SUSTAINABLE MAORI TOURISM IN TAITOKERAU

Draft Pre-Release Report for Comment by Participants

COMMERCIAL DEVELOPMENT

OF

SUSTAINABLE MAORI TOURISM

IN THE

MURIWHENUA REGION

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Cover Photograph:
Parengarenga Harbour, looking Northwest to Kotoka Spit.
(Photograph by Dr Neil Mitchell)

CONTENTS

LIST OF FIGURES

LIST OF TABLES

Introduction

This report deals with the commercial considerations involved in developing sustainable Maori tourism for the Muriwhenua region. The nature of sustainable Maori tourism is first discussed, and its importance to community economic development in the region is also highlighted. The report aims to cover four main themes. Firstly, it documents relevant and useful information about the tourism industry and the opportunities and support available for potential Maori tourism development. Secondly, it addresses the feasibility of developing Maori tourism ventures in the region, in terms of resources and capabilities and desires of the communities concerned, and also provides frameworks for determining what is required, and evaluating the chosen options. Thirdly, the report presents two models, which illustrate processes for developing a tourism industry in the Muriwhenua, addressing, in particular, cultural considerations, and the importance of links and relationships within and outside the region. Finally, the report provides an outline for developing a tourism business plan, with particular reference to the tourism marketing plan. Along with the other reports in this series, the information provided, analyses presented, and methods suggested, should provide helpful inputs into tourism development in the Muriwhenua.

The Nature Of Sustainable Maori Tourism

There are many definitions of sustainable tourism, some discussed in other reports prepared during this research programme (e.g. Charles Johnston, *Resource Inventory for the Muriwhenua Region*) and in other publications. For example, sustainable tourism development has been defined by Global 90, a conference held in Vancouver in 1990 on global opportunities for business and the environment, as "leading to the management of all resources in such a   way that we can fulfil economic, social and aesthetic needs while maintaining cultural integrity, essential ecological processes, biological diversity and life-support systems" (cited in Laxman, 2000). Sustainable Maori tourism has been less well defined, although research of the topic has provided some helpful perspectives (Urlich-Cloher, 1996). It is important to derive specific views on sustainable Maori tourism for any community or group of communities, as differences may occur between different groups, depending on specific pressures and requirements facing them.

Definition of Sustainable Maori Tourism

Previous research in Tai Tokerau (Lindsay, 1999) provided a definition of sustainable Maori tourism, which contains three main elements:

- Tourism activities must be Maori-owned;
- Maori tourism must be environmentally, socially, culturally and economically sustainable;
- Maori tourism must be community oriented and supported by the community.

Some minor differences were noted concerning the first element, in that only some people were supportive of the concept of joint ownership of tourism ventures, through joint ventures, or other equity funding arrangements. However, it should be noted that there was a range of opinions about this.

Conditions for Sustainable Maori Tourism

These views on sustainable Maori tourism were elaborated by community perspectives in the Muriwhenua, developed from workshops, hui and surveys in the communities (see Charles Johnston, *Resource Inventory for the Muriwhenua Region*, and Matthew Noonan, *Attitudes towards Mäori Tourism in the Muriwhenua Region*). These showed the most important considerations for tourism development to be:

* Local employment;
* Preservation of culture;
* Maintenance of environment;
* Education;
* Family values;
* Profit;
* Service development;
* Sense of community.

While the prospect of profit per se appeared not to be a key motivator, it was still recognised as important for the sustainability of any tourism venture.

Research Method

The research for this report involved a qualitative approach, using a mix of primary interview data and secondary data from a variety of published hard copy and web-based sources. These approaches are discussed below.

Primary Research

Personal interviews were conducted with people from the study area who were engaged in, knowledgeable about, or aspiring to be involved in tourism business development in the region. Meetings were mainly held in the field, with individuals or small groups, and via workshops held by Dr Charles Johnston, and attended by number of the research team. Contacts were made on the advice of the Research Project Committee, comprising representatives of each community involved in the study area, and from other researchers involved in the research programme. Ongoing referral to new contacts occurred quite frequently. Discussions also took place with individuals representing various business support organisations.

Secondary Research

Information was gathered from a wide range of relevant academic articles, government agency documents, newspaper articles, and the Internet. The information and insights gained from these information sources have been incorporated in the report and used to support primary data.

Collation and Synthesis of Information

Members of the research team met frequently to discuss findings and issues associated with the research. Interim findings, conclusions and ideas were also discussed with representatives

from the study region, who provided helpful feedback and insights during the course of the project.

Report of the Findings

The results of the research are presented broadly as follows. The next section outlines the various types of tourism most commonly experienced, their broad characteristics and some general marketing considerations relating to these tourism types. Following this, the New Zealand tourism industry and its structure and distribution system are discussed. Moving to a regional perspective of tourism industry, the report then discusses tourism in the Tai Tokerau, particularly the Far North. Existing tourism business in the Muriwhenua is then briefly examined. The aim of these sections is to provide a contextual understanding of tourism opportunities and issues relevant to the Muriwhenua from a national, regional and local perspective. The sections also provide information relevant to the information needs of people wishing to embark on tourism ventures.

The next two sections deal with the important business related aspects of tourism industry. Firstly, there is a discussion of regulations and compliance requirements that must be addressed by existing and aspiring tourism ventures. Secondly, a range of key agencies and organisations involved in assisting the development of tourism businesses is presented. These agencies and organisations are categorised on the three levels—national, regional and local.

The remainder of the report then deals with tourism potential in the Muriwhenua. This involves an assessment of the tourism business related resources and capabilities evident in the region and the key success factors required for various tourism types. These analyses result in the identification of the main barriers to tourism development, and suggestions of vehicles available for overcoming the barriers are presented. The report then discusses some models that address the process of Maori tourism development. Finally an outline of tourism planning issues, and a detailed approach to the development of the tourism marketing plan are presented.

Types Of Tourism: Characteristics And Marketing Considerations

Before determining the nature of specific tourism opportunities for the Muriwhenua communities, it is important to consider what is meant by tourism, the broad types of tourism and what constitutes a complete tourism product. Only when these aspects have been defined and interpreted in the context of the communities in the Muriwhenua, can specific proposals be meaningfully analysed.

Broad Tourist Types

Visitors fall into two main categories, each with two dimensions. The categories are visitor source (New Zealand or international) and length of stay (excursionists or tourists). Using a modified definition of the original 1963 Rome Conference (cited in Collier, 1994), excursionists can be defined as those visitors who stay less than 24 hours in the region and tourists are those who stay at least 24 hours in the region. These may be depicted in the following matrix (Figure 1).

Figure 1
Matrix Showing Tourist Categories
(Reproduced from Collier, 1994)

	Excursionist	Tourist
International	International Excursionist	International Tourist
New Zealand	New Zealand Excursionist	New Zealand Tourist

Visitor source (vertical axis)

Visitor Type (horizontal axis: Excursionist, Tourist)

In terms of opportunities for the Muriwhenua, it is important that these distinctions are clearly understood, since characteristics and requirements for each group are likely to be different. It is probable that the Tai Tokerau region as a whole will experience a mix of all four types of visitor, and particular tourism ventures may chose to target any one, or combination, of these.

International and New Zealand excursionists are most likely to be part of coach tours that begin at Paihia or Auckland; these visitors would be unlikely to stay overnight. Tourism providers in the communities of the Muriwhenua would probably be dependent on tour operators for inclusion as suppliers for these excursion trips. International tourists may be part of organised package holidays, where visitors have potential to stay overnight at selected locations. At present, there are few places within the Muriwhenua that serve as central accommodation areas for tourists seeking Maori cultural experience, and even fewer that are owned and operated by Maori. Again, there is some reliance on inbound tourist operators, at least initially, to target and capture this visitor group. Some New Zealand tourists would also fall into this category. Other New Zealand tourists may travel independently, with potential to stay for periods of time at any location of their choosing.

The free and independent traveller (FIT) is becoming and increasingly important type of visitor to the Far North. FITs are characterised by their desire to arrange and conduct their travel on an independent basis, rather than through package deals. Once in New Zealand, they often do not make a decision about where and how to travel, but will rely on local information to guide them. On the other hand, they may be influenced by the personal experiences of friends and colleagues back in their home country, or from personal communications via the Internet. Implications for marketing to this group of tourists are discussed in the marketing section of this report. In many ways, the free and independent travellers may reflect a more readily accessible type of tourist, since they are not already part

of a package trip that, while presenting a tourist market locally, may be relatively inaccessible to parties not associated with the package trip operations. As discussed later, this provides a great opportunity for individual tourism operators to access potential customers directly.

Although many of the service considerations are similar, the emphasis of this report is on the international tourist (including FITs), rather than the excursionist. For the excursionist, travel information, booking, and transportation are generally organised by excursion providers, and accommodation is usually not required. It is recognised that some of the tourism business will be associated with excursion travel from Auckland or Paihia, at least in the short term, until a sufficiently independent tourism industry has developed in the Muriwhenua region to attract longer stay visitors in its own right.

The Total Tourist Product

The total tourist product includes everything that the tourist purchases, sees, experiences and feels from the time the tourist enters the region (or leaves home) to the time that they leave the region (or return home). It includes travel to and from the destination, accommodation and travel while at the destination, food and beverage, souvenirs and amusement and entertainment (Collier, 1994, p12, 13). All these things, however, while critical in the overall presentation of the tourist product, are considered a lesser part of the tourist investment than the total experience that these things help to make up. The product may involve any number of separate travel / accommodation / services components - it may be just one, or, if the product is offered as an integrated, regional tourist experience, it may involve a number of separate, but linked, travel / accommodation / services components. This concept, illustrated in Figure 2 may be appropriate for tourist products offered by the Muriwhenua communities at various levels of integration within the region and throughout the Tai Tokerau.

The Importance of Product Augmentation and Supplementation

Seldom does a tourism opportunity relate only to a single product. Not only do most opportunities involve transport, accommodation and services, but also within each of these three areas are numerous opportunities to provide related products and services. This is shown at a broad level in Figure 3; within each of these segments in the figure there may also be other opportunities. A community's assessment of the value of a tourism venture should therefore consider the contribution of all parts of the total tourist product. In this way, employment, financial and other benefits spread well beyond the central tourist offering. The elements that make up the travel / accommodation / services parts of the tourist product are highly people-focused. The more people involved, however, the greater the risk of something going wrong with the tourist experience. This is an important consideration in the design and implementation of the tourism offering.

Figure 2
The Tourist Product
(Reproduced from Collier, 1994)
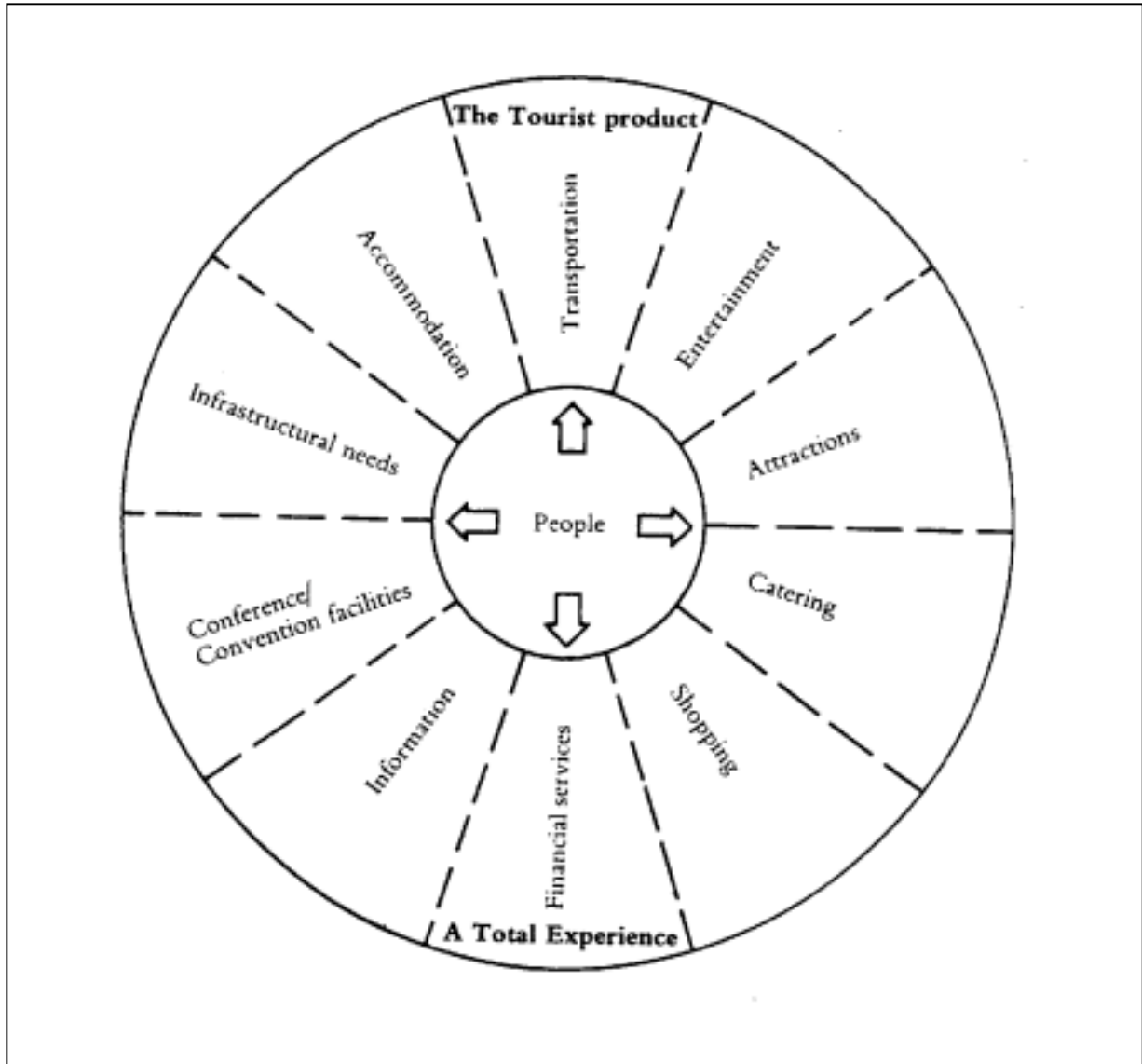
Figure 3
Product Augmentation
(Reproduced from Collier, 1994)

Pre-trip Planning and Organisation

Transportation
to Destination 1

Transportation
Home

Accommodation

Services rendered at
the destination or
between destinations,
plus experiences

Accommodation

Services rendered at
the destination or
between destinations,
plus experiences

Transportation
to Destination 2

Transportation
to Destination 3

Accommodation

Services rendered at
the destination or
between destinations,
plus experiences

Collier (1994) identifies four major elements of the tourist product that summarise those in Figure 2. These are:

- Access to the destination i.e. transportation;
- Attractions at the destination e.g. sites, events, activities;
- Amenities at the destination e.g. accommodation, transportation, retail services, catering, toilet facilities etc;
- People.

The people element is central to the success of tourist products, and some key issues for human resource development in tourism have been identified by the Tourism Strategic Marketing Group (1990) (in Collier, 1994). These are:

- The need for consistent levels of service and high standards of management;
- Adoption of a service culture and commitment to the highest possible service standards;
- Greater cultural sensitivity;
- Career path development
- Education and training - industry standards should be established.

All of these elements will apply to Maori tourism development in the Muriwhenua. The first three and last points have been noted as important by local respondents in the community workshops. In the context of sustainable Maori tourism, cultural sensitivity may be interpreted in two ways. Firstly, it suggests that Maori tourist product providers must be cognisant of the vulnerability of Maori culture to exploitation or misrepresentation if commercialised. Secondly, Maori tourist product providers must be sensitive to the cultures and cultural requirements of their visitors e.g. language.

Career path development is an important aspect of the development and sustainable employment of skilled staff involved in tourism ventures. Tourism product providers must recognise their responsibility in this area if they wish to retain qualified and motivated staff.

The NZ Tourism Industry

World growth in tourism is expected to be 4.1% per annum between 2000 and 2005, but a higher growth rate (11%) is anticipated for the Asia (WEFA Global Tourism Monitor Highlights, July 2000).

The NZTB (1993) stated the following as major influences in world tourism trends:
- a travel boom in the Asia Pacific region
- increased interest in the quality of the environment
- a growing demand for different cultural experiences.

Within this global setting, the development of a New Zealand Tourism Strategy for the next decade was commenced in October 2000. The New Zealand Tourism Strategy Group is expected to report by March 2001. The Group has representatives from central and local government, Maori and the industry. The Minister of Tourism, Mark Burton, is quoted as saying, "The overall strategy will be focused on the sustainable development of the tourism industry – not just economically but environmentally, culturally and socially." (NZGO, 2000). Part of this process has involved a study into the ways that more tourism jobs can be created

for Maori; the report of this study was expected by November 2000 (NZ Herald, 2000, 8 November).

The New Zealand tourism industry directly contributes $9 billion to the economy (TIA, 2000; NZ Herald, 2001, 23 January). Multiplier effects at a regional and national level make the contribution considerably higher. The Tourism Industry Association's recent tourism outlook survey indicated an expected improvement in profits for the industry, continuing the upward trend of the 1990s. The growth is considered to bring an anticipated 50% increase in tourism-related jobs; already, tourism supports approximately one in 12 jobs in New Zealand. The United Kingdom, North American and Australian markets showed the greatest growth potential, according to the survey (NZ Herald, 2001, 23 January). It has also been noted that international visitor spending has increased (to $3.6 billion, excluding airfares, to the year ended March 1999.

There has been a general rise in the number of visitors to New Zealand; January 2001 figures showed a 12% increase on the previous year, reaching 1.817 million visitors (NZ Herald, 2001, March 12). Recent statistics from Tourism New Zealand show a particular increases in the number of visitors in the over 50s age category, reaching 32% of all arrivals in 2000 (NZ Herald, 2001, 16 January). The significance of this trend is the preference shown by this group for cultural activities, such as vineyard tours, visits to historic buildings and sites, museums and art galleries, and attending theatres and shows. Maori-organised activities were particularly favoured by the over 50s, who comprised 46% of all visitors to these attractions in the year ended June 2000. Almost two-thirds of tourists from North America were over 50 years of age, and the other countries highly represented were Japan and South Korea. These groups were also high users of coach tours, "suggesting that cultural tourism and coach tour operators who work together will reap the benefits." (NZ Herald, 2001, 16 January). A further Tourism New Zealand finding that, overall, potential visitors rate cultural aspects of New Zealand society low, may indicate that these aspects are more appreciated by the older age group than the younger ones, as their other statistics show. Tourism New Zealand believes that the biggest attraction for international visitors in general remains the open spaces, mountains and incredible landscapes.

