Proposal for sustainable tourism strategy for Waiheke Island - a UN WTO Monitoring Observatory (INSTO) collaboration between the Waiheke Island community and University of Otago Department of Tourism in 2018

12 January 2018

Proposal to establish a UN WTO Monitoring Observatory (INSTO) collaboration between the Waiheke Island community and University of Otago Department of Tourism in 2018

1. Proposers and support

The following local people support this proposal and have committed to active support towards the establishment of an INSTO initiative on Waiheke Island. These people variously represent: (i) local Waiheke experience and knowledge; (ii) association with both tourism and conservation on Waiheke; (iii) relevant Waiheke networks; (iv) academic status relevant to tourism and/or sustainability; and (v) expressed commitment to this kaupapa.

➢ Pam Oliver, Waiheke Island resident; Pam Oliver Ltd Research and Evaluation; Convenor Kaitiaki of Newton Reserve; Board member Waiheke Resources Trust; member Forest and Bird, Hauraki Gulf Islands; Hospitality operator

➢ Ivan Kitson, Waiheke Island resident; Owner/manager Waiheke Native Plants and BioShelter Backpackers; Board member Waiheke Resources Trust; Committee member Forest and Bird Hauraki Gulf Islands

➢ Peter Wills, Waiheke Island resident; Associate Professor, Department of Physics, and Member of the Science Sustainability Network, University of Auckland; Former Chair Greenpeace NZ

➢ Zack McCracken, Waiheke Island resident; Registered nurse; Clown doctor; Workshop venue owner/operator

➢ Chris Palmer, Waiheke Island resident; Former chair, Hauraki Gulf Conservation Trust; Tourism operator

➢ Steve Poletti, Waiheke Island resident; Winemaker and co-owner Awaroa Organic Vineyard; Senior Lecturer, Department of Economics, University of Auckland

➢ Klaus Bosselman, Waiheke resident; Member Kaitiaki of Newton Reserve; Professor, Environmental Law, University of Auckland

➢ Prue Taylor, Waiheke resident; Member Kaitiaki of Newton Reserve; Senior Lecturer-Planning, University of Auckland

➢ Belinda Robinson, Waiheke resident; Content writer, School of Business, University of Auckland; Newsletter Editor, Forest and Bird, Hauraki Gulf Islands

➢ Niki Harré; Associate Professor Psychology and Associate Dean-Sustainability, Faculty of Science, University of Auckland.

Initial tourism sector and local government support

• The Waiheke Island Tourism Forum has expressed formal support for this initiative.

• ATEED[1] representative Lynne Butler, Acting Destination Development Manager - Tourism, has expressed appreciation "that the local board is taking initiative to monitor what is happening on island" (email communication 2 November 2017) and support for the proposal.

University of Otago participation

This proposal is supported in principle[2] by Professor Neil Carr, Head of Department, Tourism, Business School, University of Otago, and department staff Associate Professor Brent Lovelock and Senior Lecturers Dr Anna Carr and Dr Sebastian Filep.

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[1] Auckland Tourism Events and Economic Development.
[2] Pending the development of a formal Memorandum of Understanding following project establishment, see p 6.

II. Why will an INSTO programme be valuable for Waiheke Island?

- The INSTO programme comprises *regular and continuous monitoring of key indicators of tourism impacts, positive and negative,* applying the structured INSTO monitoring formula for sustainable tourism management and development, based on locally developed sustainable tourism strategy customised to a particular 'destination'.

- A first output in Waiheke Island participation in an INSTO project will be the development of a *draft sustainable tourism strategy customised to the Waiheke Island context.*

- Drafting strategy will involve all stakeholders with a key interest in sustainable management of local tourism, thus *bringing together people and organisations with diverse interests in Waiheke tourism with the common goal* of protecting the island's natural, social, cultural and built environments.

- Sustainable tourism strategy specific to Waiheke Island will *provide the Waiheke Island Local Board and other governmental decision-makers with guidance* in making development decisions for the island that are consistent with the UN Global Assembly 2030 Agenda for Sustainable Development, to which New Zealand is a signatory.[3]

- Monitoring of key tourism impacts indicators (positive and negative) over three or more years will provide vital information to *guide tourism management to protect the well-being of Waiheke's precious, and vulnerable, resources.*

- The participation of senior tourism academics and graduate students from the University of Otago's Department of Tourism will *contribute independent expertise to inform ongoing strategy development* and ongoing impacts monitoring.

