONAL INFORMATION	30
<u>6.</u>	<u>KEY FINDINGS FROM THE SURVEY OF INBOUND TOUR OPERATORS</u>	<u>35</u>
6.1	MAORI TOURISM PRODUCT AVAILABILITY	36
6.2	DEMAND AND SUPPLY ISSUES FOR MAORI TOURISM PRODUCT	36
6.3	MAORI TOURISM PRODUCT PERFORMANCE LEVELS AND SUCCESS	37
6.4	BARRIERS AND IMPEDIMENTS IDENTIFIED	41
	APPENDIX 1 – QUESTIONS FOR MAORI TOURISM OPERATORS	42
	APPENDIX 2 – QUESTIONS FOR MEMBERS OF THE FINANCE COMMUNITY	44
	APPENDIX 3 – QUESTIONS FOR VARIOUS AGENCIES AND ORGANISATIONS	45
	APPENDIX 4 – QUESTIONS FROM THE TOURISM BUSINESS SURVEY	46
	APPENDIX 5 – QUESTIONS FROM THE INBOUND TOUR OPERATORS' SURVEY	50
	APPENDIX 6 – NON-EXHAUSTIVE BIBLIOGRAPHY FOR THE LITERATURE REVIEW	54



LIST OF TABLES

Table 1.1: A Brief Summary of the Range of Literature Reviewed	8
Table 1.2: Barriers and Impediments Identified for Greater Maori Participation in the Tourism Industry	10
Table 2.1: Maori Tourism Operator Interviewee Business Types	12
Table 2.2: Interviewee Business Profitability and Funding	15
Table 2.3: Check-List for New Maori Tourism Businesses	16
Table 2.4: Barriers and Impediments Identified for Greater Maori Participation in the Tourism Industry	17
Table 3.1: Common Criteria for Assessing Applications for Funding	19
Table 3.2: Areas for Independent Advice	20
Table 3.3: Suggestions for the Role of Government	22
Table 3.4: Barriers and Impediments Identified for Greater Maori Participation in the Tourism Industry	23
Table 4.1: Barriers and Impediments Identified for Greater Maori Participation in the Tourism Industry	27
Table 5.1: Business Survey Respondent Business Types	28
Table 5.2: The Number of Employees and the Number of Maori Employees in the Respondent Businesses	29
Table 5.3: Length of Time Maori & non-Maori were Employed in the Respondent's Business, on average	31
Table 5.4: Type of Maori Tourism Product sold by Respondents	31
Table 5.5: Barriers & Impediments to the Involvement of Maori in the Tourism Industry	34
Table 6.1: The Survey Respondents' Visitor Markets	35
Table 6.2: Maori Tourism Product Sold in Tour Packages	36
Table 6.3: Perceived Demand for Maori Tourism Product	37
Table 6.4: Maori Tourism Product	38



Table 6.5: Reasons Given for Marketability of Maori Tourism Product	39
Table 6.6: Recommendations for Improvements to Maori Tourism Product	40
Table 6.7: Barriers and Impediments Identified for Greater Maori Participation in the Tourism Industry	41



INTRODUCTION

TheStaffordGroup, 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 (the **Study**).

As part of the Study, the Project Team offered to provide a report to the Office of Tourism and Sport (the **OTSp**) and Te Puni Kokiri (the **TPK**) on key findings after Phases 1 and 2 of the Study (the **Key Findings Report**).

The key findings of the Project Team are set out in this Report by tracking the results of the various components of the Study process, including:

- the literature review;
- the structured interviews of Maori tourism operators;
- the structured interviews with members of the finance and investment;
- the structured interviews with representatives of various government agencies and Maori organisations and with representatives from regional and economic development agencies in various regions;
- the survey of tourism businesses in New Zealand; and
- the survey of inbound tour operators based onshore and offshore.



1. KEY FINDINGS FROM THE LITERATURE REVIEW

The Project Team¹ conducted (and is continuing to conduct) a review of literature as prescribed by the Terms of Reference for the Study process. The Team also reviewed additional material. A non-exhaustive bibliography is at Appendix 6.

The aim of the literature review, although not stated in the Terms of Reference, was to provide the Project Team with background information when:

- identifying the barriers and impediments to the greater level of participation in the tourism industry by Maori (see TheStaffordGroup's document: *Closing the Gaps – He matai tapoi Maori, Barriers and Impediments Short Report* dated November 2000); and
- preparing the draft and final Study Reports².

Below, the barriers and impediments identified during the course of the literature review – to date – are summarised. In addition, a brief summary of the range of literature reviewed is provided.

1.1 A SUMMARY OF THE RANGE OF LITERATURE REVIEWED

A brief summary of the range of literature reviewed to date is set out at Table 1.1.

Table 1.1: A Brief Summary of the Range of Literature Reviewed

Maori Tourism Product	<p>A summary of the way heritage product can become more accessible</p> <p>Documents defining <i>Maori Tourism</i></p> <p>An analysis of motivations for visiting Maori attractions</p> <p>Assessments of visitor perceptions and satisfaction levels</p> <p>Maori mythology as a basis for tourism product development</p> <p>Packaging cultural product for visitor consumption</p> <p>The tourism potential for geothermal resources</p> <p>The role of leisure in Maori society and its use in tourism</p> <p>A guide to the visitor attractions and activities provided by Maori</p> <p>Issues relevant to the restoration of the Ruatapu Meeting House</p> <p>Issues relevant to cultural authenticity</p> <p>A study of what makes attractions <i>uniquely Maori</i></p> <p>A report on a mark of authenticity for Maori tourism product</p>
-----------------------	---

¹ Dr Alison McIntosh and TheStaffordGroup

² Required under the Terms of Reference



Table 1.1: A Brief Summary of the Range of Literature Reviewed (continued)

Economic Development	<p>Issues relevant to Maori economic development</p> <p>Progress in <i>closing the gaps</i> (economic and social) between Maori and non-Maori</p> <p>Maori and non-Maori employment data</p> <p>Maori occupation data</p>
Maori Involvement in Tourism	<p>A history of Maori involvement in tourism</p> <p>Issues relevant to interpretation and management of Maori heritage</p> <p>Changes in cultural performances over time</p> <p>Discussion on the concept of a <i>Maori Tourism Commission</i></p> <p>Discussion on the barriers and impediments to Maori involvement in the tourism industry</p> <p>Issues peculiar to Maori regarding business development in the tourism industry</p> <p>How adventure and eco-tourism product could benefit indigenous groups</p> <p>Case study material on Kaikoura Maori, Maori in Rotorua, 34 rural tourism enterprises owned & operated by Maori, Te Papa, Tamaki Tours, Wanganui, Tai Tokerau, the Waikato, Dunedin and Whale Watch Kaikoura</p> <p>A 3-year strategic plan for Maori tourism development</p> <p>Maori involvement in the planning and management of the tourism industry</p> <p>The effects of tourism on Maori community groups</p> <p>3 models for Maori tourism industry development</p> <p>The endorsement of the Diploma of Maori in Travel & Tourism at the Auckland Institute of Technology</p> <p>Issues concerning the intellectual property rights of Maori and the impacts of tourism</p> <p>Details of the Travel & Tourism course developed by Maori Tourism Development</p> <p>A history of the establishment of the Maori Tourism Taskforce</p> <p>Strategies for fostering respect and appreciation for Maori culture</p> <p>Issues concerning economic and cultural sustainability</p> <p>Issues concerning self-determination</p> <p>A report on a brand identity for Maori tourism</p> <p>A regional strategy plan for Maori tourism in Te Ara a Maui</p> <p>A report outlining the difficulties faced in obtaining finance</p>
Tourism in New Zealand	<p>Policy recommendations for Government</p> <p>Recommendations for increasing domestic tourism activity</p>
General	<p>Analysis of <i>start-up</i> businesses in New Zealand</p>



1.2 BARRIERS AND IMPEDIMENTS IDENTIFIED

During the course of literature review, a number of barriers and impediments to Maori participation in the tourism industry were identified. The barriers and impediments are set out in TheStaffordGroup's document: *Closing the Gaps – He matai tapoi Maori, Barriers and Impediments Short Report* dated November 2000. The barriers and impediments are summarised, briefly, in Table 1.2.

Table 1.2: Barriers and Impediments Identified for Greater Maori Participation in the Tourism Industry

A lack of data on Maori tourism and Maori tourism businesses
A lack of promotion of Maori tourism product
A lack of regional tourism organisation or Local Government support
A fragmented tourism industry
A tourism industry mindset (impenetrable)
The narrow and superficial use of Maori tourism product
Inadequate Government initiatives
Uncertainty about access to non-financial resources
Limited access to financial support
A lack of understanding by non-Maori of Maori culture and other issues
The number of formal requirements (accreditations, planning permissions and health & safety requirements etc.)
The high costs of rents and rates
The difficulties faced by SMEs in tourism generally
The unresolved issues concerning ownership of land and resources
The fact that tourism is a growing but mature industry
The fact that opportunities for new entrants are linked to continuing, satisfactory rates of growth (outside Maori control)
The fact that tourism is dominated by <i>big players</i> which make business start-ups difficult
The marginalisation of Maori (especially economically)



Table 1.2: Barriers and Impediments Identified for Greater Maori Participation in the Tourism Industry (continued)

The negative perceptions of tourism held by Maori

The lack of consultation of and lack of decision making by Maori

The presence of racism and discrimination

Negative and confrontational media coverage

Low levels of confidence among Maori

The limited skills base, among Maori, for the tourism industry

The limited knowledge, by Maori, of the international visitor market

Limited commercial acumen

Governance and cultural issues

Issues concerning the preservation of Maori culture and the protection of intellectual property rights

The limited use of new technology by Maori

The perceived limited tourism product opportunities

Increasing competition

The lack of Maori developed standards and guidelines for the tourism industry

The geographic isolation of many Maori groups

The limited Maori tourism product range

The control of Maori tourism businesses by non-Maori.



