

2050: New Zealand's sustainable future

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Abstract

Purpose – *The purpose of this paper is to portray the future of tourism in New Zealand based upon a philosophy of sustainability and cultural identity as a response to the present 2025 Tourism Strategy.*

Design/methodology/approach – *The research deployed a scenario planning methodology resulting in four portraits of the future.*

Findings – *Environmental issues and global migration are the key issues that will shape the future of New Zealand tourism. In order to address these issues four scenarios were constructed. New Zealand Wonderland portrays a future based upon a grounded international reputation for environmentalism driven by good governance, climate change targets and ecotourism. Indiana Jones and the Search for Cultural Identity position a future driven by rapid growth and unregulated air travel resulting in environmental degradation. A Peaceful Mixture is a balance of socio-cultural and environmental dimensions of sustainability at the centre of a tourism product shaped upon Maori culture and economic prosperity. The final scenario, New Zealand in Depression, is the worst possible outcome for New Zealand's tourism industry as the three dimensions of economy, community, and environment are not at equilibrium. New Zealand would be over-polluted with an uncontrolled number of migrants.*

Research limitations/implications – *The research was a social construction of ten experts' views on the future of sustainable tourism.*

Originality/value – *New Zealand's present approach to the future of tourism is shaped by the 2025 Tourism Framework (<http://tourism2025.org.nz/>). This is derived from a business perspective and a neoliberal political philosophy and it is void of the words ecotourism and sustainability. This paper argues that the present strategy will fail because of community disengagement that proposes a range of alternative directions based upon a political discourse of sustainability and shaped by environmental credentials and cultural identity.*

Keywords *Tourism, Maori, Identity, Scenario planning, Futures*

Paper type *Research paper*

Background to the study: New Zealand's sustainable future

In New Zealand, tourism is a key contributor to the country's economy and employment. In 2013, tourism generated 3.7 per cent of direct contribution to New Zealand's GDP, amounting to \$7.3 billion, while indirect value added of industries supporting tourism generated an additional \$9.8 billion to tourism. In addition, a total of 110,800 full-time equivalent employees have been employed within the tourism industry, accounting for 4.9 per cent of New Zealand's total employment (Ministry of Business, Innovation and Employment, 2014). Tourism is one of New Zealand's top export earners, contributing 5.7 per cent of the country's total exports on goods and services. These statistics illustrate the key role tourism plays within the wider New Zealand's economy. However, in light of global economic turbulence, environmental issues, emerging markets and changing consumer attitudes, managing sustainability is critical to the continual growth of the industry. Currently, Tourism New Zealand's "100% Pure" branding highlights its high dependence on its natural environment and unique Maori culture. Its ability to fulfil its product promise of a "100% Pure" experience should result in positive word-of-mouth, repeat visitation and thus, positive economic benefits. But what is the future? The New Zealand Tourism Framework (<http://tourism2025.org.nz/>) sets out an ambitious agenda to grow the economic value of

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tourism to \$NZ 21 billion by 2025 at a growth rate of 6 per cent per annum (Wallace and Riley, 2014). However, the tourism framework is a neoliberal document shaped by business and is void of the words such as sustainability and the environment (Yeoman, 2015). So, is there an alternative?

This research was commissioned by the McGuinness Institute (www.mcguinnessinstitute.org), a Wellington based non-partisan think tank which conducts future studies and contributes to strategic foresight. Through evidence based research and policy analysis, it aims to inform tourism policy by providing alternative pathways to the New Zealand Tourism Framework. Drawing upon earlier research published by the Institute (McGuinness, 2011) about New Zealand's environmental and sustainable futures, questions were raised about the country's environmental credentials. In particular, Connell *et al.* (2009), Yeoman *et al.* (2014) and Howe (2012) noted:

- Increased pollution in lakes and rivers, with 43 per cent of monitored lakes in New Zealand now classed as polluted. An estimated 18,000-34,000 people annually catch waterborne diseases.
- More than 60 per cent of native freshwater fish, as well as the only freshwater crayfish and mussel species, are now threatened with extinction.
- Seven of New Zealand's ten official "indicator species" for measuring biodiversity status are now threatened. The Kokako, for example, has suffered a 90 per cent contraction in its range since the 1970s.
- Iconic species such as Maui's dolphins and New Zealand sea lions are listed as "nationally critical". Only an estimated 55 Maui's over the age of one year remain and New Zealand sea lion pup numbers have halved over the past 12 years at their main breeding area in the Auckland Islands.
- Almost two-third of New Zealand's seabird species are listed as threatened with extinction. The main threats to seabirds are predation by introduced mammals, fishing methods and human disturbance.
- New Zealand's gross emissions have risen by 20 per cent since 1992, due to increased pollution from energy, transport, agriculture and industry sectors. Even with its Emissions Trading Scheme, emissions are projected to continue to rise.