The backpacker market, often associated with outdoor and adventure activities, showed a growth of 15% in the year to September 2000, to 190,000 visitors (NZ Herald, 2000, 27 December). Tourism New Zealand has recently published a comprehensive report on the backpacker market, providing detailed information on the characteristics of this type of market and their expectations of tourist attractions and services (TNZ 2000).

In 1993, the New Zealand Tourism Board noted that, "The New Zealand tourism industry and Tourism Board both affirm the need for sustainable management and environmentally sensitive development..... Interest in the environment and unspoiled nature is mounting throughout the world. The natural beauty and freshness of New Zealand's environment is one of our best known and most appealing features......The last major trend in world tourism is the growing demand for different cultural experiences. The strong culture of the Maori -unique to New Zealand - is a major aspect of our national heritage which enhances New Zealand's appeal to the world travellers" (NZTB, 1993). There is no doubt that New Zealand is well placed to capture a growing tourism market interested in the features and experiences outlined in this quote. The study area enjoys features and characteristics that would enable these opportunities to be realised.

Tourism is New Zealand's greatest export earner, comprising 15.8% of exports (TIA, 2000). Regional development in New Zealand is significantly enhanced by tourism, with most

benefits occurring at a regional level (TIA, 2000). Furthermore, as noted by the Tourism Industry Association, nearly all sectors of the economy benefit – for example, food services, agriculture, hairdressing, museums and galleries, souvenirs, clothing and visitor attractions (TIA, 2000). The concept of industry clusters (e.g. Porter, 1998) provides a powerful approach to the development of a regional tourism industry (see later in this report). Regional visitor expenditure (1998 figures – TIA, 2000) shows that Northland received $497.2 million from international and domestic tourism, with nearly 80% of this from domestic tourism. In contrast, of Auckland's $1783.1 million total visitor expenditure, 60% ($1073.1 million) was from international visitors. This represents over ten times the international expenditure seen in Northland, and, more importantly, highlights the relatively low ratio of international tourists reaching Northland. The potential for Northland tourism to capture a proportion of the Auckland spend is considerable, given its relative proximity to Auckland and its largely untapped or under-utilised tourism opportunities. This report attempts to highlight some of this potential and document some of the key issues concerned with tourism development in the Northland area, with particular reference to the Muriwhenua region. Key to this development is a focus on environmental and cultural tourism, which both satisfy the predominant resource base in the region, and community aspirations for Maori tourism development. There has been some research undertaken in New Zealand on this type of tourism potential, categorised variously as eco-tourism, adventure tourism, cultural tourism, or rural tourism, which captures all of these tourism classes.

Rural Tourism in New Zealand

A report by the Ministry of Agriculture and Fisheries (MAF) discusses a study that it has undertaken of rural tourism in New Zealand (MAF, 1994). According to the definition of developed in the report, rural tourism includes:

eco-tourism: attractions and activities involving birds and other wildlife, marine, river, wetland, and estuary life, forest and plant ecology, organic farming, geology, mountains, glaciers, caves and other landforms;
adventure tourism: bungy jumping, heli and Nordic skiing, guided walks, horse treks, hunting trips, rafting, paragliding;
* garden tours;
* cultural heritage trails;
provision of accommodation: farmstays, countrystays, homestays in rural towns, camp and caravan sites, self-catering and back-packing accommodation. (Added to this could be marae-stays).

Rural tourism, in the MAF report, is defined as: "a form of special-interest tourism which derives its appeal from the contrast between the rural activities or attractions New Zealand operators make available to tourists, and the tourists' day-to-day, urban life."

A number of qualities characterise rural tourism:

* closeness to nature
* absence of crowds
* quietness
* personal attention
* a sense of continuity with the past and of stability
* smallness of scale
* a focus on the improvement of the person - body, health, intellect.

The MAF report suggests that the success of tourism ventures will depend on the extent to which these seven factors are adopted, and this will also indicate how genuinely rural the operations is.

Most rural tourism ventures are small and commercial sustainability is sometimes difficult to achieve. Some studies (e.g. Lane 1991, cited in MAF, 1994), however, have shown that commercial sustainability may not be the priority for some rural tourism operators, for example farmstay operations, which instead, give primarily social satisfaction. For communities like those in the Muriwhenua region, social sustainability is also very important. In other words, the community must accept the rural tourism development, and be aware of the benefits and pitfalls.

MAF (1994) indicates that quality must be very high, and that considerable research must be undertaken to establish the requirements of customers. Tourism New Zealand has published a number of excellent market briefs on overseas tourist markets – these are accessible on its web-site (TNZ, 2001).

The physical characteristics that are needed to appeal to rural tourists generally fall into the following categories (MAF, 1994):

scenic value - including mountains, seashores, lakes, islands, rivers and special interest scenery such as wetlands, native bush and geological features;
- special wildlife assets - flora and fauna (both native and exotic)
- cultural assets - including historic buildings, towns, settlements, Maori historic sites, marae and other cultural experience opportunities, other ethnic heritage;
- agricultural/horticultural/forestry assets - farm systems and activities e.g. stud sheep, cattle, milking, interesting crops, flowers etc;
- special facilities for sporting activities - including hunting, fishing, skiing, tramping, walking etc
- ease of access to populations and to the main tourist routes.

The New Zealand Tourism Board believes that "most tourism ventures, regardless of size, succeed because they appeal to locals as well as international visitors." (NZTB, 1993). It is likely, therefore, that a proportion of the revenue of a rural tourism venture will derive from the domestic market, although some operators suggest that this market is harder to please than the overseas market.

MAF (1994) indicates that making a tourism venture profitable depends on the way in which value is added to the attraction e.g. income from the attraction; income from local crafts sold alongside the attraction; sale of native plants alongside garden tours or bush walks etc.

There are limited data on income potential from rural tourism, but a MAF survey of pastoral farmers in 1993 (cited in MAF, 1994) concluded that gross income of under $5000 was achieved from their tourism ventures, many of which were farmstays that provided social, as well as economic, rewards.

The rural tourism products that appear to offer potential for development in the Muriwhenua are discussed more fully below, according to information sourced from the MAF report (MAF, 1994).

Accommodation

Various types of accommodation are possible (see earlier comments). Qualmark New Zealand Ltd, set up in 1994, is a national classification and grading system for accommodation, involving four types of classification. Each has its own assessment procedure and a 1 to 5 rating. It is a joint venture between the NZTB and the New Zealand Automobile Association (NZ AA), and replaces the latter's former classification system (Qualmark, 2000). For international tourism, in particular, it is important that accommodation products subscribe to the Qualmark system, so that visitors' expectations of accommodation standards are met.

Adventure Tourism

Over half of the visitors to New Zealand come to enjoy a range of adventure products offered throughout the country (MAF, 1994). The Adventure Tourism Council, formed in 1992, exists to support operators and promote the products, and this organisation and its recent activities are discussed in a later section of this report.

Heritage Tourism

This includes historical and cultural products and services. Heritage trails have been operating in New Zealand since 1989, and community volunteers have developed over 100 trails (New Zealand Heritage, 2000). These trails and sites include natural features, as well as marae and other buildings and constructions. Applications for a heritage trail may be made to the Heritage Trail Foundation (heritagetrails@clear.net.nz). The MAF report (MAF, 1994) states that: "Maori culture and traditions have always been of interest to visitors to New Zealand, but a new wave of international interest in authentic cultural experiences has increased demand for attractions of this kind. The strong Maori tradition of hospitality may combine with these cultural experiences into a powerful tourist attraction." The web-site for the New Zealand Heritage Trails Foundation is www.nzsouth.co.nz/heritagetrails/intro.shtml

Eco-tourism

The environment is becoming an increasingly important component of travel and tourism globally and the Muriwhenua is one of a few areas with unspoilt, but accessible, land- and sea-scapes that could be utilised for eco-sensitive tourism developments. Eco-tourism, often called 'natural' tourism, is usually concerned with culture as well the physical environment. The US-based Eco-tourism Society describes eco-tourism as "purposeful travel to natural areas to understand the culture and natural history of the environment taking care not to alter the integrity of the ecosystem, while producing economic opportunities that make the conservation of natural resources beneficial to local people." (cited in Warren and Taylor, 1994, p 2).

The NZTB's publication, "New Zealand Natural Heritage Guide" (NZTB, 1994) gives examples of the ways in which existing eco-tourism operators fulfil the demand for different types of eco-tourism. Developing an eco-tourism venture requires very good knowledge about the eco-tourism offering e.g. scientific knowledge about wild birds, local ecosystems, geological features etc. If the eco-tourism resource has conservation value as well, it is probable that the Department of Conservation (DOC) should be involved. There are a number of books on New Zealand eco-tourism, which provide a helpful guide to the key

considerations in setting up eco-tourism ventures. For example, the Northland Regional Council holds a copy of a very useful publication, "Developing Eco-tourism in New Zealand" (Warren and Taylor, 1994). Some of the main characteristics of eco-tourism, identified by Warren and Taylor (1994, p3), which can be readily identified with the Muriwhenua are as follows:

- caters to tourists who have an interest in the natural environment and local culture, and who want to interact with it
- relies upon relatively understood natural environments
- has a positive environmental impact
- has low social and cultural impact
- promotes tourist interaction with, and appreciation of, nature
- includes environmental education
- comprises mainly small, independent, and locally controlled businesses

The natural resources supporting eco-tourism in the area are land and coastal resources. Another report in this series (*Nga Pou Whakahï o te Tai Tokerau - Muriwhenua*) discusses available land and sea resources that could provide eco-tourism potential in the Muriwhenua. It is likely that much of the eco-tourism attraction will come from the region's coastal resources, and the land/sea interface. There is, however, potential conflict if the coastal areas are also being utilised for commercial marine and aquaculture ventures, or if forestry run-off causes local water pollution – all factors needing consideration in the Muriwhenua.

For the study area, some of the main limitations to the development of eco-tourism will be in relation to the supporting infrastructure (e.g. roading, and transport, and other services, such as accommodation), which are discussed elsewhere in this report. The relative geographic isolation is, in one respect, helpful for the rural tourism theme, but it creates practical difficulties as well, particularly for market segments that include short-stay visitors, where travelling time to a destination is of the essence.

Auckland is the nearest international airport to the study region, and over twenty international airlines fly into this airport. Current tourism trends in Northland indicate growth, but most of this is centred on the Bay of Islands. Considerable work has to be done with inbound tourism operators and local bodies to encourage the stop-over options for tourists in the study area, either from the Bay of Islands or directly from Auckland.

There is no shortage of ideas for tourism ventures in the study area in most of the categories mentioned above. Few established Maori owned tourism ventures exist in the area, and potential tourism business have not developed much past the idea stage. However, there are considerable opportunities and a high level of motivation in the communities. The Rural Tourism Council is a member organisation of the TIA, and serves the interests of rural tourism operators in New Zealand, noting that seven out of the twelve categories of award winners in the recent Tourism Awards were rural tourism operators (RTC, 2001). One of the stated aims of the Rural Tourism Council is to develop the concept of Rural Tourism Networks. Since most of the proposed, as well as existing tourism operations in the Muriwhenua are of a rural nature, this organisation could be of considerable value as a networking opportunity. Access to information on the Rural Tourism Council is available at the TIA web-site, www.tianz.org.nz/tia/nl/tia/nl/rtc.html.

In summary, the current and forecast status of the New Zealand tourism industry offers many opportunities, some of these having potential to be captured in the form of sustainable Maori tourism for the Far North and the Muriwhenua, in particular. Considering some of the

structural and culturally significant aspects of the region, the following statistics and trends noted above have immediate relevance. Firstly, tourism in New Zealand is growing at a notable rate, from both domestic and international sources. The vast majority of international tourism expenditure is in Auckland, and there is potential for some of this to be channelled north – half a day's drive away. The economic impact of tourism is predominantly local, in terms of jobs, income and spin-off effects throughout the local economy.   Tourism is one of the few industries where most of the economic gain generally remains at a local level.

The Far North is probably one of the regions of New Zealand richest in authentic culture. This could be harnessed for tourism development in response to the noticeable trend towards tourists, particularly the over 50s, seeking cultural activities as part of their visit. Supporting this potential , a recent newspaper article stated, "Most international visitors to Northland, for example, say that the Maori experience is crucial to their enjoyment of the region." (NZ Herald, 2000, 26 September). The Far North, especially the Muriwhenua, also offers some of New Zealand's most attractive and pristine natural and ecological sites and attractions, catering to the observed preferences of the majority of visitors to this country. Finally, the tourism industry is a global industry, offering, through the Internet, immediate access to a potential tourism market for the Far North. No longer need the region be quite so impeded by its geographic isolation from central markets and limited access to traditional tourism channels. Increasingly, small and medium sized businesses can participate more fully and independently in the tourism industry, either alone, or in cooperative arrangements with other small or medium sized businesses.

Role of the Internet in Tourism Development

The travel industry could become one of the biggest beneficiaries of the Internet, according to Tourism New Zealand (NZ Herald, 2000, 31 October). New Zealand's four main tourist markets are the US, Germany, Japan and the UK, and the World Tourism Organisation indicates that these countries constitute 79% of global Internet users (NZ Herald, 2000, 31 October). The Internet provides cheaper and more immediate access to world markets for small businesses, such as tourist operators, as well as retailers of travel options.

An increasing trend amongst tourism's customers are the "free and independent travellers" (FITs), who use the web to research destinations and book flight accommodation, rather than working with package deals. Chris Adams, of the travel publisher, Jasons, believes that New Zealand is particularly suited to FITs, since these travellers often seek outdoor and adventure activities (NZ Herald, 2000, 31 October). He also indicates that successful selling of travel on the Internet arises from the ability to rapidly change prices according to changing supply and demand. It is widely believed that the Internet will fundamentally change the travel industry, for example, by allowing travellers to establish links with people living in, or travelling to, to the countries in which they are interested, and then being able to make all travel arrangements directly, without intermediaries. Small tourism businesses will, likewise, be able to access individual customers, or potential customers, directly on the web, or through a web-based link, such as, in New Zealand's case, the "100% Pure" New Zealand web-site (www.purenz.com) (TNZ, 2001a).

While there is clearly significant scope for the New Zealand tourism industry to use the Internet more intensively, a recent report by a United States Internet marketing expert, Jim Sterne, chief executive of Santa Barbara-based company, Target Marketing, criticised New Zealand travel related web sites. He believes that they are generally hard to navigate, contain too much text and lack interactivity. However, notwithstanding these issues, and it has been estimated that of 1.7 million in bound travellers visiting New Zealand last year, around

80,000 – 120,000 had booked their travel on the Internet (David Lane, cited in NZ Herald, 2000, 7 November). Mr Lane also indicated that of the $2749 spent by each visitor in New Zealand (Tourism New Zealand figures), around $250 to $400 would have been Internet booked. He estimates that 10% of all domestic leisure travel will be Internet booked by 2004.

A key issue for the Internet-based New Zealand tourism industry is the effectiveness of its e-commerce supply chain. In the same address, Mr Lane also suggested that the industry in New Zealand lacks a fully comprehensive e-commerce supply chain (NZ Herald, 2000, 7 November). The New Zealand Tourism Industry Association conducted a recent poll, which showed that all the association's members are now using the Internet in some way, but the degree of sophistication varied. 93% of members had established a web site, the remaining 7% were using the net only for e-mail. Of the web sites, 36% offered full "look, book and settle" functions, 32% offered "look and book" functions, and 25% offered only a "look" function. An important aspect of tourism Internet development, according to Mr Lane, is the ability for customers to work right through the information gathering, booking and paying process online. He suggests that the need to undertake a different process, particularly for booking or paying (e.g. telephone or mail), causes considerable inconvenience for customers motivated to use the Internet for travel arrangements. On the basis of this assessment, there appears to be considerable scope for New Zealand tourism operators to expand their Internet sites to full "look, book and settle" functionality.

Structure of the New Zealand Tourism Industry

Like most industries in New Zealand, tourism is characterised by a very high proportion of small and medium sized enterprises. The Tourism Industry Association indicates that the industry has ten publicly listed companies and about 16,500 small to medium enterprises (TIA, 2000). One of the ten listed companies, Tourism Holdings Ltd is New Zealand's largest land-based tourism operator (NZ Herald, 2000, 20 September). In November 2000, this company acquired the backpacker bus service, Kiwi Experience (NZ Herald, 2000, 27 December), whose green buses are, a well-known sight in Northland and an important point of access to the growing back-packer market.   The New Zealand tourism industry has a number of key players, which, together, form the industry's overall structure. The main players are discussed below. Unless indicated otherwise, this information is taken from the Tourism Industry Association's publication noted earlier (TIA, 2000).

The Tourism Industry Association New Zealand (TIA)

The Tourism Industry Association New Zealand (TIA) provides an excellent overview of the structure of the New Zealand tourism industry on its web-site http://www.tianz.org.nz/, or in its publication, "Because Size Matters" (TIA, 2000), also on its web-site. Briefly, the Tourism Industry Association New Zealand is a membership based organisation, which represents the interests of over 3,500 businesses from throughout the tourism industry. Its main activities are clustered into four areas of activity and include aspects such as government relations, media and industry relations, business networking, industry development programmes and various membership services, such as membership deals, newsletters and issues updates. Through undertaking these activities and responsibilities, TIA plays a central role in New Zealand's tourism industry.

Through its various relations with government, media and industry, the TIA is increasingly involved in policy matters that impact on the tourism industry. Recent policy initiatives include a comprehensive formulation of issues and policies for a sustainable tourism industry, details of which are available on the TIA web-site and as a policy document (TIA, 2000a).

Some of the important policy issues concerning Maori tourism development in the Far North include conservation and environment, roading, training, funding of marketing, and business compliance costs. Some of these issues are discussed in the later section dealing with Barriers to Maori Tourism Development (see later section).

Most of the industry associations involved in tourism are affiliated to the TIA, and this link provides an effective vehicle for business networking and collaborative endeavours. Start-up tourism ventures can gain access to a vast range of relevant industry contacts through involvement with the appropriate industry associations. For example, the Adventure Tourism Council (ATC), Backpacker Accommodation Council (BAC) and NZ Outdoor Instructors Association (NZOIA), are relevant to existing or proposed Maori tourism businesses in the Far North. Such associations provide access to experienced players in their industries, as well has valuable industry-related information resulting in a shortened learning times for new participants in the industry. In addition, information about compliance needs relating to specific tourism industries may be available from the industry associations concerned.