2. KEY FINDINGS FROM THE STRUCTURED INTERVIEWS OF MAORI TOURISM OPERATORS

The Project Team³ conducted 25 structured interviews with Maori tourism operators in Phase 1 of the Study process. A list of the questions (used as a guide) in the interview process is at Appendix 1.

The interviews were conducted with operators who had affiliations with tribes spread throughout the Country. In addition, interviews were conducted with operators whose businesses included those set out in Table 2.1.

Table 2.1: Maori Tourism Operator Interviewee Business Types

Culture and Heritage Tourism Businesses

Adventure Tourism Businesses

Retail Tourism Businesses

Chartering Tourism Businesses

Accommodation Businesses

Education Businesses

The aim of the interview process was to elicit information on the extent of involvement of Maori in the tourism industry by having reference to:

- employment levels;
- investment and business ownership levels;
- tourism product availability; and
- performance levels and success.

The Project Team also sought, of interviewees, information on:

- tribal affiliation (see above);
- the type of tourism business operated (see Table 2.1);

³ Ms Hinurewa te Hau.



- the primary markets for the operator's product;
- the education of Maori personnel in the operator's business;
- the direction of operator's business in the next 3 years;
- the ease or otherwise of obtaining finance for the operator's tourism business;
- what the Maori tourism operator interviewed would recommend for any new Maori tourism businesses; and
- whether there was a role for Government in encouraging a greater level of involvement by Maori in the tourism industry.

Each of the factors referred to above is canvassed below.

2.1 EMPLOYMENT LEVELS

The Maori tourism operators interviewed indicated that, on average, they employed up to 5 full-time employees and up to 20 part-time employees. Of those employees:

- up to 100% of the full-time employees were Maori; and
- up to 90% of the part-time employees were Maori.

The interviewees also indicated that:

- the ease of securing Maori employees depended largely upon the location in which the Maori tourism business was operated and upon access to networks or *Whanaugatanga*;
- they preferred to employ Maori staff;
- they had some long term Maori employees (3 to 5 years' service) but that they tended to be older: younger Maori employees tended to move on sooner (between 2 months and 1 year).

Relevant to younger employees, some of the Maori tourism operators interviewed indicated that there were concerns relevant to: the under-capitalisation of businesses; the inability to provide assurance of employment and the fact that much of the work in the tourism industry is seasonal.



2.2 INVESTMENT AND BUSINESS OWNERSHIP LEVELS

Most of the Maori tourism operators interviewed operated as limited liability companies; in partnerships or under charitable trusts.

Most of the Maori tourism businesses were 100% owned by Maori. Any non-Maori investment in Maori businesses (only in 12% of the interviews) was *passive* investment.

2.3 TOURISM PRODUCT AVAILABILITY

The Maori tourism operators interviewed indicated that:

- the availability of Maori tourism product (viewed as unreliable); and
- the price of Maori tourism product (viewed as high),

were issues that concerned the visitor market (particularly the domestic visitor market).

2.4 THE PRIMARY MARKETS FOR THE OPERATOR'S PRODUCT

The Maori tourism operators interviewed indicated that up to 80% of their visitors were international visitors while up to 20% of their visitors came from the domestic market.

Many of the operators reported repeat business from the international market:

- because they offered a cultural component in their product; or
- where they did not offer a cultural component, because they were Maori.

2.5 PERFORMANCE LEVELS AND SUCCESS

The Maori tourism operators were asked to assess their performance levels and success (including providing an indication as to how they determined *business success*). 40% of the interviewees provided details of gross turnover and gross profit. The results are at Table 2.2. The interviewees also provided details of the debt to equity ratio for their businesses.



Table 2.2: Interviewee Business Profitability and Funding

Range for Gross Turnover	\$50,000 to \$350,000
Range for Gross Profit	\$10,000 to \$60,000
Range for Debt to Equity Ratios	0% to 10%

Overall, those operators interviewed felt they were *successful* in their niche market. *Success* was measured, by the operators, by:

- repeat business;
- good turnover;
- being able to pay tax levied;
- having food on the table;
- paying good wages to staff; and
- having money in the bank.

2.6 THE EDUCATION OF MAORI PERSONNEL IN MAORI TOURISM BUSINESSES

The operators interviewed indicated that Maori personnel could, variously, have either no qualifications or hold tertiary qualifications. Traditionally, casual staff members are the holders of tertiary qualifications. On average, however, less than 40% of Maori staff were reported to have tourism qualifications of any kind.

2.7 THE DIRECTION OF THE MAORI TOURISM BUSINESS IN THE NEXT 3 YEARS

The Maori tourism operators interviewed indicated, in the main, a desire to build upon good service and to deliver quality product in the next 3 years.

2.8 THE EASE OR OTHERWISE OF OBTAINING FINANCING FOR THE MAORI TOURISM BUSINESS

The Maori tourism operators interviewed secured financing from:

- retail lending institutions;



- *Maori resources*; and
- family.

There were mixed responses on the question of how easy it was to obtain financing for Maori tourism businesses.

2.9 WHAT THE MAORI TOURISM OPERATOR INTERVIEWED WOULD RECOMMEND FOR NEW MAORI TOURISM BUSINESSES

The Maori tourism operators interviewed were asked to provide a check-list for new Maori tourism businesses. A summary of some of the key items identified for a check-list is at Table 2.3.

Table 2.3: Check-List for New Maori Tourism Businesses

Good professional (legal, financial and other) guidance from approachable and affordable advisors

Access to marketing networks

Access to finance

2.10 WHETHER THERE IS A ROLE FOR GOVERNMENT IN ENCOURAGING A GREATER LEVEL OF INVOLVEMENT BY MAORI IN THE TOURISM INDUSTRY

The Maori tourism operators interviewed indicated that Government could assist in encouraging a greater level of involvement by Maori in the tourism industry. Specifically, they recommended that a greater level of control over decision making be lent to Maori by Government (*we need more Maori owners, not only workers*).

2.11 BARRIERS AND IMPEDIMENTS IDENTIFIED

During the course of the structured interviews, a number of barriers and impediments to Maori participation in the tourism industry were identified. The barriers and impediments are set out in TheStaffordGroup's document: *Closing the Gaps – He matai tapoi Maori, Barriers and Impediments Short Report* dated November 2000.

The barriers and impediments are summarised, briefly, in Table 2.4.



Table 2.4: Barriers and Impediments Identified for Greater Maori Participation in the Tourism Industry

Low levels of tourism and related education

Unique employment patterns

Unreliable availability of tourism product and high priced product

Under-capitalised businesses and limited access to funding

Inadequate support (including advice and networks) in the tourism industry

A lack of representation at a Government level

A lack of industry guidelines for Maori

The absence of positive messages

The existence of the *tall poppy* syndrome



3. KEY FINDINGS FROM THE STRUCTURED INTERVIEWS WITH MEMBERS OF THE FINANCE AND INVESTMENT COMMUNITY

The Project Team⁴ conducted structured interviews with members of the finance and investment community in Phase 1 of the Study process. The key findings from those structured interviews are summarised below. A list of the questions (used as a guide) in the interview process is at Appendix 2.

The members of the finance and investment community (the **Banks**) were interviewed to determine the extent of involvement of Maori in the tourism industry. The Project Team sought information on, among other things:

- the level of exposure of the Banks to Maori clientele;
- the level of exposure of the Banks to the tourism industry in general;
- the approach of the Banks to lending applications (including by Maori and by non-Maori in the tourism industry);
- the approach of Maori seeking finance to the Banks;
- the factors that could assist in financing Maori participation in the tourism industry; and
- some options for increasing the level of participation by Maori in the tourism industry.

These factors are addressed below.

3.1 THE LEVEL OF EXPOSURE OF THE BANKS TO MAORI CLIENTELE

The Banks indicated that they had exposure to Maori clientele in both rural and urban New Zealand. They added, however, that their exposure was not proportional to the population of Maori in the Country.

The Banks confirmed their interest in gaining and maintaining Maori business. In this regard, some Banks indicated that they had engaged Maori client relations advisors to *breach any gap* in understanding between Maori and non-Maori commercial practices etc..

⁴ TheStaffordGroup



3.2 THE LEVEL OF EXPOSURE OF THE BANKS TO THE TOURISM INDUSTRY IN GENERAL

The Banks interviewed by the Project Team indicated that their exposure to the tourism industry was not high. In general, the industry was viewed as a high risk one that offered few *bankable* projects for consideration. Nevertheless, most of the Banks interviewed were *bullish* about tourism prospects in and for the Country.

3.3 THE APPROACH OF THE BANKS TO LENDING APPLICATIONS (INCLUDING BY MAORI AND BY MAORI IN THE TOURISM INDUSTRY)

The Banks confirmed, without exception, that their approach to lending applications did not differ if the applicant was Maori or non-Maori.

A common set of criteria for assessing applications was deduced by the Project Team and is set out in brief at Table 3.1.

Table 3.1: Common Criteria for Assessing Applications for Funding

- What level of management expertise is evident for the applicant?
 - Does the applicant have the ability to service the debt proposed?
 - What is the security being offered by the applicant?
-

3.4 THE APPROACH OF MAORI SEEKING FINANCE TO THE BANKS

The Banks noted their perceptions that:

- Maori appeared to be reticent about approaching the Banks for finance (preferring to obtain funds from *whi* or family groups);
- Maori often needed more assistance (primarily in terms of the supply of information) than non-Maori who sought finance from the Banks.



3.5 THE FACTORS THAT COULD ASSIST IN FINANCING MAORI PARTICIPATION IN THE TOURISM INDUSTRY

The Banks proffered a number of factors that could assist in financing Maori participation in the tourism industry. The factors are listed, in brief, below.