- *Invitation and encouragement to local Waiheke organisations*, including community organisations and tourism providers, to undertake monitoring projects that can contribute to the overarching programme.

III. How does the INSTO programme work? Objectives and systems[4]

- The UNWTO International Network of Sustainable Tourism Observatories (INSTO) was created in 2004 with the objective to support the continuous improvement of sustainability and resilience in the tourism sector through systematic, timely and regular monitoring of tourism performance and impact in order to better understand destination-wide resource use and foster the responsible management of tourism. Through the systematic application of monitoring, evaluation and information management techniques, the initiative provides policy makers, planners and tourism managers and other relevant stakeholders with key tools to strengthen institutional capacities to support the formulation and implementation of sustainable tourism policies, strategies, plans and management processes.

- In 2014, UN General Assembly (UNGA) *Resolution 69/233 Promotion of sustainable tourism*, including ecotourism, emphasised the contribution of sustainable tourism to poverty eradication, community development and the protection of biodiversity. It invited governments to support better informed sustainable tourism policy-making around the world.

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[3] https://www.mfat.govt.nz/en/peace-rights-and-security/work-with-the-un-and-other-partners/new-zealand-and-the-sustainable-development-goals-sdgs/

[4] Detailed information on the INSTO programme can be found at http://insto.unwto.org/about/.

- The INSTO Network comprises structured tourism monitoring projects, each situated in an identified community ('destination'), that comply with the INSTO Monitoring Rules (see Attachment 'A' to this proposal).

IV. Why does Waiheke Island need sustainable tourism strategy?

- Current tourism development on Waiheke, largely self-regulated and unmonitored, is being seen by residents and some tourism operators as already starting to damage the very features of the island that make it a tourist destination.
- The United Nations has declared 2017 as the International Year of Sustainable Tourism for Development. It aims to promote the UN's sustainable development goals of reducing poverty and social inequalities, and protecting local environments and cultural heritage.

The current issues

- In the past 3-4 years, tourism has increased rapidly on Waiheke, without any targeted management or structured monitoring by local or central government bodies.
- Increased tourism has had some significantly positive impacts for Waiheke businesses, in particular those targeting tourists and visitors. In contrast, significant negative impacts affecting residents, tangata whenua and the natural environment have been reported variously to the Local Board, Auckland Council and/or in Waiheke and national media.
- Negative impacts have included:
  ◇ Infrastructure inadequacies and damage – these include: traffic congestion; damage to roads from overuse by large tourist buses; insufficient parking; insufficient provision of toilet facilities in popular public places; crowding in public places and amenities; overuse and misuse of walking tracks in the reserves
  ◇ Increasing Council costs of enhancing selected aspects of island infrastructure related to tourism (e.g. road-widening for large tourist buses)
  ◇ Apparent inability of Council to keep up with essential maintenance of Council facilities due to rapidly increasing use (e.g. maintenance of public toilets, littering and access ways at local beaches; water supply in public places; culvert clearance, resulting in flooding on residential properties due to water run-off from blocked roadside drains and culverts)
  ◇ Rapid decrease in affordable rental and owner housing for medium-low income residents, including long-term residents, mana whenua and people whose only or primary income is a government benefit, due to factors such as residential rates increases and housing stock being converted into holiday-only accommodation, which has resulted in increasing homelessness (http://www.waihekegulfnews.co.nz/high-cost-homelessness-waiheke/)
  ◇ Erratic, congested and inadequate public transport provisions, resulting in severe stress for both regular commuters and residents attending medical and other priority appointments in Auckland (e.g. funerals)
  ◇ Increasing use of helicopters in residential areas and close to beaches, creating noise pollution
  ◇ Dumping of ferry effluent into waters close to Matiatia Harbour and the channel between Waiheke and Motutapu islands
  ◇ A range of negative impacts from the increased presence of very large tourist buses, in particular:
    o The introduction of double-decker buses, resulting in excessive and illegal 'pruning' of large protected native trees, loss of domestic privacy by many residents, and serious risk to other road users, in particular cyclists and pedestrians (both residents and visitors)