New Zealand's largest international tourism trade show, TRENZ, is organised by the TIA, in cooperation with Tourism New Zealand, Air New Zealand, Qantas and the Inbound Tour Operators Council of New Zealand. TRENZ was first run in 1994 and, over the last six years, has grown to a business forum featuring 348 New Zealand exhibitors 340 international wholesalers (TIA, 2001). The web-site address for TRENZ is www.trenz.co.nz. In addition, the TIA also runs the annual industry conference, the New Zealand Tourism Conference, which attracts up to 500 delegates.

The TIA is linked to some key international tourism organisations, which provide useful data and global information. These organisations are the World Tourism Organisation (WTO), World Travel and Tourism Council (WTTC) and Pacific Asia Travel Association (PATA).

Tourism New Zealand / The New Zealand Tourism Board (NZTB)

The New Zealand Tourism Board, a Crown entity, formed in 1991, is responsible, via its marketing arm, Tourism New Zealand, for marketing of Destination New Zealand, through developing, implementing and promoting strategies to market the tourism industry of New Zealand (TNZ, 2001). Its current campaign, "100% Pure" New Zealand, and associated web-site (www.purenz.com) recently won the gold medal at the Federation Nationale des Offices de Tourisme et Syndicats d'Initative (FNOTSI) awards in Cholet, France (TNZ, 2000a), over 600 other competitors for its Hongi image (ref 42). The award-winning images were chosen based on how well they represented the country to overseas visitors. The image also came out top in the Heritage/Cultural image section.

The thrust of the 100% Pure New Zealand campaign is to promote New Zealand as a pure, outdoor, beautiful, natural destination. The well-known Maori artist, Cliff Whiting was appointed as Kaumatua to Tourism New Zealand to help ensure that Maori culture is authentically reflected in its 100% Pure New Zealand Campaign (NZ Herald, 2000, 7 November). The 100% Pure New Zealand website provides links to individual tourism businesses or groups of businesses, enabling global advertising for these businesses, through an established and popular tourism website.

Tourism New Zealand has also recently established the concept of Marketing Networks (MN) – groups of organisations committed to co-operative marketing in international markets. Marketing Networks have been developed for the following markets: backpacker, education, nature tourism, cruise, freshwater fishing, multi-day guided walks and Japanese school

excursions (TNZ, 2001b). The concept has considerable value in providing industry-wide focused marketing efforts, rather than independent marketing campaigns that often compete in overseas markets. It also enables smaller players to be part of a quality marketing campaign that would be unaffordable if working alone. Further information on Marketing Networks is available on the Tourism New Zealand web-site (www.tourisminfo.govt.nz/Market Research/Market Research.asp).

The new International Media Centre is a Tourism New Zealand joint venture, situated in Auckland (TNZ, 2000b). This will help to host the hundreds of journalists each year that visit New Zealand, and provide information and access to technology and resources, including New Zealand video footage, photos and story angles. Tourism New Zealand's CEO, George Hickton states, "It is a very cost-effective way of marketing New Zealand, reaching many more people than through advertising alone." (TNZ, 2000b).

The Office of Tourism and Sport

This government office was established on July 1 1999 to take responsibility for the policy functions previously performed by the Tourism Policy group within the Ministry of Commerce, and the sports policy functions previously associated with the Policy Group in the Department of Internal Affairs. Its key roles include policy advice on tourism and events related issues, promoting the understanding of tourism issues within Government, acting as an agent for the Minister of Tourism in negotiations with the New Zealand Tourism Board, identifying and seeking to provide the information needs of the tourism sector, and administering the various relevant Acts for which the office is responsible. The office has a dual responsibility, that is, to the Secretary of Internal Affairs and to Vote Ministers (Tourism and Sport, Fitness and Leisure). The web-site address of the Office of Tourism and Sport is www.otsp.co.nz.

Qualmark

As noted earlier, Qualmark is a joint venture between the New Zealand Tourism Board and the Automobile Association. Its role is to implement quality grading standards in accommodation and related industries. This is a recognised quality grading system and provides useful information for visitors otherwise unsure about local accommodation options. The web-site address for Qualmark is www.qualmark.co.nz.

Conventions and Incentives New Zealand

This is the marketing name for the New Zealand Convention Association. Further information can be obtained from the website www.conventionsnz.co.nz.

Kiwi Host

This is a privately owned organisation that offers training to the industry. Its provision of quality benchmarks aims to improve service and operating standards in service industries. Access to training is a key issue for tourism businesses, which often compete on the quality of service provided. Web-site access for Kiwihost is www.kiwihost.co.nz.

The Visitor Information Network (VIN)

This network comprises 130 tourist information offices throughout New Zealand, providing tourist information to international and domestic visitors. The Far North VIN is located at

Paihia, Bay of Islands. The web-site, Infocus, provides much of the regional information for the VINs (www.infocus.co.nz).

The Regional Tourism Organisations (RTOs)

There are 26 RTOs throughout New Zealand. They are funded by local government and are responsible for marketing their regions domestically and internationally. The Far North is represented by Destination Northland, which covers the entire Northland region. The web-site for Destination Northland is www.northland.govt.nz.

In Northland, the structure of the tourism industry is enhanced by a local Maori tourism marketing group, which operates on a membership basis, called the Tai Tokerau Maori Tourism Association (TTMTA). The purpose of this group is to facilitate networking among Maori tourism operators in the Tai Tokerau, and to promote Maori tourism businesses nationally and internationally (TTMTA, 2000). The web-site address for the Tai Tokerau Maori Tourism Association is www.taitokerau.co.nz.

The Inbound Tour Operators Council of New Zealand (ITOC)

This Council has been operating since for over 25 years, and is made up of inbound tour operators who promote and sell New Zealand travel packages to offshore buyers. The operators include wholesalers, travel agents and event managers. The participation of the inbound tour operators and their links with other tourism players are discussed in a later section that deals with the distribution system of the tourism industry. The web-site for the Council is www.itoc.org.nz.

Aviation, Tourism And Travel Training Organisation (ATTTO)

This organisation was established in 1994 as the recognised industry training organisation (ITO) for these industries. Its mission is to develop and manage high-quality training links to nationally recognised qualifications. ATTTO is funded by contributions from the industries and the sale of training resource material. The web-site for this organisation is www.attto.org.nz.

Hospitality Standards Institute (HIS)

This was established in 1993 and is the provider of national standards for hospitality sector. It is endorsed by the industry and it aims to provide training opportunities to employees from throughout the sector.

Sport, Fitness, Recreation Industry Training Organisation (SRFITO)

This organisation works with the industry to set standards as well as to develop new qualifications and create training systems for workplaces specifically in the adventure tourism sector.

The tourism industry distribution system

Tourism operators need to have an understanding of how the travel industry works, both domestically and internationally. For example, many international travellers book their travel and make their travel plans through a retail travel agent in their home country. The operator,

on the other hand, does not usually deal with a foreign-based travel agent, but usually with one or more intermediaries in distribution system – in some cases, there may be as many as 5 parties involved in the chain. At the other extreme, customers and tourism operators providing the end service may interface directly via the Internet.

Figure 4 illustrates the distribution chain for tourism products, adapted from the New Zealand Tourism Board publication (NZTB, 1995). The key intermediaries shown in the figure are discussed as follows:

Figure 4
The NZ Tourism Industry Distribution Chain
(Reproduced from NZTB, 1995)
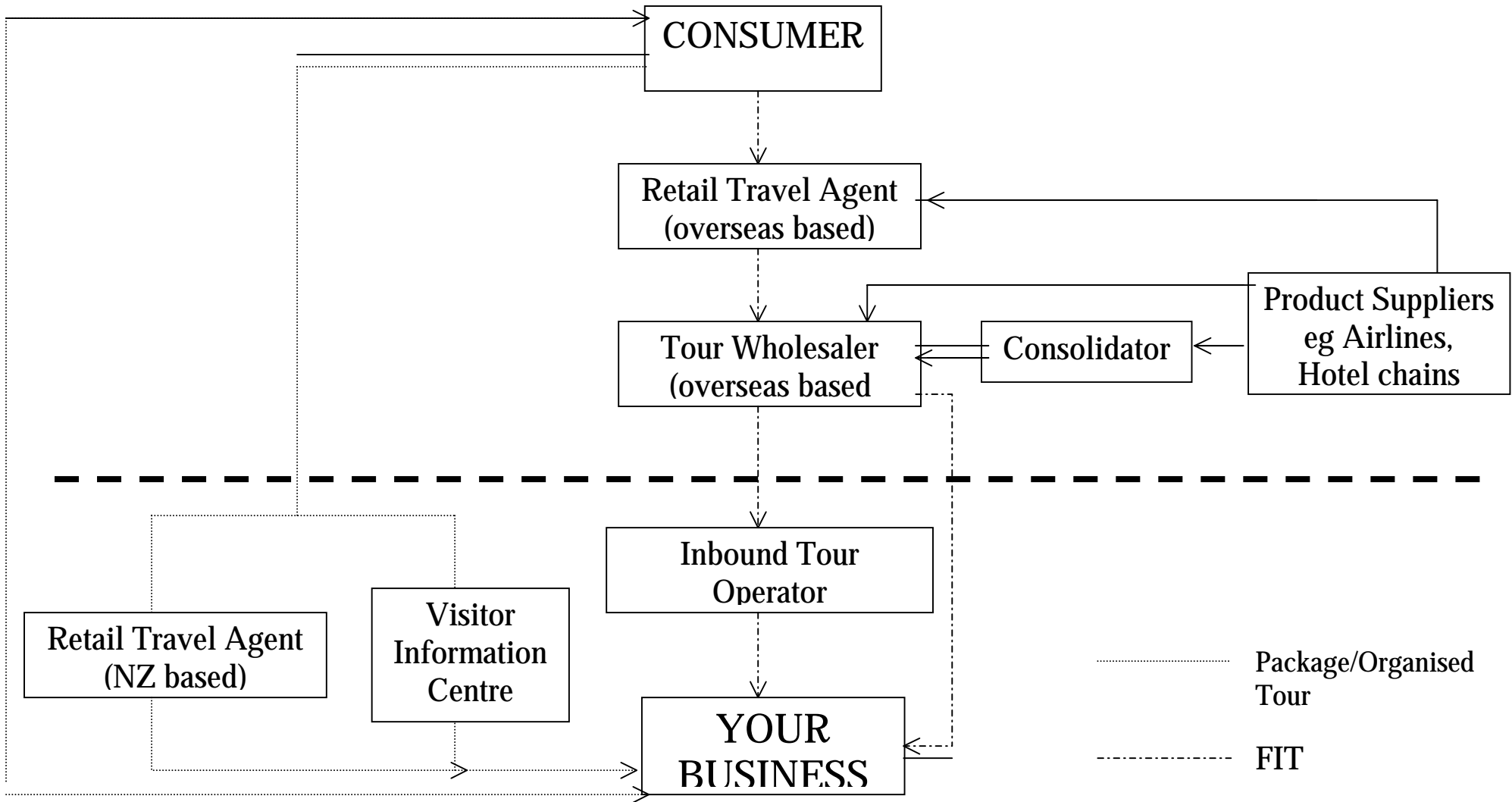
New Zealand based inbound tour operator

Inbound tour operators provide services on behalf of overseas wholesalers. The services include the development of itineraries and processing of reservations, which may include accommodation, transport and attractions.

Tourism product consolidator in the offshore market

Tourism products consolidators make bulk purchases from suppliers of products, such as air services, rental vehicles, and accommodation operators (usually chain operators). The consolidators on sell these products to others who package tour programmes.

Tour wholesaler in the offshore market

Tour wholesalers package products and itineraries in brochures, which they distribute to retail travel agents in their market, or directly to the consumer. The tour wholesaler may also set up an inbound tourism business, for example, in New Zealand.

Retail travel agent in the offshore market

These are frontline operators in the offshore markets, dealing directly with customers and potential customers. Their role is to promote and sell travel, and travel packages, to their clients.

Potential Maori tourism operators in Muriwhenua are likely to be small and independent – that is, not part of an established chain or large tourism operator organisation. It is important that the distribution system is used strategically, achieving both efficiency, in relation to potential margin and effectiveness, in terms of reaching and satisfying the customer. Part of this strategy will depend on the type of traveller and the source country being targeted. These aspects are covered in the section of this report dealing with marketing issues associated with tourism.

Maori Participation in the Tourism Industry Distribution System

Dedicated Maori representation in the tourism distribution system operating from New Zealand appears to be very limited, or non-existent. The main opportunities for Maori participation in the industry appear to be at the level of the independent tourism operator. There is scope to gain a more significant presence through collaboration with existing players through the distribution system (e.g. with inbound tourism operators), and through collaboration amongst individual operators. Given the increasing importance of the Internet in the tourism industry, there is also potential to bypass much of the traditional system and reach the customer directly, either in New Zealand or abroad. However, it must be recognised that Internet-based travel is still secondary to traditional methods that use the traditional distribution system. Reliance

on only Internet-based distribution processes may, therefore, limit the opportunities for broad market reach in the short-medium term.

Regulations and Compliance for Tourism Businesses

A number of compliance issues must be addressed by existing and aspiring tourism businesses operating in New Zealand. These are outlined clearly in the New Zealand Tourism Board publication, "Getting Started in Tourism" (NZTB, 1995). For example, land based passenger services require a Passenger Service Licence from the Land Transport Safety Authority. A licence from the Maritime Safety Authority is required for many commercial water-based activities, as well as compliance with city, district or regional council by-laws. Local authority by-laws also apply for restaurants, food services and accommodation businesses. The Department of Conservation may require the business to apply for a concession licence for a guided walk or other actively on Crown land. Of considerable importance for client safety is compliance with Occupational Safety and Health regulations; the Health Safety and Employment Act, 1993, makes all employers and employees responsible for safety measures in their business.

In addition to regulations, a number of tourism industry associations have their own codes of practice for their sector. For example, the Adventure Tourism Council, in association with the Tourism Industry Association, is developing Quality Tourism Standards (TIA, 2001). The Adventure Tourism Council began developing quality tourism standards in the early 1990s, in response to operators' concerns about raising and improving standards in the adventure sector. The Quality Tourism Standard currently comprises seven different components: compliance, safety, environment, cultural, service, training and business. These components will be developed by the specific sectors concerned; for example, environment is facilitated by the Adventure Tourism Council and Tourism Industry Association. It is expected that Qualmark will oversee the accreditation of the standard.

The cost to business of compliance to regulations and standards is a recognised burden, and an inevitable consequence of government intervention. As noted by the Tourism Industry Association in its "Policies for Growth" document (TIA, 2000a), "The sheer scale of regulation and the non-commercial manner in which much of the existing regulation is being applied is creating a significant burden on business and economic growth." (p6). In its document, the TIA recommends a review of existing regulation and a commitment by government to reduce compliance costs.

The government has recognised the need to address the compliance cost issue and established a Ministerial Panel on Compliance Costs late last year. "On 16 October 2000 Cabinet agreed to the establishment of a Business Compliance Cost Panel ("the Panel") to identify and make recommendations to Government on ways to reduce compliance costs arising from existing legislation." (Businesscompliance, 2001). This web-site provides helpful information about the compliance cost issue and the activities of the ministerial panel. As the web-site indicates, "The Panel will report its finding and recommendations to the Minister of Finance and Minister of Commerce by 30 June 2001." Regional meetings are being held to seek views on compliance cost issues before 11 April; a Whangarei meeting is scheduled for 7 March (Northland Grow, 2001).

Support and Stakeholder Organisations

A number of organisations and agencies exist in New Zealand to assist with the development of the tourism industry. Support and assistance is available to meet a range of industry needs, such as funding, business advice, mentoring promotion, market information, central and local government policy information and industry information. The organisations most relevant to tourism development in the Muriwhenua are discussed in this section, and an indication as to the type of support provided by the organisation is given. Each of web-site addresses of these organisations provides a very helpful link to other sites that may also be beneficial. Table 1 shows the main support organisations, according to local / regional emphasis or national applicability, with some overlap between the two categories.

Table 1
Main Support and Stakeholder Organisations Influencing Maori Tourism Industry Development in the Muriwhenua

Organisation	Brief Description	Type of Support Relevant to Muriwhenua Tourism Industry Development	Web-site Address
Local / Regional			
BIZ / BIZ Info	One-stop business information service	Provides free access to information and courses for business	www.bizinfo.co.nz
Northland Grow	Economic and Community Development	Access to business education and information; one-on-one facilitation on business needs	www.northlandgrow.co.nz
Chamber of Commerce	"Promoting Better Business"	Business mentoring, networking, training and professional business advice	www.chamber.co.nz
Northland dotco	Web portal. "Community-owned and driven, in-depth information resource" (web-site)	"Community-owned web-site, built by Northland people for their own use" (web-site)	http://northland.co.nz
Tai Tokerau Maori Tourism Association	Represent Maori in the Northland region	Membership-based promotion of Northland's Maori tourism	www.taitokerau.com
Far North District Council	Community services	Setting and administering local district policies e.g. resource consents, refuse, water, drainage, roading, sewerage etc.	www.netlist.co.nz/communities/Kaikohe/Feature.cfm
Far North Development Trust	Community economic development	Business development in Far North communities	
WINZ	Meeting the needs of local labour markets	With Community Employment Group, assists communities with employment initiatives	www.winz.govt.nz

Training Organisations (e.g. universities, polytechnics, private training providers	General management and specific tourism training	Short- and long-term, formal or casual training in areas relating to tourism development	Various
Local Iwi Organisations	Iwi management, and economic and environmental development	Business advice, funding (not all), networking, economic and environmental management	Various
Northland Regional Council	One of Northland's primary environmental guardians	Develops Resource Management Plans, regulates in areas of pest and weed control and emergency management, and promotes environmental education to encourage communities to manage their own environments	www.nrc.govt.nz
Destination Northland	The Regional Tourism Organisation responsible for marketing Northland as a destination	Promotion of movement as a tourism destination, using web-site and traditional promotional methods	www.northland.org.nz
National			
Industry New Zealand	Assistance for economic development of enterprises and regions.	Comprehensive funding programme for economic development. Business development information and links to useful web-sites	www.med.govt.nz
Tourism Industry Association (TIA) (see earlier section)	Represents the interests of over businesses from throughout the tourism industry	A range of services supporting the tourism industry and individual tourism associations	www.tianz.org.nz
Industry Associations	Represent the interests of specific industries associated with tourism. Generally members of TIA.	The various, including industry standards, marketing initiatives, information and lobbying.	Various

Tourism New Zealand (TourismInfo)	Provision of information and data on the tourism industry in New Zealand. International tourism market information	Excellent source of overseas tourism market information. Other general tourism related information, news, statistics etc.	www.tourisminfo.govt.nz
Te Puni Kokiri	Provides policy advice on the Crown's relationship with iwi, hapu and Maori and on the government's objectives, interests and obligations relating to Maori.	Leadership to assist in capacity building of Maori. Includes Maori Business Facilitation Service	www.tpk.govt.nz
Poutama Trust	Business development services for Maori	Business Development Grant and links to relevant sites	www.poutama.co.nz
Department of Conservation	The Department of Conservation (DOC) is the government agency responsible for conservation in New Zealand. Its mission is "to conserve New Zealand's natural and historic heritage for all to enjoy now and in the future".	Manages or administers national parks, forest parks, reserves and conservation areas, protected indigenous forests, protected inland waters and wild and scenic rivers, indigenous/native wildlife, non-commercial freshwater fisheries, historic places on conservation land, marine reserves and protecting marine mammals offshore islands set aside for conservation	www.doc.govt.nz
TradeNZ	Championing New Zealand export business	The Maori Enterprise team provides Maori companies and organisations with expert assistance in any export sector.	www.tradenz.govt.nz
Statistics New Zealand	Statistics and survey reports	Comprehensive tourism statistics and reports	www.stats.govt.nz
Ministry for the Environment	Advice on policies for improving	Policy responsibility in resource	www.mfe.govt.nz

	environmental management	management; land, air and water quality; waste, hazardous substances and contaminated sites; protection of the ozone layer; and climate change. Advice on the environmental implications of other Government policies, such as Treaty of Waitangi settlements.	