- **(increased delegation of authority)** There needs to be greater delegation of authority. There needs to be one influential voice that represents the interests of the Maori group and the *Kamatus*. A single point of contact will assist the Banks (the example of 10 or more *Iwi* representatives presenting for a preliminary meeting was given).
- **(greater levels of expertise)** As indicated above, in any assessment of funding applications, the Banks will look at the applicant's level of expertise in management and other areas. Without appropriate or sufficient expertise, the exposure of the Bank becomes all the greater.

The Banks went on to say that Maori groups were often and understandably venturing into new industries and were presenting themselves with short learning curves. The suggestion was made that appropriate expertise could be *brought in* to assist in establishment phases, in the least.

- **(increased evidence of advisors)** As a corollary to the above, the Banks suggested that there be greater use of independent advisors in the establishment and operation of Maori businesses. Specifically, it was suggested that advisors be engaged to assist with those things set out in Table 3.2.

In addition, it was noted that when independent advisors were engaged, often their advice was not heeded (often on non-commercial grounds). The Banks warned against this practice.

Table 3.2: Areas for Independent Advice

Start-up structure advice (including accounting practices and procedures and legal advice)
Feasibility assessment advice
Planning advice (including business, strategic and marketing planning)
Operations advice (including codes of conduct, governance statements and procedures manuals)
Ongoing accounting and legal advice



- **(increased commercial acumen)** It was suggested that the commercial acumen of managers of Maori enterprises needed to improve and be brought into line with standard practice. That is, the Banks felt that dealing with traditional structures (such as companies or partnerships etc.) was easier than dealing with Maori structures.

Without traditional structures and commercial practices in place, there was, reputedly, an increased risk:

- of delay in decision making and progressing deals; and
- of widening the *gap* between Maori and non-Maori as each group remained unaware of the practices and principles of the other.

On the last point, it was noted, for instance, that often income and profit earned from a funded enterprise was transferred to other enterprises managed by the Maori group, often to pay for socio-economic needs of the group. The Banks had difficulty with this practice while a debt was outstanding.

- **(increased accounting transparency)** As a corollary to the above, the Banks also suggested that there be greater transparency regarding the accounts of Maori enterprises. Without traditional accounting structures in place, there was perceived to be difficulty in tracking the performance of an enterprise.
- **(better choice of ventures)** The Banks suggested that better planning of ventures be undertaken. The often cited instance of the *Tainui* purchase of the *Warriors* football team was used as an example of Maori groups choosing ventures to operate:
 - without the necessary expertise; and
 - for which inadequate feasibility planning etc. had been undertaken.

Following on from this, the Banks called for better evidence of planning, from feasibility studies, to annual business plans. Specifically, the Banks felt that Maori groups establishing or operating *new* ventures needed to have an idea of where the venture *sat* within the overall business operations of the *Iwi* group.

3.6 SOME OPTIONS FOR INCREASING THE LEVEL OF PARTICIPATION BY MAORI IN THE TOURISM INDUSTRY

The Banks proffered a number of options for increasing the level of participation by Maori in the tourism industry. Some of the options proffered are set out below.



- **(role of Government)** Overall there was a view among the Banks that the Government had a role to play in increasing the level of participation by Maori in the tourism industry. Suggestions for the role Government varied, however.

At the outset, it was noted that some reference to the wishes and needs of Maori should be made. That is, the question should be asked: *do Maori want involvement by the Government?*

Proceeding on the basis that there is a role to be played, some suggestions are summarised at Table 3.3.

Table 3.3: Suggestions for the Role of Government

The role Government should not be to contribute greater funding to Maori groups to encourage participation in the tourism industry

The Government should offer better and more appropriate education

The Government should encourage foreign investment for joint venture projects

The Government should establish, operate and monitor a mentoring program

The Government should facilitate access by Maori groups to independent advisors

The Government should ensure that Maori groups do not enter into ventures for which they have no expertise

- **(a Maori asset database)** As indicated above, the Banks confirmed their interest in pursuing Maori business and were bullish about the tourism market. It was suggested that contact by the Banks could be facilitated if there was a central database that recorded details of the assets (including land, companies and investments) of Maori groups. The database could be used, then and for example, to seek out opportunities for cashed up venture capitalists etc..
- **(traditional corporate structures etc.)** The Banks noted their discomfort in dealing with non-traditional structures, preferring to deal with companies, partnerships and joint venture arrangements etc.. It was argued that traditional structures lent greater comfort of dealing for the Banks and that they had clear and understood practices (for governance and accounts etc.).
- **(promotion)** Many of the Banks saw the way forward for New Zealand's tourism industry as including a weighting on cultural Maori tourism product. To this end and to encourage greater participation in the industry by Maori, the Banks suggested the need for promotion of the success of Maori tourism enterprises, perhaps via a credible helmsman and via a public relations campaign.



3.7 BARRIERS AND IMPEDIMENTS IDENTIFIED

During the course of the structured interviews, a number of barriers and impediments to Maori participation in the tourism industry were identified. The barriers and impediments are set out in TheStaffordGroup's document: *Closing the Gaps – He matai tapoi Maori, Barriers and Impediments Short Report* dated November 2000. The barriers and impediments are summarised, briefly, in Table 3.4.

Table 3.4: Barriers and Impediments Identified for Greater Maori Participation in the Tourism Industry

Negative perceptions of tourism investments generally

The approach (usually reticent) of Maori to the Banks

The lack of assistance sought by Maori

The governance of Maori groups

The lack of transparency in Maori business practices (including accounting practices)

The choice of venture by Maori groups (often inappropriate and not researched)

A lack of commercial perspective

A lack of asset backing (tribal land is seldom offered and is not generally favoured by the Banks)

A reluctance, on the part of Maori, to accept risk



4. KEY FINDINGS FROM THE 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 Team⁵ 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. The key findings from those structured interviews are summarised below. A list of the questions (used as a guide) in the interview process is at Appendix 3.

The agencies and organisations were interviewed to determine the extent of involvement of Maori in the tourism industry. The Project Team sought information on, among other things:

- the information maintained by the agencies and organisations on Maori involvement in the tourism industry;
- the growth or decline in Maori participation in the tourism industry in recent years;
- the perceived opportunities for greater involvement by Maori in the tourism industry; and
- the perceived changes required to effect a greater level of involvement by Maori in the industry.

These factors are addressed below.

4.1 THE INFORMATION MAINTAINED BY THE AGENCIES AND ORGANISATIONS ON MAORI INVOLVEMENT IN THE TOURISM INDUSTRY

Few if any of the agencies and organisations interviewed gathered their own or held statistical information on Maori enterprises (or Maori tourism enterprises). Overall, reliance was placed on the *general* information prepared by *Statistics New Zealand* from time to time. Without information to hand, the agencies and organisations were hamstrung. They could not, for instance, accurately identify the opportunities available in the tourism industry that may be available to Maori or non-Maori.

⁵ TheStaffordGroup



4.2 THE GROWTH OR DECLINE IN MAORI PARTICIPATION IN THE TOURISM INDUSTRY IN RECENT YEARS

Again, without accurate statistical data to hand, it was nigh impossible for the agencies and organisations interviewed to estimate if there had been any growth or decline in Maori participation in the tourism industry in recent years. Some regional economic agencies were able to estimate, however, that there had been status quo or modest growth in the last 2 years.

4.3 THE PERCEIVED OPPORTUNITIES FOR GREATER INVOLVEMENT BY MAORI IN THE TOURISM INDUSTRY

A number of the agencies and organisations interviewed identified opportunities for increased involvement by Maori in the tourism industry. Some agencies and organisations went so far as to say that Maori tourism would be the lynch pin for tourism to New Zealand in the future.

Opportunities identified included:

- using prime coastal or bush land (held by Maori) for tourism purposes;
- supporting organisations dedicated to the development of Maori and cultural tourism (for instance, *Tai Tokerau*);
- developing Maori cultural product (in some regions, for instance, there is little museum product);
- adding a Maori cultural dimension to existing and generic tourism product; and
- developing authentic Maori cultural experiences.

4.4 THE PERCEIVED CHANGES REQUIRED TO EFFECT A GREATER LEVEL OF INVOLVEMENT BY MAORI IN THE INDUSTRY

Recommendations were offered to improve the level of involvement by Maori in the tourism industry. Some of the recommendations made by the agencies and organisations are listed below.

- **(education)** There is a need to improve access to suitable education for Maori. Specifically, education should be affordable and should be developed around the *Maori learning style*. There should be increased business training opportunities for Maori. Appropriate and high quality education needs to be well funded. For the tourism industry, education must involve specialised training.



- **(support)** There should be support offered for mentoring services; representative organisations (such as *Tai Tokerau*) and support for community entrepreneurial leaders.

There should also be increased funding support for *start-up* businesses in the industry. If the level of funding does not increase, then access to funding should be made easier.

(It should be noted, however, that some agencies and organisations held the view that there should be no increase in funding for *start-up* or existing businesses.)

- **(improved understanding)** There should be a clear understanding that there is often a lag between the start-up of a business in the industry, the building of a profile and the realisation of profit etc..

It was also suggested that there needed to be less emphasis (via an improved understanding of commercial practices) on trying to stimulate *start-ups*. It was felt that that stimulation of *start-ups* was often at the expense of the quality and sustainability of current operations.

- **(improved planning)** There needs to be greater emphasis on the need for planning and, especially, the need for feasibility planning before investment (of any kind) is made in *start-ups* etc..
- **(an attitude shift)** There needs to be a move toward a *can-do* and *motivated* attitude. This may be effected by a public relations campaign aimed at *maraes* and schools etc..

(Some organisations and agencies advocated that no intervention should be encouraged and that with the right attitude, Maori could avail themselves of the opportunities available in the tourism and other industries).

- **(match opportunities with skills)** There is a need to identify the opportunities in the tourism industry markets and to match those opportunities with the available, local expertise & skills and investment in plant & infrastructure. This will be dependent, however, on access to robust (accurate and current) statistical data.
- **(a hierarchy for responsibility)** There should be a clear hierarchy for accepting responsibility regarding the development of Maori tourism industry involvement. That hierarchy should take into account the roles of:
 - regional tourism organisations;
 - regional economic development agencies; and
 - other Government departments.



