

**The Potentials of Maori Cultural
Tourism Products in Otepoti
Dunedin**

Research Report 2009

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The Potentials for Maori Cultural Tourism Products in Otepoti Dunedin

**Prepared for the Maori Advisory Group at the
University of Otago and the Economic
Development Unit of the Dunedin City Council**

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To the People of Dunedin-Otepoti

Ma whero, ma pango, ka oti te mahi

By black and red together it is done.

Red (whero) refers to the kokowai—a mixture of shark oil and red ochre — which was smeared on the body of the chief. The rank and file workers (plebians) looked black by comparison. This saying means that only by the united labour of chiefs and commoners can the task be accomplished. It was a powerful appeal in calling for volunteers. The saying has fallen out of use because chiefs are no longer smeared with red ochre and because, as a wit succinctly put it, 'We're all chiefs nowadays!'

All these sayings were used to eulogise and stimulate the energetic qualities of man and to extol the virtues of co-operative effort.

Te Ao Hou THE MAORI MAGAZINE [electronic resource]

Executive Summary

This study prepared for the Maori Advisory Group at the University of Otago and the Economic Development Unit of the Dunedin City Council found,

- there is substantial demand for Maori cultural tourism products in and around Dunedin Otepoti
- there are substantial numbers of businesses willing to supply product to meet it
- such products could be positioned within the current branding of Dunedin

The purpose of this research was twofold:

1. To establish the needs, barriers and opportunities for **Maori Cultural Tourism Products (MCTP)** in and around Otepoti Dunedin, including the current use of Maori culture in existing tourism services
2. To establish the demand from tourists for Maori culture in international tourism services by local businesses.

Demand side - Tourists:

A new Tourism Culture Contact Scale was developed and a sample of 247 tourists were surveyed

1. There is a strong latent demand for Maori tourism in Dunedin with more than 30% of the market visiting Dunedin interested in genuine cultural tourism services.
2. The market could be divided into the **Not-Interested Market (31%), the Potential Market (33%), The Interested Market (36%)**
3. The **average member of the Interested Market segment** is more likely to be European, between the age of 18 and 39, or between 50 and 59, more likely to be single than married, and travelling alone rather than with partner or family. Furthermore, males are significantly more interested in Maori culture than females and significantly more likely to be a member of the Interested Market
4. The highly Interested latent market to Dunedin is looking for genuine, close-up experiences. They are motivated by wanting challenges, to expand themselves and to learn and grow.
5. In contrast, the Potential Market is more interested in the lower end, low-personal-involvement encounters that allows observation without participation or personal interaction. Their motivation is rest and relaxation, fun and entertainment.
6. Whereas the highly interested Market can be interested in niche experiences in low numbers, the Potential Market enjoys more the safety of larger groups

7. The Interested Market resembles the Interactive Traveller (IT) but, in addition to their high level of interest in local culture, is also interested in Maori culture. While there are strong similarities between the two segments, the IT segmentation tools do not work for Maori Cultural tourists. This shortcoming of a national tool may have consequences for the success of and future local strategy targeting the Interested Market.

Supply Side – Existing Operations

Short telephone interviews were recorded with more than 300 tourism providers from all relevant sectors in direct contact with tourists, from Moeraki south via Dunedin to the northern Catlins and inland to Middlemarch.

8. Of the interviewees, 99% were managers and owner-operators of all accommodation providers and large samples of attraction, transport and hospitality providers, thus achieving a high level of reliable information.
9. The interviewed sample (n= 319) are Tourism Characteristic businesses of which 80% of the accommodation providers, 80 % of transport providers 35% of hospitality providers and 73% of attraction providers, derive more than 25% of their turnover from international tourists.
10. 27% of the sample stated that “involving Maori culture could be beneficial for my business with international tourists”.
11. **To the question, “On a scale of 1-5, 1 being the lowest and 5 being the strongest, how strong are your intentions to expand the use of Maori culture as an international tourist attraction?”**
 - a. 17% of the accommodation providers are seeking to expand their use
 - b. 20% of the transport providers from an already strong base
 - c. 18% of the hospitality providers of which a small group excels already in the promotion of Maori culture in their cuisine and services
 - d. 36% of attraction and activity providers, who all up, show the most consistent desire for expansion and express the highest need for mentoring

An in-depth literature review was conducted for background research and 11 In-depth interviews with existing and aspiring Maori Cultural Tourism Businesses were conducted and analysed.

12. The literature states that the most contentious issues in cultural tourism are,
 - a. The commoditisation of culture, i.e. the debasing effect of commercialisation and the subsequent loss of meaning and function
 - b. The need to establish mechanisms to keep cultural services authentic
 - c. The need to generate mechanisms that leave indigenous people in control of cultural goods
 - d. The effects of tourism demand on the issues of authenticity and control
13. In the eyes of the mana whenua, the potential for MCTP lies with,

- a. Landscape Interpretation
 - b. Nature-based ventures
 - c. Contemporary Māori Art
 - d. Māori cuisine
 - e. Boutique personalised tours
14. The role and use of tikanga/tikaka is paramount
15. Local areas and resources have been identified that would be suitable for high quality, ecologically sustainable tourism development
16. There are issues of legality and access to some of those resources that need addressing
17. A strong and inclusive steering committee needs to be formed with the help of local government,
- a. to develop mechanisms for training and mentoring
 - b. the dispersion of cultural knowledge and its appropriate use
18. In line with 17. and with Tourism Dunedin, Maori (tangata whenua) need to develop appropriate mechanisms
- a. to organise themselves for efficient and effective communication
 - b. to reach out into the wider tourism community to consolidate networking

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Introduction

Outline of the present research report

This report lays the groundwork for a discussion of the Potentials of Maori Cultural Tourism Products in and around Dunedin. It covers the first phase of an initially conceived four-stage program

1. Phase one: Market Research: interview supply and demand sides
2. Phase two: Benchmarking of Potential; Setting an Agenda
3. Phase three: Entrepreneurial Generation & Incubation
4. Phase four: Innovation & New Product Development

The market research conducted here covers both the supply side and the demand side and is based on an acknowledgement that

- a) New Zealand has been positioned as a country of natural beauty, not culture.
- b) The conscious focus on Maori Cultural Tourism in Aotearoa is only a relatively recent phenomenon, outside of the traditional 'hot-spots' (e.g. Rotorua)
- c) Dunedin is not the first in the country to consider Cultural Tourism
- d) Dunedin is not traditionally known for Maori Tourism Attractions
- e) The South Island has been consistently positioned as the 'adventure island' in contrast to the North Island which, by nature of numbers of tangata whenenua and the consequent physical presence of Maori Culture, has a positioning that highlights cultural attractions
- f) New Zealanders as a whole show little recognition of Maori Culture as a tourism attraction (which immediately puts the focus on international tourists)
- g) The willingness, pervasiveness and skill-basis to provide Maori Cultural Tourism in and around Otepoti is hardly known
- h) The views on using Maori Culture and the extent to which it is used as an attraction are not widely known nor have they been publicly canvassed (they won't be here either)
- i) The demand for Maori Cultural Tourism products in Dunedin is not known in terms of actual interest and willingness to experience it.
- j) Cultural tourism, while arguably around for a long time, is difficult to define
- k) It may provoke debates on 'who owns cultural objects?', as well as 'what is actually authentic culture?'

Not all of these issues can be covered in a small research project as the present one funded by the Dunedin City Council and generously supported by the University of Otago. It has been conducted in response to Treaty of Waitangi obligations, the New Zealand Tourism Strategy 2015, and, quite simply, the economic potential Maori Cultural Tourism in Dunedin might hold. While being a timely recognition of any potential Maori Cultural Tourism may hold for the region, it is, after all, because Dunedin has grown into a major tourism destination and many jobs rely on it.

Should this effort succeed and phase two to four be reached, Dunedin's Maori community will be able to tap into the Ministry of Tourism's 'Business Capability Mentoring Programme For Maori Cultural Tourism Business'.

As a sporting and university city Dunedin has, more recently, discovered its colonial but also its natural heritage. Given that some 10% of Dunedin's population are known to be Maori, it is timely to find out whether there is any Maori Cultural Tourism happening, how much, of what type, and what, if anything, could be done to encourage, nurture and manage it, both as a facilitator to experience taonga as well as an additional asset to the region's strengths and features.

This report is based on a serious discussion with the literature of what cultural tourism actually is and what can be learned from theory, the experiences, and analyses in New Zealand and overseas. The next section (1.2.) therefore creates a background by briefly outlining the ongoing discussion of what cultural tourism might be, and how this contributes to our purpose.

This is followed by three further sections, the analysis of the demand side (2.-4.), the presentations of findings on the supply side (3.-5.) including a report on in-depth interviews with Maori operators and aspiring entrepreneurs (6.). The final section (7.) contains a brief summary and recommendations.

1.2 Cultural Tourism

As long as there has been tourism, there has been culture because tourism in its many forms and expressions is itself an outcome or product of culture. Likewise, it has been said that culture is everything and, indeed, it is. It is the medium within which we organise our daily lives as much as we perceive our history or those of another culture. Culture is thus a system of tangible and intangible objects that give expression to what a culture is and how it operates. These objects are things like architecture, music, language but also values, views on life and community, on the present, the past and the future.

Culture is a living thing. It is a dynamic process and entity that constantly reinvents itself as its representatives go about their daily lives, interacting with their environment, shaping and creating things, and gaining meaning and satisfaction from it. Culture is entirely man-made; it is made up, and constitutes a system whereby we can create a sense of continuity. As a created thing, culture is all about values, and the knowledge about those values: it is about what and how we exchange things whether they are property, gifts, or love. And because we all know that culture is imperfect as it is created by man, as well as recreated and changed by man, it is very precious to us, because, even if it is imperfect, where would we be without our culture?