Further details about all of these organisations can be obtained from the comprehensive web-sites listed, with the exception of the Far North Development Trust, which appears not to have a web-site at this stage.

Tourism in The Far North

A substantial proportion of tourism in the far north is initiated from the Bay of Islands, which captures the vast majority of Northland tourism. While often seen as competition to Moray tourism in northland, this large pool of visitors annually travelling to the date of islands provides a readily accessible market for those locations further north, as well as for the subset of Maori tourism operations throughout Northland. Many of the issues and opportunities relating to Maori tourism in the Far North are similar to those existing for Maori across Northland, although there are some important unique features.

The dominant tourist attraction in the Far North is Cape Reinga, usually visited as a brief stop during a bus trip along the famous 90-mile beach. This trip is serviced by a number of operators, the most significant being non-Maori owned. However, a Kaitaia-based Maori-owned tour operation offers some competition (see Harrisons Cape Runner, later). The attraction is, however, currently being exploited mainly by non-Maori. The fact that there are many hundreds of tourists coming into the area cannot, though, be ignored. It affords an opportunity for local Maori business to capture some of the captive market, either independently, or in collaboration with non-Maori operators. This is discussed in more depth later in this report.

The major tourism operator in the Far North is Fullers, Bay of Islands (www.bayofislandstravel.co.nz), which won the 2000 Supreme Award in the New Zealand Tourism Industry annual prize giving. It is one of the few companies outside the main centres to have won this award (NZ Herald, 2000, 6 September). The current owners of the business turned around the failing Fullers Northland through the 1990s, to achieve an extraordinarily successful business focusing on land and marine based tourism in the Northland area. The company's presence in the Far north is characterised by the 90 mile Beach trip to Cape Reinga. This service operates directly from Paihia in the Bay of islands, and no direct involvement of the Maori

communities. Local Maori do not exploit time spent by visitors at Cape Reinga, as there is very little in the way of commercial operation there.

Far North (Kaitaia) based Maori owned company, Harrisons Cape Runner Tours (www.ahipara.co.nz/caperunner) operates a successful Cape Reinga tour via 90 mile Beach, including a number of local scenic and cultural attractions. This company is listed in the Te Puni Kokiri Maori tourism directory (TPK, 2001) and is a member of the Tai Tokerau Maori Tourism Association (www.taitokerau.com), whose primary function is the national and international marketing of Maori tourism in the Tai Tokerau.

The local iwi, Ngati Kuri, and the Department of conservation are in discussion concerning the development of a tourism centre at Cape Reinga, which would provide the opportunity for local Mali tourism operations to be promoted, and for peripheral players, such as retailers of Maori art and craft, and restaurant owners and caterers to be involved commercially. It is expected that work will start on the centre some time this year (ref).

Another tour operator, Kiwi Experience (www.kiwiexperience.com), also operates tours to Cape Reinga from Auckland and Paihia, and tends to serve the backpacker / adventure traveller rather than the traditional package tour visitors. Established from a Wellington – Auckland bus service in 1989 by two entrepreneurs, the Kiwi Experience grew to 40 bright green buses before it, and New Zealand's largest tourism operator, Tourism Holdings, acquired its Australian arm, Oz Experience, in November 2000. The bulk of the Kiwi Experience's clients are international backpackers, and these provide a regular stream of visitors into the Far North region. As with Fullers, there is little direct tourism involvement with local Maori, but there may be opportunities for negotiation and collaboration for future developments that would benefit both parties.

Other major tourism attractions in the Muriwhenua, to which small businesses may link, include Wagener Park, Motor Camp and Museum at the Houhoura Heads, Waitiki Landing and the Te Paki Farm Park and the Ancient Kauri Kingdom.

There appears to be a good opportunity to capture more of the FIT market, given the nature of the opportunities available in the Muriwhenua. According to discussion with local Maori tourism operators, the FITs that visit the Far North generally make personal contact with a variety of tourism operators once there, or sometimes arrange an activity as a result of an informal meeting with an operator or person associated with the operator. They may also access information about independent tourism operations in the Far North from the Internet. A number of Maori tourism operations have good web-sites, with helpful links to make them easily found without onerous searching. The Tai Tokerau Maori Tourism Association's web-site lists and links to many of the established Maori tourism operations in the Far North, as does the Te Puni Kokiri Maori tourism web-site (www.tpk.govt.nz).

Existing Maori Tourism Businesses in Muriwhenua

A number of existing Maori tourism businesses operate in the Muriwhenua / Far North area listed in a variety of directories and web-sites. These are accessible to visitors searching for tourism information in the area. The list below highlights some of the established Maori tourism businesses in the area. The list is by no means complete, but illustrates the variety and quality of tourism already operating in the Muriwhenua, from which foundation new businesses can develop. An existing tourism business infrastructure, although small, provides a valuable base for further development. The established Maori tourism businesses already attract tourists to the area. In so doing, they have assisted in developing a Maori tourism reputation for the Far North and provide a potential core from which to build collaborative links for individual businesses across the whole Muriwhenua region.

In addition to the established businesses with existing public exposure, there appear to be a number of informal Maori tourism offerings, operating mainly by word-of-mouth, casual meetings with tourists, or referral from other operators. These operations generally run on an ad hoc basis, but many have potential to develop into established tourism businesses over time.

Examples of Established Maori Tourism Businesses in the Muriwhenua

The following list provides examples of Maori tourism businesses operating in the Muriwhenua. Information is obtained from a variety of sources, namely, from interviews with local people, individual company web-sites, or the web-sites of Te Puni Kokiri (TPK, 2001) and the Tai Tokerau Maori Tourism Association (TTMTA, 2001). Other Maori tourism businesses certainly exist in the area, but they are not all named here.

Tall Tale Travel and Tours

This company (www.tall-tale.co.nz) is owned by local people, Peter and Kerry Kitchen, and offers a range of tourist products. These include New Zealand's first Maori Backpackers accommodation (Main Street Backpackers), a variety of guided tours of the Muriwhenua, including Cape Reinga, Marae visits and herbal medicine (Earth Mother Medicines) and hands-on experience of Maori culture, such as bone carving and weaving, and tuition on Maori culture and protocol. The company also organises the well-known annual endurance race, The 90 Mile Beach "Te Houtaewa" Challenge.

Te Wero Nui Trust

This organisation offers hand-made crafts that are derived from traditional themes. They use contemporary art form and specialise in wood carving and flax products.

Harrison's Cape Runner

The Cape Reinga tour company is another successful tourism business discussed in the previous section.

Koauau, Awanui

Taharangi Marie Lodge, Kaitaia

Tua Tua Tours, Ahipara

This company offers guided quad bike rides on the massive sand dunes of Ahipara Gumfields. Tours include a guided visit to the Buried Ancient Kauri Forests and a cruise of the coastline of Reef Point.

Adriaan Lodge Motel, Ahipara

Wildcat Charters, Ahipara

This company offers big game fishing charters on the fishing grounds off Ahipara, a relatively untapped fishing area.

Ahipara – others

Various tourism operations in Ahipara, listed on the web-site, www.ahipara.co.nz

There are opportunities for these and other businesses to gain exposure through joint marketing activities, such as those offered by the Tai Tokerau Maori Tourism Association, and through networking and cluster activity (see later). They also provide potential leverage points for new tourism businesses to enter the tourism industry, through linkages created from complementary activities, and utilisation of existing industry contacts.

Promotion of Maori Tourism in the Muriwhenua

Tourism promotion is a key part of the marketing process of any tourism business. Promotion is outlined in the section of this report on the Tourism Marketing Plan (see Appendix). The purpose of this section is to discuss the main promotion tools and vehicles currently being used by Maori tourism businesses.

Promotion of tourism activities can occur at a variety of points in the tourism industry distribution system, as shown in the earlier section. The key issue is providing ready and easy access to information for potential customers with the minimum of channels necessary for the customer to navigate, using either Internet or traditional means. This will depend to a large extent on the type of tourist being targeted, with direct, web-based promotion generally being more appropriate for the free and independent traveller, and intermediaries oral some mix of Internet and traditional methods being more appropriate for packaged tourism. Generally, tourism businesses are promoted using a combination of traditional and Internet-based methods.

Tourism in the Far North is relatively well represented on the Internet, through a variety of web-sites and links. However, access to information on the region or tourism activities is seldom direct – almost all require several intermediary web-site manoeuvres before gaining relevant information. In the case of Maori tourism operations, access is often through associated Maori web-sites, which may not be well known to prospective overseas tourists. Links with mainstream New Zealand tourism web-sites are often quite distant from the primary site. Most of the Maori businesses links with the mainstream web-sites (e.g. 100% Pure New Zealand) are with the well known cultural tourism centres, such as Rotorua. Tai Tokerau's main Maori tourism promotion organisation is the Tai Tokerau Maori Tourism Association (TTMTA), which uses a combination of all weather-based and traditional promotion methods. Wider international exposure of the Tai Tokerau Maori tourism industry could be gained if the TTMTA web-site had a direct link from the Tourism New Zealand web-site. The TTMTA is usually present at New Zealand's largest international tourism trade show, TRENZ, organised by the Tourism Industry Association of New Zealand. This provides exposure of the Maori tourism operations in Northland to tourism buyers from around the world.

Access to Maori businesses and business organisation, including those involved in tourism, is available through some very well supported Maori web-sites. Of particular relevance are www.maori.org.nz, which provides information and access to a large range of Maori-related activities and organisations; www.maoribiz.co.nz, a comprehensive web-site providing links to many Maori businesses and related-related organisations. Included among these links is access to the Maori Business Network (www.maoribiz.net.nz), a non-profit, professional organisation, focused on supporting business and economic development. Established in Auckland in 1996, it now has a Tai Tokerau branch, operating from Whangarei. It has an indirect, but helpful role in furthering tourism development in the Far North, particularly through its personal networking function. The Te Puni Kokiri web-site (already mentioned) provides information about the Maori tourism industry, including a directory of Maori tourism businesses, some business development guides and information on government policy relating to tourism, as well as a very useful Business Facilitation Service These are mentioned in the section of this report dealing with supporting organisations.

The local government funded Regional Tourism Organisations (RTOs) are responsible for marketing their regions. Destination Northland is the RTO acting for the Far North in this capacity. Its web-site (www.northland.org.nz) provides helpful information for tourists in the Northland region and includes links to a number of Far North tourism operations, both Maori and non-Maori. The organisation has heavily promoted the Twin Coast Discovery Highway scenic route through Northland. This drive takes the tourist north from Auckland to Cape Reinga, with possibilities for stop-over visits to attractions in the Muriwhenua region (Destination Northland, 2001).

Other ways of achieving exposure to tourism activities is to use traditional means, such as brochures and promotion by intermediaries in the tourism industry distribution system. This may form part of a regional tourism promotion, or package holiday offering, for example. Involvement of intermediaries in promotion generally involves a financial cost, reducing the margin of the tourism business concerned.

Overall, though, this may be an effective and efficient method for promoting a tourism business whose owner does not wish to utilise direct or stand-alone Internet-based methods, for whatever reasons.

The promotional activities of the Tai Tokerau Maori Tourism Association and Destination Northland include the publication and distribution of printed colourful brochures on tourism activities in Northland, and, in the case of the TTMTA, specifically on Maori tourism. These are very useful promotional vehicles, which gain fairly widespread distribution through Auckland and the North.

More widespread coverage of Maori tourism operations via intermediaries in the tourism industry in the region appears to be relatively limited, other than that provided by the above two organisations. Many of the new, or start-up businesses have not reached a stage of development where they are ready for international promotion, but require more experience from smaller-scale locally sourced tourism activity. Gaining access to the various types of tourist and their respective and level of sophistication with which they can comfortably cope in the early stages is often difficult for these businesses. Only when they have got a successful track record can they afford to fund further upgrading, development and more widespread exposure to capture the benefits of more developed businesses.

Tourism Potential in Muriwhenua

Other reports in this series have concentrated on identifying potential tourism opportunities with regard to the attractions available and the desires of the communities concerned (see Charles Johnston, *Resource Inventory for the Muriwhenua Region*, and Neil Mitchell, *Nga Pou Whakahï o te Tai Tokerau - Muriwhenua*). The attitudinal survey (see Matthew Noonan, *Attitudes towards Mäori Tourism in the Muriwhenua Region*) outlines the types of tourism that would be acceptable to the communities, and highlights some specific tourism ideas generated by the communities' members. In a recent media report, the Minister for Economic Development, Jim Anderton, suggested that innovative tourism was one area that stood out as a development prospect in the Far North (NZ Herald, 2000, 17 March). This section of the report focuses on the requirements for developing these ideas and the readiness of the individuals, groups or communities to undertake development of the tourism businesses suggested.

A very useful overview of the opportunities and issues associated with tourism development in Northland is provided in a comprehensive document, which outlines a draft strategy for Tourism in Northland (NZTB, 1996). The document highlights a number of key issues that are still relevant to the area, some five years on from its publication. For example, it covers aspects of marketing of Northland, product development, key development issues, infrastructure, the role of visitor information services and the regional tourism organisation, and summarises the report with a discussion of the benefits of tourism to Northland. It stresses the need for more Maori participation in the region's tourism industry, and more Maori tourism products to be available for visitors. Many of the recommendations contained in the document have direct relevance to current issues in tourism development in the Far North.

Resources and Capabilities for Tourism Development in the Muriwhenua Region

The resources and capabilities of the study area fall under the following categories: natural resources (land, marine and cultural), physical resources, financial resources, human resources, infrastructure, and networks (particularly links external to the region)

Natural Resources

These involve land-based, marine and human resources (notably, cultural resources), all of which have significant potential or influence in tourism.

Land-based and Marine Resources

Other reports in this series document the land and marine resources offering tourism potential and provide information relating to their use (see Charles Johnston, *Resource Inventory for the Muriwhenua Region*, and Neil Mitchell, *Nga Pou Whakahï o te Tai Tokerau - Muriwhenua*

Cultural Resources

The importance of social and cultural dimensions to commercial tourism development is noted from results of the workshops, attitudinal survey and other parts of this and previous studies of Tai Tokerau tourism. In addition, the potential value of tourism opportunities, such as cultural tourism and hospitality-based ventures, is an important consideration.

Physical Resources

The community workshops dealt with the issue of physical resources in the area, and this is reported in the relevant study in this series (see Charles Johnston, *Resource Inventory for the Muriwhenua Region*). In brief, most of the physical resources in terms of hotels, motels, transport services and retail centres are located outside the Muriwhenua region, mainly at Paihia and Whangarei. However, well-developed tourist resources could serve as effective springboards for new tourism in the Muriwhenua region, given appropriate promotion and links into these areas. Important physical resources for the Maori communities in the Muriwhenua include marae, pa sites etc. While most of the physical resource issues are discussed in other reports, it is worth noting the particular difficulty experienced with local transportation services.

Transport Services

The region lacks a regular rural public transportation system, and what services there are do not reach many of the more remote areas, off the state highways. This means that local people must commute mostly in private vehicles. This is costly and often

inconvenient, for example, when several family members need to travel at different times and to different places. The opportunities for rural Maori people to seek and commute to other tourist localities or tourist hubs serving their area are, therefore, constrained. This situation also restricts options for tourists accessing the region. There are a few local transport companies for freight and local tourism, but the region is considered by many rural Maori people to be severely disadvantaged because of the lack of adequate transport facilities.

Financial Resources

Many Maori people in the region cite the lack of finance as a major obstacle to tourism development. Maori owned land and land under claim also represent valuable assets, but the ability of Maori to raise funds on the basis of land as security is limited because of multiple ownership. However, lending frameworks for Maori in these circumstances have occasionally been flexible, enabling businesses to get started. Other funding opportunities are highlighted elsewhere in this report (see section on Support Organisations).

According to the study's research in the Muriwhenua region, finance appears to be required for a variety of stages of tourism development. For start-up businesses, people are recognising the need for finance to initially assist in the utilisation of expert assistance on the writing of proposals for funding applications, as well as for tourism planning. These activities are clearly necessary before the commencement of a tourism business venture. Finance is generally needed on a larger scale for the actual development of a tourism venture, and the extent of finance needed would have been assessed and presented in a business plan.

Human Resources

The Maori people in the study area suggest that one of the most valuable resources in the region is their human resource. The attitudinal research addressed the human resource capacity as well as some of the aspirations for commercial development and social and cultural characteristics of the region and its communities.

Relatively few people are engaged in business, particularly their own, but the potential skill base is large and motivated. According to the community survey, however, there does appear to be quite a high level of management skill of various kinds in the communities surveyed, though few formally trained business managers.