From a tourism perspective, 100% Pure New Zealand has been acknowledged world-wide to be one of the most successful international tourism brands and branding campaigns, and is even considered to have influenced other countries' national branding strategies. Over time, the 100% Pure New Zealand imagery has been both transformed and contested. The "pure" image of a green and clean New Zealand has been internalised not only by international tourists but also by domestic residents. Tourism in New Zealand is a competitive industry, been ranked 12th by the Travel and Tourism Competitive Index in 2013 (Blanke and Chiesa, 2014) for overall performance. This includes a ranking of 22nd for environmental sustainability out of 140 countries. However there are issues about New Zealand's environmental sustainable performance in relation to threatened species (ranked 139/140).

The term "sustainability" has a range of different definitions, often related to aspects of resource activity and community-based management (Saarinen, 2006). The literature on sustainability and tourism is well documented in academic literature (Buckley, 2012) and its history as a tourism topic stretches back forty years (Young, 1973; Liu, 2003). As such sustainable tourism as an academic field is a mature topic, with its own research journals such as the *Journal of Sustainable Tourism* and the *Journal of EcoTourism*.

From a tourism planning perspective, Page and Thorn (1997) refer to it as the "concern for the long-term future of resources, the effects of economic development on the environment, and its ability to meet present and future needs" (p. 60). This means that in order to achieve sustainability now and in the future, three elements – the economy, the environment and the socio-cultural community – needs to be at equilibrium. Indeed Yeoman *et al.* (2014) suggest that New Zealand could be an Eco Paradise or utopian place. However, in order to achieve

this desired state sacrifices would have to be made which involve changes in behaviour and new policy directions. Such a proposition fundamentally follows an environmental prisoner's dilemma approach (Clemons and Schimmelbusch, 2007) which highlights the circumstances and the actions which stakeholders have taken to address the issues of the economy, environment and community. For New Zealand, sustainability and ecotourism have always had a historical context as landscapes and the environment have been a draw card for tourists, whether it was the Pink and White Terraces or Southern Alps (McClure, 2004).

In order to address these issues and find an alternative to the present policy document (2025 Tourism Framework) this paper addresses the question "what is a sustainable future for New Zealand's tourism by 2050?" By using a scenario planning approach, four scenarios are constructed illustrating different sustainable futures for New Zealand's tourism industry.

Research methodology

Overview

A "scenario planning" approach has been used as the methodology for this research. Yeoman *et al.* (2011, p. 509) describe scenario planning as a "tool for ordering one's perception about alternative future environments". Unlike traditional research methodologies, scenario planning is more inclined towards action-based research; it acknowledges the complexity of the question and accepts the diversity of perceptions on a topic. Scenario planning provokes a "high turbulence within the participating group" (Heijden *et al.*, 2002, p. 188) where traditional thinking is challenged and creativity is infused. A key element of the scenario planning methodology is to speak to a diverse range of key people and attempt to understand the topic through their opinions, perceptions and beliefs. For this research, a list of ten "Remarkable People" (Table I) from diverse backgrounds were interviewed to explore their perceptions on the drivers that will impact and shape the sustainable future of New Zealand's tourism industry by 2050. These drivers were then consolidated into nine key drivers as the basis for the construction of four scenarios. In doing so, it created an understanding between the cause-and-effect relationships between the apparently unrelated drivers from these key people/stakeholders. Such action-based research "frees thinking and promotes research" (Heijden *et al.*, 2002, p. 189), allowing for creativity to be infused into the design of future scenarios. An overview of the research schedule is shown in Figure 1.

Research questions

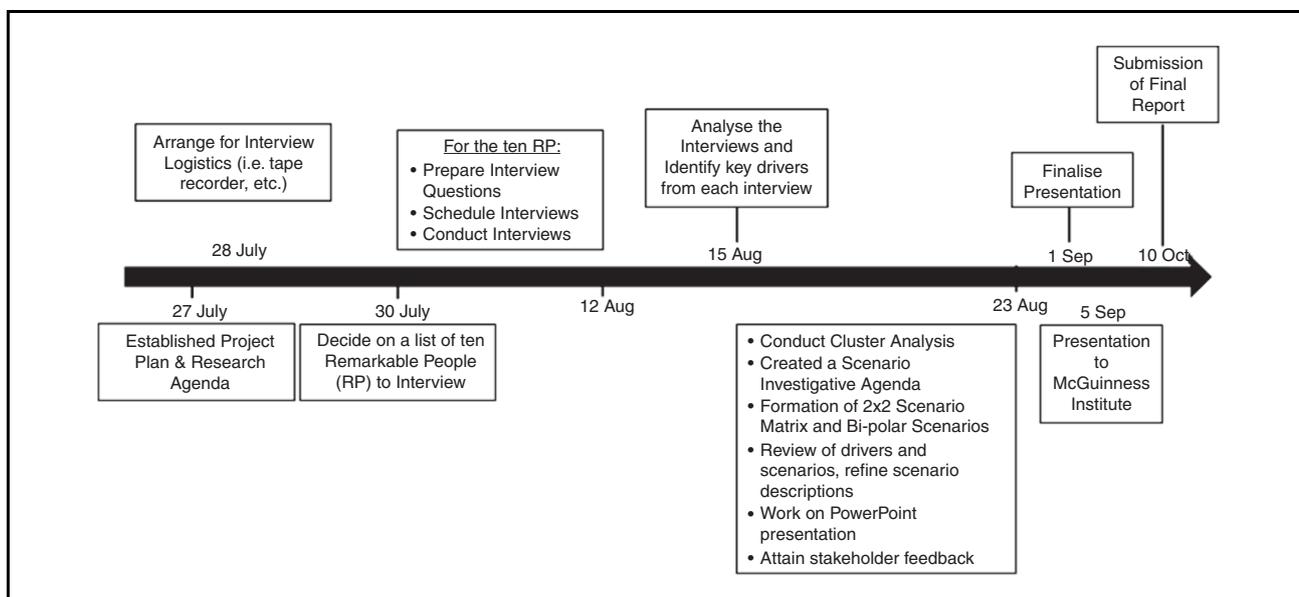
The team established a research agenda and a list of the following objectives where agreed with the McGuinness Institute as a guide for the research:

