

The Future of the New Zealand Tourism Workforce: 2035

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To Rhya,
“You’ll all thank me when the economy crashes.”

Abstract

Imagining the future is a tantalising thought, considering that we will never truly know what lies ahead. Despite this inability, envisioning the future has not remained trapped in the realm of mere science fiction fantasies, but is increasingly attempted by organisations, academics and governments. This thesis uses scenario planning to ask what will the future of the New Zealand tourism workforce look like in the year 2035. Scenario planning, as a method of futures studies, is an increasingly popular approach to envisioning the future and draws upon key drivers of change in the present to formulate plausible future scenarios. This provides decision makers with a space for discussion and stretches their thinking through rich storylines. This thesis adds valuable insight to both areas of workforce planning, and New Zealand's valuable tourism industry and its workforce. It takes an alternatively qualitative scenario approach to holistically explore this topic.

The year 2035 was chosen to push the current industry discussions around the Tourism 2025 strategy even further into the future. A modified Delphi method guided the research, based on a similar scenario planning study by Solnet, Baum, Kralj, Robinson, Ritchie, and Olsen (2013) which focused on the tourism workforce of the Asia-Pacific region. This method adds truthfulness to the research and involves three rounds of surveys that draw upon the knowledge and consensus of experts within the tourism and workforce fields in New Zealand. From a list of ten drivers, immigration policies and the growing Asian market emerged as the most important and formed the basis for the four alternative future scenarios. "Manaakitanga is Found Here" presents a world of closed immigration and a niche Asian tourist market, where the workforce relies on, and celebrates, local knowledge and culture. "Pick of the Labour Crop" encourages a flexible workforce for private profit within open immigration settings with a niche Asian market. "Struggling for Respect" warns of a future where tourism lacks national strategic importance with a struggling workforce, amongst closed immigration policies and a mass Asian market. Finally, "Cheap and Plentiful" explores how open immigration and a mass Asian market could push a flexible workforce and a cheaper tourism product, which damages the country's industry and image.

The study reveals that some scenarios are more desirable than others, but regardless of which scenario unfolds, they each present various challenges and opportunities for the workforce. They emphasise the unpredictable nature of the future and stress the importance of flexibility in

order to respond and adapt to changes. They also highlight the necessity of seeking a balanced solution for the workforce and striving for a quality tourism product that respectfully integrates our Māori culture.

Keywords: New Zealand, tourism, workforce, scenario planning, future.

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Table of Contents

Abstract	2
Acknowledgements	4
Table of Contents	5
List of Tables and Figures	9
Chapter 1 – Introduction	11
1.1 Introduction.....	11
1.2 Thesis Structure.....	14
Chapter 2 - Overview of the New Zealand Tourism Workforce	16
2.1 Introduction.....	16
2.2 Defining the Tourism Workforce.....	16
2.3 Tourism Workforce Characteristics.....	17
2.4 The New Zealand Context.....	19
2.5 Conclusion.....	23
Chapter 3 - Research Methodology	24
3.1 Introduction.....	24
3.2 Introduction to Research Methodologies.....	24
3.2.1 Scenario Planning.....	24
3.2.2 Delphi Technique.....	26
3.2.3 Advisory Group.....	27
3.3 Thesis Structure with Delphi-Based Scenario Planning.....	28
3.3.1 Environmental Scanning.....	29
3.3.2 Consensus Building.....	30
3.3.3 Scenario Construction.....	30
3.4 Conclusion.....	30
Chapter 4 - Environmental Scanning	31
4.1 Introduction.....	31
4.2 Determining Preliminary Drivers.....	31
4.2.1 Advisory Group Reflections.....	36