- o Increased road safety risks to pedestrians, both residents and visitors, due to unrestricted tourist bus access and wide-scale widening of roads permitting greater traffic speeds
- o Large-scale removal of protected native trees in the road reserves, together with destruction of significant tracts of habitat for endangered geckos, to avail road access for tourist buses
- o Persistent crossing of the median double lines by tourist buses, resulting in risk to pedestrians, cyclists and motorists alike
- ✧ Significant increases in *E coli* levels in the sea water at popular beaches over summer, making swimming unsafe
- ✧ Illegal fires and fireworks at New Year resulting in major fire damage to native flora and fauna in Council Reserves
- ✧ Noise and light pollution, from both commercially-run events (e.g. dance parties at vineyards) and holiday tenants in rented private accommodation, interfering with residents' quiet enjoyment of their homes and locale.

- Each of the above factors was identified as a significant area of concern for island residents in the *Essentially Waiheke 2016* strategic framework document (Attachment 'B') published in early 2016. However, the negative impacts were significantly exacerbated in the 2016-2017 summer period, resulting in many residents voicing their concerns to Auckland Council.

- While all of these impacts on residents' right to 'quiet enjoyment' of their locale are well recognised by locals, Auckland Council has been seen as slow to address the issues. To its credit, and within its limited mandate, the current Waiheke Island Local Board prioritised the development of sustainable tourism strategy for Waiheke in its Local Board Plan 2018-2021 – see Attachment 'C', p 11.

- Despite evidence of these issues, and their coverage in both public media and formal complaints by island residents to Council over several years, there is no sustainable (or general) tourism *strategy* as such for Waiheke specifically. However the *Essentially Waiheke* document, 'refreshed' and then approved in 2017, can provide a robust basis for developing strategy. ATEED (Auckland Tourism, Events and Economic Development) does not appear to have a plan for developing sustainable tourism strategy for the island; in fact its current strategy focuses on maximising tourism and tourism income in the Auckland region[5].

- Although impacts for tourism operators on Waiheke are often assumed to be generally positive, several business owners and tourism providers reported negative impacts over the 2016-2017 summer, in particular loss of significant income – up to 30% decrease over the year before. These losses were attributed to the introduction of the Fullers double-decker buses and other tourist buses that collectively took hospitality and transportation business away from Oneroa and taxis, while privileging those restaurants on the tourist bus routes.

- Currently, tourism-related and other businesses, organisations and individuals are developing their own 'solutions' to both chronic and emerging problems, potentially resulting in ad hoc action which may not be in the best interests of the community or the environment of Waiheke Island generally, or even viable in the short or long term.

In summary…

- Tourism is highly likely to continue to increase on Waiheke.
- Waiheke Island needs sustainable tourism strategy as a priority, to:

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[5] http://www.radionz.co.nz/news/national/341039/goff-tells-ateed-to-take-a-hard-look-at-its-focus

i.   minimise the actual and potential negative impacts of tourism on the island for residents, natural and built environments, and for visitors,

ii. protect the unique island features that constitute its attractiveness to tourists,

iii. optimise economic and other benefits to the island from sustainable tourism, and

iv. most importantly, *synergise tourism and related developments on the island, to avoid counterproductive ad hoc 'solutions'*

- The INSTO programme comprises robust regular and continuous monitoring of key indicators of tourism impacts, positive and negative, applying a structured monitoring formula for sustainable tourism development based on locally developed tourism strategy for a particular 'destination' community. The goal is to ensure tourism is sustainable in the context of a unique natural, social and cultural environment and a residential community that values that environment.

V. What is required to join the INSTO network?

- The detailed steps to joining the INSTO programme are summarised in Attachment 'D'.

- To join the INSTO Network, the 'destination' community makes an application to the WTO that outlines a targeted programme of regular monitoring activity that based on (i) tourism strategy specific to the identified community, (ii) outlined in a detailed project plan of activity that (iii) will be undertaken in a structured and rigorous manner by people and organisations with relevant research and monitoring skills.