- to develop an understanding on the key themes, concepts and issues relating to the sustainable future of New Zealand's tourism industry by 2050 through interviews with various specialists and generalists;

Table I Remarkable expert interviews

<i>Remarkable person</i>	<i>Area of expertise</i>	<i>Position</i>
1	Tourism futures	Academic
2	Environment	Academic
3	Economist	Academic
4	Tourism policy	Academic
5	Futures	Futurist
6	Destination strategy	Chief Executive
7	Designer	Academic Practitioner
8	Environmental legislation	Public Servant
9	Energy exploration	Managing Director
10	Consumer behaviour	Academic

Figure 1 Research schedule



- to develop scenarios portraying New Zealand's sustainable tourism industry by 2050; and
- to identify the significant questions that will need to be addressed in order to shape the future.

A list of ten "remarkable people" or experts from a range of fields were identified and qualitative interviews were conducted with each of them for approximately one hour. Each interview was summarised and key concepts were identified. A cluster analysis followed, grouping similar key concepts together to establish a total of nine key drivers that is deemed to have an impact on the sustainable future for New Zealand's tourism. These drivers were reviewed once to include any additional drivers the team felt was important but not mentioned in any of the interviews.

Based on the identified drivers, a scenario investigative agenda was created, listing the bi-polar outcomes of two selected drivers. A 2 × 2 Scenario Matrix was then formed and descriptors were made based on the cause-and-effect relationship between both drivers. This resulted in a total of four different scenarios which were then reviewed and refined. The final stage of the research required feedback from stakeholders (i.e. McGuinness Institute), which saw another round of refinement of the project findings.

Remarkable people

A remarkable person is someone who can contribute new ideas and challenge the thinking of the scenario team. This person is creative and a challenging thinker in their field (Heijden *et al.*, 2002). The selected ten remarkable persons are both generalists and specialists' in their field which provides a diverse range of insights on what a sustainable future for New Zealand is. Those interview included are highlighted in Table I.

The four key questions used to formulate ideas about a sustainable future were:

1. If you fell asleep today and woke up 2050, how would you describe New Zealand's sustainable tourism proposition?
2. What are the key drivers and trends that will influence of shape New Zealand sustainable future?
3. What are the future risks?
4. What are the key decisions New Zealand and tourism has to take in order to achieve a sustainable future?

These questions were starter questions; answers were explored, laddered and probed in order to identify drivers of change, visions, risks and key decisions (Heijden *et al.*, 2002).

Drivers of change

From the remarkable persons' interviews and the literature, nine drivers of change were identified. The process of identification followed the principles of systems clustering as described by Heijden *et al.* (2002) thus taking into consideration the key concepts and statements from the interviews and deriving general consensus amongst the team before proceeding to the next stage. The following nine drivers identified:

- Driver 1: Technological Advancement: Consumer Immersion.
- Driver 2: Fiscal Deficit: How Does New Zealand Pay of its Future?
- Driver 3: Shifts in the World Economic Order: The New Consumer.
- Driver 4: New Zealand Position: Mobility, Distance and Isolation.
- Driver 5: The Future of Food: Population Pressures.
- Driver 6: Environment: Scarcity of Resources.
- Driver 7: Cultural Identity: Mobility, Immigration, Nationhood and Maoridom.
- Driver 8: Demography: Ageing Populations.
- Driver 9: New Zealand's Response to Sustainability: Best Practice.

Scenarios for a sustainable tourism future

Scenario matrix explained

The key drivers as described above were next ranked in accordance to their certainties and uncertainties, as well as their level of importance for a sustainable future for tourism in New Zealand (Figure 2). The purpose of matrix is to provide an overview of identified key drivers and their level of certainty/importance when thinking of the research question. Essentially, each driver was ranked in against how certain and important it may be in influencing the sustainable future of New Zealand's tourism by 2050.