4.3 Final Ten Drivers.....	39
4.3.1 The Role of Immigration Policies & Their Effect on Labour Mobility....	39
4.3.2 The Growing Strength & Significance of the Māori Economy.....	40
4.3.3 The Impact of Asia's Growing Wealth & Middle Class.....	40
4.3.4 New Zealand's Reliance on a Few Key Industries Creating Potential Labour Competition & Economic Vulnerability.....	41
4.3.5 The Impact of Technological Advancements on the Tourism Industry & its Workforce.....	42
4.3.6 The Impact of Both an Ageing Consumer & Workforce.....	43
4.3.7 The Effect of an Increasingly Educated & Fluid Workforce Both Globally & Within New Zealand.....	43
4.3.8 The Growing Demand for Local Employment Against the Industry's Traditional Reliance on Migrant Labour.....	44
4.3.9 The Growth of the Sharing Economy Affecting Businesses & Their Workforce Needs.....	45
4.3.10 The Growth of an Experience Economy Pushing Higher Standards & Increasing Customisation/Personalisation Preferences from Tourists.....	45
4.4 Conclusion.....	46
Chapter 5 - Consensus Building.....	47
5.1 Introduction.....	47
5.2 Selection of Panellists.....	47
5.3 Questionnaire Development.....	48
5.4 Delphi Round One.....	49
5.4.1 Results and Analysis.....	51
5.5 Delphi Round Two.....	55
5.5.1 Results and Analysis.....	57
5.6 Delphi Round Three.....	59
5.6.1 Scenario Construction Process.....	59
5.6.2 The Four Scenarios Used in Survey Three.....	64
5.6.3 Survey Three Design.....	64
5.6.4 Results and Analysis.....	66

5.7 Conclusion.....	67
Chapter 6 - Scenario Construction.....	68
6.1 Introduction.....	68
6.2 Scenario One: “ <i>Manaakitanga is Found Here</i> ”.....	70
6.2.1 Storyline.....	70
6.2.2 Scenario Explanation.....	73
6.3 Scenario Two: “ <i>Pick of the Labour Crop</i> ”.....	75
6.3.1 Storyline.....	75
6.3.2 Scenario Explanation.....	78
6.4 Scenario Three: “ <i>Struggling for Respect</i> ”.....	80
6.4.1 Storyline.....	80
6.4.2 Scenario Explanation.....	82
6.5 Scenario Four: “ <i>Cheap and Plentiful</i> ”.....	84
6.5.1 Storyline.....	84
6.5.2 Scenario Explanation.....	86
6.6 Conclusion.....	87
Chapter 7 - Strategic Implications.....	88
7.1 Introduction.....	88
7.2 Tourism Workforce Strategic Direction.....	88
7.3 Scenario One: “ <i>Manaakitanga is Found Here</i> ”.....	90
7.4 Scenario Two: “ <i>Pick of the Labour Crop</i> ”.....	92
7.5 Scenario Three: “ <i>Struggling for Respect</i> ”.....	94
7.6 Scenario Four: “ <i>Cheap and Plentiful</i> ”.....	96
7.7 Concluding Thoughts.....	97
7.8 Conclusion.....	99
Chapter 8 – Conclusion.....	100
8.1 Introduction.....	100
8.2 Thesis Reflections.....	100
8.3 Contribution to Knowledge.....	104

8.4 Conclusion.....	106
Appendices.....	107
References.....	126

List of Tables and Figures

Table 1: First round of 48 drivers from the literature.....	33/34
Table 2: Second round of driver refinement, producing 21 drivers.....	35
Table 3: Final 13 drivers presented to advisory group with the intention of narrowing to ten.....	36
Table 4: The final ten drivers to be presented to the Delphi panellists.....	38
Table 5: Identified areas of participants and spread by organisation.....	48
Table 6: Survey 1, 2 & 3 response rate by organisation.....	51
Table 7: Driver rating results from survey one.....	55
Figure 1: Map of New Zealand.....	19
Figure 2: Example of early New Zealand tourism advertising.....	21
Figure 3: Thesis Delphi-based scenario planning process and timeline August 2016-May 2017.....	29
Figure 4: Example of question in survey one.....	50
Figure 5: Survey two question example.....	56
Figure 6: Results from survey one – driver importance.....	57
Figure 7: Results from survey two – driver likelihood.....	58
Figure 8: Scenario matrix with opposite states of drivers.....	61
Figure 9: The four scenarios which are created utilising the various states of drivers.....	62
Figure 10: Example of brainstorm around key factors of drivers.....	63
Figure 11: Survey three question example.....	65
Figure 12: Scenario matrix.....	69
Figure 13: Scenario one placement on matrix.....	70
Figure 14: Scenario two placement on matrix.....	75
Figure 15: Scenario three placement on matrix.....	80
Figure 16: Scenario four placement on matrix.....	84
Figure 17: Adapted Strategic Direction Framework.....	89