4.5 BARRIERS AND IMPEDIMENTS IDENTIFIED

During the course of the structured interviews, a number of barriers and impediments to Maori participation in the tourism industry were identified. The barriers and impediments are set out in TheStaffordGroup's document: *Closing the Gaps – He matai tapoi Maori, Barriers and Impediments Short Report* dated November 2000. They are summarised, briefly, in Table 4.1.

Table 4.1: Barriers and Impediments Identified for Greater Maori Participation in the Tourism Industry

- A lack of information on Maori participation in the tourism industry
 - A lack of training and support
 - A lack of planning
 - A defeatist attitude
-



5. KEY FINDINGS FROM THE BUSINESS SURVEY OF TOURISM BUSINESSES IN NEW ZEALAND

A Survey was sent to 500 randomly selected tourism business in New Zealand. A 32% response rate was achieved with respondents representing those business types listed at Table 5.1. In brief, some 162 responses were received from across the broad spectrum of tourism businesses operating in New Zealand. A copy of the Survey questions is at Appendix 4.

Table 5.1: Business Survey Respondent Business Types

Tour Operators	15.8%
Travel Agents	11.8%
Attraction Operators	25.0%
Accommodation Providers	36.1%
Transportation Operators	6.6%
Restaurants and Cafes	2.6%
Other Businesses	9.9%

More than 75% of the Survey respondents (who completed the Survey form) had been operating their businesses for more than 5 years (with 14.7% having operated their businesses between 2 and 5 years). With only 8.8% of the respondents having been in business less than 2 years, the Project Team has concluded that the large part of the respondents were experienced tourism operators.

Over 78% of the respondents were general managers, managing directors, company directors or owner-operators of the businesses. The balance of the respondents was in sales and marketing (3.9%) or were travel consultants (2.9%).

There was a high level of interest in this Survey, with over 52% of the respondents wanting to receive a copy of the Study Report.

The aim of the Tourism Business Survey was, among other things, to determine the extent of involvement of Maori in the tourism industry, including by looking at the following factors:

- employment levels; and
- business ownership levels.



In addition, the Survey was designed to elicit additional information on:

- how long Maori and non-Maori employees had worked in the respondent's business, on average;
- what percentage of Maori and non-Maori employees had completed tourism or tourism related courses;
- whether the respondent's business sold Maori tourism product⁶; and
- whether there were any barriers or impediments that, in the respondent's opinion, affected Maori involvement in the tourism industry.

Each of the factors is addressed below.

5.1 THE EMPLOYMENT OF MAORI IN THE RESPONDENT BUSINESSES

Respondents were asked to indicate the number of employees, the number of full-time Maori employees and the number of part-time Maori employees in their businesses. A summary of their responses is at Table 5.2.

A significantly high number of the respondents employed less than 5 Maori full-time or part-time employees in their businesses.

Table 5.2: The Number of Employees and the Number of Maori Employees in the Respondent Businesses

Range	All Employees	Full Time Maori Employees	Part Time Maori Employees
0 - 4	58.8%	72.5%	64.7%
5 - 9	12.7%	5.9%	3.9%
10 - 19	9.8%	1.0%	1.0%
20+	21.7%	2.0%	2.9%
Don't Know	2.0%	3.9%	4.9%

⁶ Defined to include product or services that provide the visitor with an opportunity to have some contact with Maori culture – for instance via handicrafts, food and food preparation, music & dance, architecture, dress styles, history and mythology and leisure activities that reflect distinctive life-styles etc..



5.2 MAORI BUSINESS OWNERSHIP LEVELS

Survey respondents were asked to indicate the percentage of their businesses owned by Maori:

- 83.3% of the respondents indicated there was *no* Maori ownership of their business;
- 7.9% of the respondents indicated there was some (but not total) Maori ownership of their business; and
- only 2.9% of the respondents indicated that their businesses were 100% owned by Maori.

5.3 ADDITIONAL INFORMATION

5.3.1 HOW LONG MAORI AND NON-MAORI EMPLOYEES HAD WORKED IN THE RESPONDENT'S BUSINESS, ON AVERAGE

Respondents were asked to indicate how long Maori and non-Maori employees had worked in the respondent's business, on average. A summary of the responses is at Table 5.3.

Overall, longer term employees tend to be non-Maori, particularly employees who have worked with the respondents for between 2 and 5 years.

From additional research undertaken by the Project Team⁷, the disparity between the length of time Maori and non-Maori are employed in the respondents' businesses could be attributed to:

- the desire by some Maori to establish their own businesses;
- the desire by some Maori to try other forms of employment;
- the lack of advancement opportunities within the respondent's business (due to its size); and
- Maori employees moving outside of the location of the respondent's business.

⁷ In the course of the structured interviews undertaken by TheStaffordGroup.



Table 5.3: Length of Time Maori & non-Maori were Employed in the Respondent's Business, on average

Average Length of Employment	Maori Employees	non-Maori Employees
Less than 12 months	7.8%	7.8%
1 – 2 years	9.8%	12.7%
2 – 5 years	13.7%	34.3%
5 years or more	13.7%	21.6%
Not Established	54.9%	23.5%

5.3.2 THE PERCENTAGE OF MAORI AND NON-MAORI EMPLOYEES WHO HAD COMPLETED TOURISM OR TOURISM RELATED COURSES

The Survey respondents were asked to identify whether Maori or non-Maori employees had completed tourism or tourism related courses:

- 21.7% of the respondents indicated that Maori employees had completed a tourism related course (with 6.9% of the respondents indicating that more than 75% of Maori employees had completed a tourism related course); and
- 46% of the respondents indicated that non-Maori employees had completed a tourism or related course (with 18.6% of the respondents indicating that more than 75% of the non-Maori employees had completed a tourism or related course).

5.3.3 WHETHER THE RESPONDENT'S BUSINESS SOLD MAORI TOURISM PRODUCT

Some 43% of the Survey respondents indicated that they sold some form of Maori tourism product, including those listed in Table 5.4.

Table 5.4: Type of Maori Tourism Product sold by Respondents

Maori Art, Culture and History Product	45.5%
Maori Carving Product	18.2%
General Maori Souvenir Product	11.4%
A Hangi and Concert Party Product	6.8%
A Kaikoura Whale Watch Tour Visit	6.8%
A Tour of Whakarewarewa	2.3%





5.3.4 WHETHER THERE WERE ANY BARRIERS OR IMPEDIMENTS THAT, IN THE RESPONDENT'S OPINION, AFFECTED MAORI INVOLVEMENT IN THE TOURISM INDUSTRY.

Respondents were asked whether there were barriers and impediments that affected Maori involvement in the tourism sector and, if so, to specify those barriers and impediments.

73.5% of the Survey respondents indicated there were no barriers or impediments for greater Maori involvement in the tourism industry. Some respondents noted that by raising the question, the Survey was, itself:

- creating a barrier or impediment to Maori involvement; or
- creating an argument for unwarranted support for Maori involvement.

In support of their position, the respondents who did not believe there were barriers or impediments to the involvement of Maori in the tourism industry, noted that:

- the industry is open to anyone (Maori or non-Maori);
- there were already good examples of highly successful Maori tourism operators;
- all tourism businesses (Maori and non-Maori) had difficulty raising capital, given the risks often associated with tourism businesses; and
- there is an on-going need to increase the skills base of Maori (to enable them to run businesses more effectively).

Of the 23.5% of respondents who indicated there were barriers or impediments, the barriers and impediments specified are summarised at Table 5.5 (see also TheStaffordGroup's document: *Closing the Gaps – He matai tapoi Maori, Barriers and Impediments Short Report* dated November 2000).

The primary barrier or impediment identified by these respondents was *Maori attitude and professionalism* (33.3% of these respondents noted the barrier or impediment). The barrier or impediment may be manifested in the perception of the respondents of:

- a lack of reliability in the supply of goods and services (see the next section of this Key Findings Report);
- limitations in communication (in terms of technology and timeliness);
- the need to upgrade Maori tourism product to meet changing market conditions and changing market expectations;



- a lack of sufficient administrative systems being in place; and
- a lack of commercial structure.

Some respondents felt, however, that the barriers and impediments were not insurmountable (they could be addressed by training; introducing improved support systems and encouraging attitudinal shifts).

Table 5.5: Barriers & Impediments to the Involvement of Maori in the Tourism Industry

Maori attitudes and professionalism	33.3%
Lack of education among Maori	25.0%
The general ability of Maori	25.0%
The Maori willingness to participate	25.0%
A lack of commitment by Maori	20.8%
A lack of understanding	16.7%
The isolated geographical locations	8.3%
A lack of funding for Maori	8.3%
The language barrier	8.3%
Government Department policies	4.2%
Tribal factions	4.2%
A lack of support and assistance	4.2%
An inability to work together	4.2%



6. KEY FINDINGS FROM THE SURVEY OF INBOUND TOUR OPERATORS BASED ONSHORE AND OFFSHORE

60 survey forms were distributed to tour operators (30 to operators based onshore and 30 to operators based offshore). A 47% response rate was achieved. A copy of the Survey questions is at Appendix 5.

The Survey respondents catered to the markets listed at Table 6.1 (the primary markets being those of North & South America, Europe and Australia).

Table 6.1: The Survey Respondents' Visitor Markets

North and South America	60.7%
Europe	57.1%
Australia	28.6%
South East Asia	17.9%
Other Asia	25.0%
Pacific	7.1%
Other Destinations	28.6%

Over 67% of the Survey respondents (who completed the Survey form) were general managers, managing directors or company directors.

More than 78% of the respondents had more than 10 years' experience in the travel or tourism industry and 57% of the respondents had more than 10 years' experience in their current operation.