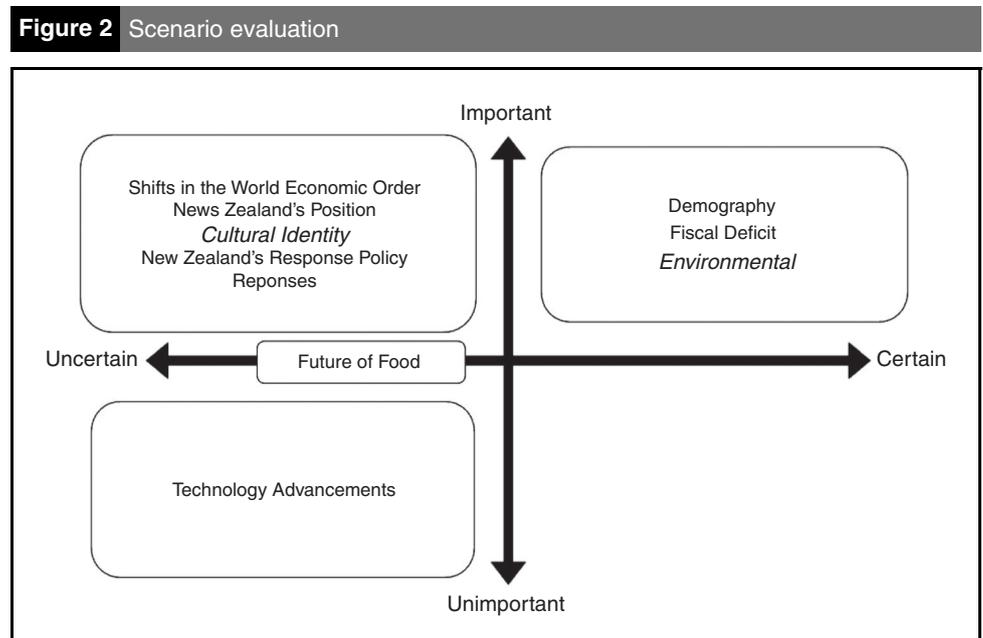


Figure 2 illustrates the two drivers selected after several iterations for the scenario construction where environmental and cultural identity. The research team and stakeholders felt these drivers represented a plausible construction around which scenarios could be portrayed as different and purposeful as both drivers had direct implications for ensuring the sustainability of New Zealand's tourism by 2050. It is important to acknowledge both natural and human factors when managing tourism. A core product of New Zealand's tourism and branding relies on its' friendly people and scenic landscape.

Scenarios for the New Zealand's sustainable future

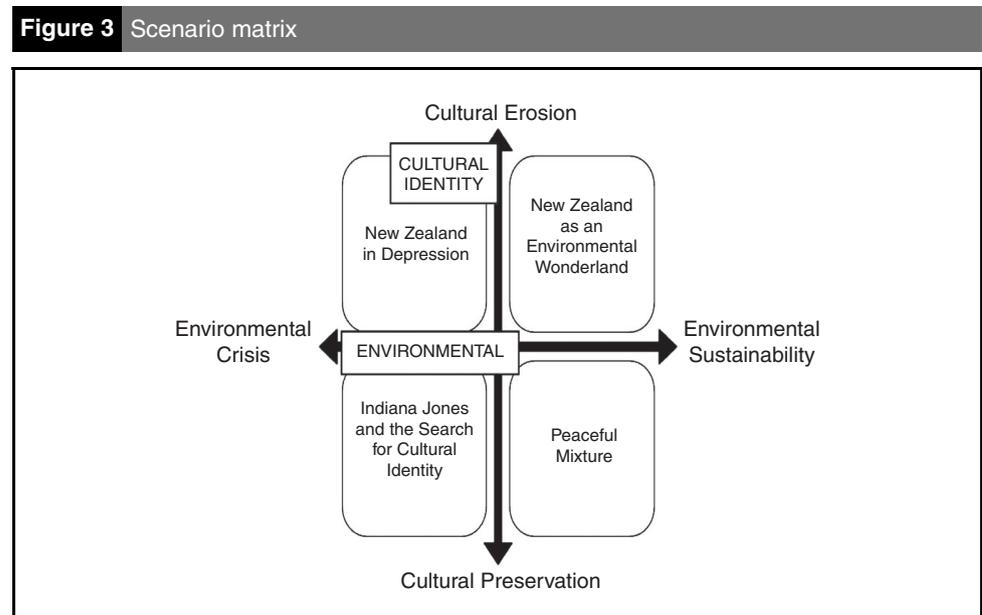
Figure 3, The Scenario Matrix depicts the two polar outcomes of the selected drivers Cultural Identity and Environmental. The vertical axis depicts a situation of overflow of migrants in New Zealand and how it could potentially impact on New Zealand cultural identity, thus causing dilution. The horizontal axis takes into consideration two extremes of the environment within tourism. At one end, New Zealand's environment would be placed under tremendous pressure as it would be unable to cope with climate change, resulting in a situation of resource scarcity. On the other hand, there would be a more positive scenario where New Zealand would be able to cope with the current environmental issues, resulting in environmental sustainability which reflects an abundance of resources. In the cause-and-effect relationship between both drivers, four different scenarios are created. The following four scenarios were created through exploring the interaction between both drivers and the potential outcomes of it:

1. New Zealand as an Environmental Wonderland.
2. Peaceful Mixture.
3. Indiana Jones and the Search for Cultural Identity.
4. New Zealand in Depression.

In the next section, a scenario is told as a fictional account illustrating New Zealand tourism in 2050.