The 'Pre-establishment' phase

- The INSTO Framework sets out a 'pre-establishment' phase that requires:
  ✧ Awareness-raising activity, to notify the local community and relevant others of the proposal for an INSTO project
  ✧ Engagement of all relevant stakeholders in the development of the proposal
  ✧ The establishment of a 'Local Working Group', comprising a range of parties committed to supporting medium- to long-term monitoring of tourism in the destination. Those parties must include representation from:
    o Local government
    o Regional government, if relevant
    o Tourism provider networks in the destination
    o Other relevant stakeholders in the destination community, based on tourism impacts and key indicators (e.g. environmental groups; cultural/indigenous groups; communities identified as at risk from tourism impacts)
  ✧ The development of a 'Preliminary Study', setting out detailed information on the following (see also **Appendix 1**):
    o Destination profile (key destination features and data)
    o Situational analysis of tourism activity and its impacts
    o Risks and other issues in relation to the sustainability of either tourism and/or the community's quality of life
    o An outline of the value of monitoring tourism impacts; that is, the goals of the proposed INSTO project
    o Key impacts indicators (positive and negative) to be monitored; these include:
      (i) some required impacts indicators (e.g. local satisfaction with tourism; tourism seasonality; employment; water management; waste management; energy management; economic benefits); and

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(ii)   other indicators unique to the particular destination (e.g. well-being of marine life and other fauna and flora; other environmental impacts; residential affordability; homelessness).

Making the INSTO application

The application requires:

- A completed INSTO Application Form
- A completed Destination Profile
- A viable Local Working Group
- A completed Preliminary Study
- Developments towards constructing local sustainable tourism strategy
- A proposed monitoring programme, comprising a set of linked monitoring projects to be undertaken by graduate students and others (see below), extending over at least three years and including a plan for utilising the monitoring data
- Evidence of capacity to undertake the proposed monitoring project
- Letters of support for the proposed project from local and regional or central government.[6]

VI. What will establishing and operating a Waiheke INSTO project require, and how will that be provided?

Project structures, participants and processes

- This proposal envisages a collaboration between the Waiheke community (represented by a Local Working Group comprising diverse stakeholders) and senior academics from the Department of Tourism at the University of Otago – Associate Professor Brent Lovelock and senior lecturers Dr Anna Carr and Dr Sebastian Filep[7], all of whom have substantial expertise in sustainable tourism strategy development and monitoring. Their participation is supported in principle by their Head of Department, Professor Neil Carr, pending an agreed memorandum of understanding. The Otago Department of Tourism has been recognised recently as an internationally high-performing academic department - https://www.odt.co.nz/news/dunedin/tourism-dept-among-best . The collaboration will be formalised in a memorandum of understanding (MoU) detailing activities, responsibilities and relationships (e.g. confirming "Host" status (see below); addressing the academic and graduate requirements of the University of Otago and constraints of university staff capacity; secure data storage facility on site; etc.).

- Following the model established in New Zealand earlier this year in the collaboration between the University of Waikato School of Management (Professor Chris Ryan) and the Raglan community (see Attachment 'E'), it is envisaged that the work involved in the 'Pre-establishment phase' will be undertaken largely by the Local Working Group (LWG), with input as appropriate from the University of Otago team, in particular around draft sustainable tourism strategy development.

- The INSTO application will also be compiled largely by the LWG, with input from the Otago University team to clarify and confirm their role in monitoring.

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[6] The Waikato INSTO project, which involves a collaboration between the Raglan community and the University of Waikato, obtained letters of support for their application from Minister of Tourism Paula Bennett and former PM John Key.

[7]   Profiles   available   at: http://www.otago.ac.nz/tourism/staff/otago062441.html; http://www.otago.ac.nz/tourism/staff/otago062443.html   ; http://www.otago.ac.nz/tourism/staff/otago062496.html

- The University of Otago will be named formally as the "Host" of the INSTO collaboration project.

- Monitoring projects will be undertaken by Department of Tourism Masters students, under the supervision of the Otago academic team, with on-site support from LWG members who have relevant research and monitoring expertise.

- Some additional monitoring projects may be undertaken by others with capability and interest, in particular graduate students from relevant faculties in Auckland tertiary education institutions; Associate Professor Harré is available to facilitate this engagement. Other monitoring may be undertaken by Waiheke organisations or individual residents.

- An initial Steering Group of 6-8 people will undertake the activities needed to establish the LWG. Several of the people listed as 'Proposers' of the INSTO initiative have expressed a willingness to be involved in the initial set-up. The Tourism Forum and ATEED have also expressed a willingness to participate in a Steering Group.