General human curiosity aside, this is one of the major reasons why many of us are interested in other cultures, and why many of us travel to see and experience how others 'do it', whatever that may be. Despite this genuine interest in 'the other', there are, of course, different levels to how this tourism comes about and how it is conducted and managed, but also what sorts of impacts it creates. These impacts are of a physical, social and economic nature and require careful management as the exposure of one culture to another may not necessarily result in just positive impacts.

Tourism is the movement of people from one place to another before they return home. In between the times that these journeys take place, tourists bring not only their money but also their own values and behaviours to the other culture. And when these tourists become numerous, their impact will also be felt physically and often help change the physical landscape as much as their values and behaviour may have social impacts on the local culture.

For these reasons, to create cultural tourism attractions is not only a financial gamble but also risky at the environmental and social levels. The study of cultural tourism has therefore tried to understand this phenomenon and come up with a number of useful classifications and insights.

Some scientists have estimated that at least 1/3 of any tourism experience involves cultural tourism activities. This can be as general as travelling to a different country and musing over the architecture and city-scapes, or as specific as studying the works of art in a local museum, or the different ways a people prepare their meals. While the former might be a typical example of mass-touristic activity, the latter is far more particular and, consequently, rarer. Similarly, it has been found, that indigenous tourism, i.e., travelling to cultural minorities, is far less common and more of what is called a 'niche' in marketing terms.

1.2.1 Indigenous Tourism

Indigenous tourism, and specifically Maori tourism, can be viewed from two perspectives. One appears more objective as it explains this tourism as visits to cultural centres, viewing arts and crafts, and cultural performances. The other perspective focuses on what is exchanged; cultural tourism is thus also an exchange of information on life styles, customs, beliefs, and values. The latter is less objectively measurable because it involves the actual motivation tourists have when interacting with the other culture.

The first perspective is often associated with mass-tourism. This form of tourism is characterised as much as by 'numbers' as by sameness: while tourists want to experience 'difference' it is only from a 'safe distance', that is, without actual involvement. Mass tourism seeks 'the other' as spectacle, as fun, and as entertainment, with little appreciation of what it is within itself and for itself. Providing for mass-tourism comes at a cost: it requires tourists to be housed, transported and fed as they desire it or are used to; hence the physical (and social) impact of mass tourism that comes with providing for 'strangers' including tolerating their different values. Indigenous tourism has therefore usually been considered as vulnerable as the minority status of the travelled people threatens the very thing that is 'for sale': their culture.

Conversely, there are also plenty of experiences where indigenous tourism works to the benefits of the native culture and the tourist. This is, however, more related to the second perspective, i.e. invited and negotiated exchange of each others' culture. Genuine indigenous tourism is 'soft', it is conscious of its potential impacts and appreciative of 'the other' for its own sake. It cherishes and seeks insights into the value system of the other and tries 'to fit in'.

1.2.2 Conclusions for the Present Research Project

The Maori cultural tourist is one who seeks to find out about Maori culture, its values, meanings, and ways of interacting. Such tourists appreciate not only the surface, i.e., Maori artefacts and rituals but also seek to grasp something of the intangible layers of Taha Maori, the Maori worldview. It is this more genuine type of cultural tourist that we need to find, identify and distinguish from those tourists who are only interested in the superficial encounter, and those whose interest is only sporadic or, attracted only by spectacles and self-directed pleasure seeking. Such a classification may help differentiate the various levels and types of interest (e.g., nature, sports, adventure tourism etc.) New Zealand has experienced over the years of actively promoting tourism, and to give sound guidance on how many of each type there are, whether these segments are large enough to turn them into viable markets, how they can be attracted, and what interests them.

The leading questions for this Study therefore are:

1. What is the level of interest in Taha Maori by international tourists to Dunedin?
 - How large is the potential market?
 - How large is the 'truly interested' market?

2. What is the current level of interest among tourism operators in Dunedin to include Otepoti Maori cultural heritage into their services?
 - What are they doing and how much?
 - What is the potential in the future?
 - What opportunities and barriers do they see?
3. What recommendations can be drawn from the findings?

2. Demand Side Analysis

2.1. Methodology

For this piece of research we used several methods, extensive literature reviews, phone interviews, and face-to-face interviews both for the initial development of the survey form as well as in the data gathering process. The interviews with operators were transcribed and analysed, together with the quantitative data from the surveys that were entered into a computer and analysed with a statistical software package (SPSS).

2.1.1. Tourists

The initial 12 interviews to develop the survey form were conducted at the Albatross Colony and in and around town at various attractions. The final data collection took place in the Octagon, in front of the information centre, at cooperating cafes and bars nearby and the Dunedin railway station over a period of 4 weeks.

The weather often cut the days of data gathering short and made it difficult to get to other venues such as Sandfly Bay or back to the Albatross Colony. This may have affected the representativeness of the sample. While the researchers are fairly confident to have struck a realistic number of the size of the market interested in Maori culture (around 36% of tourists coming to Dunedin), to verify the true market size it is recommended to continue surveying and to gather another 150 surveys at selected locations different to those above.

The survey was tested on 59 tourists and went through 3 versions. Particular care was taken to make the questions as transparent and easy to understand as possible.

Tourists were approached by one of two research assistants, informed of the purpose and origin of the survey, and invited to participate. The tourist would then typically hold a laminated survey form and give his or her answers to the assistants as the assistants read out the questions. This was done to generate complete surveys but also to assist in case tourists' English struggled with the meaning of some words.

3. Demand for Maori Cultural Tourism Product and Services

The demand for MCTP&S is calculated in terms of,

1. Motivations to for travelling to NZ and to experience Taha Maori
2. Interest and exposure sought to experience things Maori
3. How tourists learned about Maori in NZ as measures of involvement

Tourists travel for many reasons. These can be separated into two fundamentally different movements: 'to get away from it all' and to escape every-day-life, or to seek out new challenges. The first relates to recovering from stresses and strains and is mainly concerned with rebuilding the tourist's self. The other relates to people who are 'on top' of their environment and in flow but lack sufficient challenges that help them extend themselves. Psychologically, 'escape' and 'search' create different attitudes and behaviours when travelling. These will be considered here as well as they help explain how tourists confront 'the other', that is, the host culture of Maori New Zealanders.

Brief Sample Description

Here follows an only brief sample description to give the reader a feeling for the sample rather than a full insight, because our interest focuses on (potential) interest in Maori cultural tourism products. The latter focus will be developed first before the sample characteristics are then discussed with this focus in mind.

The sample is comprised of 247 foreign tourists to Dunedin from more than 20 countries. The age distribution is bi-modal and reflects the national trends of a bulge around the 20-30 year olds and the 50-60 year old age groups.

3.1. Importance of Maori Cultural Experiences

In addition to the rankings presented here, and in order to understand tourists' general motives, tourists were also asked about their emotional state before their holidays as well as their personal motivations (specific) to go on this holiday. The findings of the latter will inform the analysis throughout.

Visitors were asked to rank seven overall holiday attractions or motives for travel. Table 1 shows the ranked results.

Table 1 Ranks of Motives for coming to NZ

Natural beauty and landscapes	1
Viewing wildlife and nature	2
New Zealand cultural experience	3
Adventure and excitement	4
Rest and relaxation	5

Maori cultural experience	6
Seeing family and friends	7

Interestingly, while the ranks appear clear-cut in terms of their numbers, a statistical analysis of the ranks across the sample shows that there are clusters of motives going together.

Across the sample of tourists to Dunedin, *Viewing the natural landscape* takes either 1st, 2nd or 3rd position, while *Viewing Wildlife* takes 2nd, 3rd or 4th position most frequently. And while *New Zealand Cultural Experiences* take most frequently 2nd, 4th and 5th position, seeking *Maori Cultural Experiences* takes 4th, 5th and 6th position most frequently.

This means that, on the one hand, the desire for Maori cultural experiences is secondary after the desire for landscape, wildlife and general culture experiences; on the other, however, the former is in many cases directly followed by the desire for Maori culture experiences. Indeed, the shape and form these experiences are desired in is strongly influenced by whether tourists seek rest and relaxation or whether they seek adventure and excitement. In any case, as found elsewhere in nation-wide research, the experience of Maori culture is an extra or a bonus to the overall experience of Aotearoa New Zealand.

3.2 Interest in Maori culture

Interest in Maori culture was measured via 6 statements

Table 2 The Maori Tourism Culture Contact Scale (1= Not true at all to 5= Very true)

Chronbach Alpha = .93	Mean	Std. Deviation	N
I am interested in getting to know more Maori people	3.6	1.1	247
I would like to get to know more about Maori culture	3.7	1.1	247
I would like to get involved in Maori activities	3.3	1.2	247
I like to spend time on finding out about Maori Culture	3.3	1.1	247
The more I see, hear, and sense about Maori Culture, the more I want to experience it	3.5	.9	247
I am very keen on finding out about Maori culture	3.5	1.1	247
Summed to form the measure : Interest in Maori Culture	3.5	.9	247

Summing and dividing these items by their number into a variable called 'Interest in Maori Culture' gives a reliable indicator of the actual interest in the market. Overall,

31% answered between 1 and 3, and are thus not interested (**Not-Interested Market**)

33% answered between 3 and 4, showing some interest (**Potential Market**)