Scenario 1: Environmental Wonderland

In this scenario, New Zealand will depend on its environmental sustainable management to keep its international reputation and green image; it is a utopian scenario. An ambitious target on



emission reduction will not only reinforce New Zealand's clean and green environmental reputation but also attract more international tourists and migrants alike:

Rajesh Koothrappali is an Indian married man with two children. He has a degree in Computer Science and works for a multinational company in Bangalore. His children are two boys who are full of energy, practice sports regularly and love interactive activities. Since the children are on school vacation, Rajesh decides to travel with his family to New Zealand to visit his sister Rajani and enjoy the country's internationally renowned landscapes and adventure activities. Upon arrival in New Zealand they are very pleased to make friends with a Chinese couple that have one child who plays with their children. Both families take some daily activities together and have dinner in local ethnic restaurants. The families engage in a number of activities including; jet boating, high swing, mountain biking, glaciers hiking and watching the dolphins.

Rajesh and his wife are very impressed with how New Zealand's nature and landscapes are conserved. But what catches most of their attention is the way the nation manages the environment. All land transport, from cars to buses is electric. New Zealand is the only country according to the United National Energy Authority to pass a mark of 50% in the reduction on its greenhouse gases emissions in the past 40 years. The Koothrappali family rank the trip as the best of their lives not only for the great time spent on outdoor activities but also because of how well New Zealand manages its environment. So, they are sad to get the plane back home but the family has already decided on the amount of trees they will have to plant when arriving in back in India.

Scenario 2: Indiana Jones and the Search for Cultural Identity

In this scenario, environmental degradation is prominent due to rapid economic and population growth and unregulated air travel. Hence, visitors to New Zealand rely on its strong cultural identity and as such the country has heavily invested in the preservation of its indigenous culture:

Chin Wei is a single man who is middle-class from the city of Guangzhou in the south of China. He wants to be more fluent in English and is also looking for an authentic experience. When he was a teenager, he started watching very old movies from more than forty years ago to connect with different cultures. He found out about Maori and Samoan culture through the films such as "Once Were Warriors" and "The Tattooist". When he was a child, he travelled to New Zealand on holiday with his parents because they wanted to visit a friend, see the natural landscapes and do some wildlife watching of seals, dolphins and whales. All he could remember about New Zealand was the environment in harmony with the astonishing landscapes and natural habitat. His decision to vacation in again New Zealand comes from a TV advertisement commissioned by Tourism New Zealand promoting the Maori culture as the main experience; in the ads there are some aspects of a multi-cultural society showing that he would be able to keep eating the food from his home country because there are a lot of restaurants specializing in Asian cuisine. After arriving at the destination and spending three days, he realises that the natural beauties are not the same. The rivers and sea are polluted, there is a lot of deforestation, and there are no whales to be observed anymore. He spends thirty minutes in a queue to see one of the last kiwi birds, a very endangered species. Since Chin Wei has got very sad about the environmental degradation of the country, he decides to immerse himself for one day at his hotel in a virtual reality experience (which was designed by Asian residents of New Zealand) where he can see the landscapes and touch the wildlife just like it was before – clean, green and full of animals.

Scenario 3: Peaceful Mixture

This is the "best case scenario" for New Zealand, where the country will manage to cope with external environment and migration issues to become a cohesive society and a leader in environmental management. A key theme that runs through the scenario story is the balance between the dimensions of sustainability; technologies and government regulations can be used to cope with environmental issues. Changing consumer attitudes and educated migrants contribute in shaping a sustainable society:

Chi Ke-Chong is a 35 year old architect from Taiwan who specialises in sustainable building designs. Having grown up in a period plagued by climate change and environmental crisis, Ke-Chong has seen rapid environmental degradation through urbanisation and development. New Zealand has always been a country of awe to Ke-Chong; he has consistently kept up on the country's policies and development plans in environmental management. He has saved up on his personal carbon credits

for the last 5 years in order to travel to New Zealand to experience a country free of environmental issues. Being environmentally conscious, Ke-Chong had ensured that he has sufficient carbon credits to offset his emissions throughout his trip in New Zealand; he has also willingly paid NZD\$250,000 more to travel in Boeing's latest supersonic aircraft because it produced the least amount of environmental impacts.

Upon arriving in Wellington, New Zealand, Ke-Chong proceeds to the visitors' centre where he is greeted in fluent Maori by a friendly Chinese lady who shows her Manaakitanga (hospitality). He is interested in signing up for a city trail which features some of the sustainable building designs in the city. This walk is popular amongst tourists, who like Ke-Chong, come to New Zealand to experience its way of sustainable living. For the remainder of his trip, he rents an electric, self-drive car and heads towards the rural regions. Ke-Chong has booked a farm stay in one of the rural regions, where he works beside a local farmer, feels part of the extended family (whanau) and learns how the use of green technologies can help to reduce carbon emissions from agriculture. His holiday also involves a trip-planting day, where he is led by a local team of conservationists from different nationalities including China, India, Indonesia and Pacific Islanders in planting and learning about New Zealand's native plants. For Ke-Chong, getting away from the urban areas is a major highlight of his trip as he feels that being able to return to basics and getting close to nature is increasingly rare in today's global urban environment. Before leaving the country, Ke-Chong stops by Rotorua to learn more about New Zealand's indigenous culture; it is something he has been looking forward to since his arrival to New Zealand. He learns phrases of the Maori language, and how to weave from a local Maori at Te Puia. Before leaving, he buys a locally handcrafted greenstone as a souvenir and donates \$10,000 towards a local culture-conservation programme.