There was a high level of interest in this Survey, with over 71% of the respondents wanting to receive a copy of the Study Report.

The aim of the Inbound Tour Operator Survey was, among other things, to determine the perceptions of Maori tourism product, including by looking at the following factors:

- tourism product availability;
- demand and supply issues; and



- performance levels and success.

Each of the factors is addressed below.

6.1 MAORI TOURISM PRODUCT AVAILABILITY

To determine Maori tourism product availability, Survey respondents were asked to indicate if they sold tour packages that contained Maori tourism product⁸. Those respondents who sold Maori tourism product were asked to indicate the types of product sold. 93% of the respondents indicated that they sold tour packages that contained Maori tourism product. An indication of the types of product sold is at Table 6.2.

Table 6.2: Maori Tourism Product Sold in Tour Packages

A Hangi and a Maori Concert Party	57.7%
A Tour of Whakarewarewa	26.9%
Maori Art	26.9%
A Tour of Tamaki Village	15.4%
A Tour of Te Papa	15.4%

6.2 DEMAND AND SUPPLY ISSUES FOR MAORI TOURISM PRODUCT

To determine demand and supply issues for Maori tourism product, the Survey respondents who did not sell Maori tourism product in their packages for New Zealand were asked to indicate why the product was not sold. 50% of the respondents indicated that their clients were not interested in the product and a further 50% indicated that their clients preferred natural, environmental products.

Also, the Survey respondents were asked to consider and indicate what level of demand there was, in their markets, for Maori tourism product. Overall, the demand for Maori tourism product was estimated to be *average* or *low* (see Table 6.3).

⁸ Defined to include product or services that provide the visitor with an opportunity to have some contact with Maori culture – for instance via handicrafts, food and food preparation, music & dance, architecture, dress styles, history and mythology and leisure activities that reflect distinctive life-styles etc..



Reasons for the low levels of perceived demand included:

- the lack of new, vibrant and diverse product within the Maori tourism product range; and
- the age, type and limited variety of experiences offered in the Maori tourism product range.

Table 6.3: Perceived Demand for Maori Tourism Product

High Demand	25.0%
Medium Demand	7.1%
Average Demand	35.7%
Low Demand	28.6%

6.3 MAORI TOURISM PRODUCT PERFORMANCE LEVELS AND SUCCESS

To determine perceptions of Maori tourism product performance levels and success, the Survey respondents were asked to:

- rate the quality of Maori tourism product available in their tour packages;
- rate the quality of Maori tourism product generally;
- rate the price competitiveness of the Maori tourism product available in their tour packages;
- rate the range or selection of available Maori tourism product;
- indicate the most marketable Maori tourism product they were aware of;
- indicate what improvements should be made to Maori tourism product; and
- indicate how well Maori tourism product is promoted overseas.

6.3.1 THE QUALITY OF MAORI TOURISM PRODUCT SOLD IN PACKAGES AND GENERALLY

Over 60% of the Survey respondents rated the Maori tourism product sold in their packages as *excellent* or *very good*.



Only 32.2% of the respondents, however, rated Maori tourism product generally as *excellent* or *very good*, with 50% of the respondents rating Maori tourism product generally as *satisfactory* or *poor*.

6.3.2 THE PRICE COMPETITIVENESS OF MAORI TOURISM PRODUCT

Only 32.2% of the Survey respondents rated the price competitiveness of Maori tourism product as *excellent* or *very good* while 28.6% of the respondents rated it as *satisfactory* or *poor*.

6.3.3 THE RANGE OR SELECTION OF MAORI TOURISM PRODUCT

Only 17.9% of the Survey respondents rated the range or selection of Maori tourism product as *excellent* or *very good* while 42.8% of the respondents rated it as *satisfactory* or *poor*.

6.3.4 THE MOST MARKETABLE MAORI TOURISM PRODUCT

The Survey respondents indicated that the tourism product listed in Table 6.4 was the most marketable product of which they were aware⁹. The *hangi* and Maori concert party product and the *Tamaki Village Tour* product were the most marketable products according to the respondents (particularly in offshore markets). Interestingly, a *Kaikoura Whale Watch* visit was perceived as an environmental experience rather than a Maori tourism product experience.

Table 6.4: Maori tourism product

A Hangi and a Maori Concert Party	28.6%
A Tour of Tamaki Village	25.0%
Maori Culture	17.9%
Maori Arts	7.1%
A Kaikoura Whale Watch Visit	3.6%
A Tour of Whakarewarewa	3.6%

⁹ First mentioned tourism product, rather than overall view.



Reasons cited for the marketability of Maori tourism product included those in Table 6.5.

Table 6.5: Reasons Given for Marketability of Maori Tourism Product

Professionalism	17.9%
Aspects of the Experience	10.7%
Marketing	10.7%
Commercially Run	7.1%
Cultural	7.1%
Understanding Visitors' Needs	3.6%
Enjoyable	3.6%

6.3.5 THE IMPROVEMENTS THAT SHOULD BE MADE TO MAORI TOURISM PRODUCT

The Survey respondents' recommendations for improvements to Maori tourism product are summarised at Table 6.6.

It is interesting to note that while *professionalism* was quoted as the main reason for the marketability of Maori tourism product it was also quoted as the area requiring attention should Maori tourism product be improved.

The Project Team suspects that the recommendation that a *stronger cultural depth* be provided for Maori tourism product reflects the needs of more mature visitor markets (for instance the European and North American markets) for more advanced forms of cultural experiences and higher levels of interpretation.

The recommendation that there be an *improved reliability of service* needs to be addressed. From additional research undertaken by the Project Team¹⁰ service areas requiring greater reliability included timing of tours, last minute changes to tours and the reliability of merchandise offered for sale.

The recommendation that Maori tourism product *not become too commercial* is, the Project Team surmises, a recommendation born out of concern that Maori tourism product remain *cultural* and *authentic*. Respondents will, of course, compare Maori tourism product with that available in less developed parts of Asia, the Pacific and Africa etc..

¹⁰ In the course of the structured interviews undertaken by TheStaffordGroup.



The recommendation that there be *more interest and excitement* in the Maori tourism product offered should be weighed against the recommendation that the product *not become too commercial*. The recommendation should be viewed, then, as one that reflects the respondents' desires for greater levels of interaction as part of the visitor experience.

Table 6.6: Recommendations for Improvements to Maori Tourism Product

Better organisation, management and professionalism	21.4%
Stronger cultural depth	17.9%
Improved reliability of services	14.3%
Not become overly commercial	10.7%
More interest and excitement	7.1%
An exchange program with Maori	3.6%

6.3.6 THE PROMOTION OF MAORI TOURISM PRODUCT OVERSEAS

The Survey respondents were asked to indicate how well Maori tourism product was promoted overseas. 25% of the respondents considered Maori tourism product was *well promoted*; 35.7% said it was *satisfactorily promoted* and 32.1% said it was *poorly promoted*.

These results indicate that despite the best efforts of *Tourism New Zealand* and tour operators, the respondent inbound tour operators were not particularly satisfied with the level of promotion to date.

From additional research undertaken by the Project Team¹¹, it appears that there is:

- a lack of product awareness offshore;
- a lack of images for promotion and advertising and a commensurate perception of outdated imagery and lack of new product; and
- a passive rather than a proactive approach to the promotion of Maori tourism product.

¹¹ In the course of the structured interviews undertaken by TheStaffordGroup.



6.4 BARRIERS AND IMPEDIMENTS IDENTIFIED

During the course of Survey, a number of barriers and impediments to Maori participation in the tourism industry were identified. The barriers and impediments are set out in TheStaffordGroup's document: *Closing the Gaps – He matai tapoi Maori, Barriers and Impediments Short Report* dated November 2000. They are summarised, briefly, in Table 6.7.

Table 6.7: Barriers and Impediments Identified for Greater Maori Participation in the Tourism Industry

The interests of the inbound visitor markets (in product other than Maori tourism product and in natural, environmental product)

The negative perceptions of Maori product, its range and promotion overseas



APPENDIX 1 – QUESTIONS FOR MAORI TOURISM OPERATORS (GUIDELINE ONLY)

1. What is your tribal affiliation
2. Where, in New Zealand, do you operate?
3. What type of tourism business do you operate?
4. How many personnel are engaged in your business? (please specify the number of full time staff and the number of part time staff)
5. How many personnel are Maori? (please specify the number of full time staff and the number of part time staff)
6. How many of your Maori staff have tertiary qualifications? (for instance, from a University or Polytech)
7. Can you provide details of the qualifications held by your Maori staff?
8. How many of your Maori staff have tourism specific qualifications? (Can you provide details of the tourism courses those staff members completed? Did your business provide any assistance (including time or funding) to assist the staff completing the course?)
9. Is it easy to find and secure Maori personnel to work in your business?
10. If it is not easy, why do you think this might be the case?
11. How long, on average, do Maori staff stay with your business?
12. If Maori stay, on average, less than 2 years – why do you think this is the case?
13. Do you operate as a limited liability company, a trust or other structure? (Please specify)
14. Who are the shareholders or investors in your business?
15. Are the shareholders or investors active or passive participants in your business?
16. Where do most of your customers/visitors come from? (Please specify the share from each market)
17. Can you provide an indication of the feedback (positive and negative) that you have received from customers/visitors on the product your business provides?



18. What percentage of your product do you consider to be *Maori tourism product*?
19. What makes that percentage of product *Maori tourism product*?
20. What is the approximate, annual gross turnover of your business?
21. What is the approximate, annual gross profit for your business?
22. Please comment on the profitability of your business (how do you determine profitability?).
23. Do you have any difficulty in securing capital for your business?
24. How and from whom do you normally source your capital?
25. What is your business' debt to equity ratio?
26. Do you consider your business to be successful (how do you determine success?).
27. What do you want to achieve in the next 3 years for your business?
28. What changes will you make in to your business in the next 3 years?
29. How will you fund the changes referred to above?
30. Will there be additional opportunities for Maori involvement in your business?
31. If you could provide Maori tour operators with a checklist for success in New Zealand's tourism industry, what would be on the list?
32. How do you imagine more Maori can be encouraged to become involved in the Country's tourism industry?
33. Is there a role for Government to encourage more Maori to become actively involved in the tourism industry. If there is a role, what should it be?