Figure 18: Scenario one strategic implications.....	90
Figure 19: Scenario two strategic implications.....	92
Figure 20: Scenario three strategic implications.....	94
Figure 21: Scenario four strategic implications.....	96
Figure 22: Spread of drivers across this study and Solnet et al. (2013).....	102

Chapter One

INTRODUCTION

1.1 Introduction

The idea of predicting the future is something of a science fiction fantasy. Our curiosity to know what will become of ourselves and the world around us, is a tantalising thought and an ability which we will never truly achieve. However, despite this inability, we still try. Individuals, organisations, and governments become heavily involved in planning and projections in an attempt to be as prepared as possible for what lies ahead. Alternatively, planning is undertaken to avoid the very consequences of not doing so, or in the infamous words of Benjamin Franklin; “by failing to prepare, you are preparing to fail”. Workforce planning in particular, is an area of paramount importance for industries and governments to ensure that the future’s labour requirements will be met, by taking appropriate actions in the present. The problem, of course, is the issue of complexity. Since labour markets are notoriously difficult to determine and projections often adopt a heavily quantitative, economic driven approach. Both micro and macro environmental drivers of change will ultimately affect the shape, quality and quantity of a workforce, which will consequently require various degrees of “knowledge, skills and abilities to perform well” (Bartlett, Johnson, & Schneider, 2016, p. 441).

This thesis specifically explores what the future of New Zealand’s tourism workforce will look like in the year 2035, and adopts a qualitative approach of a Delphi-based scenario planning process. This method produces four alternative yet plausible futures for this workforce: “*Manaakitanga is Found Here*”, “*Pick of the Labour Crop*”, “*Struggling for Respect*”, and “*Cheap and Plentiful*”, which create discussion spaces for tourism policy makers and industry practitioners. These contrasting futures exemplify a number of strategic directions which the tourism industry could take, each with a different effect on its workforce, and some more desirable than others. New Zealand tourism is currently engaged in many industry and planning discussions, with the ‘Tourism 2025’ strategy document envisioning growth within this sector. This document expresses a desire for the industry to reach a \$41 billion expenditure goal by 2025 from its current base of \$34 billion (Tourism Industry Aotearoa, 2016a). This growth will have consequences for the workforce, what is already the country’s largest export earner and

directly and indirectly employs over 12% of the New Zealand workforce (Statistics NZ, 2015). Industry growth will mean that the workforce will need to adapt, in terms of skills and composition, in order to deliver the appropriate tourism services and products that a larger sector will require. Simultaneously, the industry will need to find balanced solutions for the workforce and strive for a quality tourism product that respectfully integrates our Māori culture.

By no means has this issue slipped under the country's radar, as a number of workforce planning strategies have emerged over the years which recognise this industry's potential for growth and workforce implications. This included the '2004 Tourism Workforce and Skill Projections' document (Business & Economic Research Ltd, 2004) which was bought on by a warning from the 'New Zealand Tourism Strategy 2010' report (Tourism Strategy Group, 2001) that there were "looming skills shortages which would affect the sector" (BERL, 2004, p. 2). This was the first time "that the industry [had] collectively looked at its labour and skills needs so comprehensively and strategically" (Burton, 2004). In 2007, the 'New Zealand Tourism Strategy 2015' was released by the Ministry of Business, Innovation and Employment (MBIE) (Ministry of Business, Innovation & Employment, 2007) and Tourism Industry Aotearoa (TIA), with the aim of tourism becoming a leading contributor to a sustainable New Zealand economy. However, the 2015 strategy only mentioned the workforce in one of its strategic objectives. Today, policy and industry focus surrounds the aforementioned Tourism 2025 strategy document, with a section dedicated to people and skills. The New Zealand Labour Party, currently in opposition, has also developed the Future of Work Commission, to recognise and respond to the changing nature of work. This establishes the current industry need for further research within this area.