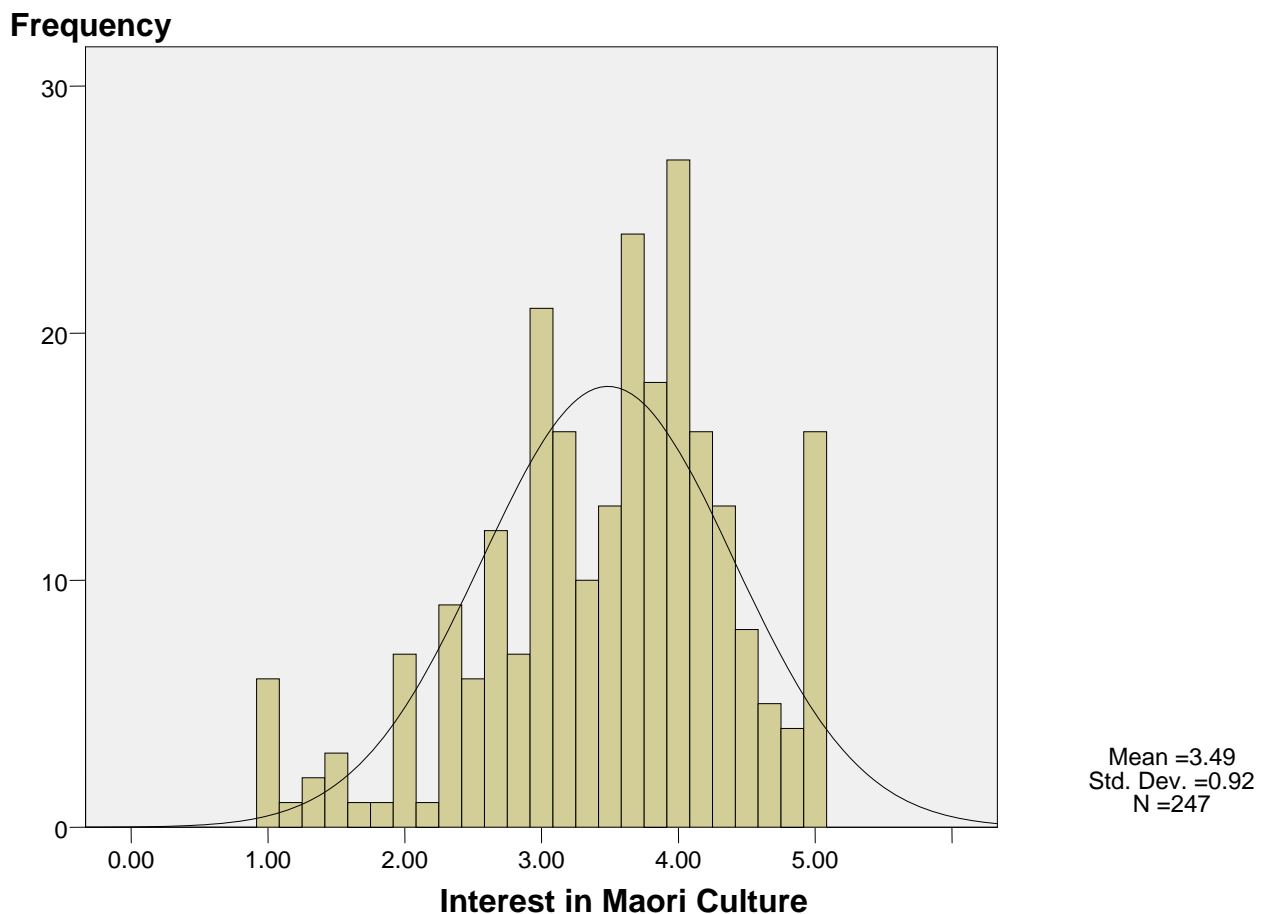
36 % answered 4 and 5 which is the size of the dedicated or **Interested Maori Culture Market**.

The distribution of this interest across the sample can be seen in Figure 1 on the next page. The next section introduces potential activities that tourists might wish to pursue. They are generic attractions that relate to how cultures develop their world-view, in other words, how they interact with their place.

Fundamentally, this research tests how well the 'Interest in Maori Culture' measurement tool helps explain the level of engagement tourists seek with Maori. One would expect that, if measured accurately, those who show little interest in Maori culture would also show little interest in engaging with Maori Cultural Tourism products and vice versa. If that holds true we can then seek out further differences between the interest groups proposed above, in order to better understand them. We would then be in a better position to design services and target them.

Figure 1 Interest in Maori Culture

(1= Not at all interested; 5= Very interested)



3.3 Interest in Maori Cultural Activities

The international tourists visiting Dunedin were asked in what sort of activities they would be interested in and how much (1= Not at all interested to 5= Very interested; see Table 3).

The interest in participating in any Maori cultural activities and services is strongly moderated by visitors’ general interest in local culture and interest in Maori culture specifically according to their rankings (see 3.1).

Indeed, once the Interest in Maori Culture factor has been weighted according to the ranking of motives, only those ‘strongly agreeing’ to an interest in local culture can be assumed interested in Maori cultural products. This group comprises about 36% of the market.

In case tourists already had experienced any of the listed activities they were then asked how interested they would be in more of the same activities.

Table 3 shows the activities and the average levels of interest together with the numbers of those who have not yet or have done that activity.

The levels of interest in all activities are remarkably high . It is notable, however, that the more passive activities, i.e., those that do not require the tourist to get involved but rather remain as an observer, are the highest scoring ones.

Conversely, once tourists have engaged in an experience already they are, on average, more interested in doing it again than those who have yet to try it. It demonstrates a simple but important fact. If tourists’ hold a vague interest which is met with satisfactory service, they often want more. This is the case with the tourists we meet in Dunedin. However, as they hold different levels of interest and expectations, they also need to be served differently.

Table 3 Interest in (Repeating) Activities across the whole Sample

(1= Not at all interested to 5= Very interested).

Activity	Average Interest	n	Average Interest to do it again/ more	n
Find out about native plants and animals	4.2	200	4.5	42
Learn about Maori stories and history	4.0	214	4.3	27
To learn about the early European settlers in Dunedin	3.9	213	4.0	29
To try a traditional Maori food such as a feast (Hangi)	3.9	204	4.2	39
Learn about the history of Dunedin	3.9	222	4.4	24
Learn the Maori interpretation of landscapes	3.8	220	4.4	22
To visit a Maori craft shop or gallery	3.6	207	4.1	34
Maori dance performances	3.5	167	3.9	74
Participate in traditional Maori	3.4	217	4.1	27

activities (e.g. food gathering and preparation)				
Cooking classes	2.9	244	5.0	2
Carving classes	2.9	236	4.1	9
Weaving Classes	2.5	339	4.0	6
Learning Te Reo	2.4	246	4.0	1

3.3.1. North Island Experience

Tourists were also asked whether they had already been to the North Island as that may affect their interest in experiencing more Maori culture in the South Island. Of the 247 respondents in the sample, 174 had already been to the North Island before coming to Dunedin while 73 had not.

Testing statistically whether there were any differences in interest for Maori cultural experiences on account of prior travel through the North Island revealed that despite different expectations, no differences amongst the respondents could be detected.

This is an encouraging result as it indicates that prior exposure does not generate disinterest or even boredom. Rather, and as the above Table 3 reveals, interest increases with exposure. Both those who travelled the North Island and those travelling the South Island but who had done the above activities do not differ in their ‘average interest to do it again’ (see Table 3) .

3.3.2. How did you learn about Maori in New Zealand?

The interviews leading to the creation of the survey showed a remarkable lack of depth in knowledge about Maori in New Zealand. While Maori culture is considered an interesting aspect of life in New Zealand and an attraction of sorts, it is surprising how little is actually known beyond a few stereotypical pieces of knowledge (Maori Battalion, All Blacks etc.).

Based on these interviews then, the researchers used a variety of quotes to get a better understanding how, if at all, tourists seek out information on Taha Maori.

The relatively low Chronbach alpha value of .625 calculated on the first 5 items (not italicised) indicates a just acceptable internal reliability of the measure (a good scale should have at least .8).

The low means reveal very low levels of information search prior and during their holiday stay. It signals that tourists’ actual level of knowledge and true interest in Taha Maori is sporadic, very superficial, and disconnected as a body of knowledge.

Table 4 Information Seeking Behaviour

1= Not true at all 5= Very true			
Chronbach Alpha= .625	Mean	Std. Deviation	N
I feel I have learned a lot about Maori so far	2.7	1.2	247
I am picking up a lot of knowledge during my travel through NZ	3.6	1.2	247

I am using my travel guide / book to gain a better insight	3.6	1.3	247
I find out a lot about Maori attractions at Tourist Information sources (brochures, accommodation, info centre)	3.3	1.3	247
I also learned about Maori while talking to other tourists	2.2	1.3	247
<i>I have been reading up and learning about Maori at home</i>	2.4	1.4	247
<i>Through family or friends who have visited New Zealand before</i>	2.3	1.4	247

Tourists' general attitude towards things Maori amounts to little more than a gaze at something that exists and is appreciated as an attraction. And while most tourists can locate and recognise similarities with other Pacific cultures, their knowledge is void of understanding of what being Maori is about, their culture and worldviews. The main sources of learning about Maori are what they see when travelling through the country. That may often be supported by travel guide books and brochures which open up avenues of communication.

These findings lay down the challenge to help tourists acquire more substantive knowledge before and during their sojourn in New Zealand, and hopefully, a sustained interest in Maori after their return home.

3.3.3. Nationality

There are some differences in the interests of tourists in the suggested activities according to nationality. Upon closer inspection it turns out that the least interested in Maori are the Australians.

Excluding the respondents to the pilot (n=59), the sample size is n=247. It shows a strong representation by US citizens (33%), followed by Australians (13%), The UK and Germany at 10% each, and the Netherlands at 8%. A brief check with historic accommodation data in Dunedin reveals that the survey catches fewer than half of the Australians but double the number of US citizens.

That said, it is hard to estimate any error because the data for the month of February 09 had not been published at the time of writing. During January 09, there was a stark decline in arrivals in most major markets, excluding the Australian and German markets. Overall, there has been a significant drop in bed nights during the year ending December in Dunedin. How the different countries of origin are affected could not be ascertained.