Overall, business skills of the people at present are limited, and business planning was cited as the most important skill needed for business development. Peoples' knowledge about their environment, weather conditions, flora and fauna, and local geography, however, is impressive. Also, their knowledge and wisdom relating to their history, important sites, the relationships and migrations of their people, and underlying cultural and traditional knowledge can also be harnessed for tourism-related businesses.

Infrastructure

Infrastructure plays a fundamental role in the economic development of any region. Without critical services and support structures, even the best commercial venture will not succeed. Infrastructure also creates the links with organisations, industries, communities and markets outside the region - a vital component for the economic flows into and out of the region, particularly in tourism.

Transportation

This involves roads, rail, air and seaports. Maori people in Northland's rural communities believe that the roading system is inadequate for current use, and will definitely be insufficient as commercial development progresses. Travel for local people is considered difficult as the roads are thought to be slow and dangerous. Many of the roads are unsealed and create a hazard, especially if not well maintained, or used by drivers inexperienced for such conditions, such as international tourists. Road repairs on State Highway 1 are frequent and inconvenient. Local people suggest that the roading system is a major barrier to tourist services operating in the region. The recent sealing of State Highway 20 to Rawhiti, however, has opened up a major stretch of the coastline north of Whangarei, which many believe will substantially increase tourist traffic to that area. This provides another gateway to the Far North, which could include the Muriwhenua region.

Logging of the forests in the Muriwhenua has started recently and, already, the inadequacy of the roads has become apparent. As the trees in the other forests become mature over the next ten to fifteen years, the demand on roading by logging trucks is expected to increase dramatically throughout the region, including much of the study area. A number of reports have highlighted the increased need for roading to cater for the expected rise in logging traffic (MoF and TPK, 1995; NRC, circa 1994; NZ Herald, 2000, October). The Northland Regional Council stated the following about the roading impacts of increasing heavy traffic: "Lightly trafficked roads will suffer the most...... Logging traffic has the potential to cause the greatest damage owing to the abnormal concentration of heavy vehicle loadings over a short time period, particularly if this occurs over winter when roads are at their weakest....Moderately trafficked roads may cope better with logging traffic but will require significantly increased maintenance....Bridges which have load restrictions can have a major impact on the economies of forestry harvest". This issue is also of immediate concern with regard to the large and maturing Aopouri Forest. Access to the 90-mile beach area is also an issue facing local Maori, particularly those concerned for the development of tourism operations. The New Zealand Herald (1996, July 12) reported as the front page headline that the northern region won a larger chunk of the national roading budget with a 134 percent boost in funds year to almost $208 million. ….. $27.17 million has been allocated to Northland..... and.... the Far North District Council's 250Km seal extension programme will be completed with the help of the programme". It is a widely held view among local people that the changes that have occurred are inadequate. The Tourism Industry Association has raised the inadequacy of New Zealand's rural roading system as a major tourism issue in a recent policy document (www.tianz.org.nz).

There is a freight rail system serving the region south of Whangarei, and north to Kawakawa, but there are limited options for passenger rail traffic. Whangarei has a commercial airport servicing regular freight and passenger flights on a national basis. The airport links directly to Auckland, and is an important communications link both into and out of the Far North. Two local airports, Kerikeri and Kaitaia, also take air passenger traffic from Auckland, but cater only for small planes and have flight schedules that are relatively minimal. Local residents have been seeking the upgrading of these airports for some time. Major port facilities are located at Whangarei, a two- four hour drive from the northern parts of the region. The port is well provided for the handling and shipping of logs, and a new terminal at Marsden Point was designed to cater particularly for the export of logs, and also for multi-purpose vessels (Northland Port Corporation, circa 1994). Both the airport and the coastal port provide good transport links with other parts of Auckland and overseas, which are important considerations for export-based and tourism business developments.

Health

Health facilities, particularly for the people in the rural areas, are often difficult to access. Issues relating to Maori health are covered in previous reports of the James Henare Maori Research Centre (JHMRC, 1995-1999). These issues impact on potential tourism operations in so far as health issues affects local employment potential.

Education and Training

The availability of local training and education organisations, specialising in tourism and business management, are key to successful tourism development in the Muriwhenua region. The area relies on the formal training organisations generally as far away as Kerikeri (Northland Polytechnic Far North campus), or Whangarei.

Training has an important part to play in commercial development of the region, particularly for those people becoming involved in business. There have been a number of training schemes provided by central or regional government over recent years, aimed mainly at providing employment opportunities for the unemployed. These training schemes are fairly generic nature, and often at a rather basic level. The local Maori people suggest that training needs to be targeted towards utilisation of the specific tourism assets, as well as towards leadership and business management, at a level that is both practical and sustainable. Many of these training needs are covered by programmes offered by Northland Polytechnic, by private trainers, and by the government sponsored BIZ programme, run from Whangarei. The Northland Polytechnic provides useful vocationally based courses, offering a number of skills that are relevant to Maori tourism. This organisation also has a campus at Kerikeri. Some tourism training organisations offer distance learning programmes, which help to overcome the geographic isolation of the area. Some training providers servicing Northland are listed in Table 1. There is potential, under the government's new Closing the Gaps programme for training for Maori in business to be more focused on Maori needs and controlled and delivered by Maori. An exceptionally useful web-site, providing links to training in a range of vocations, including many categories tourism and hospitality, is www.careers.co.nz.

Communications

Telecommunications in Northland appears to be adequate, with most households having telephones (JHMRC, 1996). Cellular connectivity has improved considerably over recent years, with the installation of satellite sites in the region. Some reports (NZ Herald, 2000, October; personal communications) have pointed out the deficiencies in the quality of landline telecommunications in the rural areas, which makes Internet-based business problematic at this point in time. This could have serious implications for the quality of web-based tourism promotion and business.

Electricity (power)

All communities in the region are supplied with electricity, and there appears to be no difficulty with supply or service.

Water

Water is one of the most valuable resources for Maori (Lincoln University, 1994; and personal communication). Traditionally, water is seen as the force sustaining all forms of life. Water supplies are good, although there is general concern that water quality might be lessened by run-off from some of the nearby forests. The impact of forests on water levels has also been noted. The continuous development of the land may drain natural water sources, or pollute fresh water, or local coastlines, all of which are potential issues for eco-tourism development in the Muriwhenua. Relationships with DoC and the role of the Resource Management Act are important for future developments that impact on water and water quality in the area. These relationships are also, of course, important in terms of access to key, and development of ecological and historical sites.

External Links and Networks

Without links outside the region, the local economy will lack important inflows of information, knowledge and expertise. It will also experience difficulties in finding and nurturing markets for its goods and services. The links can take a number of forms, according to their function. It appears that there is relatively little involvement of the communities with organisations outside the region, except for links involved with regulatory matters involving members of the communities dealing with legal, environmental and claims issues. In particular, there is relatively little awareness, or use of links with commerce and tourism-related organisations and individuals outside the study area. Many people feel that the geographic isolation of the Muriwhenua is an impediment to tourism development, while at the same time a significant attraction because of its isolation and relative under-development. Most of the central and regional government support agencies and organisations are non-Maori, but nevertheless, provide access to useful advice and resources. Some of the most relevant types of links are outlined in the section on Support Organisations.

Commercial Links

Commercial links include contacts with other organisations involved in the tourism industry, in other parts of New Zealand or overseas. Such links may exist with suppliers, competitors, and related or supporting firms, and with other members of the tourism industry distribution system. From these links a better understanding of the value-added chain can be obtained, as well as better supplier and customer relations, better understanding of competitor firms, and an opportunity for the formation of alliances or joint ventures. There is little evidence of these types of links occurring to any significant extent for communities in the study area.

Whanau Links

For Maori communities, the opportunities afforded by whanau located away from home are significant. Many whanau members of the communities in the Muriwhenua are located in urban centres of New Zealand, particularly Auckland. Links with these family members can give rise to market opportunities, for example, through referrals, investment in tourism projects at "home", an inexpensive accommodation base for family members to stay while conducting business in the cities, and provision of 'an ear to the ground', enabling people in the Muriwhenua to keep in touch with events outside their region.

Business Support Links

A number of central and local government bodies are responsible for administering business support in various forms. The section in this report on Support Organisations discusses a number of these types of organisations in detail, and provides, where available, web-site addresses.

Overall, there is a general lack of awareness of most of these organisations by Maori people aspiring to develop tourism businesses. Exceptions to this are the recently highly publicised Industry New Zealand support programmes, and those organisations most involved directly in employment and social welfare (e.g. WINZ).

Links with regulatory and administrative bodies, such as regional and district councils, Department of Conservation, and Ministry for the Environment, are important for gaining access to information, and, in some cases, to provide opportunities to influence decision-making.

Social Support Links

A number of central and regional government links provide access to a variety of programmes and assistance packages in the areas of social support, employment and education (see also section on Support Organisations). Because these address some of the immediate needs of the Maori people in the study area, these links are generally quite well established. The lack of ultimate job access, however, remains an issue for many Maori in the study area. For example, many people have attended training and worker programmes, but remain unemployed. It is vital for a basic tourism

infrastructure to be developed in the region, both to provide job access for trained Maori and to enable ongoing development of tourism businesses.

Conclusions On Resources And Capabilities

A number of issues impacting on the potential for development of Maori tourism development are apparent in the study area. A significant issue for the entire Northland region is the inadequacy of the road system, particularly as the region develops its logging rate and tourist numbers. Other infrastructural deficiencies noted in the report may serve to hinder tourism development in the region. The human resource capacity offers high potential for economic development, but currently lacks appropriate skills to make full use of development opportunities. Business-related skills are generally limited or lacking in tourism-related business, as is general experience in the tourism industry. This means that new venture initiatives may be limited until more skills are developed. Funding remains a limiting factor, although recent government programmes for industry, enterprise and regional development offer some opportunities for the study area. In addition, access to funding, such as venture capital and bank loans, is likely to increase once business skills have been developed and demonstrated in the form of business and financial plans. Another area in need of development is links with individuals, organisations and institutions outside the study area. Any tourism business development undertaken in isolation from these links is likely to be significantly disadvantaged, and it is probable that many new ventures will not get off the ground without the support from some of these external organisations and institutions. Links within the tourism industry are especially important, in order to gain access to information and markets. It appears that the principle reason for the absence of such links is lack of awareness and information about the organisations and institutions, coupled with a minor distrust of government-associated bodies and "outsiders".

Key Success Factors for Tourism Types

In order for a business venture to succeed, it has to be able to achieve the key success factors relevant to its particular industry. In other words, key success factors are critically important factors relating to an industry that firms in the industry must achieve if they are to succeed beyond the short term were. The factors may be based on competencies or other resources, such as finance. Definition of the relevant 'industry' should be determined at the greatest level of detail possible. For example, tourism as an industry has a number of key success factors relating to the provision of service, funding, and suitable attractions. However, while having many factors in common, each particular type of tourism will have some unique requirements, and should, therefore, be analysed as separate 'industries', or sub-industries.

Key success factors are derived from information about the industry, gained from sources such as industry experts, published reports about the industry and independent primary research. It is important that the factors determined are an accurate reflection of what is required for success in the industry, as anything overlooked may result in business failure. In addition, it is likely that these factors may change or modify over time, so an ongoing assessment of the industry is necessary. Key success factors, once determined, should then be compared with the actual situation of the business, or

community concerned. Questions should be asked as to the extent of achievement of the key success factors, and, where gaps exist, strategies may be developed to address them.

The tourism opportunities identified in the workshops are grouped into four tourism classes (see Charles Johnston, *Resource Inventory for the Muriwhenua Region*). These are eco-tourism, cultural and historical tourism, recreational and adventure tourism, and scenic tourism. Tables 2-5 below show examples of key success factors for each of these tourism classes and include broad comments relating to the Muriwhenua (informed from the secondary research, workshops and personal interviews). It should be noted that this is only a summary. The communities themselves, with the assistance of market and industry research, should determine the extent to which individual communities achieve the key success factors. The columns in the Tables headed 'Extent Achieved' are blank for this reason. A scoring system can be used to depict this assessment e.g. from –3 (not achieved at all, to +3 achieved to a great extent). The key success factors and those aspects for which the community has strengths or weaknesses form the basis for a tourism business plan.   Time spent by the communities on this analysis is, therefore, very important.

Table 2
Key Success Factors and Extent Achieved for Eco-tourism

Key Success Factor	Extent Achieved	Comments
Natural attractiveness		Vast areas of unspoiled beauty
Good knowledge of local geographic area and natural features - guides		Access to knowledgeable local people
Specialist scientific knowledge of natural features - guides		Specialist scientific knowledge generally limited or lacking
Labour to maintain the attractions (e.g. tracks)		Usually available and skilled
Accommodation / hospitality services		Not very well developed in most areas
Good infrastructure (roads, power, airport, communications etc)		Road access generally adequate; no airport facilities
Favourable climate		The "Winterless North"
Minimal seasonality effects		Constraints may occur in winter e.g. tracks
Capital		Access need, but not necessarily large amounts
Networks and links with outside bodies / agencies to draw visitors to area		Generally need to be developed, overall
Marketing and market research skills		Usually limited skills; training necessary

Table 3
Key Success Factors and Extent Achieved for Cultural and Historical Tourism

Key Success Factor	Extent Achieved	Comments
Cultural and historical attractiveness		Rich in culture and history
Good local knowledge of culture and history (story-tellers)		Extremely knowledgeable people, though little documented
Networks of marae and other places of cultural and historical significance on which to base 'tours'		Many areas of cultural and historical interest located within easy access of each other
People to undertake cultural activities e.g. carving, dancing, singing		Available and skilled
Others: as in Table 1		

Table 4
Key Success Factors and Extent Achieved for Recreational and Adventure Tourism

Key Success Factor	Extent Achieved	Comments
Activities for recreational and/or adventure use		Abundant in recreational activities
People to train and guide visitors in recreational activities		Knowledgeable and capable people
Safe equipment and practices, meeting legal standards		Few with legal standards approval
Adequate supply of recreational resources (e.g. fish, horses) to cater to numbers of visitors		Probably adequate, depending on numbers targeted
Others: as in Table 1		

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Table 5
Key Success Factors and Extent Achieved for Scenic Tourism

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Key Success Factor	Extent Achieved	Comments
Areas of outstanding scenic beauty		Vast areas throughout Tai Tokerau
People knowledgeable about the areas of scenic interest		Knowledgeable and capable people
Adequate means of access to areas of scenic beauty, depending on type of tourist		Some improved road access may be necessary
Variety of attractions within short distances		Many attractions within easy reach of each other
High quality facilities at stop-off places of interest		Generally not well resourced – developments needed
Others: as in Table 1		

Coupled with the assessment of resources in the area, as discussed earlier, it is possible to determine where key success factors exist, and where barriers to tourism development occur. The next section attempts to identify the barriers facing potential tourism development in the Muriwhenua, and to provide possible avenues for overcoming these barriers.

Barriers to Maori Tourism Development in the Muriwhenua

The earlier sections of this report have noted a number of barriers to the development of the tourism opportunities identified. These range from lack of skills and knowledge or finance, to physical barriers, such as infrastructure development. Most of these barriers are generic in nature, although some specialised skills may be needed to deal with certain of the tourism ventures anticipated.

Table 6
Barriers to Development of Commercial Opportunities and Sources of Assistance

BARRIER	SOURCE OF ASSISTANCE
Skills	
- Business and management	Universities, Polytechnics, BIZ providers, Northland Grow, private, others shown in Table 1
- Marketing	Universities, Polytechnics, BIZ providers, Northland Grow, private
- Knowledge of external links (e.g. BIZ, Poutama Trust, Enterprise Agencies, Northland Regional Council, Whangarei District Council, Far North District Council, Social Welfare, Polytechnics, Industry Associations etc)	Individual and community pursuit, BIZ Info, BIZ providers, Northland Grow, others shown in Table 1
- Relationship development and networking (with internal and external individuals, organisations and institutions - as above)	Individual and community pursuit, BIZInfo, BIZ providers, Northland Grow, others shown in Table 1
- Communication (internal and external, including electronic means)	Mentoring, Polytechnics, private, BIZInfo, BIZ providers, Northland Grow, others shown in Table 1
- Technical (various - specific)	Polytechnics, Industry Associations, Government departments, others shown in Table 1
Resources	
- Infrastructure (roading, airports, port facilities, rail)	Local / regional councils, Transit New Zealand, private enterprise, port companies
- Capital	Banks, other investment institutions, private investment, others shown in Table 1
- Information	Local and regional councils (e.g. NRC), libraries, Internet, government agencies (e.g. TradeNZ), TIA, others shown in Table 1
- Environmental	DoC, Ministry for the Environment, Universities
Social and Cultural Factors	
- Iwi issues	Iwi institutions (Trust Boards, Runanga, etc); churches
- welfare dependency and attitudes to work	Social welfare agencies, community-based social support structures, schools

	and other educational structures, others shown in Table 1
- attitudes to success, causing limitations	Communication of success through marae-based structures; schools and other educational structures; churches
- ownership issues (multiple, Iwi, Crown)	Trusts and Incorporations; whanau; government agencies.

Table 6 outlines the main barriers to development of the tourism opportunities identified and suggests sources of assistance in overcoming these barriers:

This report has, so far, noted trends and opportunities occurring in the tourism industry at a national and regional level, the relevant resources and capabilities of the Maori communities in the Muriwhenua, the key success factors for various tourism classes, some of the barriers to successful tourism development and a number of support organisations that could assist in the development of tourism business in the Muriwhenua region. The following section of this report presents a framework for assessing the various options for tourism development. This provides a basis for a preliminary selection of the most promising tourism classes or specific projects that can be taken into tourism planning process.

An Evaluation Framework for Maori Tourism Opportunities

Given information gained earlier about potential tourism opportunities, it is important to evaluate the types, or classes, of tourism being considered, as well as individual tourism venture ideas, in terms of the community, social and economic considerations of the communities. In addition, it is necessary to evaluate the opportunities in terms of their appropriateness in the wider national and international tourism-related environment. This is a process demanding wide consultation and debate, which also needs to draw on accurate information. A process for evaluating projects in a community context is provided from an adaptation of a framework developed by Johnson and Scholes (1993). It is discussed and applied to the tourism opportunities identified in this report, as shown below.