- The LWG will comprise people with expertise in at least the following areas (and other areas to be identified) – in no particular order:
  - ✧ Committee management and leadership
  - ✧ Community relations
  - ✧ Tangata whena and mana whenua
  - ✧ Community development
  - ✧ Sustainability theory, research and practice
  - ✧ Research and monitoring
  - ✧ Tourism strategy development
  - ✧ Content writing
  - ✧ Tourism enterprise development and operations.

Capacity and capability

The following tables provide an estimate of what would be involved in carrying out an INSTO project over the next 3-4 years and how capacity would be assured.

The Pre-establishment phase

Task	Responsibility / capacity	Hrs req'd (approx)[8]	Progress deadline
Initial awareness-raising activity in the community, through island media channels	LWG	20	31 Jan 2018
Liaison with Otago University team	LWG Director	20	15 Feb 2018
Engagement of *all essential* key stakeholders in the development of the INSTO project proposal (see **Appendix 1**)	LWG	60-80	15 Feb 2018
Establishment of a 'Local Working Group'	LWG		
The development of a 'Preliminary Study' (all essential background information to inform the development of a draft sustainable tourism	LWG – tasks shared relevant to	200	15 May 2018

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[8] Note that all tasks will be shared across a Steering Group or the Local Working Group members. Timing for the various tasks will also overlap across these periods.

strategy; see above p 4)	skills		

The INSTO application

Note: The indicative dates will be reviewed for feasibility in the scoping phase, to ensure both capacity and that participation is both beneficial and enjoyable for all taking part..

Task	Responsibility / capacity	Hrs req'd (approx)	Progress deadline
Convening the LWG	LWG convenor	2-3 per month	On-going
Compiling the INSTO application material	LWG delegate/s	60	15 June
Developments towards constructing local sustainable tourism strategy	LWG delegate/s Otago Uni team	50 20[9]	
Scoping and drafting the proposed monitoring programme (extending over at least three years and including a plan for utilising the monitoring data)	LWG delegate/s Otago University team	50 20	
Identifying capacity (personnel) to undertake the proposed monitoring project/s			
Liaison with key stakeholders participating in the monitoring projects			
Letters of support for the proposed INSTO project from local and regional or central government	Local Board; LWG delegate/s		

Carrying out the monitoring project/s

TO BE COMPLETED FOLLOWING SCOPING DISCUSSIONS

Task	Responsibility / capacity	Hrs req'd (approx)	Progress deadline
Tasks will be detailed once the scope and focus of the project has been agreed. They will include a clear division of tasks variously for the Local Working Group, University of Otago personnel, and any other key players (e.g. potentially participants from other institutions)	Academic supervision by Otago University Local support and supervision by Waiheke residents with appropriate research/academic expertise		Feb 2018- Dec 2020 - timeline to be determined

VII. What is sought from the Local Board?

Joining the INSTO Network requires an endorsement from local government, so the engagement of the Local Board is pivotal in adopting this approach to developing sustainable tourism strategy and management on Waiheke. In particular, we are seeking the following support from the Local Board:

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[9] Total hours shared across the university team.

Support	*Importance*
Board commitment to a minimum 3 year initiative	Viability and utility of the project
Knowledge and ideas relevant to the project	Optimising LB expertise and participation
Participation in the LWG by at least one LB member	Essential liaison with, input from and endorsement by the LB
Ensuring essential participation in the proposed Waiheke Island INSTO Network of: • ATEED • Other key Auckland Council entities • Fullers Ferries	The LB has access routes and status to these essential parties.
Obtaining the required letters of support from regional and central government representatives (e.g. Minister of Tourism; Prime Minister; Mayor Goff)	The LB has access routes and status to these essential parties. Other Waihekeans with personal access to key government representatives will also be called on.
Financial support - $29,750 over 3 years (see budget **Appendix 2**)	While Waiheke residents participating variously in the project will contribute significant time and some other personal resources *gratis*, funds will be needed to cover (i) transport costs of bringing University of Otago collaborators to Waiheke and (ii) other occasional costs (e.g. tea/coffee for public and stakeholder meetings).