Table 5 Nationality of Visitor Sample

Nationality		Frequency	Percent	Cumulative Percent
Valid	Australia	31	12.6	12.6
	North America	92	37.2	49.8
	UK	24	9.7	59.5
	Asia	11	4.5	64.0
	Germany	24	9.7	73.7

Other European	52	21.1	94.7
Other Countries	13	5.3	100.0
Total	247	100.0	

There are no outstanding differences in interest in Maori culture between nationalities, however, Australians are, on average, less interested in Maori culture, not the least because they perceive the two main islands differently: the North Island positioned as the cultural destination while the South Island is more of the landscape and adventure destination. Yet this may also be true for other nationalities, although less pronounced due to the fact that Australians appear to have a better knowledge about New Zealand than others.

3.3.4. Age distribution of the sample

The distribution curve in Fig.2 and Table 6 shows clearly that the 20-29 year age group and the 60-69 together with the 50-59 year group comprise the bulk of the sample. It is noteworthy that the age distribution differs according to nationality.

The Australian sample is, on average, by far the oldest group of visitors (55 years), together with visitors from the US (46) and the UK (43). The ‘other countries’ segment is the youngest with 20 years of age on average, while Asians are 26, ‘Other Europeans’ 32, and Germans are 33 on average.

‘Other Countries’ differ significantly from the UK, North American and Australian visitors, while Germans are significantly younger than Australians.

Those most interested in experiencing Maori culture are aged between 18 and 39, as well as those aged 50-59. There is a marked slump in the interest amongst those aged between 40-49 and those older than 60. Putting the outlier group of the 40 to 49 year olds aside, there is a continuous decrease in levels of interest in Maori culture the older the visitor is.

Fig. 2 Age Distribution across the Sample

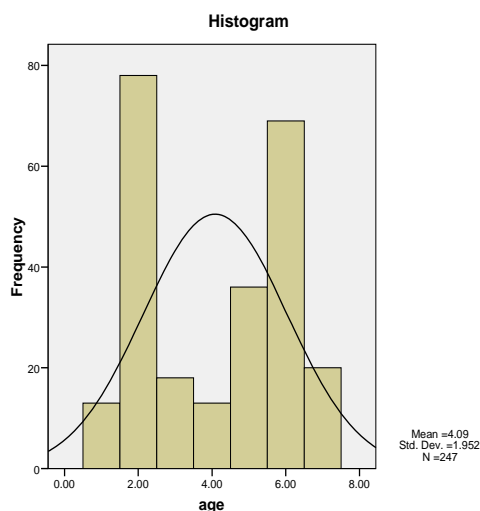


Table 6 Age Distribution Across the Sample

Age	Frequency	Percent
18-19	13	5.3
20-29	78	31.6
30-39	18	7.3
40-49	13	5.3
50-59	36	14.6
60-69	69	27.9
over 70	20	8.1
Total	247	100.0

3.3.5. Length of Stay

The median length of stay in New Zealand by all visitors is around 30 days with 21 days the single most often mentioned length of stay (mode). The minimum was 2 days and the maximum was 365 days.

The average length of stay in Dunedin is 4.8 days with a median and mode of both 2 days. The skewed mean thus indicates that there is a tendency for tourists to stay longer than just 2 days. While 82% of the visitors to our town stay 3 days or less, the rest stays between 4 and 150 days. It is an interesting finding that some 20% stay far longer than the mode of 2 days and should warrant further investigation as such tourists are usually more interested in experiencing the true width and depth of a place.

3.3.6. Personal Status

The sample has 119 (48%) single and 128 (52%) married respondents.

Some 6 questions asked why they seek a holiday in NZ. Comparing their answers uncovers that single visitors tend to seek personal growth more than married respondents ($p=.000$), as well as trying to rebuild their selves in the sense of escaping the stresses and strains from their work-a-day lives ($p= .012$).

Likewise, singles are significantly more interested in Maori culture than married respondents ($p=.000$) which includes the measured interest in activities that requires personal involvement ($p= .002$). Regarding passive activities, however, such as learning about native plants or listening to stories and landscape interpretations, singles and married do not differ.

These results demonstrate that married couples are less interested in cultural encounters than singles, but that amongst those singles are also those who are more affected by escape motives which also impact their interest in directly involving encounters, but possibly in differing ways. While this goes beyond the current scope of this study, these singles may, for example, be more romanticising the encounter while those interested in personal growth may be more genuinely interested and focus more on how Maori see their environment.

3.3.7. Gender

The sample is comprised of 47% males and 53% females . Males are consistently and significantly higher in their Interest in Maori culture overall ($p= .002$), and also when it comes to more

participatory interaction ($p = .004$). This difference, however, vanishes for more passive consumption such as learning about native plants and wildlife, history and landscape interpretation.

3.3.8. Travel Companions

Incidentally, while 52% of the sample is married, they are mostly travelling with their husband or wife. When comparing respondents across their different ways of companionship, the group that is the least interested in Maori culture are those travelling with family ($p = .007$). There are 10 of these respondents (see Table 7) who are from North America ($n=5$) and from Other European countries ($n=5$). However, it is more likely that nationality is of little relevance but rather their companionship.

Table 7 Who are you travelling with?

	Frequency	Valid Percent	Cumulative Percent
Valid travelling alone	40	16.2	16.2
travelling partner/spouse	136	55.1	71.3
travelling with friends	52	21.1	92.3
travelling with family	10	4.0	96.4
travelling in a group	9	3.6	100.0
Total	247	100.0	

The findings are supported by research elsewhere that group travel promotes a more inward-looking interest into the group rather than the culture of the destination which functions more as a backdrop than a focus.

3.3.9. Transport

While there is a wide variety of forms of transport, it is remarkable that there are no differences between them in their interest or otherwise in Maori culture. That said, it is equally interesting to note that cruise ship passengers, while quite interested in Maori culture, do see any consumption of cultural services rather as entertainment than an opportunity to grow, learn and discover (the latter analysis has been conducted with a sample of cruise ship passengers of $n=18$, including those from the pilot study; there is a special mention on cruise passengers in section 3.3.13.).

Table 8 Transportation

	Frequency	Valid Percent	Cumulative Percent
Private car	33	14.2	14.2
Rental car	86	34.8	49.0
Coach tour	14	5.7	54.7
Bicycle motorcycle walking	6	1.6	56.3
Campervan	34	13.8	70.0
Domestic air	11	4.5	74.5
Public transport	34	13.8	88.3
Backpacker bus	20	8.1	96.4
Cruise ship	9	3.6	100.0
Total	247	100.0	

3.3.10. Have tourists to Dunedin been to the North Island?

This question is important as it is often assumed that previous exposure to Maori culture affects interest or the desire for more in the South Island and Dunedin in particular.

Of the sample, 70% have been to the North Island and 30% not, before coming to Dunedin.

Surprisingly, there are no differences between these groups in their levels of interest.

3.3.11. Is Interest in Maori Culture affected by Tourists' Emotional State Prior to Travel?

There is a sizeable correlation between the extent to which tourists want to grow, learn and experience new things and the measure of Interest in Maori Culture' ($r = .4$; $p < .000$), whereas there is no correlation between that interest and those tourists desiring to relax and reduce tension.

This indicates that the experiences at tourists' homes affect their perceptiveness and interest levels in certain attractions at the destinations. It supports the generally accepted research finding that tourists can assume different roles during one holiday as much as they can adopt differing roles across different holidays.

Importantly, a mass-tourist today can be an 'anthropological' or genuinely interested tourist tomorrow, depending on their needs for holidays, interests and energy levels. In any case, an impressive or memorable encounter in one role or even a strong word-of-mouth experience with others can lead to an increase in interest and a return visit during which the tourist is the more genuine cultural tourist rather than the superficial mass-tourist.

3.3.12. Age and 'the need for a holiday'

There is a small but considerable correlation between visitors' age and their poise or interest with which they approach their travel to New Zealand. The older tourists are, the more they come away from home, feeling relaxed, in control, important, calm and full of energy (i.e., not in the stereotypical 'need' for a holiday) ($r = .3$; $p = .000$).

There is a negative correlation between age and learning, however: the older tourists are the less are they interested in learning and growth as an adventure during which they would need to extend themselves, such as in inter-cultural exchanges ($r = -.4$; $p = .000$).

Older folks feel less the need to rebuild their damaged ego and to escape the frustrations of everyday-life ($r = -.3$; $p = .000$) which younger people tend to experience more. They have less to prove to themselves and others and are therefore not as interested in experiencing the 'otherness' or

‘strangeness’ of another culture. Conversely, this diminishing interest poses as a challenge for operators to create attractive and enticing propositions (i.e., services).

This phenomenon then carries further into the relationship between age and Interest in Maori Culture which also has a negative correlation, albeit small ($r = -.118$; $p = .040$). Once we control for the level of active participation and involvement required in cultural encounters, this relationship vanishes completely. In other words, the more the older people are convinced that they need not actively participate but can enjoy cultural experiences from a distance, the more likely they are interested in Maori cultural products.

The implications of these findings are that such ‘reluctant’ tourists require tourism products that do not force them to engage other than as spectators. In turn, the resulting product may well be seen as a degrading commoditisation of cultural features on show and for consumption.

This dilemma is at the heart of the discussion on authenticity and control of indigenous people over their own culture as highlighted in the report on operators’ views on opportunities and barriers.

[please note: the p-values used in the statistical results mean that the findings are significant. $p = .000$ means there is a better than 99% chance that this result is true; $p = .040$ means that there is a better than 95% chance that the result is true].

3.3.13. Cruise Ship Passengers

Due to the variable weather during the time of surveying and the otherwise only sporadic availability of cruise ships the survey generated only a small, but nevertheless indicative sample of 18 passengers.

Of these passengers, 72% fell into the category of ‘not interested’ in Maori culture, 11% into the potential market and 17% into the ‘interested’ group.