The framework utilises three sets of criteria. The first relates to the **suitability** of the venture or idea; that is, whether or not it takes advantage of opportunities and threats presented in the wider national and international tourism environment. The second set of criteria refers to the **feasibility** of the venture or idea; that is, the ability of the organisation or community to undertake the venture or idea, and to achieve desired economic returns. The third set of criteria relates to the **acceptability** of the venture or idea to its stakeholders; in the case of the Muriwhenua, this would equate mainly to the communities concerned and also to other stakeholders impacted by, or impacting on the potential venture. Each venture or idea is assessed against these criteria and decisions can then be made on the 'best' option. 'Best' may not always be the most

economically rewarding; it may, for example, be the venture that provides the greatest level of employment, given the expectations of the people. For any venture to be sustainable, however, it must at least break even economically, and preferably return a level of profit sufficient to maintain and grow the business to desired levels.

Table 7 illustrates the application of the evaluation framework and a broad assessment of each of the classes of tourism identified and discussed earlier in the report. There is relatively little difference between them, as they all appear to meet the expectations of the communities, are all similarly feasible, and all meet growing trends in the tourism industry. In using this framework, however, the communities should develop their own assessments for each criterion, based on accurate information and wide consultation among community members

Given the earlier analyses and the use of this evaluation framework, it is possible for Maori communities to determine and plan appropriate sustainable Maori tourism developments. These approaches serve to expose the issues that need to be addressed by communities, from a macro- to a micro-perspective, with Maori cultural and community concerns as a core element. While sustainable tourism opportunities have been identified with some communities in the Muriwhenua, the process of moving from idea to successful implementation is central to their success. The evaluation of these ideas, based on sound information and analysis, is one important step towards successful implementation.

In summary, the evaluation framework considers individual Maori tourism initiatives or broader types of tourism initiatives and provides a mechanism for evaluating these in the context of Maori communities and development at the community level. With any Maori tourism initiative, a number of stakeholders are likely to be involved. These include individuals and organisations outside the community, as well as the community itself. Failure to satisfy stakeholders may lead to difficulties for businesses in the community at some stage in their development. Particularly important for the Maori communities is the ability of the tourism initiatives to satisfy community expectations and values. These have also been discussed elsewhere in this series (see Matthew Noonan, *Attitudes towards Māori Tourism in the Muriwhenua Region*). Utilisation of the evaluation framework provides a means to assess the extent to which the community, as principal stakeholder, and other stakeholders are likely to be satisfied with the potential tourism initiatives.

Table 7
Evaluation of Tourism Opportunities by Class, Using an Evaluation Framework
adapted from Johnson and Scholes, 1993

	CULTURAL / HISTORICAL	ECO- / NATURAL	RECREATIO- NAL / ADVENTURE	SCENIC
SUITABILITY				
- Is the opportunity consistent with the trends occurring in the macro- and industry- level environments?	√√√	√√√	√√√	√√
- Does the opportunity overcome any threats in the macro- and industry-level environments?	√√	√√	√√	√
- Does the opportunity take advantage of the strengths of the community/ies?	√√√	√√√	√√√	√√√
FEASIBILITY				
- Does the community/ies have the resources required to succeed with the opportunity?	√√	√√	√√	√
- Does the community/ies have the necessary skills required to succeed with the opportunity?	√	√	√	√
- Is the opportunity feasible in financial terms (e.g. profitability)?	√√	√√	√√	√√
ACCEPTABILITY				
- Does the opportunity satisfy all the community stakeholder requirements, not just financial stakeholders? Does it enable:				
* retention of culture and values	√√√	√√	√√√	√√√
* environmental preservation	√√	√√	√√	√√
* employment	√√	√	√	√

* local ownership and control	√√	√√	√√√	√√√
* improved standards of living	√√	√	√√	√
* education	√	√	√	√
* improved social well-being	√√	√	√	√
- Is the opportunity acceptable to stakeholders outside the community?	√√	√√	√√	√√
- Acceptability of cross-impact on other industries?	√√√	√√√	√√√	√√√

Models For Assisting The Development Of A Maori Tourism Industry

This section of the report describes two models that can be used by Maori communities to help develop a strategy for tourism development in their region. The first model draws on the well established concept of business networks and regional cluster development. The second model, developed from earlier work in Tai Tokerau with the James Henare Maori Research Centre, addresses community based process for developing a tourism industry.

Model 1: business networks and regional Cluster Development

Business networks are known to provide greater opportunities for business success than are likely with companies working alone; this is especially relevant in small-to-medium sized businesses (Porter, 1998). A business network generally involves an informal cooperative relationship en a number of a similar, but complementary firms. By working together in some aspects of their business, these firms can perform tasks (e.g. access information or resources, or marketing) more efficiently than is generally possible alone. Clusters generally involve business networks in a larger, more diverse and regionally-based sets of organisations concerned with economic growth.

Cluster development is increasingly recognised as a successful mechanism for economic development, particularly at a community, or industry level (Enright, 1995). Technically, a cluster can be defined as: "A geographically proximate group of interconnected companies and associated institutions in a particular field, linked by commonalties and complementarity." (Porter, 1998)
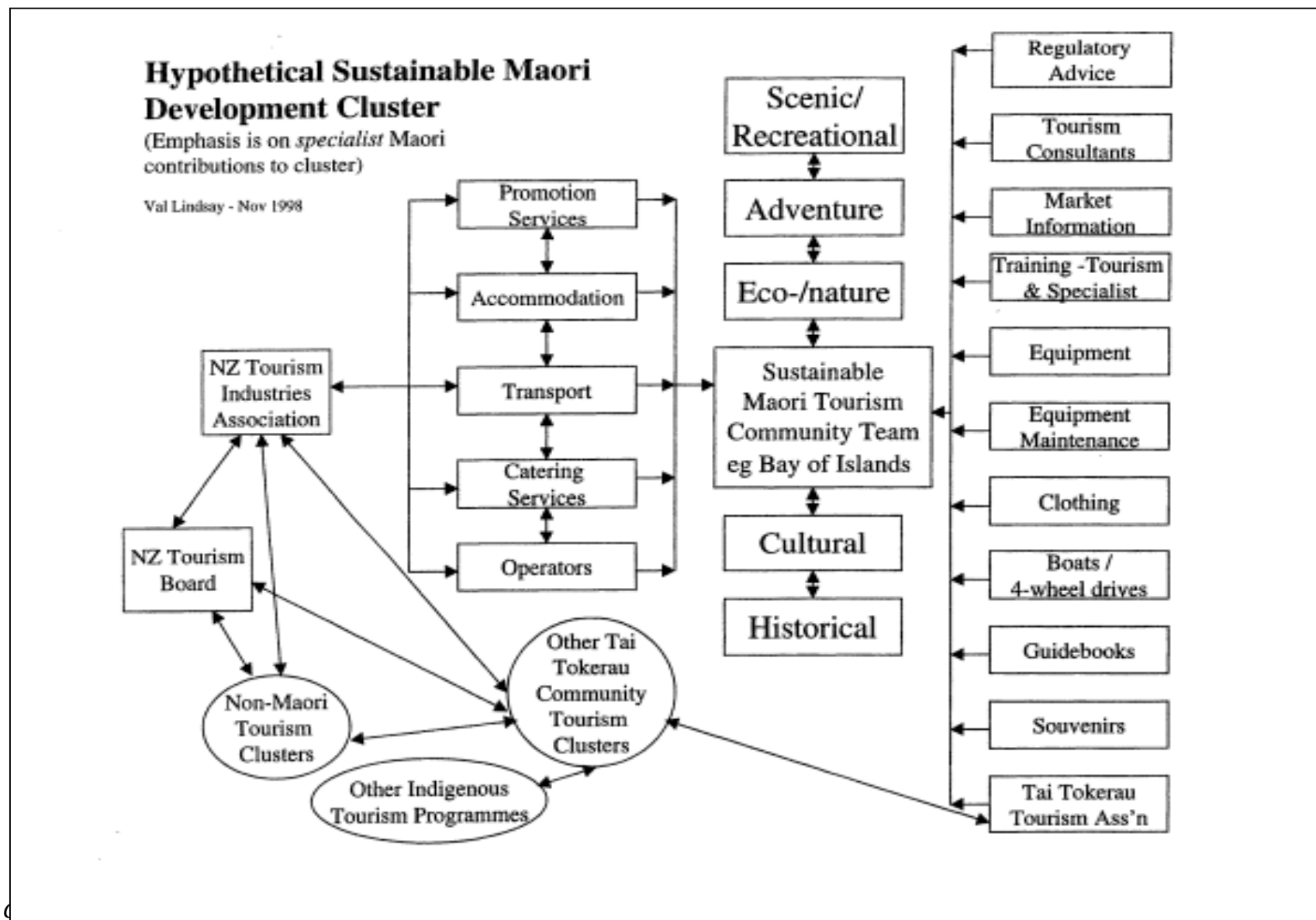
The fundamental concept underlying clusters is co-operation and relationship development, and the involvement of players at a community, or regional level. Clusters do not generally work well if spread across a large geographic area. There is recognition that members of a cluster contribute to other members and the mutual

contributions benefit the cluster as a whole. Thus, if members of a tourism cluster work together in relevant ways, the entire tourism cluster stands to benefit. In other words, the tourism cluster is regarded as a single competitive unit, rather than a collection of several related businesses or organisations competing mainly against one another. This is not to say that members of a cluster should not compete with one another. Rather, the more competitive the businesses and organisations in the cluster, the higher the demand for strong performance. The key issue is that all players co-operate in raising the standards of the cluster and the industry that they represent. In addition, the cluster will usually operate more efficiently because of co-operation in areas such as cost-sharing and minimising the duplication of effort. One of the key benefits to firms in the cluster derives from information flows from the networking that is a key part of the cluster process.

Another feature of clusters is the involvement of a range of players in an industry, usually at various levels of involvement, from indirect to direct, and right through all 'layers' in a community, or region. For example, a tourism cluster might involve local specialised training organisations, as well as tourism operators. Cluster members also include players involved at a broader level, for example, in infrastructure development or policy-making (such as roading and communications), in education, or in health, as they impact on the industry concerned. The rationale for this involvement is based on the assumption that these macro-level factors influence the industry concerned, possibly on a long-term, but nevertheless important, basis. For example, the role that schools may play in developing language and culture of children may be important where a community is planning to have strong cultural-based tourism developments. Likewise, government bodies are likely to have a role in a variety of industry developments, for instance, in regulatory issues, or funding processes. The cluster concept suggests that if the industry players work with other organisations in a co-operative way, information flows are likely to be improved, as well as access to new insights and skills, which may be relevant. Such relationships would lead to a more competitive industry than would otherwise be possible. A key element of clusters is the focus on specialisation in the various aspects of the industry concerned. Not all organisations involved will be specialised in the industry, or be part of a specialised group within the industry, with many having other, broader industry interests as well. However, by operating as a cluster, these organisations are able to bring their relevant skills, products or services to an industry that is specialised and able to use those offerings in ways aimed to enhance and capitalise on that specialisation.

Figure 5 shows a hypothetical cluster for Maori tourism in the Muriwhenua. This is explained briefly, as follows. The tourism product providers are positioned in the centre of the cluster. These providers may involve ventures such as a marae visit, or a set of hiking activities, or a marae-, or hapu-based package of activities.   They are represented in the cluster diagram as the main classes or types of tourism activity.

Figure 5

Hypothetical Sustainable Maori Development Cluster

(Emphasis is on *specialist* Maori contributions to cluster)

Val Lindsay - Nov 1998

On the right hand side of the cluster are the key, direct suppliers to the tourism venture/s. These often involve players who are also involved, perhaps more directly, in other industries, but, nevertheless, have a supply function to the tourism industry. Some of these participants may be networked with one another, and may, therefore, also be involved in other industry clusters. On the left hand side of the diagram are the main service suppliers to the tourist product providers, including, for example, accommodation and catering. All these players in the industry are linked, mainly through the tourism product supplier, but also through other links. Broader connections exist with industry players that are generally less directly connected, and often outside the locality or region concerned. In a Maori tourism cluster diagram, these players mainly include Tai Tokerau Maori Tourism Association, Destination New Zealand, New Zealand Tourism Industries Association, Tourism New Zealand, and inbound tourism operators – key organisations in the tourism industry distribution system. The cluster concept, outlined above, offers potential for a Maori specialisation within the broader tourism industry. Such a cluster enables a concentration of skills and creation of a specialised focus in what might otherwise be a fragmented and competitive industry, much as many Maori in the Far North currently perceives the state of tourism in their region.

Model 2: A Process Model for Sustainable Maori Tourism Development

This has been adapted from a model of indigenous sustainable economic development developed in the Tai Tokerau Sustainable Maori Economic Development Research Programme (Lindsay, 1997). The model considers the process by which business development (in this case, tourism development) may take place within a community, noting, particularly, the important role that community characteristics and dynamics play in the development process. It is a four-stage, sequential model, explained below, and shown in Figure 6.

Development Steps

These are steps that must be taken by a community to achieve economic development. They are sequential and lead to the growth of businesses, either large or small, or both. It is assumed that the successful implementation of each step is dependent on the previous step being completed successfully. The first two steps are pre-conditions necessary for business start-up. The last two steps focus on the actual start-up of businesses and their successful evolution and development. Without the satisfactory completion of the first two steps, it is assumed that businesses will either not start successfully, or will not be viable beyond the short-term. The four steps are considered in detail below.

Figure 6
A conceptual model for sustainable economic (tourism) development of small, isolated, rural, indigenous communities
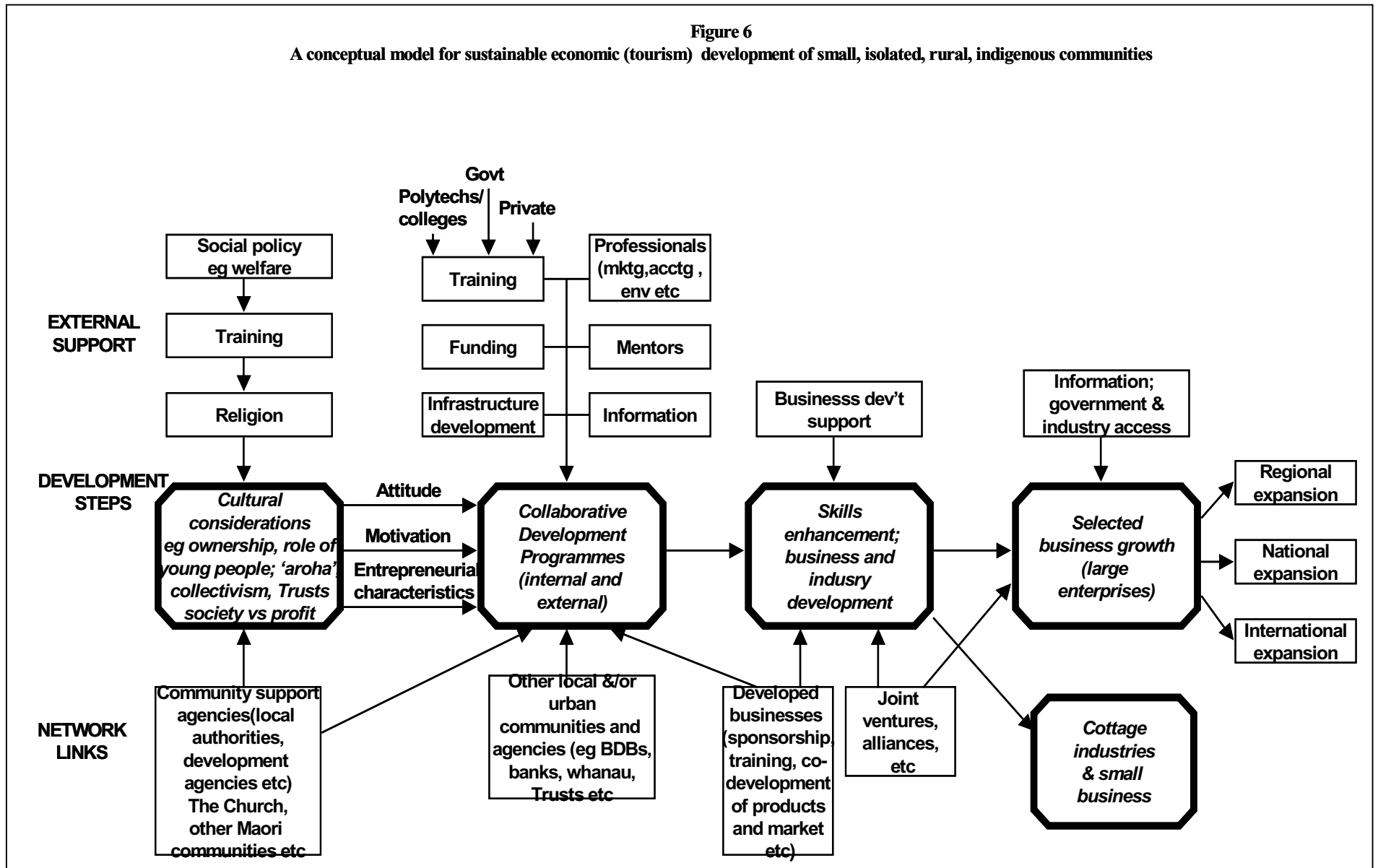
Cultural considerations

The first step towards successful business development involves understanding, accommodating or adjusting cultural[1] aspects of the communities which may be acting as impediments. Such impediments may result from internal structures, values etc., or they may arise from the marketplace, or wider environment. Ultimately, it is important to address both types, as they may pose powerful constraints in the long-term. Whatever the community cultural situation, and adopted business forms, the businesses will depend on other cultures outside the communities, for their economic returns. As long as the communities operate in an open economy, essential for those of particularly small size, it will be from outside the communities that the majority of income will ultimately derive. Thus, the forms and styles of business conducted will need to be "acceptable" to the cultures that form the major markets. In the case of tourism businesses in the Far North, the marketplace will be predominantly non-Maori, so the forms and styles of business must be compatible with these customers' expectations. This is not to say that Maori values cannot be incorporated, merely that market expectations must be met. The same considerations would prevail with respect to any nationality of tourist.

Cultural considerations underpin the *attitudes and motivation* towards business development, and also help to determine the application, or development, of *entrepreneurial characteristics.* Appropriate development of these three elements is crucial for the next step in the economic development process.

The internal institutional framework/s that impact on economic development are unique to Maori. Originally set up by a government Act, Trusts and Incorporations are charged, among other things with the overseeing of Maori asset accumulation and utilisation. These institutions impact on Maori economic development in a variety of ways. .

Collaborative development

Almost all the research literature states that small, isolated, rural communities cannot successfully achieve economic development alone. Collaborative efforts are crucially important, enabling shared goals and opportunities for mutual gain. The extent to which this is embraced will depend on a number of factors. One, already mentioned, is the extent to which outside involvement is welcomed, and the associated attitudes that are embedded in the culture. Others include knowledge of potential collaborative organisations/individuals, the extent of existing personal contact with these, their availability and location, and the expected gains to both parties. The types of gains to be expected are fundamental skills acquisition, development of appropriate business environment (including infrastructure), and funding.