Academic research on the tourism workforce highlights its complexity and the specific issues it faces in terms of its structure and characteristics; consisting of lower pay, lower skill, and unfavourable working hours and conditions. Baum, Kralj, Robinson, and Solnet (2016) note that tourism workforce research is neglected and explain that the reasons for this neglect stem from the challenging characteristics mentioned above, creating a sense of the industry having "no obvious solutions" (Baum et al. 2016, p. 2). Regardless of these issues, the tourism sector represents the largest employer globally (Davidson, McPhail, & Barry, 2011) and is a field which deserves more attention. Within New Zealand, the tourism industry holds an extremely important role within the economy. Globally, the importance of this sector is solidifying, as Bartlett et al. (2016) note that "tourism and hospitality organisations are increasingly tasked to

create projections on the size, composition, and skill level of the future workforce” (p. 440). This creates an opportunity for further futures research within this area, offering valuable contribution to both academic and industry knowledge.

Envisioning the future is a task which has risen in popularity and emerged as the field of futures studies. Yeoman, Davies, Wheatley, Mars, Schanzel, and Butterfield (2012) describe this pluralism as a notion that accepts there is not only one future, but many. Scenario planning in particular, is a tool for “trying to manage the processes of change rather than being an engine for making predictions” (Yeoman et al. 2012, p. 3). It therefore develops possible, yet alternative futures, based on current drivers of political, economic, social, technological and environmental change. Utilising this approach for the workforce is effective for its ability to “simplify an avalanche of data into a limited number of possible states” (Schoemaker, 1995, p. 25), an important tool for an industry which is so complex and multifaceted.

In terms of previous scenario planning studies for the tourism workforce, there is a relatively scarce amount which has been done. However, one paper by Solnet et al. (2013) utilised a Delphi-based scenario planning approach to envision possible scenarios for the future of the Asia-Pacific workforce in 2030, as there was a lack of long term workforce planning within this wider region. No such method has been utilised within the context of New Zealand, despite the economic importance of the industry and its workforce. Therefore, this paper aims to replicate the purpose and design of the 2013 study by Solnet et al. to focus specifically within New Zealand, in the year 2035. Research at this national level, provides industry policy makers and planners with richer and more relevant insight, as well as the inclusion of issues and drivers of change unique to New Zealand. This includes the indigenous economic development factors, with a particular focus on the Māori perspective which could be overlooked at a global level. The year 2035 has been chosen to push the current industry discussion a further ten years into the future. The utilisation of a Delphi-based scenario planning process, provides a greater degree of consensus and truthfulness to forecasting, as it involves drawing upon experts’ knowledge within this field. The study also incorporates an advisory group of three individuals to guide and inform the researcher's decisions throughout the study. This adds to the primary rigour dimension of trustworthiness in the research (Brady, 2015).

This thesis therefore seeks to answer the following research question:

Using a scenario planning process, what will the future of the New Zealand tourism workforce look like in the year 2035?

The following sub questions will also be addressed in order to answer this question:

- 1. From an analysis of key trends, issues and drivers that will affect the New Zealand tourism workforce in 2035, which two have the highest likelihood of occurrence and greatest importance?***
- 2. What four possible future scenarios could evolve from these trends, when placed on a Heijden 2x2 matrix?***
- 3. How will each of these scenarios have implications in regard to policy and management of the New Zealand tourism workforce?***

1.2 Thesis Structure

The thesis structure differs from the traditional layout of a literature review, methodology, findings and conclusion, as the process of Delphi-based scenario planning is an ongoing process of both data collection and analysis. It involves a three-phase process of environmental scanning, consensus building and scenario construction. The following structure is therefore utilised as a logical explanation of this:

Chapter One has introduced the purpose, design and research question for this thesis. It has emphasised the importance and necessity of this study, including the gaps it fills in current tourism workforce academia and industry practice.

Chapter Two establishes the background to this study, with an overview of tourism workforce literature more generally, followed by the New Zealand context. It explains the workforce's history and its current situation. Traditional tourism workforce issues are highlighted as well as the problems specific to New Zealand. This chapter provides the reader with a greater understanding of this workforce before the scenario planning process begins. It also builds the case for the necessity for this research as the industry is currently adopting a strategy for growth.

Chapter Three outlines the specific Delphi-based scenario planning research methodology utilised in this thesis. This is an essential step to explain the history of both methods. It explains why this methodology has been adopted and its usefulness within futures studies; providing a disciplined approach to an otherwise vague and unpredictable field of study.