Their answers as to how interested they were in the listed activities showed some willingness to visit dance performances and try Maori kai. Conversely, they showed far more interest in the history of early settlers and Dunedin as a whole.

As is generally the case, this may well be because of the positioning of Dunedin in brochures, guidebooks, and on-board familiarisation videos which is likely to be the only material cruise passengers make use of. In contrast, a concerted effort by several providers of Maori cultural products may well create the inroads into that market as into the general ‘potential’ market described above (3.2.) and further analysed below.

However, the nature of this market is such that they prefer passive consumption and high quality presentations within very exacting timeframes that are the hallmarks of shore visits.

4. Comparing the Potential and Interested Market Segments

4.1. What does 'Interest' actually mean?

The visitor most interested in genuine experiences of Maori culture (the **Interested Market** segment) is characterised by a **genuine attitude to meet and interact with Maori** in a way that does not look for the spectacular or popular, but a wish to share, learn and appreciate Taha Maori for what it is.

In contrast, the 'Not Interested group' and parts of the 'Potential Market' tend more to gaze, observe passively and look for what is different in order to be entertained rather than educated.

Unlike previous research into indigenous tourism as reviewed by the authors, the present research establishes that the Potential Market contains many of those who would be part of the Interested Market if it were not for their emotional state and need for genuine rest and relaxation.

Interest in contemporary culture, or 'the other' (i.e., Maori), is a challenge to the individual tourist as it confronts him or her with differing value systems and unfamiliar behaviour that often requires a response. As such, intercultural exchanges are involving and can be embarrassing.

As indicated previously, the survey also established the motives (general) and motivations (specific) for visitors' trips through New Zealand. Findings clearly indicate that there is a genuine relationship between whether people travel because they need to escape from their every-day environment and repair their inner balance or, whether they travel to expand themselves, find new challenges and have a desire to learn.

Those who seek to escape from home because they have a somewhat lower self-esteem due to their frustrating experiences at work, tend more towards passive rest and relaxation. Unlike the Interested Market, the **Not-Interested often lacks the 'get-up-and-go'** energy that stretches their skills; they avoid the challenge of genuine encounters with Maori more for lack of energy than interest and respect.

As a consequence, in contrast to the Interested they prefer just to observe, rather than interact with Maori ($p=.000$). Regarding authenticity, they look for not more than staged performances ($p= .000$) by Maori, that is, contrivances that act out what is otherwise common behaviour in Maori every-day life.

4.2. Summary Analysis of the Interested Market Segment

The **average member of the Interested Market segment** is more likely to be European, between the age of 18 and 39, or between 50 and 59, more likely to be single than married, and travelling alone rather than with partner or family. Furthermore, males are significantly more interested in Maori culture than females and significantly more likely to be a member of the Interested Market ($p=.023$).

The primary interest of the Interested Market is in what can easily be distinguished and appreciated, such as food, history and landscape interpretations; in addition, this market stands out by also seeking engaging activities such food gathering and even carving or cooking are not outside the range of possible interests.

It is further noteworthy that the typical Interested Visitor does not quite fit the profile of the Interactive Traveller (the tourist segment most targeted by the national strategy devised by Tourism New Zealand. This issue will be dealt with in more depth further below (see Table 12 below).

4.2.1 Ranked Motives

Visitors were asked to rank 7 motives for coming to New Zealand (see Table 1). The results show that The Not Interested and the Potential Markets differ significantly in ranking their motives. The Not Interested segment is far more likely to have **Visitors of Friends and Relatives (VFR)** amongst its group.

As could be expected from the Interested Market, they show a strong interest in experiencing the **general New Zealand culture** which distinguishes them significantly from the Not Interested segment. Interestingly, though, the Potential Market does not differ from either, the Interested nor the Not Interested Market on this motivation.

However, both the Interested and Potential Markets differ significantly in their **interest in Maori culture** from those Not Interested, but not amongst themselves. The last two results (together with those differences found in the interests for Maori cultural *activities*) further support the strong discriminant validity of the scale we constructed to sort out the groups (Interest in Maori Culture).

Any campaign that informs about Maori in general terms and any Maori cultural tourism product in particular would therefore be relevant for more than 50% of all visitors to Dunedin.

As could be expected, neither of the groups differs on 'viewing natural landscapes', nor on 'viewing wildlife' which are the prime draw cards for New Zealand and Dunedin. Finally, they do however differ on the motivation for 'rest and relaxation' for the above mentioned reasons (see 3.4.1.) leading to stronger interest in landscapes and less interest in cultural encounters.

4.2.2. Activities

The scale developed for this project, Interest in Maori Culture, has turned out to be an accurate and useful tool for dividing the tourism market to Dunedin. It is shown in Table 9 how this set of six questions manages to differentiate who is interested in Taha Maori and to what extent.

The activities of ‘Learning about Dunedin history’ and ‘Learning about early settlers’ has been left in Table 9 to highlight the validity of the scale: the scale manages to differentiate between the secondary travel motive of interest in Maori culture versus the primary attraction to come to Dunedin for the wildlife and (mainly European) heritage. As should be expected, the interest in heritage should not differ between the segments as the primary attraction is what brought them here.

Overall it can be said that the Interested Market is attracted not only in seeing and observing Maori culture from a distance but is rather genuinely interested in getting involved in activities and interaction. They would thus form a highly receptive target for negotiated experiences, i.e. those experiences that bear the support of Maori in terms of authenticity and levels of control, an issue discussed elsewhere in this report (see Maori operator interviews in section 6.).

Note that in Table 9 the counts of group members are missing. This is because these numbers differ according to activity. Those who have done the activity already have been excluded, but were asked to state how interested they were in doing the experience again.

In the main, those who have done the activity, show an increased interest in doing the activity again (see Table 3 above). Below, the activities are organised according to the preference of the Interested Market (1= Not at all interested to 5= Very Interested).

Table 9 Interest in (Maori cultural) Activities by Segment

(1= Not at all interested to 5= Very Interested)

Activities	Not Interested Grp1	Potential Grp2	Interested Grp3	Significance
To try a traditional Maori food such as a Hangi	3.1	3.9	4.7	.000
Learn the Maori interpretation of landscapes	3.0	3.8	4.6	.000
Learn about Maori stories and history	3.3	3.9	4.6	.000
To find out about native plants and animals	4.0	4.1	4.5	.004**
Participate in traditional Maori activities	2.4	3.4	4.4	.000
Maori Dance performances	2.6	3.6	4.2	.000
To visit a Maori craft shop or gallery	3.1	3.7	4.0	.000*
Maori cooking classes	2.1	2.9	3.6	.000
Maori carving classes	2.1	2.9	3.9	.000
Maori weaving classes	1.8	2.5	3.1	.000
I would like to learn the language (Te Reo)	1.4	2.3	3.1	.000
To learn about early European settlers in Dn	3.7	3.9	4.1	Not sig.
Learn about the history of Dunedin	3.6	3.9	4.0	Not sig.

* Group 1 differs from Groups 2 and 3

** Group 1 differs only from Group 3, Groups 2 and 3 do not differ

4.2.3. Nationality

Table 10 Market Segments According to Nationality

		Not Interested Grp 1	Potential Grp 2	Interested Grp3	Total
Nationality	Australia	12	10	9	31
	North America	36	33	23	92
	UK	6	5	13	24
	Asia	3	3	5	11
	Germany	6	9	9	24
	Other European	12	17	23	52
	Other Countries	2	4	7	13
Total		77	81	89	247

There is a small significant difference between the market segments. It tells us that while the UK, the 'other European' and 'other countries' segments have slightly more visitors in the 'Interested Market', Germans appear equally distributed across all segments.

The North American and 'Other European' segments have the highest potential to join and boost the 'Interested Market'.

4.2.4. Age

Table 11 Average Age by Market Segment

Groups	N	Average Age
3.00	89	36
2.00	81	38
1.00	77	49

Group1 = Not Interested; Group2 = Potential Market; Group 3= Interested Market

Table 11 shows the average ages of each segment. While the Potential Market and the Interested Market do not differ significantly, they are both significantly younger than the Not Interested segment.

The overall spread of ages amongst the visitors is from 18 to 70. The entire distribution of the sample is shown in Table 6.

4.3. Comparison with the Interactive Traveller

In Table 12 below are the questions usually put to distinguish the Interactive Traveller from other tourists. They are here replicated with the mean values of the answers beside the items (1= not true at all to 5= very true for me). The interactive Traveller is meant to always achieve the highest score on the scale as compared to other nationally defined segments (apart from the last one which is

reverse coded; including or excluding Asians makes no difference despite frequently differing response behaviour).

As can be seen in Table 12, the culturally Interested Segment (3) often does not differ at all from the other segments. Indeed, only their interest in local culture and a taste for ever-new experiences differentiates the groups.

This is an important finding. If this finding can be replicated and confirmed, the National targeting strategy tools are either not as effective as hitherto believed or they are somewhat askew from the local reality in Dunedin.

In other words, if Dunedin attracts its share of Interactive Travellers then one would expect them to be in the Interested Market. (Group 3 in Table 12). However, the Interested differ from the other markets in only two of the six questions ('local culture' and 'new experiences').

Table 12 Performance of the Indicative Questions distinguishing the Interactive Traveller

(1= not true at all to 5= very true for me)

Questions /Groups	1 (n=75)	2 (n=89)	3 (n=81)	Significance
I prefer to holiday where I can see nature or be in a natural setting	4.6	4.6	4.7	Not significant
I'd like to holiday where I can experience the local culture	3.6	4.0	4.6	.000
I look for new experiences every day	3.9	4.0	4.6	.000*
I would like to take off on a trip with no pre-planned routes in mind	3.6	3.9	4.0	Not significant
I consider myself a leader more than a follower	3.4	3.5	3.6	Not significant
I enjoy holidays where everything is organised for you	2.0	2.0	2.2	Not significant

Group1 = Not interested; Group2 = Potential Market; Group 3= Interested Market

* Group 3 differs from Group 1 and 2; Groups 1 and 2 do not differ from each other

Conversely, if all tourists to Dunedin were Interactive Travellers, one would expect no differences at all between our 3 groups, with all answers close to the high end of the scale (i.e., 5).