APPENDIX 2 – QUESTIONS FOR MEMBERS OF THE FINANCE AND INVESTMENT COMMUNITY (GUIDELINE ONLY)

1. Do you have a Maori client base (whether in the tourism industry or another industry)?
2. What criteria does the Bank consider when approaches are made for funding or advice (by Maori or non-Maori)?
3. Do you have some good or bad examples of approaches by or relationships with Maori clients?
4. Is there a role for Government in assisting Maori approaches to or relationships with the Bank?
5. Do you have exposure to the tourism industry? Are there any issues peculiar to the industry?
6. What would facilitate easier applications by Maori to your bank for financing? Particularly for the tourism industry?
7. What options are available to increase Maori participation in the tourism industry?



APPENDIX 3 – QUESTIONS FOR VARIOUS GOVERNMENT AGENCIES, MAORI ORGANISATIONS, REGIONAL AND ECONOMIC DEVELOPMENT AGENCIES (GUIDELINE ONLY)

1. Do you collect statistical data on Maori enterprises?¹²
2. If you do, please provide:
 - a. an indication of the number of Maori enterprises (including companies & trusts etc.); or
 - b. an indication of the number of Maori enterprises per economic sector (for example forestry, agriculture or tourism).
3. Do you collect data on tourism enterprises?
4. If you do, please provide details of the enterprises (including the number of tourism enterprises; the nature of the businesses (for instance: tour operators or travel agencies etc.) and their size (such as the number of employees and turnover, if known)).
5. Has there been growth in the number of Maori enterprises in the last 2 years?
6. If there has, please specify:
 - a. the level of estimated growth in the number of enterprises and the size of those enterprises; and
 - b. the sectors (including the tourism sector) where growth may have been experienced.
7. Has there been a decline in the number of Maori enterprises in the last 2 years?
8. If there has, please specify the level of estimated decline and the sectors (including the tourism sector) where declines may have been experienced.
9. In your opinion, are there opportunities for Maori to become more actively involved in tourism?
10. If there are opportunities, what needs to happen to facilitate greater Maori involvement in the tourism sector?
11. What changes, if any, need to occur to achieve greater Maori involvement in the tourism sector in New Zealand (for instance: education, policy change and funding etc.)?

¹² Maori enterprises will include enterprises where Maori have an ownership interest of at least 50% or greater



APPENDIX 4 – QUESTIONS FROM THE TOURISM BUSINESS SURVEY

Q. 1: Which area of the tourism industry does your business primarily operate in? (Please place an X on only one line.)

Tour Operator	_____	1
Travel Agent	_____	2
Attractions	_____	3
Accommodation	_____	4
Transportation	_____	5
Restaurants and Cafes	_____	6

Other, please specify: _____

Q. 2: Please indicate the length of time your business has been operating. (Please place an X where appropriate.)

Less than 1 year	_____	1
1-2 years	_____	2
2-5 years	_____	3
More than 5 years	_____	4

Q. 3: Please indicate your position in the Company.

Please specify: _____



Q. 4: Please indicate the number of Maori employees in your business. (Please place an X where appropriate.)

	0-4	5-9	10-19	20+	Don't Know
Total No. of Employees	_____ ¹	_____ ²	_____ ³	_____ ⁴	_____ ⁵
No. of full-time Maori Employees	_____ ¹	_____ ²	_____ ³	_____ ⁴	_____ ⁵
No. of part-time Maori Employees	_____ ¹	_____ ²	_____ ³	_____ ⁴	_____ ⁵

Q. 5: What percentage of your business is owned by Maori? (Please place an X where appropriate.)

None	_____ ¹
Less than 10%	_____ ²
10% to 49%	_____ ³
50%	_____ ⁴
51% to 74%	_____ ⁵
75% to 99%	_____ ⁶
100%	_____ ⁷

Q. 6: What percentage of your employees have completed tourism or tourism related education courses? (Please place an X where appropriate.)

Maori Employees who are undertaking or who have completed a Course

Non-Maori Employees who are undertaking or who have completed a Course

Not Applicable	_____ ¹	Not Applicable	_____ ¹
None	_____ ²	None	_____ ²
Less than 25%	_____ ³	Less than 25%	_____ ³
25%-50%	_____ ⁴	25%-50%	_____ ⁴
51%-75%	_____ ⁵	51%-75%	_____ ⁵
More than 75%	_____ ⁶	More than 75%	_____ ⁶



Q. 7: How long, on average, have your employees worked for your business? (Please place an X where appropriate.)

Maori Employees

Non-Maori Employees

Less than 12 months _____¹

Less than 12 months _____¹

1-2 years _____²

1-2 years _____²

2-5 years _____³

2-5 years _____³

More than 5 years _____⁴

More than 5 years _____⁴

Q. 8: Does your business offer or sell any Maori tourism product* or service? (Please place an X where appropriate.)

*(*For the purposes of this Survey, **Maori Tourism Product** will include product or services that provide the visitor with an opportunity to have some contact with Maori culture – for instance via handicrafts, food and food preparation, music & dance, architecture, dress styles, history and mythology and leisure activities that reflect distinctive life-styles etc..)*

Yes _____¹

No _____²

If Yes, please specify the product provided: _____

Q. 9: Are there any barriers or impediments that, in your opinion, may be affecting Maori involvement in the tourism industry?

Yes _____¹

No _____²

If Yes, please specify the impediments or barriers: _____



Q. 10: Is there any other comment you would like to make?

Please
specify: _____

Q.11: Would you like a copy of the final research report?

Yes _____¹
No _____²



APPENDIX 5 – QUESTIONS FROM THE INBOUND TOUR OPERATORS' SURVEY

Q. 1: Do you sell tour packages that contain Maori tourism product? (Please place an X where appropriate.)

*(For the purposes of this Survey, **Maori Tourism Product** will include product or services that provide the visitor with an opportunity to have some contact with Maori culture – for instance via handicrafts, food and food preparation, music & dance, architecture, dress styles, history and mythology and leisure activities that reflect distinctive life-styles etc..)*

Yes _____¹

If *Yes*, please specify the types of product contained in your

packages: _____

No _____²

If *No*, please provide a reason why the product is not contained

in your packages: _____

Q. 2: How would you rate the quality of the Maori tourism product available in your packages? (Please place an X where appropriate.)

Excellent _____¹

Very Good _____²

Good _____³

Satisfactory _____⁴

Poor _____⁵

Not Applicable (*have never experienced the product*) _____⁶



Q. 3: How would you rate the quality of available Maori tourism product generally? (Please place an X where appropriate.)

Excellent	_____	1
Very Good	_____	2
Good	_____	3
Satisfactory	_____	4
Poor	_____	5
Not Applicable (<i>have never experienced the product</i>)	_____	6

Q.4: How would you rate the price competitiveness of the Maori tourism product available in your packages against other product in your New Zealand tour packages? (Please place an X where appropriate.)

Excellent	_____	1
Very Good	_____	2
Good	_____	3
Satisfactory	_____	4
Poor	_____	5

Q. 5: How would you rate the range or selection of available Maori tourism product? (Please place an X where appropriate.)

Excellent	_____	1
Very Good	_____	2
Good	_____	3
Satisfactory	_____	4
Poor	_____	5

Q. 6: What is the most marketable Maori tourism product that you are aware of?

Please nominate and give reasons: _____



Q. 7: What improvements (if any) would you like to see made to Maori tourism product?

Please
specify: _____

Q. 8: In your opinion, how well is Maori tourism product promoted overseas? (Please place an X where appropriate.)

Well promoted	_____	1
Satisfactorily promoted	_____	2
Poorly promoted	_____	3

Q.9: What level of demand is there for Maori tourism product in your market? (Please place an X where appropriate.)

High Demand	_____	1
Medium Demand	_____	2
Average Demand	_____	3
Low Demand	_____	4
Don't Know	_____	5

Q.10: Please specify your market (for the purposes of Question 9). (Please place an X where appropriate.)

Europe	_____	1
America (North and South)	_____	2
South East Asia	_____	3
Other Asia	_____	4
Australia	_____	5
The Pacific	_____	6
Other	_____	7



Q.11: Do you have any other comments?

Please specify: _____

Q.12: Please indicate your position in the Company, how many years the Company has been operating and the number of years you have worked in the tourism industry?

Please specify your position: _____

Please specify how many years your company has been

operating for: _____

Please specify the number of years you have worked in the

tourism industry: _____

Q.11: Would you like a copy of the final research report?

Yes _____¹

No _____²



APPENDIX 6 – NON-EXHAUSTIVE 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
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
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.
Proceedings of the 1994 World Congress on Adventure Travel & Ecotourism, Hobart, Tasmania, Australia Wrest Point Hotel.	The Adventure Travel Society Inc.	The Adventure Travel Society Inc, 1994. ISBN: 1-885789-03-3.	Proceedings of Adventure & Ecotourism Conference. Includes reference to need for “eco-cultural tourism” to benefit indigenous communities.
The impact of Tourism on the Maori Community in Kaikoura.	Poharama, A; Henley, M; Smith, A; Fairweather, J.R; Simmons, D.G.	TREC Lincoln University Report #17 1998.	Describes & evaluates the interaction between Kaikoura Maori, their culture & tourism. Quantifies extent of Maori involvement in tourism in Kaikoura and key issues of concern.
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.