Scenario 4: New Zealand in Depression

This scenario depicts the "worst case scenario" for New Zealand, where the country faces challenges in the management of environmental issues and global migration. Current events such as global climate change, talent/brain drain and New Zealand's dependence on agriculture as a key export industry makes it vulnerable as a country. This is a scenario which New Zealand should actively seek to manage and avoid:

Fatimah Anwar is a 36 year old sales director working in a multi-national information technology company in Malaysia. For years, she has heard the many stories about New Zealand as a wonderful destination from her colleagues, who are mostly New Zealanders who migrated out in search of better opportunities abroad. Fatimah loves travelling and has travelled extensively within Malaysia. However, the global environmental crisis has made international leisure trips rare in Malaysia as they are deemed to be environmentally unethical and expensive. Fatimah is travelling to New Zealand for a Tech Symposium where she will be using the company's pre-allocated carbon credits by the Malaysian government – a measure used to control carbon emissions – and will be taking a 5 h flight on Boeing's latest supersonic aircraft. New Zealand is increasingly being recognised as a hub for information technology specialists in the Asia Pacific region and Fatimah is excited about her trip to New Zealand.

Fatimah's arrival into Christchurch International Airport is the exact opposite from what her colleagues had mentioned: cluttered urban landscapes stretch across the horizon, vehicles and industrial activities replace what she thought was going to be green pastures dotted with livestock. Pollution clouds the skies and deforestation is evident from the air. As Fatimah exits the airport, she notices a multi-cultural ethnic welcome board rather than the traditional Maori welcome sign as mentioned by her colleagues. At the Tech Symposium Fatimah meets many information technology specialists. Most of them have migrated to New Zealand for more than 5 years in search of better jobs, but they do not seem assimilated as they spoke a variety of languages and congregate in similar ethnic clusters.

Fatimah is hosted on a 2-day city tour by the local company, exploring the city's various urban attractions. The hosting guide tells Fatimah that because of global environmental crisis, the agriculture sector cannot sustain the continual growth of New Zealand's economy. As such, the country had turned to developing urban-based service sectors such as information technology, banking and finance as key economic sectors. Although these developments aggravate New Zealand's environment, they have ultimately sustained New Zealand's economy. At the end of her trip, Fatimah greatly values the networking session with her business counterparts, but is gravely disappointed with the tours. She decided that it will not worth travelling to New Zealand in the future.

What does this all mean for sustainability in New Zealand?

Significant questions

In order to consider the significance of the scenarios and drivers from a futures perspective, a number of significant questions are propositioned and answers pondered in this section. These questions are based on what the authors consider to be the key issues pertaining to the future of sustainability and are derived from viewing the scenarios as answers. Thus the authors consider what are the questions that the scenarios are asking. Questions were then ranked for importance and impact by the research team (Robertson and Yeoman, 2014).

The questions derived were:

- How will key events shape New Zealand's sustainable future?
- What are the policy measures that New Zealand needs to take in order to achieve a sustainable future by 2050?
- Will tourism still be important to New Zealand in 2050?
- What is an authentic New Zealand experience in 2050?

The answers which follow are illustrated by drawing on evidence from the scenarios.

How will key events shape New Zealand's sustainable future

Climate change, global warming and peak oil prices are key environmental issues that will have a definite impact on the future of New Zealand's tourism. They have multiple implications as they not only affect the ability of tourists to travel to New Zealand, but also impact on the core rural and landscape product offering of tourism in New Zealand. Transport is vital for New Zealand as it is a long-haul destination; the dependence of transport on oil will ultimately affect tourists' ability to travel to New Zealand. Indeed tourism is a very oil-intensive industry (Becken, 2010). Overall the deterioration of these environmental issues can lead to harsher international environmental regulations, possibly curtailing international tourists and discouraging domestic travel. The key difference in outcomes between positive scenarios (Peaceful Mixture and New Zealand as an Environmental Wonderland) and negative scenarios (New Zealand in Depression and Indiana Jones and the Search for Cultural Identity) is a result of New Zealand's response towards the management of the identified environmental issues. If these key issues are left unmanaged, New Zealand's tourism industry will not be sustainable in the long run and tourism may no longer be a key economic sector to the country or a new tourism offering will need to be developed. If New Zealand decides to effectively manage these issues, environment sustainability can ensure the continuity of tourism albeit in a much different form. As illustrated in the Indiana Jones and the Search for Cultural Identity, tourists to New Zealand will not only be interested in nature-based activities, but also in learning about environmental management.

What are the policy measures that New Zealand needs to take in order to achieve a sustainable future by 2050?