The conclusion is that the Interactive Traveller strategy does not appear to work for Maori, at least not in Dunedin. Any emerging Maori tourism strategy in Dunedin be in danger of not be commensurate with the national strategy nor harvest any benefits from it. This issue requires national attention and further research.

5. Supply Side Analysis

5.1. Operators

In order to analyse the situation and potential for Maori cultural tourism on the supply side, operators had to be contacted too. However, as we wanted to ascertain not only the potential but also identify existing practices and levels of activities of Maori cultural tourism a wider net needed to be cast.

The Maori operators and supply-side representatives (including those interested but not yet entrepreneurially active) were initially identified through referrals by members of the advisory group formed at the University of Otago. Further people were then contacted through a snowball system whereby each interviewee was asked whether he or she knew of other interested persons (entrepreneurs).

Similarly, the phone interviews with operators covering all tourism sectors in the city also asked for referrals. Initially identified via various sources (details in the respective sections), existing business owners or managers were asked whether they received overall 25% or more of their turnover from international tourists.

Usually, the cutting point for identifying Tourism Characteristic Businesses as defined by Statistics New Zealand, and as used in the Tourism Satellite Account, is that a business needs to make at least 25% of its turnover from (domestic or international) tourists.

These criteria have been refined by one of the authors to include only those businesses that directly interact with tourists. Furthermore, tourism service providers have then been asked whether their turnover is above or below 25% from international tourists. In the samples interviewed here,

80% of accommodation providers

80% of transport providers

35% of hospitality providers

73% of attraction and activity providers

draw more than 25% of their turnover from international tourists. The majority canvassed are thus Tourism Characteristic businesses.

5.2 Accommodation Providers

A complete list of accommodation providers in the greater Dunedin region was created and each operation was contacted. Greater Dunedin is defined as 'within 90 minutes drive of the city up or down the coast and inland not further than Middlemarch'. Clearly, this involves somewhat more than the actual city boundaries but is realistic as the catchment for tourists who use Dunedin as a hub .

The strategic reason for this geographic delineation is that, as elsewhere in the country regional tourism boundaries do not coincide with tribal or Maori Tourism boundaries, the region was chosen to recognise that there are larger Maori settlements in the vicinity that may better represent the catchment of potentially cooperating Maori operators.

- All businesses listed with the yellow pages under Tourism Characteristic Industry (TCI) categories and sub categories logged and called
- Extensive internet search via google.co.nz using TCI categories and sub category..
 - Notable websites searched include
 - DunedinNZ.co.nz,
 - AA travel,
 - atoz online guide,
 - tourismNZ.net
 - totaltravel.co.nz
 - the Tourism Dunedin databases were used to check for completeness

For the samples of our survey, the owners or managers were sought as respondents and the questions put to them were:

1. **What is your position within the business?**
2. **As an estimate do international tourists make up more than a quarter of your turnover?**
3. **Do you consider yourself to be Maori, or of Maori descent?**
4. **Do you know if any staff outwardly profess to be Maori or of Maori descent?**
5. **Do you offer your customers products or services that reflect or draw upon Maori culture in any way? (Prompts were given if not immediately apparent to the respondent what that might involve).**
6. **Can you give a few examples of product types or service examples?**
7. **Do you feel involving Maori culture could be beneficial to your business with international tourists?**
8. **On a scale of 1-5, 1 being the lowest and 5 being the strongest, how strong are your intentions to expand the use of Maori culture as an international tourist attraction?**

5.2.1 Accommodation totals:

Population	268
No responses/ wrong number/ disconnected	68
Number of successful respondents	200 (75%)
Dunedin	
Sample size	199
No responses/ wrong number/ disconnected	40
Number of successful respondents	159 (59% of total)
North of Dunedin	
Sample size	8

No responses/ wrong number/ disconnected	3
Number of successful respondents	5 (2% of total)
Inland Dunedin, Middlemarch	
Sample size	15
No responses/ wrong number/ disconnected	7
Number of successful respondents	8 (3% of total)
South of Dunedin, Milton, Waiholo, Catlins (Otago)	
Sample size	41
No responses/ wrong number/ disconnected	11
Number of successful respondents	30 (11% of total)

5.2.2. Sample Description

1. The job titles of the 200 respondents were,
 - o 139 Owner-operators
 - o 38 Managers, Managing Directors, or assistant Managers (4)
 - o 2 Duty Managers
 - o 2 Front-of- House staff
 - o 19 non-responses
2. 26 (13%) providers have Maori staff.
3. 12 (6%) have Maori owners and/or in management positions
4. Of the accommodation providers 44 (20%) had no or fewer than 25% of international tourists as their customers

5.2.3. Maori Cultural Content

1. Respondents were asked: **Do you feel involving Maori culture could be beneficial to your business with international tourists?**
 - 52 answered 'yes' (26%)
 - 89 answered 'no' (45%)
 - 39 were doubtful or not sure (20%)
 - 20 had no answer (10%)

2. Related to point 8. above, respondents were asked, **On a scale of 1-5, 1 being the lowest and 5 being the strongest, how strong are your intentions to expand the use of Maori culture as an international tourist attraction?**

Of the 268 providers in the sample, 186 or 70% offered a rating. Of these,

- 18% rated their intentions between 3 and 5, i.e. between moderately and very strong
- 16% rated their intentions as weak
- 66% rated them as non-existent or having no intentions (122 rated =1)

Table 13 Intention Ratings Accommodation Providers

		Frequency	Valid Percent
Valid	1.00	122	65.6
	2.00	31	16.7
	3.00	23	12.4
	4.00	6	3.2
	5.00	4	2.2
	Total	186	100.0

Ratings (1= no intentions at all; 5= very strong intentions)

Given these results, the intentions of adding Maori cultural aspects to their service or expanding it differ from respondents' thoughts on whether respondents **feel involving Maori culture could be beneficial to your business with international tourists** (see 1. above). It is found there that respondents often feel that it may add to tourists' experience; but this feeling has yet to be converted into strategy and action in concrete business plans.

3. **Examples:** Asked whether and what was on offer for tourists that related to Maori history and culture or local Maori attractions,
- o 142 mentioned at least brochures but also the provision of books and artefacts
 - o 47 offered none of the above

5.2.4. Operators' Comments

1. 5 businesses questioned the use and validity of offering Maori culture as an experience because, for one, there was little of Maori culture in and around Dunedin and, secondly, it would be ineffective to offer Maori culture here in competition to the North Island
2. 53 businesses commented on the extent of their own cultural awareness which ranged from greetings, knowledge of local historic events and sites. Many also dwelled on how they think of expanding their use and knowledge of Maori within the business. While some give

referrals to the local marae, others also involve neighbours to come along and explain things Maori to visitors so that here and there tourists can find a whanau-like experience.

3. Of these 53 businesses 14 produce a wider range of products and services relating to Maori. Many of these mention language use, books and artwork both for guest-use and sale, as decorations and as merchandise. Some offer wide-ranging services such as private or small group tours of the local area involving Maori sites of interest.

5.2.5. Conclusions

One may conclude that while there is a strong faction among accommodation providers who does not believe that Maori experiences would add to the success of the business, the affirmative side together with the 'not sure' section implies that there is also a strong latent group that could support Maori cultural tourism in Dunedin (around 40%). Yet, they would possibly need a good strategy and arguments to turn this latent support into action.

Some 20% of Dunedin's accommodation providers express some intentions of including or extending their offerings in terms of Maori cultural services and information. Unless this intention increases and widens across the accommodation sector, there is the potential that Dunedin will not satisfy the latent demand as expressed by tourists (see section on estimates of demand, 3.2).

Conversely, there is strong latent support to satisfy international tourists' demand for information on Taha Maori and attractions both around Dunedin and New Zealand as a whole. This can be deduced from the fact that 95% of the accommodation businesses at least carry some information on Maori on their premises.

Given the right strategy, some 40% of businesses in Dunedin appear to support increasing knowledge amongst tourists about the presence of mana whenua and Maori in general in and around Dunedin.

5.2. Transport Providers

5.2.1. Sample description

The population of transport providers in and around Dunedin comprises 40 companies including Mainland Air, taxi and bus companies, as well as rental businesses hiring motorised and non-motorised vehicles.

The sample comprises 10 randomly chosen operations which ended up to be taxi, tour and bus companies making up 25% of the population.

The job titles of the respondents were as follows:

4 were owner-operators and

6 were managers or managing directors

8 of these 10 businesses draw 25% or more of their business from international tourists.

Only one respondent is of Maori descent.

5 (50%) of the businesses employ Maori staff.

5.2.2. Maori Cultural Content

1. **Five (5) operations offer Maori cultural content with their services (50%)**
2. **Content examples** ranges from brochures and some language use (1) to tours around local Maori attractions, shops with Maori artwork (2), and from some history and landscape interpretation (2) to in-depth provision of commentary on local iwi and sites.
3. **Could Maori cultural content be beneficial to your business?**
 - 5 answered 'yes' (50%)
 - 4 said 'no'
 - 1 answered 'possibly'
4. **On a scale of 1-5, 1 being the lowest and 5 being the strongest, how strong are your intentions to expand the use of Maori culture as an international tourist attraction?**
 - One (1) business has no intentions (answer = 1)
 - 6 have weak intentions (answer = 2)
 - 2 have some intentions (answer = 3)
 - One respondent had no answer

5.2.3. Operators' Comments

Six respondents offered comments.