Title	Author	Reference	Abstract
Tourism & Cultural Proximity-Maori & Pakeha.	Ryan, C.	Submitted to Annals of Tourism Research 2000. Unpublished manuscript.	Discusses concepts of indigenous tourism & the role of cultural difference in European conceptualisations of the exotic other. Provides evidence that Maori Culture holds little appeal for domestic tourists in NZ.
A Strategic Plan for Maori Tourism Development for the Ministry of Maori Development 1999-2002.	TPK	TPK, Wellington. ISBN: 0-478-09140-0. 1999.	3 year strategic plan for Maori tourism development-identifies issues for Maori Tourism.
Maori Tourism Task Force Report	Maori Tourism Task Force	1992 ISBN 0-473-00468-2	Findings of the Maori Tourism Task Force for strategies & associated actions for Maori Tourism development.
Maori involvement in managing the environmental effects associated with the tourism industry.	Dolheguy, A	1999. Thesis – Master of Science in Resource Management, Lincoln University	Insight into the present involvement of Maori in the planning & management of the tourism industry & its subsequent effects/concerns. Identifies legislation that governs tourism to determine provisions for Iwi & hapu participation in planning for tourism.
The Sociocultural Impact of Tourism on the Te Arawa people of Rotorua, NZ.	Te Awekotuku, N.	1981. Thesis PhD, University of Waikato.	Effect of tourism on a major tribal community; their insights, reactions & experiences.
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.
Developing Rural Tourism in NZ.	Warren, J & Taylor, N.	C.R.E.S.A, Wellington 1999. ISBN 0-9582092-3-5.	Includes survey findings of 34 rural tourism enterprises that are owned & operated by Maori (7% of rural tourism).
Tourism & Culture: The Maaori Case	Mahuta, R.T.	1987. Centre for Maaori Studies & Research, University of Waikato. Unpublished Paper.	Suggests 3 models of Maori development in tourism.



Title	Author	Reference	Abstract
Leisure: A Maori & a Manganian perspective.	McGregor, H & McMath, M.	1993. In: Perkins, H & Cushman, G. Leisure, Recreation & Tourism. Longman, Paul. Pp 44-57.	The role of leisure in Maori society – a historical outline. Refers to use of Maori imagery in early & current tourism promotion.
Maori Towards 2000	T.P.K.	Whakapakari: Tatauranga. Taupori, no.1. 1998. ISBN: 0478091362. T.P.K. Wellington	Report analyses changes in the size and composition of the Maori population over the past 2 decades; compares Maori and Non-Maori demographic profile & socio-economic status.
Maori Tourism Directory Aotearoa New Zealand.	T.P.K.	Ministry of Maori Development 1998. ISBN 0-478-09130-3	A guide to the visitor attractions & activities provided by Maori tourism operations in NZ.
New Zealand now Maori.	Statistics NZ	1998. Statistics NZ, Wellington Pp59-72.	Maori employment and unemployment. At the 1996 census, 20.4% of employed Maori were concentrated in wholesale, retail trade, restaurants & hotels (an increase of 8.9% points since 1986 – the largest increase of the industry sectors).
1996 Census of population and dwellings	Statistics NZ	1996. Statistics NZ, Wellington Pp124-129	Occupation/Industry by sex and employment status for employed people of Maori ethnicity resident in NZ, 1996.
Maori tourism conference & trade show 'Te Putanga Mai'	Zeppel, H.	Journal of Travel Research, 1997. (Fall) pp78-80.	Conference report – the 2 nd annual Maori tourism conference & trade show, Auckland. Conference addressed key issues in Maori economic development.
Maori in Tourism standards authority.	Butt, P & Ormsby, O.	New Zealand Qualifications authority. 1994. (Unpublished). Paper presented Tourism Down. Under: A tourism research conference, 6-9 December. 1994, Massey University.	Maori in tourism standards authority endorsement of the Diploma of Maori in Travel & Tourism at Auckland Institute of Technology – MITSA was established by NZQA to develop unit standards in Maori tourism & sets accreditation criteria.
Ruatepupuke working together, understanding one another.	Hakiwai, A.	NZ Museum Journal 1994. 25(1) pp42-44.	Issues involved in the renovation & restoration of Ruatepupuke meeting house in the Field Museum of Natural History, Chicago, and USA. Also looks at relationship between museums and indigenous peoples.



Title	Author	Reference	Abstract
Position Paper on the protection of Maori Cultural & Intellectual Property within the Tourism Industry.	CIPR	CIPR working party for AMTF. Presented at AMTF National Hui Paparoa Marae, 10-11 September 1994.	Report of the CIPR (Cultural & Intellectual Property Rights). Working group on issues pertaining to cultural & intellectual property rights of Maori & the impact of tourism activities upon those rights.
Maori Tourism Development. Educational Training & Tourism Development at the Papakura Marae, Auckland, NZ.	Ormsby, O	Unpublished consultancy report submitted to Te Arikiniui, Dame Te Atairangi kaahu. [no date]	Details Travel & Tourism course designed to offer a marae training programme whereby members of the Maori community may gain necessary expertise & skills.
Issues in Maori Tourism	Zeppel, H.	Pacific Tourism Reviews, vol 1, Pp363-370. 1998.	Report on the second annual Maori Tourism Conference & Trade Show, Auckland 1997. Identified issues of cultural authenticity trends in development, cultural protocol, sustainability, Maori environmental values & case studies in Maori Tourism.
NZ Maori Tourism on the launch pad	Young, B.	Tourism Management, June 1989, Pp153-155.	Details upsurge of interest in Maori tourism & describes the setting up of the Maori Tourism Task Force in 1985.
Developing Cultural Tourism & Regional Differentiation in Aotearoa.	Kearsley, G & McIntosh, A.	1999. Unpublished working paper presented at Ninth Australian Tourism & Hospitality Research Conference, 10-13 Feb 1999, Adelaide, South Australia.	Reviews the potential for cultural tourism development in NZ & highlights issues seen as problematic for the development of a cultural tourism agenda for NZ (includes Maori tourism development).
Maori Attractions in Aotearoa/NZ: Setting a context for sustainable Tourism.	Hinch, T; McIntosh, A & Ingram, T.	1999. Research paper #6. Dunedin, NZ: Centre for Tourism, University of Otago. ISBN:	Outlines 16 key strategies for fostering respect & appreciation of visitor for Maori culture and engendering cultural pride among staff. Case studies of Tamaki Tours whale Watch Kaikoura and Te Papa.
Managing Maori Attraction in Aotearoa	Hinch, T; McIntosh, A & Ingram, T.	1999. World Leisure & Recreation Journal, 41 (2) p21-24.	Outlines management strategies employment at 3 Maori attractions in their pursuit of cultural sustainability.



Title	Author	Reference	Abstract
Cultural Representation as Sense of Place through Tourism: A Case Study of Maori Attractions in NZ.	McIntosh, A; Hinch, T & Ingram, T.	1998. In: Proceedings of NZ Tourism & Hospitality Research Conference, 1-4 December 1998, Akaroa, NZ.	Looks at aspects of 3 Maori attractions that make those attractions 'uniquely Maori'.
Trafficking Authenticity: Aspects of non-Maori use of Maori Cultural & Intellectual Property.	Bella Te Aku Graham	1994. New Zealand Museums Journal 25 (1) p31-34	Discusses Maori cultural & intellectual property & intellectual property & issues of cultural authenticity in museums.
Concepts and models for Maori Museums & Culture Centres	Mead, S.	1985. ALMANZ Journal 16(3) Pp3-5.	Discuss issues of museum ownership, taonga, control, presentation, prejudices, cultural discontinuity & separation.
Small Business Development & Tourism: Terra incognita	Page, S.J; Forer, P & Lawton, G.R.	1999. Tourism Management 20(4) p435-459	Reports results of project assessing role of Tourism & business development in Northland. Looks at extent of indigenous participation in small business development & implications for indigenous involvement in the development of tourism opportunities.
Tourism in the South Pacific The contribution of research to development & planning.	Pearce, D. (editor)	NZ Man & the Biosphere Lincoln University report #6 1980. Proceedings of UNESCO Tourism Workshop Rarotonga, June 10-13, 1980. Published for NZ national commission for UNESCO by Department of geography, University of Canterbury.	Includes chapter by T. Ingram on "An Assessment of Residents' Attitudes and Tourism Employment in Raratonga, Cook Islands' Pg69.
Consuming identity: modernity & Tourism in NZ.	John Taylor	1998. Research in Anthropology & Linguistics, no.2. Department of Anthropology, University of Auckland.	Anthropological perspective of Maori identity in Tourism advertising, issues of Maori tourism & authenticity,



Title	Author	Reference	Abstract
Relevant Government Policies & Programmes for Maori living in rural areas	John Hill of Bridgeport Group.	MAF Agriculture Policy Technical Paper 94/3, 30 June 1994. ISBN: 0-478-07352-6	Outlines a range of current government policies & programs of relevance to Maori living in rural areas; includes Treaty of Waitangi, TPK, RMA 1991, & relating to Maori land & fisheries, health policies & programs, wahine, education, training & employment, social welfare.
Maori Heritage: Visitor Management & Interpretation	Keelan, N	In: Hall, C.M & McArthur, S. 1993 Oxford Uni. Press, Oxford, pp95-102.	Issues of Management of Maori Heritage.
Small Business Survey 95. NZ Tourism Industry	Deloitte Touche Tohmatsu	Deloitte Touche Tohmatsu, Christchurch. ISBN: 0-908941-08-0.	Report on the operation & performance of small business in the Tourism Industry. Including; planning, marketing, relationships with Tourist Operators; profitability, employment & growth inhibitors.
Wanganui Community Strategic Plan. A plan for the future. Briefing paper: Economic Maori Business Perspective.	Wanganui Economic Development Corporation.	1995. Wanganui District Council, Wanganui.	Briefing papers on Maori economic development & tourism in Wanganui.
Cultural Designs in NZ Souvenir Clothing: the question of authenticity.	Asplet, M & Cooper, M.	2000. Tourism Management (21) pp307-312.	Research reports that there is a niche market in production of designer textiles and clothing incorporating local NZ cultural motifs & issues of authenticity.
Maori & Aboriginal Tourism: Research, Marketing & Development.	Zeppel, H.	2000. Tourism Management (21) pp205-212	Report on the 3 rd Biennial NZ Tourism & Hospitality Research Conference, Akaroa, December 1998. Reports on papers addressing Maori involvement in NZ Tourism.
Settling Maori Land Claims: Legal & Economic Implications of Political & Ideological Contexts.	Toon van Meijl	1999. In: Toon van Meijl & Benda-Beckmann, Franz von. (eds) Property rights & economic development: land & natural resources in South East Asia & Oceania. K. Paul Int, London. pp 259-291.	History of & issues relating to Maori land claims in NZ.