In all the scenarios, the implementation of environment policies and regulations will continue to shape New Zealand's response towards a sustainable tourism model. Bowen and Clarke (2009) describe how tourism is both a "victim" and a "vector" in sustainability; that tourism is affected by climate change yet at the same time contributes to a global environmental crisis. In order to mitigate Peaceful Mixture and New Zealand in Depression, personal carbon credits are used to regulate consumers' travel behaviour.

In addition, the use of green technologies for other sectors such as agriculture – as illustrated in New Zealand as an Environmental Wonderland – will contribute to building New Zealand's international reputation in environmental management. In a report to the Ministry for the Environment, it notes that domestic carbon prices are "necessary" in order to sustain New Zealand's international reputation (Ministry for the Environment, 2011). However, in order to be recognised as a world leader in environmental management, policies will need to take into consideration other aspects of the economy. Education and immigration policies play a vital role in ensuring the effectiveness in assimilation of new migrants to New Zealand. Migrants are

inevitable with Statistics New Zealand forecasting Asian and Pacific migrants will account for nearly 26 per cent of the country's population by 2026 (Statistics New Zealand, 2007). The key issue for New Zealand is to manage not just the quantity, but quality of migrants to New Zealand. In the scenario Peaceful Mixture, Ke-Chong was served by a Chinese lady who greeted him in fluent Maori. Such service delivery can impact on the way tourists perceive the "authenticity" of their trip. Essentially, migrants who are graduates will presumably allow for better communication and tolerance to other cultures; their globalised perspective and education levels will allow them to easily assimilate into New Zealand's society, thus allowing them to retain both their own ethnic culture while embracing New Zealand's unique culture.

Will tourism still be important to New Zealand in 2050?

Tourism in New Zealand will still exist in 2050. However, what will be different is the nature of tourism undertaken. In New Zealand in Depression, Fatimah's main purpose in travelling to New Zealand was business oriented whilst Ke-Chong's trip to New Zealand in Peaceful Mixture was distinctively an outbound leisure trip. The aggravation of the global environmental crisis in New Zealand means that tourism no longer has a competitive advantage to other destinations in the world. The decision to shift its economic focus from tourism as a key industry to other more service- and urban-based sectors such as information technology will ultimately result in tourism not being a key focus in New Zealand's economic structure. This can be seen through Fatimah's New Zealand in Depression situation where nature-based activities were not available and staff were not trained to provide a satisfactory service delivery simply because it was not important. Furthermore the rapid rate of urbanisation and pollution in New Zealand meant the demise of its agriculture and tourism sectors, both of which could not have been supported with the state of the environment. However on the other hand, Ke-Chong's (Peaceful Mixture) experience in New Zealand was more tourism oriented, with farm stays, city trails, eco-tourism and cultural activities. Unlike the former scenario, sustainability will be a key competitive advantage for New Zealand by 2050. In *Environmental Wonderland*, the scenario is based on a tourist utopia (Yeoman *et al.*, 2014) where tourists values are matched with sustainable destination management and a regulatory approach, thus positioning the destination as a pristine place to visit.

What is an authentic New Zealand experience in 2050?

A key element in sustainable tourism is the protection of a destinations' indigenous culture as it is fundamental in the delivery of an authentic tourism experience. Sustainable tourism planning should also take into consideration how development can provide incentives to the indigenous people – an ethical consideration vital in achieving sustainability. Such ethical tourism development is said to "provide incentives to support indigenous people's traditional customs and values; protect and respect sacred sites; and, enhance the legitimacy of traditional knowledge (McCool and Moisey, 2008, p. 262). In this context, New Zealand's indigenous Maori culture will continue to play a vital role in the tourist experience in 2050. The use of Maori greeting at the visitor's centre, as well as Ke-Chong's (Peaceful Mixture) motivation to participate hands-on in a traditional Maori arts and crafts activity such as weaving illustrates the importance of Maori in creating what is an "authentic" experience to the 2050 visitor. Creating authenticity is important in order to achieve economic and cultural sustainability, as it is interrelated with elements of satisfaction and repeat visits (Chhabra *et al.*, 2003). Globalisation and the commoditisation of communities and destinations are key drivers which increase the demand for authentic experiences; tourists will want to escape from over-developed urban environments and seek simple, back to basics (i.e. rural-based activities) experiences. Reisinger and Steiner (2006) argue that the concept of authenticity should be defined and controlled by tourists rather than managed by destinations. Authenticity in this context can thus be interpreted in a variety of ways depending on the tourist. For New Zealand, its international reputation in environmental management – although not part of its historic culture and identity – can redefine the authenticity of a tourist experience in 2050. Ke-Chong (Peaceful Mixture) had perceived his trip authentic because he managed to learn about the destinations' "best practice" in achieving sustainability, an experience he feels is unique to New Zealand. However, in a post-modern society cultural identity is diluted and lost in a technology filled world as portrayed in Indiana Jones and the Search for Cultural

Identity. The tourist gaze portrayed in the scenario is not a reality, thus a reminder that the present tourism brand image of 100% Pure New Zealand must be a presentation of reality and not a diluted, failing environmentalism.