- 2 are global companies of which one had no Maori cultural component to add while the other has management “strongly aware of the potential of Maori cultural content” in their service offerings
- 3 businesses employ self-managing drivers. One of these businesses is actively gathering information from the early settlers Museum, iwi and Maori businesses
- 1 business fears to narrow down its customer base by adding Maori cultural content

5.2.4. Conclusions

Of the sample, 50% make use of Maori culture in terms of collaborating with Maori attractions or by offering comments or interpretations of things Maori. This number is relatively high but can be explained with the nature of the businesses which often involve sight-seeing tours, and by the fact that 50% employ Maori staff who may well be the ones providing that service.

5.3. Hospitality Providers (Pubs, Cafes, Restaurants and Bars)

5.3.1. Methodology

The fragmented nature of this sector required a more complex approach than previous sectors. The database was created using the one supplied by Tourism Dunedin and also included a comprehensive web search using Google.

Keywords searched were based on Tourism Characteristic Industry's (TCI's) groups or subgroups. They were: Cafes & Restaurants, Pubs, Taverns and Bars from Moeraki to the Catlins.

Businesses were screened for having responded previously in the study (most commonly Hotels with Bars/ restaurants).

Some businesses were excluded for promoting themselves as other ethnic experiences. For instance, (and among others), Indian Spice of North Dunedin and Galata Turkish Cafe of Princess Street were excluded. Businesses with one specialised product or service such as fast food businesses or takeaway coffee businesses were also excluded.

184 suitable respondents were found of which 46 (or a sample of 25%) were sought.

Respondents sought were those in positions of influence to the businesses direction and management.

5.3.2. Sample Description

Corresponding to 25% of the population, the sample comprises 46 randomly selected bars, restaurants and cafes.

Respondents were 31 Owner-operators, 12 Managers or Directors, 1 duty Manager, 1 Chef, 1 Maitre D'. As elsewhere, the population of café, bar and restaurant operations was drawn from in and around greater Dunedin, between the northern Catlins and Moeraki..

Of the 46 establishments 16 estimated to have 25% or more of their turn-over deriving from international tourists whereas 30 had less.

Amongst the respondents the sample had, 7 Managers or Owner-Operators (15%) who are Maori whereas 39 are of other ethnic origin. In contrast, 29 (63%) operations had Maori staff which makes the hospitality sector the largest employer of Maori amongst tourism businesses in Dunedin by far.

5.3.3. Maori Cultural Content

1. Do you offer your customers products or services that reflect or draw upon Maori culture in any way?

13 (28%) offer Maori cultural content

33 do not offer any Maori cultural content

2. Can you give a few examples of product types or service examples?

Of the 46 establishments, 19 or 41% reported no use of Maori cultural aspects

17 (37%) reported to use wines with Maori labels/names and traditional Maori food. Three of these reported to utilise elaborate Maori cooking techniques

12 (26%) regularly exhibit Maori art and books on Maori were mentioned 11 times.

3. Do you feel involving Maori culture could be beneficial to your business with international tourists?

Of the 46 businesses,

3 answered 'possibly'

28 answered 'no' (61%)

15 answered 'yes' (33%)

4. On a scale of 1-5, 1 being the lowest and 5 being the strongest, how strong are your intentions to expand the use of Maori culture as an international tourist attraction?

Table 14 Hospitality Intention Ratings

		Frequency	Valid Percent
Valid	1.00	25	54.3
	2.00	13	28.3
	3.00	4	8.7
	4.00	1	2.2
	5.00	3	6.5
	Total	46	100.0

(1= no intentions; 5= very strong intentions)

Results on intentions to use or expand the use of Maori culture show a low mean of 1.78 meaning, overall there is no strong willingness to use or expand on Maori culture as part of the service offer in Dunedin pubs bar and restaurants.

Nevertheless, there are some 17% of establishments thinking of expanding their use of Maori culture.

The results echo findings in other sectors where it was established that once a business does use Maori culture the intention on expanding is far higher than with those whose businesses do not feature Maori cultural aspects (although they may have Maori staff without acknowledging that as a cultural impact).

5.3.4. Operators' Comments

Of all respondents 15 offered comments. These ranged from claiming awareness of Maori culture but had no use of it within their business, to descriptions how the business works closely with the runanga in developing ambience as well as cooking techniques.

In addition, 3 businesses (7%) seek constant expansion within their service offering including food dishes, cooking techniques and in host-guest interactions.

5.3.5. Conclusions

In this sector the presence of Maori staff is by far the most prolific (63%). Also, 37% of the businesses offer Maori food and other experiences such as Maori staff using Maori language, artistic exhibits, books and information on Taha Maori.

In this sector, some 11% of businesses consider expanding their use of Maori culture or are actively building it into their services.

Rural establishments are often particularly sensitive supporters of Maori culture.

5.4. Attraction and Activity Operations

As far as could be ascertained through an extensive search through various sources and search mechanisms on the internet, the population of attractions in and around Dunedin is comprised of 62 businesses.

The businesses include tour operators such as the Monarch boat tours but also parks and gardens such as Glenfalloch, off-road tours, kajak-hire or breweries. The total list of operators was used to generate the following sample. As with the previous tourism sectors, each business had to have an equal chance of being contacted.

Targeting a sample of 25% meant that each third business on the list was phoned. If there was no answer, the next on the list was chosen and if successfully contacted, the next third on the list was contacted. Each sample, apart from the accommodation sector which was contacted in its entirety, thus ended up as being between 25 and 36% of the population.

5.4.1. Sample Description

The sample size of attraction and activity providers was $n= 22$ (36% of the population). Respondents comprised 14 owner-operators and 9 managers, and 2 directors.

27% of the sample draws 25% or less of their turnover from international tourists whereas 73% draw 25% or more from the relevant tourist group.

None of the 22 respondents stated to be of Maori descent. 7 of the businesses (32%) employ Maori staff.

5.4.2. Maori Cultural Content

1. Of the sample, 11 or **50% draw on Maori culture in their services** while 50% do not.
2. **Examples of service Content:**
 - 13 businesses (21%) give running comments on tours involving local history and Maori cultural attractions
 - 3 have artefacts and exhibit Maori objects
 - 4 mention to provide books on Maori culture
 - 3 provide brochures
 - 1 makes referrals to the local Marae
 - Only one makes no reference to Maori
3. **Do you feel involving Maori culture could be beneficial to your business with international tourists?**

59 % or 13 businesses state ‘yes’

32% or 7 businesses say ‘no’

1.5% or 3 operations are unsure

4. On a scale of 1-5, 1 being the lowest and 5 being the strongest, how strong are your intentions to expand the use of Maori culture as an international tourist attraction?

Table 15 Intention Ratings attraction Providers

		Frequency	Valid Percent
Valid	1.00	9	40.9
	2.00	5	22.7
	3.00	6	27.3
	5.00	2	9.1
	Total	22	100.0

While not very high in absolute terms, with a mean of 2.2 the attraction providers show the highest level of intentions to include or expand on Maori culture attributes in their services. Some 36% even show a strong-to-dedicated inclination. Given that none of the operators appear to be Maori themselves, they are obvious targets for further research as to their needs and requirement for cooperation, resources and guidance.

5.4.3. Operators’ Comments

Of the sample 17 operators or 77% offer comments. These are overwhelmingly indicating strong interest in Taha Maori and willingness to expand, if appropriate and if help was forthcoming. While some mentioned difficulties in making contact with local Maraes, others used books and resource persons at libraries (e.g. Hocken) in order to expand on their knowledge.

The comments generally carried an air of respect for Maori culture and some businesses would not refer to more than Maori legends in their comments, in case they might misinform.

Throughout the telephone interviews, operations were scanned for their potential to become the targets for in-depth interviews exploring the needs, demands, opportunities and barriers for Maori tourism development further.

Therefore, in addition to contact persons provided by the advisory committee that commissioned this research, further respondents were chosen from the above providers for in-depth interviews. That is the content of the next section.

6. Interviews with Maori Operators

The focus of this report is the potential for Maori cultural tourism in Dunedin as a conscious development. Up until now the report covered a survey of the general availability of Maori culture to international tourists in Dunedin as provided by the relevant sectors of accommodation providers, transportation, hospitality, and attraction and activity businesses.

Prior to these and the previously reported results, an extensive literature review was conducted which also included indigenous tourism, as well as Maori tourism in New Zealand. One of the major outcomes of this review in the context of New Zealand was the recognition of Tourism New Zealand's and the Tourism Industry Associations commitment to the Tourism Strategy Document 2015 which clearly addresses issues of Maori tourism development.

Indigenous tourism development should encapsulate traditional Māori values and concepts, recognising their importance in the sustainable development of Māori, socially, economically and spiritually. Two of these concepts have been adopted in the Tourism Strategy 2015. *Manaakitanga* and *kaitiakitanga* are key cultural concepts that influence tourism in New Zealand and obviously Māori tourism. *Manaakitanga*, while expressed in many different forms in many different contexts, applies to the level of hospitality provided. *Kaitiakitanga* recognises the importance of the natural environment and the need to guard these natural resources for sustainable environmental development. As these natural resources are central to Māori identity, due to the close relationship Māori have to the land, the maintenance of the environment also maintains Māori in all other holistic aspects.

It follows a summary of 11 separate in-depth interviews with Maori operators.

6.1. Methodology

The main aim of the interviews was to determine the level of interest and potential Māori cultural tourism products in Otepoti. The interviewees consisted of members from the Kai Tahu leadership community and local tourism operators.

The selection of interviewees representative of *mana whenua* interests began with a list of three members, each representative of the three *runaka* in Otepoti, Te Runaka o Otakou, Te Runaka o Moeraki and Kati Huirapa ki Puketeraki. This list was given by one of the members of the advisory committee to this project. From the subsequent interviews more names were gathered and a total

of 11 interviews were conducted with members of the local Kai Tahu community. The prospect of more interviews is possible, however the interviews were terminated as common themes, comments and recommendations were made.