Title	Author	Reference	Abstract
Sustainable Maori Tourism in Tai Tokerau: Collection of Reports for the North Hokianga Region.	James Henare Maori Research Centre	Maori Research Centre & University of Auckland, May 1998, Auckland.	Reports of FRST funded research programme: - Impacts, resources, economic sustainability of Maori Tourism.
Factors Inhibiting or Impeding Maori Economic Development	Bryant, R; Rose, D; Sanderson, K; Morgan, P; Stuart, G & Andrews, G.	1997. A Report Prepared for T.P.K by Business & Economic Research Ltd, Wellington	Identifies factors seen to be inhibiting Maori economic development including human resources, physical resources, legislation & government, Maori & non-Maori values, organisation & finance.
Strategies to Facilitate Maori Economic Development	Rose, D; Sanderson, K; Morgan, P; Stuart, G & Andrews, G.	1997. A Report Prepared for T.P.K by Business & Economic Research Ltd, Wellington.	Suggests major strategies relating to human resources, physical resources, legislation, organisation, finance, Maori & non-Maori values, socio-economic factors, politics & history – overcome inhibiting factors to achieve economic development.
Contemporary Maori Development: Issues & Broad Directions.	Durie, M.	Working Paper No. 7/2000. Department of Development Studies, School of Maori & Pacific Development, University of Waikato, Hamilton.	Identifies a framework & critical tasks for Maori Development.
Government's Role in Maori Development. Charting a New Direction?	Loomis, T.	Working Paper No. 6/2000. Department of Development Studies, School of Maori & Pacific Development, University of Waikato, Hamilton.	Questions whether the Government's policy of Maori Development He Putahitanga Hou is genuinely a new direction.
Maori & self-determination in Aotearoa/New Zealand	Mikaere, A.	Working Paper No. 5/2000 Department of Development Studies, School of Maori & Pacific Development, University of Waikato, Hamilton.	A historical & legal view of Maori & self-determination, including responses to Maori Treaty claims.
The Political Economy of Indigenous Peoples & Development.	Loomis, T.	Working Paper No. 4/2000 Department of Development Studies, School of Maori & Pacific Development, University of Waikato, Hamilton.	Discusses indigenous people's struggle within political arena to maintain their right to self-determination.



Title	Author	Reference	Abstract
Indigenous Populations & Sustainable Development: Building on indigenous approaches to holistic, self-determined development.	Loomis, T.	Working Paper No. 3/1999 Department of Development Studies, School of Maori & Pacific Development, University of Waikato, Hamilton.	Discusses recent efforts by Maori in NZ to articulate a culturally – relevant, holistic 'sustainable' development.
Capacity Building for Self-Determined Maori Economic Development.	Loomis, T; Morrison, D & Nicholas, T.	Working Paper No. 2/1998 Department of Development Studies, School of Maori & Pacific Development, University of Waikato, Hamilton.	Reports on recent research linking successful indigenous development with effective capacity building.
Discussion of a Project for Assessing Tourism Resources & Business Potential Among Maori Communities in the Bay of Islands, NZ.	Johnston, C.S; Lindsay, V.J; Mitchell, N.D.	2000. Paper-presented at the 96 th annual meeting of the association of American Geographers, Pittsburgh, Pennsylvania, April 2000.	Looks at rural Maori economic opportunities in Tai Tokerau that are in harmony with their values & contemporary lifestyle.
Maori Involvement in Tourism in the Waikato region	Cukier, J & de Haas, H.	Proceedings of NZ Tourism & Hospitality Research Conference. Advances in Research, 1-4 December 1998, Akaroa, Part 1 . Lincoln University, Christchurch	Describes research & development of database of Maori involvement in tourism in the Waikato region. Maori involvement on Tourism activities in Waikato region found to be high.
Sustainable Maori Tourism in Tai Tokerau. Collection of Reports for the North Hokianga Region.	University of Auckland & James Henare Maori Research Centre, Auckland: James Henare Maori Research Centre. 1998.	University of Auckland & James Henare Maori Research Centre, Auckland: James Henare Maori Research Centre. 1998.	Reports of FRST funded research looking at impacts & perspectives on the human & cultural environment, tourism resources & the physical environment & economic sustainability of Maori Tourism.



Title	Author	Reference	Abstract
Maori Cultural Experiences in Dunedin	Bryant, R.	Postgraduate Diploma Dissertation, University of Otago, 1997.	Research into visitors' experiences of Maori culture in Dunedin and demand for authentic Maori cultural experiences and souvenir buying.
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.
Carving and Tourism: A Maori Perspective.	Ryan, C & Crotts, J.	1997. Annals of Tourism Research 24(4): 898-918.	Describes some of significant impacts of tourism on Maori culture.
Case Study: Urban Tourism in NZ: The National Museum of NZ Projects.	Page, S.J.	1993. Tourism Management, 14 (3): 211-17.	Charts the growing interests in niche markets & examines National Museums in NZ.
Rethinking Collaboration & Partnership: A Republic Policy Perspective.	Hall, C. M.	1999. Journal of Sustainable Tourism, 7(3/4): 274-289.	Issues of co-ordination, collaboration & integration in tourism policy.
Sharing Taonga & Wairua: Maori Cultural Interpretation in NZ.	Zeppel, H.	1997. Paper presented at 'Big ideas.... small budgets', 6 th annual conference of Interpretation Australia Association, 28 September – 01 Oct 1997, University of Queensland.	Interpretation of Maori cultural values at tourism sites in NZ.
Maori Mind, Maori Land. Essays on the cultural Geography of Maori People from an Outsider's Perspective.	Yoon, H.	1986. Peter Lang, Publishing Inc. Berne. ISBN: 3-261-03666-4.	Describes the cultural landscape of NZ as valued by Maori.
Business & bi-culturalism side by side.	Baird, P & James, C.	1990. Management 37 (3): April: 25-37.	Advocated need to business to consider bi-culturalism – but "something more for Maori than Rotorua concert parties, menial jobs etc" p37.



Title	Author	Reference	Abstract
Indigenous entrepreneurship in the Tourism Industry in the Pacific Islands.	Ingram, P. T.	1990. PhD Dissertation, Massey University, Palmerston North.	Includes examination of Government policies for tourism & indigenous economic development in Cook Islands & Fiji.
Indigenous People & Ecotourism: Bringing Indigenous Knowledge & Rights into the Sustainability Equation.	Johnston, A.	2000. Tourism Recreation Research, 25(2): 89-96.	Identifies major issues identified by indigenous peoples for sustainable tourism.
Ethnic Tourism in Developed Countries: Special Interest or Specialised Mass Tourism.	Fagence, M.	2000. Tourism Recreation Research, 25 (2): 77-87.	Looks at tourist interest in the circumstances of ethnic & indigenous groups in developed countries.
Case Law on Tangata whenua Consultation.	Ministry for the Environment	RMA Working Paper, June 1999. Ministry for the Environment, Wellington.	Assists in an understanding of the principles emerging from case law in making decisions under the RMA, with specific reference to consultation.
Iwi & Local Government Interaction under the RMA 1991: Examples of Good Practice.	Ministry for the Environment	RM Working Paper, February 2000. Ministry for the Environment, Wellington.	Reviews Iwi & local Government interaction in the context of implement the RMA.
Possible Impediments to Maori Tourism	Abbott, B.	Unpublished working notes from late 1998. TNZ, Wellington.	Literature review and possible impediments to Maori Tourism.
Development Plan: Te Ara a Maui Regional Maori Tourism Inc. June 30 1999 – 31 May 2000.	Te Ara a Maui Regional Maori Tourism Inc.	Report prepared for TPK 1999-2000.	Report outlining development of a brand identity for Maori Tourism in the macro region of Wellington, Wairarapa, Nelson, Marlborough & Wider-Wellington for use in international tourism promotional material.
A Regional Strategy for Maori Tourism in the Central Region.	Te Ara a Maui Regional Maori Tourism Inc.	Te Ara a Maui Regional Maori Tourism Inc. (unpublished)	A regional strategy plan for Maori Tourism in Te Ara a Maui.



Title	Author	Reference	Abstract
Report on the Current Market position of Maori Tourism Product.	Aotearoa Maori Tourism Federation.	AMTF Unpublished	Report to assess the current market position of Maori Tourism Product. Includes review of literature on the marketing of indigenous tourism products, an analysis of promotional tools and a review of research on consumer perceptions and interviews with industry participants.
Maori Tourism Seminar Working Papers.	AMTF	AMTF Unpublished	Outline of presentation on Maori Tourism covered by AMTF with support from Business Development Board, Poutama Trust, Waiariki Polytechnic.
Speech notes from Te Putanga Mai 1997, The Future of Maori Economic Development: A Vision.	AMTF	Unpublished notes from Te Putanga Mai 1997, Carlton Hotel, 8-9 April 1997.	Collection of short papers on issues of Maori Tourism.
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.
Access to Business Finance – The Issues	TPK	Report by the Ministry of Maori Development – Te Puni Kokiri	Report prepared to outline the finance industry, problems associated with obtaining finance and government solutions and responses.