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[1] "Culture" here is used to imply characteristics relating either to a specific community (i.e. community culture), or to race or ethnicity, or, indeed to any combination of these. The point to be made is that, however the characteristics are classified, it is important to understand what the characteristics are, and how they may influence potential business development

Tourism business development

The skills obtained and developed in the first two stages are fundamental to any start-up business, or, indeed, to the successful management of existing businesses. Once these skills have been successfully acquired, and the appropriate conditions met (as outlined above), it is assumed that business start-ups, or acquisition of existing businesses are possible. It is also expected that the first two stages will enable existing businesses in the community to be more successfully managed and developed for the long-term. The businesses will probably represent a wide range, from small to large enterprises. For such businesses to grow and develop, further support and skills enhancement are necessary. The acquisition and impact of these are likely to occur continuously, and the experience-base developing at the individual and community level will complement their benefits. A process of natural and deliberate selection of the tourism businesses that are likely to prevail over the long-term and provide sustainability (in its broadest sense) will take place over time. The selection should be influenced by macro-economic and market forces as well as the capabilities of the communities concerned (see earlier evaluation framework).

Selected tourism business growth

Tourism businesses selected for growth, from the previous step, require further resources to enable their growth and on-going development. It is possible that these businesses will be, or will become, large in scale, and may involve some degree of vertical integration, such as with tourism product providers integrating with tourism operator chains. Possible future outcomes of this type of business development include: regional expansion, providing growth for the region, as well as the communities concerned; linkage with other businesses in the industry, or related industries, via networks or alliances; and opportunities to operate directly in overseas markets, though foreign direct investment (for example, with the establishment of a tourism marketing office).

In addition to the growth and development of selected large enterprises, it is likely that small businesses will continue to operate, and possibly grow. However, research in community economic development suggests that they are less likely to contribute significantly to the economic growth of the communities - this is usually the domain of the larger enterprises. In community-based tourism development, however, it is possible that many of the businesses will remain small. The important role of these businesses is in providing employment and individual incomes that would, at least, provide for self-sufficiency. They may also be viewed as incubators of business skills and experience that may be subsequently utilised in larger businesses.

External Support

For each of the four development steps outlined above, certain types of external support are helpful, or necessary. For example, support for cultural constraints on the nurturing of attitudes and motivations for business development, and the development of entrepreneurial characteristics, include training and social policy (e.g. policy on qualifying criteria, utilisation of welfare benefits, and employment and training programmes). While many of the support factors may be important at a number of the

steps, the most important and influential factors are shown in the model. Access to some of the support factors has been discussed in the earlier section on Supporting Organisations. The important task is to identify what is necessary, and then seek the most appropriate support provider/s. Accessing existing network links with the support organisations can facilitate this task.

Network Linkages

These represent voluntary, flexible, linkages with individuals and organisations that could play a role in facilitating the four development steps and/or the provision of the support factors. The links may be formal or informal, though the research literature suggests that informal links, based on shared goals and mutual commitment and gain are likely to be more fruitful and more enduring. Formal or informal linkages with local authorities (or individuals within them), development agencies, churches, and other communities may all be helpful in facilitating the first step. Existing tourism businesses (inside or outside the communities) may assist in skill development, by providing opportunities for training or co-developing products or markets. Network linkages with tourism operators may assist small businesses to grow and gain market experience. Linkages are becoming increasingly important in business growth and development, and will certainly have a key role to play for small communities, whose dependency on external providers and consumers is high.

In summary, the model shows the steps towards sustainable Maori tourism development that may be taken by the Maori communities. One of the most critical elements of the model for communities that are isolated geographically, and, to some extent, culturally, from the 'mainstream' populations, is the development of network linkages and creating access to external support. Without these, facilitation of the four steps in the development process is difficult.

Summary of the Models

The first model is concerned with the operation of potential Maori tourism ventures within the dynamics of the whole industry, particularly at a local, or regional level. The premise here is that a high level of connectedness to other industry players may promote the ventures to a greater potential competitiveness and profitability than would be possible without these links. High levels of connectedness enable greater flows of knowledge and information and greater operational efficiencies. Encompassing a wide range of industry stakeholders also ensures that all the elements of a successful industry are involved.

The cluster model highlights the ways in which an integrated regional Maori tourism development strategy may serve to increase the collective performance of the communities' venture. An overall assessment of the communities suggests that few of them are particularly well linked into a broader industry cluster, such as one that could operate Tai Tokerau-wide. One of the aims of the Tai Tokerau Maori Tourism Association is to promote the regional benefits of an integrated Maori tourism strategy to Maori tourism businesses in the region. It may also be important to consider the possible benefits of linking with non-Maori structures in Paihia, in order to gain better

access to tourists and tourism information. Knowledge of the processes and players involved can only support the efforts of the communities to capture a share of the broad Far North tourism market. The communities are aware of the importance of these, and other, links and recognise the opportunity presented.

The second model encourages communities to consider the economic development process and debate the key cultural issues that will impact on the success or failure of the tourism opportunities involved in this process. Experiences have been noted here and elsewhere in the Tai Tokerau of community-based business ventures that were developed without first having addressed some of the fundamental cultural issues, such as the distribution of responsibilities and profits, and the competing goals of employment creation for the community and efficiency needs of the business. The communities in this study have noted the importance of community involvement in determining the outcomes of potential tourism ventures in their communities. Results of the research suggest that most of the communities have considered these issues and are conscious of the need to resolve any potentially negative influences before serious commitment to tourism ventures occurs. On the other hand, the communities also recognise the value of their cultural characteristics in contributing strongly and positively to the success of community tourism ventures. Finding a balance between enhancement and exploitation of culture appears to be a significant challenge in Maori tourism development. The model also highlights the need for school development before, during and after business formation, and shows how following the four-step process can lead to community-based economic development.

Tourism planning – some preliminary considerations

Research with communities in Muriwhenua has identified a range of relatively small-scale tourism ventures with potential for commercial development (see Charles Johnston, *Resource Inventory for the Muriwhenua Region*). These are: marae visits and overnight stays, hiking, cultural shows, diving and recreational fishing, day trips to bays, kai moana, hangi, camping grounds, eco-tours, waka rides, water sports, bike and quad trails, historical trails, Maori medicine, Maori gardens, farmstays.

The discussion focuses on the start-up considerations for the potential tourism businesses identified by the communities. Longer-term tourism business development plans are be necessary once the start-up issues have been addressed. Planning for tourism business development involves the same considerations as any business development, although many of the aspects will be specific to the tourism industry. The Appendix provides a guide to tourism business and marketing planning, which could be used by individuals and groups of individuals to contribute to their generation of a tourism business plan.

A New Zealand Tourism Board (NZTB, 1995) publication provides a very useful guide to the main initial issues concerning aspiring tourism operators. This section of the report discusses a number of these and other issues, in particular, finance, labour, management, market information and community involvement. These link into the first two steps of the process model described above. These preliminary considerations are also helpful in informing the tourism planning process.

Capital – finance

One of the first, and most important, decisions required in planning for a tourism business venture, is an estimate of the start-up finance requirements. Ongoing business development finance needs must also be understood in the course of business planning, but for initial feasibility assessments, the start-up costs are critical. For obvious reasons, the more accurate these cost estimates, the more likely that the business feasibility assessment, and the business start-up itself, will reflect the reality of the business environment. The estimation process should involve a detailed breakdown of all the requirements for initiation of the business venture. These include input costs (raw materials, labour etc), equipment, premises, licenses, regulatory certificates (e.g. occupational safety and health – OSH), commissions (e.g. to tour operators), administration, and initial marketing costs (promotion and advertising). Particular tourism business ventures may require special start-up costs, depending on the nature of the venture (e.g. equipment for adventure tourism activities).

Having established the likely amount of finance required to take a tourism venture into the start-up phase, the next issue concerns the availability and sources of finance. Communities may have ready access to funds, for example, from Trusts and Incorporations, or investments, or may have very limited availability. Potential sources of finance must be identified and evaluated alongside conditions associated with access to the funds concerned. Funds may be available from organisations or institutions within the community, or the iwi, from government sources, or from the private sector (see earlier discussion on Support Organisations). Arrangements with funding sources might involve loans, joint ventures, or some other contractual arrangement, and these options also need to be considered, alongside their associated benefits and risks.

Labour, Management and Training

Availability and level of relevant skills associated with labour and management are critical for successful tourism business development. Key issues associated with labour include its quantity and availability, as well as skill level. While a high quantity of potential labour may be available, particularly among the unemployed, the motivation, commitment and reliability of these people will determine the contribution to the tourism ventures considered. The ventures need to offer attractive rewards to engage a suitable workforce. These rewards need not be solely financial; training, self-esteem, responsibility, and potential opportunity for self-employment, are also important factors. New Maori tourism ventures in the region will require a range of skills, depending on the nature of the particular venture. For example, specific skills might include guiding and local geographical knowledge of the area, Maori culture and tradition, Marae protocol, ecological knowledge (e.g. bird and plant species, or knowledge about geological or ecological features), and boat management. Compliance with regulations, including licences, where necessary, will also be important. More generic skills include hospitality, catering and administration. Each proposed Maori tourism project must be assessed in terms of the particular skill set required and then considered in the light of the communities' available human resources.

Management skills are critical to successful Maori tourism business. While specific tourism and management skills are desirable, more generic business management skills are also fundamental. These include management of finance, human resources, sales and marketing, service production or manufacturing, communication, information technology, and research and development, as well as general management. Manages of, and in, tourism businesses needs to understand the industry structure and build relationships with other key players in the industry e.g. the Tourism New Zealand, New Zealand Tourism Industries Association, the Tai Tokerau Maori Tourism Association, inbound operators, and other key organisations and individuals already mentioned.

Managers also need to display characteristics of leadership, in order to motivate and direct the people in their businesses and associated organisations. In the context of Maori business, the notion of leadership is entwined with marae- or iwi-based leadership and hierarchy. The responsibilities for this type of leadership may be quite different to those required for leadership of successful businesses. For example, marae- or iwi-based leadership is likely to be more concerned with social, cultural and spiritual needs of the community than on business development strategies. Thus, business leaders and managers may well be different individuals to those who assume other leadership roles in the communities. It is important for this distinction to be understood in relation to the communities' human resource availability.

Training plays a key role in human resource development for tourism business. This may take the form of specialised training, in order to meet the labour and management needs described above, or it may be more generic for the more general areas also discussed. Even where existing skill levels are high, ongoing training is usually part of an organisation's ongoing human resource development strategy. In order for communities to achieve the levels of skill development demanded by their proposed tourism ventures, there are two basic requirements. Firstly, training must be available, and secondly, people must be prepared to participate in training. Research from the James Henare Maori Research Centre programme (JHMRCa, 1998) has indicated that Maori people who qualified with standard, recognised tourism qualifications, such as those obtained through Polytechnics, or private training institutions, usually obtained employment in the 'mainstream' tourism industry quite readily. Formally qualifier and experienced Maori people offer a valuable resource for recruiting into new, or existing, tourism ventures. Gaining of experience outside their community, and later transferring their skills to tourism ventures in the Muriwhenua are a helpful way to generate tourism and hospitality experience in the early stages of tourism industry development.

Markets / Marketing

Tourism is a relatively complex industry, with a number of intermediaries and peripheral players, as discussed in earlier sections of this report. In addition, tourism markets are widespread geographically, and include national and international markets. Control of activities from the tourism product right through to the consumer is unusual, except for market organisations. As discussed earlier, tourism products may be offered directly from tourist product providers, or by tourism operators, acting as intermediaries. Tourism product providers may link with inbound tourism operators when dealing with overseas tourists. Knowledge of the stages and

intermediary organisations involved is critical for tourist product providers, and margins may be shared widely across the industry. In addition, competition for the tourism dollar is often determined, or influenced by, the intermediary players in the industry, given that promotional and marketing strategies may rely on their co-operation. In general, the more widely connected the tourism product provider with other players in the industry, the greater the flow of information about markets and the industry, and the more likely the success of the tourism product provider. Where markets and marketing skills are relatively poorly developed, there may be opportunities to work co-operatively with other industry members to assist in the early stages of a tourism business development. For example, with strong relationships across the industry, a tourism product provider may 'piggy-back' with an established provider by offering related products to established markets already served by this provider. Once sufficient experience has been gained by the new business, it may decide to operate alone, forge a closer relationship with its informal partner, or follow other strategies.

Key marketing aspects relating to tourism are: knowledge of the markets and consumers, knowledge of the industry, particularly the industry dynamics (that is, the ways in which the various players interact and influence competitiveness of the industry), and ability to develop and implement marketing plans, which cover the main aspects of the marketing activity (e.g. pricing, promotion, distribution, product / service).

Infrastructure

This section deals with infrastructural issues that include roading, transport, local amenities and facilities (e.g. sewerage, water, power, and public conveniences), and communications (e.g. telephone access, cellphone reception). The current status of these in the Muriwhenua has already been discussed. Regardless of the state of a community's own resources, the infrastructure can greatly influence the likelihood of success of a tourism venture or development programme. For instance, some areas lack public conveniences, and this may act as a deterrent to tourists visiting the area. Other areas have quite long stretches of unsealed roads, which tourists may find difficult or dangerous. At the same time, however, unsealed road access creates a positive impression of an area as undeveloped and "off the beaten track", which appeals to certain sectors of the tourist market. The communities should address the impact of infrastructure on the proposed tourism developments; that is the extent to which the current state of the infrastructure may negatively, or positively, influence the potential success of the tourism ventures. In addition, they need to assess the extent to which their infrastructure needs are being addressed by the authority/ies responsible.

Community

The extent to which the communities are supportive of tourism development projects, and the extent to which they might be expected to benefit is an important consideration where communities are the stakeholders. If tourism projects are perceived as individual, rather than community, initiatives, then community support may not be directly relevant, but may still, through indirect involvements, influence business development.

Earlier research in Tai Tokerau indicated the importance of clear communication of the tourism idea to the community, and sound research and analysis to provide credibility to the ideas. Support was usually dependent on the tourism development being of benefit to the whole community, not just individual members. Community perspectives of tourists were often negative, stemming from their limited experience of tourists, or observations of 'mass' types of tourism. Community support will generally be dependent on a tourism idea fulfilling the communities' criteria for sustainable Maori tourism development (see beginning of this report). The classes of tourism discussed in this report are most likely to achieve this requirement.

The Tourism Marketing Plan

A guide to developing a business and marketing plan for a tourism venture is provided in the Appendix A and B. Parts of the marketing plan require considerable research of market and industry information. Earlier parts of this report have indicated some key sources of information, which will provide much, if not all, of the information needed. www.tourimsinfo.govt.nz is an excellent site for information on various tourism markets (e.g. Germany and other European markets, North America, and many countries in Asia), including detailed tourist characteristics, preferences and survey feedback etc. The development and utilisation of links within the tourism industry will also foster the flow of useful information.

Development of a tourism plan will also involve consultation with, and participation of, the communities and other stakeholders. It may, overall, the time-consuming process, but it is a key part of any business' success.

Conclusions

The research programme has investigated the resources available for sustainable Maori tourism development in a number of communities in the Muriwhenua. It has identified tourism opportunities from a broad resource base, including physical, natural, human, cultural and social resources. The options for the communities to develop some of these opportunities have been assessed in terms of social and cultural aspects of the communities, and the business-related resource requirements. Overall, the communities appear to have many of the resources available to develop a number of small-style (at in the short term) tourism initiatives, but are limited in the pool of business and management expertise on which to draw. The need to develop a number of business-related resources for the ongoing development of tourism and a more integrated Maori tourism industry is recognised. Areas in greatest need of development are finance to assist with the writing of tourism plans and to fund subsequent ventures, as well as skills in management and tourism-related services. Opportunities exist for these skills to be acquired over the short-to medium term, and recent government funding opportunities are a potential source of early development finance.

The report describes some key processes for communities to assess the ways in which they might proceed with the development of some of the opportunities identified, and

to evaluate those that will best satisfy the needs of the community as a key stakeholder.

Development strategies are required for both individual tourism ventures and an integrated region-wide tourism strategy. Two models are presented to assist with these. First, the cluster model encourages the development of business networks and broad linkages in the region to lower entry hurdles and enable an efficient industry to emerge, with specialist skills and offering in sustainable Maori tourism. The second model addresses the various stages of development over a tourism industry, paying particular attention to the early impact of cultural considerations on Maori tourism businesses development.

Finally, the issue of tourism business and marketing planning is addressed, with a review of the key considerations informing the development of these plans. The Appendices provide outlines of a tourism business plan and marketing plan that may assist individuals and communities in the writing of their formal business plan.

Summary - Towards a Sustainable Maori Tourism Industry in the Muriwhenua

In summary, a number of important requirements for developing tourism business, particularly in an integrated manner, are outlined below.

- A much higher profile of the region as a tourist destination (not just an excursionist drive-through) is required. There is scope for greater use of web-based promotion of the region, and better links to established mainstream web-sites than is apparent at present.

- It is probable that the best opportunity for tourism in the short-term is the development of small-scale businesses. This both reduces potential business risk and provides time for tourist operators new to the industry to gain experience.

- Better utilisation of collaborative links with existing tourism providers in the Northland region, especially the Far North, would help in order to create initial opportunities, develop a Maori tourism profile and lower business risk.

- A fully-informed tourism operator is more likely to succeed than one who is poorly informed about the industry and its trends. This can be assisted by greater utilisation of existing industry-related information (e.g. from easily accessible web-sites) and incorporation of the information into a tourism planning process. Types of information important to tourism businesses are tourism market information, training opportunities, compliance needs, and activities and members of industry associations.

- Of particular importance is accurate, and up-to-date information about potential tourist markets and the characteristics and preferences of tourists

likely to visit the region. This enables a more targeted marketing campaign and the provision of more relevant tourism offerings.

- Proactive research into funding opportunities is essential in the development of tourism operations from a limited resource base, such as in the Muriwhenua. Utilisation of experts to assist in the preparation of funding applications and business proposals is important to succeed, where these skills are presently lacking in the communities.

- The most fundamental requirement for the long-term success of a tourism business is the quality of the offering and the its supporting services. Where skills are lacking, specialised, formal training is the most effective way to achieve the quality standards for successful tourism ventures. Experience gained in established tourism operations, probably outside the Muriwhenua, is and invaluable way to generate important tourism-related skills and later transfer them to new operations in the region.