The selection of tourism operators began with short phone interviews conducted by a research assistant. The aim of the short interviews was to determine the degree of Māori tourism already present in Dunedin and also the level of interest from existing operators in developing their business in a Māori tourism direction. From these short interviews common themes were already emerging however, we chose 3 operators to have in-depth interviews with. These three operators showed a high level of interest in developing further and had already begun Māori tourism within their business in some way.

6.2. Results

The themes of the interviews will be treated separately. The *mana whenua* perspectives give insight into the prevailing attitudes towards Māori tourism in Otepoti, potential areas for growth and perceived barriers to development in the area. The perspectives of tourism operators provide an understanding of current demand and issues surrounding meeting that demand.

6.2.1. Mana Whenua Perspectives

All of those members of the community interviewed highlighted a desire to grow Māori centred tourism in Dunedin. The general feeling from the interviewees was one of enthusiasm and passion for the development of tourism within Ōtepoti that was distinctly Māori. While one interviewee stated that there had been strong opposition to tourism in the past, the attitude was changing and solutions to perceived concerns had been discussed within the *runaka*. The main concerns for the development of Māori tourism in the area were:

- Potential loss of control of intellectual property
- Disruption of *tikaka*
- Lack of business related skills within their communities
- Misrepresentation of the local community

One interviewee stressed concerns regarding the need to maintain control of intellectual property related to local Kai Tahu history, an example is that once tourist operators are provided with the information, Kai Tahu lose control over how the stories are told, whether they are told accurately and where that information may appear later on. This echoes the major theme from within tourism literature regarding control. While the literature focuses mostly on Māori ownership of tourism businesses, the concern presented by interviewees related to control over knowledge and the representation of Māori.

Regarding the use of local *marae* in the tourism product, it was highlighted that *tikaka* must not be disrupted and be put ahead of any commercial operation. An example being that *takihaka* (death ceremonies) must take precedence over any pre-arranged visit. This was not expressed in the literature that was reviewed.

It was emphasised by a majority of the interviewees that while there was a desire and an interest in developing Māori tourism businesses, there was a lack of business acumen among those with the passion. Also, the knowledge regarding historical areas of interest, narratives of Kai Tahu history are held and maintained by only a few, limiting the number of people 'trained' to give this knowledge within a tourist package. This meant that a supportive environment was required for the business to develop. One interviewee suggested a mentoring system, one that required the mentor to be more hands on, similar to a "*tuakana-teina*" relationship.

Potential tourism products developed need to represent and fit within the communities. This highlighted the overall theme of the need to sustainable tourism in the area. Sustainability includes, social, cultural, economic and environmental sustainability. This theme was present in the literature and is representative of the need for Māori based development. This requires there to be consultation with the community involved and the incorporation of Māori values as represented in Māori development literature and Māori-centred tourism literature.

6.2.2. Potential

Despite some major concerns, all of the interviewees saw potential areas for development for Māori tourism in the Dunedin area. The general feeling was that the Dunedin area presented unique opportunities that were different from those Māori tourism products offered elsewhere and would fit with the overall theme of nature tourism that is closely associated with the South Island. The potential offerings are listed below:

- Landscape Interpretation
- Nature-based ventures
- Contemporary Māori Art
- Māori cuisine
- Boutique personalised tours

Knowledge of *wahi tapu* (sacred areas) and other areas of historical significance to Māori can add value to current tourism operations. One interviewee had expressed the desire to work with already established tourism operators, however they also stated that there needed to be a relationship developed that was mutually beneficial. One suggestion was a tour guide that boarded the already established tour and provided Māori information and knowledge tailored to that tour. Another

suggestion was the development of CDs or downloadable information that contained information and narratives for areas of the region. This would be targeted towards independent and caravan travellers. This would counter-act the issue of control related to intellectual property.

An area that is emphasised as being under-developed and under-utilised are the Sinclair Wetlands. Under a QE II Open Space Covenant, the wetlands have long term potential for growth. Again, the idea of developing the area for the use of existing tourism operators was expressed. It was highlighted that the QEII Covenant restricted the local *hapū* from developing the area into a *mahika kai* (food production) which was expressed as an underlying desire.

There is a large community of contemporary Māori artists in Dunedin, there is potential for a Centre of Contemporary Māori Art or introducing a Māori presence in Dunedin through contemporary art. While other centres (Rotorua, Gisborne) have strong traditional Māori art influences, Dunedin could establish itself as a contemporary Māori art centre. This would fit with the wider arts community of Dunedin and therefore contribute to a naturally achieved identity.

A large resource of traditional Māori foods can be found in the Otago region. There is potential for tourism products that include traditional Māori knowledge about food gathering, production and sustainability. This product includes nature, heritage and gastronomy tourism. In a report of Demand for Māori Tourism created out of the office of the Ministry of Māori Development, local cuisine was presented as a potential opportunity. International visitors had expressed that their experience of local cuisine in New Zealand was 'superb' or 'very good'. The quality of the food and the flavour of 'real' New Zealand cuisine were highlighted as the strengths. It was also highlighted that while there was a variety of Māori cultural products there was very little in the way of experiencing Māori food. With the naturally occurring resources present in Ōtepoti, such as the *tuangi* (cockle), the potential for Māori cuisine exists.

It was emphasised by a majority of the interviewees that the potential for Māori tourism should be directed towards boutique personalised tours. Mass tourism opportunities would struggle to be resourced. One interviewee highlighted that tourists want a personal approach that gives a higher degree of involvement. This is also reflected in the literature which linked the level of involvement to the level of authenticity. The more involved, emotionally and physically, the more authentic, the experience was perceived to be.

6.2.3. Recommendations

There are a number of potential products that could be developed and there are also a number of concerns and barriers which could hinder their development. The interviewees gave several recommendations to overcome these barriers.

- Mentoring of potential businesses in a *tuakana/teina* (older sibling/younger sibling) model
- Formation of strong network of Māori tourism operators
- Creation of mission statement for all stakeholders
- A culturally acceptable direction for everybody involved
- A forum for everybody to voice their concerns, discuss solutions and potential products

The recommendations provided show a long term commitment to Māori tourism in Ōtepoti. The development of relationships with major stakeholders and collective agreement with a clear strategic direction is required. The over-arching theme is the need for consultation and the development of supportive and nurturing networks.

A *tuakana-teina* model of mentoring replicates the traditional relationship between an older sibling and a younger sibling in Māori society. This relationship used kinship ties and *mana* as concepts that bound each person to the other. In business development, this would require a mentor that is willing to be more hands-on and to work closely with the developing operator.

There is a need for regional strategic direction regarding Māori tourism. This was highlighted in a report developed by Keri Wikiteria. The respondents to her interviews highlighted the lack of regional tourism strategy as a significant barrier to their development. The strategy needs to embrace the local community and *hapū* and recognise their importance to the development of tourism projects. A mission statement was suggested by one of our interviewees. The interviewee stated that the various stakeholders, *hapū* and local government, needed to agree on a direction, create a statement and then begin the process of product development.

To begin this process a meeting/forum needs to be conducted where the issues expressed in this report can be explored further and the development of Māori tourism in the region can be openly discussed. This forum must be initiated by the local government and an invitation sent to all interested parties, Māori and non-Māori.

6.3. Maori Tourism Operator Perspectives

The short interviews conducted by the research assistant highlighted those businesses that already felt they were providing a product that included aspects of Māori tourism, businesses that had a desire for development in Māori tourism and also perceived barriers to development. Attraction Operators showed a high desire to develop their businesses in Māori tourism, 36% of which scored between 3 and 5, i.e. having concrete to very strong intentions to expand on the Maori component in their businesses.

The in-depth interviews with the keenest tourism operators revealed a desire to develop their businesses into Māori cultural tourism areas. The tourism operators voiced several barriers:

- Unsure where to gain information about Māori culture in the area
- Perceived resistance from community
- Lack of funding to develop
- Unsure of the demands of tourists
- Lack of available skills within the community

There is an apparent desire to expand current operations into Māori cultural tourism. However, the majority of those interviewed, both in the short and in-depth interviews, that wanted to expand struggled to find the required information, skills and personnel to develop these desires. The lack of available information is reflective of the concerns voiced by local Māori related to losing control of their intellectual property. This can be overcome as relationships are built between local *hapū* and existing operators.

One particular interviewee had been expanding their company into Māori performing arts and found that there was a lack of skills in performing arts within the community. They were required to train people which was taking time and funding. They also highlighted that there was an apparent lack of support from the wider community in the development of their business and were unsure to the reasons behind this.

There was also a desire for the research regarding the demands of tourists in this area to be disseminated to all of the operators so they were able to understand the direction their business

should take. Presentations of findings and forums for the discussion of the development of Māori tourism would be vital to bring together stakeholders and interested parties.

6.4. Conclusion

This report has emphasised the most important points from in-depth interviews with interested parties of Māori tourism in Ōtepoti. Undoubtedly, the potential for Māori tourism from a supplier's perspective is immense and the barriers while many, are solvable. A collective effort from all interested parties is the best strategy, with consultation and discussion important to sustainable development.

Historical and stereotypical forms of mass Māori tourism would not be sustainable in Ōtepoti, this is due to the lack of support this form of tourism would receive from the local community. A Māori perspective on 'contemporary' tourism products was presented as the most desirable avenue for development. The most favoured and frequently presented potential products lay in the nature, landscape interpretation, local history and local resources such as food.

Nurturing networks must be created for those operators that want to expand their businesses in this area and for those within the community that want to develop new businesses. There are several models throughout New Zealand, such as Central North Island Māori Tourism.

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