Concluding thoughts

Sustainability is recognised as an important element in the development of New Zealand's tourism. The chosen drivers reflect the importance of New Zealand's pristine landscape and unique Maori culture as a core tourism product. As Blanke and Chiesa (2014, p. 46) state that:

Policy-makers, especially those in developing tourism destinations, should prioritize long-term sustainability to safeguard their natural and cultural assets because "green consumerism" has become a significant buying power in developed markets. Key emerging tourist groups, including the well-travelled retiring baby boomers, are demanding green travel offerings instead of traditional sun-and-beach vacations. A clear focus on greening the supply side of tourism as well as environmental conservation efforts on a national level will generate clear advantages over competing destinations. Policy-makers need to be able to consistently match long-term tourism master planning, short-term interests of multiple stakeholders, and external influences such as macroeconomic events or tourist demand changes to make tourism sustainable economically and environmentally.

For New Zealand to succeed (and it is succeeding) the country needs to build upon its approach to the environment in order to manage the future which is economically and ecologically sound. Ecotourism in New Zealand is the core product and a responsible tourism approach that is necessary. What is disappointing is that the present approach to tourism growth is built upon a neoliberal agenda in which the words of sustainability and ecotourism are absent (Yeoman, 2015; Wallace and Riley, 2014). But sustainability is more than just the environment; it is community, culture and economic context as well. The four scenarios presented here highlight these aspects drawing the role of community and cultural identity as represented through the indigenous Maori population.

Therefore considering all four scenarios, a sustainable tourism strategy should be founded on the following:

- The creation of a vision in which New Zealand's tourism industry is first and everlasting. First in the terms of performance and quality built from community, culture, and with the economy and environment in harmony thus ensuring that New Zealand is a first choice destination for the many like-minded tourists. The creation of such a future should enshrine the notion of everlasting in legislation thereby acting as an environmental guardian.
- New Zealand's values should draw upon the Maori virtues of *Manaakitawnga* which would result in hospitality and welcome being at the heart of the visitor economy.
- Visitors should be treated as New Zealanders, through providing an experience of *Whanau* as an extended family.
- New Zealand should be used as a laboratory of ecotourism where the practice of sustainability is tested and showcased for the rest of the world.
- 100% Pure New Zealand should be a brand based upon values and behaviours shaped by sustainable practices.
- 100% Pure New Zealand should be underpinned with consistent product delivery and experiences.
- The role of government should be to ensure a sustainable industry through capacity building.

Research limitations: a critical reflection

Heijden *et al.* (2002) approach to scenario planning was used in this research study through the application of storylines and drivers to portray a particular aspect of life in four possible

future worlds through key drivers of change and extrapolation through different narratives in order to bring about an output for discussion. This approach uses a social constructivist approach in the interpretation of the outside world (Moriarty, 2012a) therefore the quality of the output depends on the engagement with stakeholders, validity of output and the scenarios as a process to action change. As this project was commissioned not to change minds but rather to educate and influence, the output cannot be measured against a cause and effect approach to decision making where these scenarios and the researchers can say "this the change that this project brought about". This project came about as to counter balance the New Zealand Tourism Framework 2025 (tourism2025.org.nz) project which delivers a future based on a business approach and a neoliberalism framework which is void of a sustainability and a Maori dimension. So, this paper therefore should be viewed as a thought leadership discussion document rather than the basis of a strategic plan.

One of the disadvantages of a narrative approach to scenario planning is that the scenario writer is taking a precise view of the world as if that scenario will happen. Narratives are stories which Moriarty (2012a) points out are fictional and stakeholders sometimes find difficulty in engaging with as they are often portrayed as science fiction (unreal) or visionary (will never happen) (Bergman *et al.*, 2010) thus they have no utility value. Moriarty (2012a, b) is critical of this approach stating it depends on intuition rather than science and centres on the scenario planner's perspective thus bringing a subjective rather than objective view of the future. These arguments dismiss a driver-based approach as being too narrow and only capturing a top line view of the future; drivers are limited in range, are praxis in nature and not based on theory. Yeoman (2012) argues the opposite as a praxis approach is grounded in practise thus demonstrating utility and accessibility. In addition, scenarios using a matrix approach demonstrate a focus on certain aspects of the future in alternative formats. As Heijden *et al.* (2002) has often stated the matrix approach is the Shell Oil way, it's simple, accessible and it works. Yeoman (2012) further argues that scenarios are a constructivist paradigm therefore based upon an interpretation and thus allow participants to negotiate their own interpretation of the future through a sense making process. Stories and narratives are a means to discuss and reflect rather than an absolute future. Yeoman (2012) is dismissive of Moriarty's (2012a) perspectives as they are based on a paradigm of science in which the future is not a formula but a process of negotiation and sense making. The future cannot be always based on casualty because of the degree of uncertainty but rather separation thinking (Sparrow, 1994). This is when we know phenomena may be related but we cannot explain how but they are in the same zone. The approach used by the authors, although is not perfect it is a proven process of engagement and actions.

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Further reading

Yeoman, I., Davies, J., Wheatley, J., Mars, M., Schanzel, H. and Butterfield, S. (2012), "Tourism2050: scenarios for New Zealand", available at: www.tourism2050.com (accessed 10 November 2014).

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