These are some of the key requirements underpinning the development of a successful sustainable Maori tourism industry. Achieving them demands the investment of time, commitment and resources from the communities involved. Underpinning longer-term success of any new tourism venture is a sound and will research tourism business plan. As this report has discussed, the more integrated this planning amongst the potential businesses and other stake holders involved, the more likely to sustainability of the industry and its ability to tamper the undoubted potential of a growing global tourism industry. The region has a number of unique offerings that appears to the increasingly sought by large segments of international tourism markets—namely its environmental attraction, and unique cultural heritage. The challenge to the Maori people in the Muriwhenua is to capture the economic benefits of these types of tourism, without destroying the unique environmental and cultural foundations on which these benefits depend. At the same time, the desires and needs of the communities, particularly in terms of social development, must also be part of any tourism industry development in the region. This report has aimed to address all of these issues, and to provide the necessary information and processes that will assist the Maori communities to take forward their ideas for the development of a tourism industry in the Muriwhenua.

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APPENDIX: Sustainable Maori Tourism – Business Planning

A: Some Preliminary Considerations

(Adapted from "My Beautiful Business", Warwick Terry, dfc Publishing, 1987)

	Starting the Business
List the MOTIVES for developing the tourism product/service	_____ _____
	_____ _____
	_____ _____
	_____ _____
	_____ _____
	_____ _____
Note your views about the OBJECTIVES shown opposite; add other objectives if relevant	*Money:*
	• How much?_____ ____
	• When?_____ _____
	• In what form?_____ __
	Working Hours:
	• Number of Hours?_____

	• Amount of Holiday?_____
	• Flexibility?_____ _____
	Risk:
	• What level? _____
	Stress:
	• What level?_____ ____
	• How acceptable?_____ ____
	Type of work:
	• What type of work?_____
Indicate the likelihood of being able to achieve the following criteria critical for SUCCESS (H, M, L)	
	Personal achievement: _____ _____
	Other: _____ _____
	_____ _____
Indicate the likelihood of the following causes of FAILURE occurring (H, M, L)	_____ _____
	_____ _____
	_____ _____

	Success or Failure
	Success
	1. People involved realistically assess their strengths and weaknesses and try to overcome their shortcomings
	_____ _____
	2. The idea and the market for it have the necessary growth potential
	_____ _____
	3. Financing is sufficient to cover the shortfall of working capital, especially in the early days
	_____ _____
	Failure
	1. Overestimating sales and underestimating how long it takes to achieve them
	_____ _____
	2. Underestimating costs
	_____ _____
Define the TYPE OF BUSINESS that you really want to be in, and which reflects, in words, what you think it will be to others (briefly!!)	3. Failing to control costs ruthlessly
	_____ _____
	4. Losing control over cash (e.g. debtors and creditors)
	_____ _____
	5. Failing to accurately identify the market because of inadequate market research
	_____ _____

Briefly and clearly, describe your product/service	6. Failing to adapt the product/service to changing customer needs _____ _____ 7. Lacking sufficient skills, especially in selling and marketing, finance, management _____ _____ 8. Failing to build a team, which is compatible and consistent _____ _____ 9. Taking unnecessary risks _____ _____
What will your product/service DO?	10. Underpricing _____ _____ Defining the Business _____ _____ _____ _____ _____ _____
What will your product/service NOT DO?	_____ _____ _____ _____ _____ _____

	Defining the Product/Service
Indicate the broad characteristics of your intended CUSTOMERS	_____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____

	The Customers / Market
	Type of Tourist Interest
	☐ Recreational ☐
	☐ Sight-seeing ☐
	☐ Cultural / historical experience ☐
	☐ Adventure ☐
	☐ Eco- / nature ☐
	Origins of tourist
	☐ International ☐
	☐ Domestic ☐
	☐ Auckland ☐
	Sector of tourist
	☐ Leisure ☐
	☐ Business ☐
	Locational status of tourist
	☐ Muriwhenua as a destination ☐
	☐ Muriwhenua as a stop-off ☐
	☐ Muriwhenua - Passing through ☐
Indicate the broad characteristics of your	

intended MARKET	**Class of tourist**	
	☐ Backpacker	☐
	☐ Average comfort	☐
	☐ High comfort	☐
	☐ Luxury	☐
	Income of tourist	
	☐ Low	☐
	☐ Medium	☐
Indicate the level of skills available in the following areas of MARKETING (H,M,L). Indicate where help will be needed	☐ High	☐
	☐ Irrelevant	☐
	Sex of tourist	
	☐ Women	☐
	☐ Men	☐
	☐ Both	☐
	Age of tourist	
	☐ Child	☐
	☐ 16-25 years	☐
Indicate the level of skills available in the following areas concerned with the PRODUCT/SERVICE (H,M,L). Indicate where help will be needed	☐ 25-40 years	☐
	☐ 40-60 years	☐
	☐ 60+ years	☐

	Is the market a niche or mass market? _____ Is the market growing (how much)? _____ _____ _____ How competitive is the market? _____ _____ _____
Indicate the level of skills available in the following areas concerned with the FINANCE (H,M,L). Indicate where help will be needed	Is the market dominated by one or a few main players? _____ _____ _____ How price-dependent is the market? _____ _____ _____
	Skills ***Marketing:*** ***Help needed:*** ☐ Market research ☐ ☐ Selling ☐ ☐ Relationships with industry ☐ ☐ Promotion ☐ ☐ Product development ideas ☐ ☐ Public relations ☐ ☐ Service ☐
Indicate the level of skills available in the following areas concerned with the MANAGEMENT (H,M,L). Indicate where help will be needed	

	Product / Service:	Help needed:
List the areas in which you are STRONGEST	☐ Accessing materials/equipment	☐
	☐ Accessing people	☐
	☐ Finding a location	☐
	☐ Delivery - consistant/reliable	☐
	☐ Consistency in quality	☐
	☐ Providing the product/service	☐
	☐ Customer service	☐
	Finance:	**Help needed:**
List the areas in which you are WEAKEST	☐ Financial projections	☐
	☐ Cash flow forecasts	☐
	☐ Breakeven analysis	☐
	☐ Debtor control	☐
	☐ Creditor control	☐
	☐ Profit and loss accounts	☐
	☐ Cash management	☐
	Management:	**Help needed:**
How will you deal with your weak points?	☐ Organisational structure	☐
	☐ Writing job descriptions	☐
	☐ Choosing staff	☐
	☐ Motivating staff	☐
	☐ Delegating	☐

	☐ Sourcing finance ☐
	☐ Time management ☐
	☐ Negotiating ☐
	Areas of strength:
	_____
With regard to the people who will be responsible for the tourism ventures. How many of the personal characteristics can be answered 'Yes'?	_____ _____
	_____ _____
	_____ _____
	_____ _____
	_____ _____
	_____ _____
	_____ _____
	Areas of weakness:
	_____
	_____ _____
SUMMARISING:	_____ _____
Write a brief sketch of your tourist product / service, including the points indicated opposite	_____ _____
	_____ _____
	_____ _____
	_____ _____

_____
_____

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_____

Personal Attributes

	Yes	No
Are you a self-starter?	☐	☐
Can you work long hours, forcing yourself keep going?		
	☐	☐
Are you decisive?	☐	☐
Can you accept responsibility? ☐		☐

Can you put up with boring, repetitive jobs?

☐   ☐

Can you accept change readily?

☐   ☐

Can you live with uncertainty? ☐   ☐

Do you keep going, rather than give up?

☐   ☐

Brief Sketch

Description of the product/service:

_____
_____

_____
_____

_____
_____

_____
_____

An indication of why it will attract visitors and make money

_____
_____

_____
_____

_____
_____

_____
_____

_____
_____

	A description of the intended market
	_____ An estimate of the approximate price _____ How you think it will be promoted (e.g. through tourist operators, own advertising, Internet etc) _____

	_____ _____ _____ _____ _____ An estimate of how much it will cost to set up _____ _____ _____ _____ _____ _____ An estimate of the first year's income and profit _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ NEXT: THE BUSINESS PLAN, INCLUDING A DETAILED ANALYSIS OF THE MARKET, PRODUCT/SERVICE, ORGANISATION AND FINANCE

B: Tourism Business and Marketing Planning Guide

(Adapted from "My Beautiful Business", Warwick Terry, dfc Publishing, 1987)

Describing the Product / Service

NB The term 'product' will be used to indicate the tourism offering, which may be a physical product, a service, or a combination of both.

A. THE PRODUCT

1. What is your product (concise and clear description)?

2. What will your product do?

3. What will your product not do?

4. If your product has a number of parts, briefly describe each part of you product

5. What inputs (e.g. raw materials, people, buildings) will you need in order to offer your product?

6. Where will you get these?

7. Where will you offer the product?

8. How often will you offer the product?

9. Have you got enough supply of inputs to be able to offer the product for these time periods - consistently?

10. Have you got back-up for your key inputs, in case they are unavailable for some reason?

11. Can you think of a good 'model' or example that could help you develop your product?

B MARKET POSITION

1. What price range will you offer (e.g, high medium low)?

2. What quality of products will you aim at (e.g. high medium low)?

3.   What image do you want your product to have (e.g. superior quality, inexpensive, functional, exclusive)?

4.   What extra customer services will you provide (e.g. free hotel pick-ups, complementary souvenirs etc)?

C   INITIAL SPECIFICATIONS

Review what you have decided so far and write a brief specification for your product, as outlined below:

1. Product description

2.   When in the year it will be offered and how often it will be offered (e.g. over a month, or year)

3. Inputs to be used and those needed

4. Where it will be located

5. Flow chart depicting initial contact with tourist to the point of tourist departure

6. Drawing, or artist's impression of the product

7. Comparisons with other products on the market

8. Rough draft of advertising or a product description sheet

D THE MARKET

1. Is the market increasing, decreasing, or static?

2. How long is it likely to exist?

3. Is it a new market, a traditional market, a rapidly changing market, or a seasonal market?

4. How buoyant, generally, is the geographic region in which you plan to operate?

5. Are more potential customers being attracted to the area - if so, why; if not, why not?

6. Have **any** tourist operations or businesses closed down, or moved out of the area recently? If so. why?

7. Have any tourist operations or businesses moved into the area recently? If so, why

8. How long will it be before you will need substantial expansion or renovation?

9. Will you have the resources to undertake either of these?

The Market and Marketing

A: EVALUATING THE MARKET

1.   What do you already know about the tourism market in Northland   / Muriwhenua?

2. How might you find out more?

   Indicate which method below might be most useful and relevant:
   - Surveys / street interviews with tourists (Kaitaia/Awanui etc.)
   - Interviews with tourist operators (Auckland and Kaitaia)
   - Hotel / motel located questionnaire (Auckland and Kaitaia)
   - Questionnaire distributed via tourist operators and inbound tourism companies (Auckland and Kaitaia)
   - Databases
   - Inter-views with key tourist industry players (e.g. NZTB, TTMTA, Destination Northland, NZT1A, inbound operators, such as Thomas Cook)

3. Who can undertake this research for your product?

B: EVALUATING THE CUSTOMERS

1. What do you know about the characteristics of your potential customers (examples below):
    - Numbers of tourists

    - Age groups

    - Income groups

    - Nationality

    - Independent, or 'package'

    - Immediate prior location

    - Next intended destination

    - Length of stay

    - Spend while in Muriwhenua

    - Category of tourism sought (e.g. adventure, leisure, cultural, scenic etc)

    - Time of year visiting,

2. What do you know about the behaviour and satisfaction levels (H,M,L)of tourists to the Muriwhenua?

    - Where have they been and what did they do?

    - *How satisfied were they with:*   *- quality of offering?*
                      - value for money?
                      - ease of participation?

    - How did they get there?

    - *How satisfied were they?*

    - How did they know about it?

- *How satisfied were they with the information?*

- Overall, how well did it meet their expectations?

- Where were they staying?

- *How satisfied were they with their accommodation?*

- How did they get to Northland / Muriwhenua?

- *How satisfied were they with transport arrangements and roads?*

- Where did they get information about Northland \ Muriwhenua?

- *How satisfied were they with the availability and quality of this information?*

- How much information have they received about Maori cultural tourism activities in the Muriwhenua? Where did they get it?

- To what extent would they like to experience Maori cultural tourism in the Muriwhenua?

C: THE TARGET MARKET

Using information from outside sources and survey data etc.:

1. Define, specifically, your target market

2. Estimate the size of your target market

D: COMPETITORS

Using information sources, similar to those above (e.g. TPK directory, NZTB website, yellow pages):

1. Who are your main direct competitors?

2. Who are your main indirect competitors?

3. What are their products, and what is the quality of their products?

4. Where are they located?

5. Who owns and operates them?

6. How strong are they?

7. How well are they doing?

8. Where do they position their products in the market (top-end, middle, low-end etc)?

9. To what extent will their product/s compete with yours?

10. Is it likely that their products could complement yours? If so, how?

11. Do you know of any competitor likely to set up in the Muriwhenua area?

12. If new competition arose once you'd set up your business, how would you combat it?

13.   For your main competitors, what do you know about the following:

-    prices of their product/s

-    quality standards

-    product image and reputation

-    particular selling points of product

-    customer service
-    number of staff, skills and experience

-    advertising (media used, frequency, where advertised etc)

E: IS THERE A BIG ENOUGH MARKET?

1. What 'market share' do you expect to achieve?

2. Are you creating new 'market share' or taking customers away from someone else's tourist offering?

3. If you will be taking, customers away from a competitor's tourist offering, who will those competitors be, and how do you think they will react?

4. What share of the market do you expect to achieve in the first two years?

5. Why should tourists choose your product in preference to another product in the market?

F: PRICING AND SALES POLICY

1. What is a suitable price to expect the customer to pay?

2. If the product is a 'bundle' of component products, what will the price be for each component?

3. Will you be selling the product direct to the end-user, or will there be a middleman? If a middleman, what price will you sell to him/her?

Discounts.

4. Will you offer discounts, and, if so, how much and for what (e.g. groups, introductory offers, etc)?

Distribution.

5. Will the customers come to you, or will you go to them?

6. If you have to get the product to them, how will you do it? Will you use middlemen (e.g. retailers for crafts)?

Selling.

7. Who will do the selling, and what expenses will they have?

Servicing and guarantees.

8. Will you offer repair and maintain your products after they have been sold?

9. Who will repair them?

10. How much will it cost and who will pay?

Quality Management.

11. How will you know about complaints concerning quality of your product?

12. How will you deal with complaints about quality?

Packaging

13.   How will you package your products?

14. Where will you source packaging material?

Credit Terms.

15.   Will you allow customers to have an account with you? If so, which customers?

16. What terms will you offer and how will you monitor and control this?

Customer Service.

17.   What extra customer services will you offer?

1

18.   How will the costs for these be covered (e.g. customer pays in original price)?

G: PROMOTION AND ADVERTISING

1. Write a concise statement of the message you want to convey of your product (remember the image you thought of earlier)

2. Will you do your promotion continuously, or periodically?

3. When are the key promotion periods in year for your type of product?

4. When do your 'suppliers' (e.g. inbound tourism operators etc) undertake their main promotions?

5. Will you have a product launch campaign?

6. Which advertising media will you use?

- national newspapers

- local newspapers

- tourist magazines

- websites

- through operators (which, where)

- magazines

- radio

- TV

- tourism operators (including. inbound), TTMTA etc

7. Does the profile of the medium (e. a. readership) match your target market?

8. What proportion of your target market do you think the medium reaches?

9. What would be the cost of advertising during one promotion period? How much is that per customer (approximately)?

10. How many customers do you estimate would buy your product as a result of the advertising,? Is it worth the cost?

11. What other types of promotion might you consider using:

- direct mail

- mail bookings

- Internet

- PR

- signs, posters etc

- brochures, catalogues etc

12. Do you think you would use an advertising / marketing specialist to help you with this aspect of your business? If so, who might that be?

13. Can any costs be shared with other businesses?

14. How much will tourism industry operators etc charge for including promotion for your business in their promotions? Are you prepared to pay it?

15. List your final promotion choices and summarise their pros and cons

Getting Started

A: MEETING REGULATORY NEEDS

1.   Have you met, or can you meet, all the necessary regulatory requirements associated with your business e.o,. OSH, RMA, food hygiene standards etc?

2. If not, how easy will it be for you to do so?

B: PREMISES

1.   What premises do you need?

2. What function will they serve?

3.   How much building, or refurbishment is needed to provide what is required (e.g. toilet facilities, heating, and regulations)?

4. Are there any special requirements?

5. Who will pay for this work?

6. Will there be costs associated with rents or leases?

C: EQUIPMENT

1. What sort of <u>operating</u> equipment are you likely to need (e.g. transport, boats, mattresses, riding, equipment, fishing equipment, costumes etc)? Estimate the costs of the equipment needed in the table below:

Equipment	Number needed	Rent / buy/ make / koha	Unit cost $	Total cost $

2. What sort of <u>administration</u> equipment are you likely to need (c. computers, desks, photocopier etc)? Estimate the costs of the equipment needed in the table below:

Equipment	Number needed	Rent / buy/ make / koha	Unit cost $	Total cost $

D: SUPPLIES

1.   What material supplies will you need, once in operation?

2.   Do you know of a reliable supply source/s? If so, who? If not, how will you deal with this?

3. What terms of sale are you likely to be able to secure with your suppliers?

E: AVAILABILITY OF SKILLS

1.   What special skills are needed to make and deliver the product?

2. Do these skills exist in the necessary quantity and of the appropriate quality?

3. If not, how will you deal with this?

4. How long will it take for the necessary skills to be in place?

F: OTHER OPERATING POLICIES

1. What name will your business operate under?

2. What type of business structure will you adopt (e.g. limited liability company, trust etc)? What are the pros and cons of this?

3. What will your operating hours be?

4. How many staff will be employed:

- full time, paid

- full time, unpaid

- part time, paid

- part time, unpaid

- causal, paid

- casual, unpaid

- other

6. Who will be able to claim expenses, and what sort of controls will be in place?

7. What banking arrangements will you require (accounts, authorised signatures etc)?

8. How will spending authorisations be decided and managed?

Who Will Do What?

A: THE ORGANISATION CHART

1. Draw an organisation chart for the business; try to apply names to the roles, and indicate where there is nobody currently able to fill a role

2. Write a brief job description for each role in the organisation chart

3. Write brief conditions of employment for each role in the organisation chart

The Finances

[To be included in the final edition!]