Appendix 1. The 'Preliminary Study'

The list below provides a brief overview of main topics which should be covered in the Preliminary Study', providing as much detail as possible. *Other topics of relevance to the individual destination should also be added (e.g. cultural aspects and unique features).*

1. Possible issues identified for the destination
- What kind of issue areas are common for the destination?
- Which have possibly the greatest impacts and what?
- Which issues have evolved most rapidly over the past years?
- Which are the issues the destination is currently working on?
- Which are the areas where most advances are needed in the near future?

2. Detailed description of current monitoring processes (if available)
- What are the current structures and procedures of monitoring and reporting?
- Which reports are available at the time of application that show monitoring results?
- Since when have there been specific monitoring processes and how is their long-term viability secured?
- Who are the partners in the current monitoring processes?

3. Existing available tourism-related data that enables stakeholders to evaluate the sector's performance
What economic data is available and from whom:
(a) Tourism flows
- Is there regular and comprehensive collection of data on visitors' arrivals (domestic/ inbound/ outbound)?
- Does the collection and presentation of data create comprehensive profiles of visitors and informs about their activities and other characteristics (e.g. purpose of visit, length of stay, mode of transport, etc.)?
(b) Tourism industries, revenues and employment
- Is data available regarding the structure of the tourism industry (e.g. number of accommodations, food and beverage serving establishments, etc.)?
- What information is gathered on the overall revenue in the destination, tourism's contribution to the local GDP, etc.?
- Are the figures presenting numbers of employees in the tourism industry, full-time/part-time distribution, with details on genders and skills, etc.?
(c) Others
- Is a TSA or similar analysis undertaken to estimate the economic contribution of tourism? If so, when was the last time?
- What are the existing data sources for the available data (national tourism administration, national statistical office, immigration authorities, service provider associations, etc.)?
- What factors may be inhibiting the establishment of an effective data collection system?
- Besides economic data and data on tourism flows, what data is available on environmental and social aspects (consider especially data and data sources for the mandatory issue areas)?
- Where are the greatest data gaps and/or constraints?
- Which kind of data is most urgently needed?

4. Structure, recommendations, suggestions and comments
- What is the current or envisaged structure of the Observatory?
- What are the current or envisaged processes behind the Observatory?
- What are the relevant stakeholders in the destination (first indication were given in the application form but please provide a detailed list here as well).
- Preliminary objectives for the first reporting year that will be discussed in the stakeholder's workshop.

Appendix 2: Budget

This is an indicative budget and subject to change over time.

Note: Funds are needed for January 2018 to pay for the University of Otago academics to visit Waiheke and meet with key stakeholders and the Steering Group.

Budget item	Estimated $ (ex gst) over 3 yrs	Proposed 2018 budget
Travel costs – Otago University staff and students • 3 trips per year X 4 people ($300 pp return Air NZ, + ferry + Discount Taxis + airport parking Dunedin = total $1,750 per trip = total $5,250 pa) • Dates and flights booked in advance to optimise the budget • Accommodation, food and local transport provided to Otago University staff and students *gratis* by Waiheke residents and tourism providers • Petrol vouchers	$15,750	$5,250
Meeting costs – LWG and public meetings • Catering (tea/coffee and bikkies X 6-8 pa = $800 pa) • Venue hire (community halls [public meetings] X 3 pa = $300 pa) • Printing / stationery ($300 pa)	$ 2,400 $ 900 $ 900	$ 800 $ 300 $ 300
Website development and maintenance • Establishing and maintaining a Waiheke-based website/webpage to disseminate INSTO information (linked to the Local Board website)	$ 5,000	$3,000[10]
Data management[11] • Wages for management of monitoring data collation	$ 3,000	$1,000
Other essential costs – • UoA library associate membership for one member of the LWG, 3 years • Koha for marae hui (1 pa = $600 total)	$ 1,200 $ 600	$ 400 $ 200
TOTAL SOUGHT FROM LOCAL BOARD over 3 years	**$29,750**	**$11,250**

We envisage that other essential costs will be covered by:

• Donations from Waiheke locals and local tourism operators – accommodation, food, transport for Otago University staff and students; kai for meetings

• Crowd-sourcing and other fundraising.

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[10] Note, website primary responsibility UoO.

[11] To the extent possible this work will be undertaken gratis by people participating in the monitoring projects. However some data storage expertise will need to be purchased, to ensure accuracy and security.