Chapter Four explains the first stage of the research process; the environmental scanning phase. Similar to a literature review, this involves scanning the academic and grey literature to produce key drivers of change which could shape the workforce's future. The process of refining a multiplicity of drivers to just ten is explained and the incorporation of the advisory group's reflections are discussed.

Chapter Five moves into the study's second step of consensus building, where the Delphi panel is assembled and the three rounds of surveys are executed. An explanation is provided of how and why the Delphi panellists are selected, as well as the design of the surveys. Finally, each survey is explained in detail, including the results, analysis, and advisory group reflections. The first survey (section 5.4) aims to reduce the ten drivers to four, utilising the Delphi method of group consensus from experts. The second survey (section 5.5) refines these four drivers to the two most important through the same method. These two drivers form the basis for the creation of the four scenarios; "*Manaakitanga is Found Here*", "*Pick of the Labour Crop*", "*Struggling for Respect*", and "*Cheap and Plentiful*". The third and final survey (section 5.6) explains how the scenarios were created using a 2x2 matrix adopted from Heijden, Bradfield, Burt, Cairns, and Wright (2002). Then, how the execution of the third survey was used for testing and validating these scenarios with the Delphi panel, producing the finalised scenarios.

Chapter Six presents the four completed scenarios for the future of New Zealand's tourism workforce in 2035. Each of the four scenarios are described in detail, with storylines to give the reader a richer insight into these 'worlds'. The storylines are communicated through the perspective of employees to highlight the workforce environment in each future.

Chapter Seven acts as a final discussion chapter of the strategic implications for each of the scenarios, including the risks associated with the strategic direction the tourism industry could take. It also includes the researcher's concluding thoughts around the necessity for a balanced approach from decision makers within this field. Chapter Eight summarises the research project by revisiting the research questions and purpose of the thesis. It discusses this study's contribution to academic and industry knowledge, with reflections on similarities and differences to the similar study by Solnet et al. (2013).

Chapter Two

THE NEW ZEALAND TOURISM WORKFORCE

2.1 Introduction

In an almost prophetic statement; in order to imagine the future, we must understand the present and in order to understand the present, one must look to the past. Therefore, before exploring the future of New Zealand's tourism workforce, it is important to understand this industry's past situation, its current state, and the discussions within academic literature. This chapter begins with a review of the academic literature, regarding the tourism industry and its workforce as a complex and multifaceted phenomenon with particular characteristics which create definitional and structural challenges. The New Zealand context for this issue is then discussed, including the history, current situation and future projections. This discussion sets the context of this thesis before the explanation of the methodology in Chapter Three.

2.2 Defining the Tourism Workforce

To describe the tourism workforce, one must understand its complexity and furthermore, the complexity of the tourism industry. Davidson et al. (2011) highlight the enormity of the sector, existing in every culture and country (Baum, 2006), with numerous stakeholders, sub-sectors and presence as largest employer globally (Davidson et al. 2011). Thus, it becomes obvious why the sector as well as its workforce, suffers from definitional issues. This issue is continually highlighted throughout the literature and even the term 'tourism industry' is contested. Leiper's 2008 paper focuses on this, arguing that the multifaceted nature of tourism creates issues in terms of succinctly defining it and due to its complexities, should not be referred to as a single industry. This ambiguity has stumped many academics and industry professionals, resulting in the industry being described as fragmented (Smith, Ioannides, & Debbage, 1998). Nevertheless, defining this industry and its workforce plays an important role in understanding the sector overall. This involves understanding who makes up this industry and how it is measured.

This thesis adopts a similar interpretation of the sector as Baum (2007), which accepts an inclusive understanding of the industry as one which is diverse, containing multiple sub sectors.

These are not limited to merely hospitality, which is often overrepresented in tourism workforce research (Baum et al. 2016), but recognises accommodation, food and beverage, transport, activities, attractions and tours. Additionally, Davidson et al. (2011) notes the importance of understanding that these sectors are comprised of businesses ranging from multinational companies, to the small and micro businesses which make up the majority of the sector. Smith et al. (1998) provide a good argument that tourism is not a “conventional industry [but rather] a mix of industries that have varying involvement in the provision of services to visitors” (p. 32). The tourism workforce can be broadly seen as those individuals directly working in its sectors (Baum et al. 2016). The workforce domain which this thesis analyses consists of “workers, to organisations, to broader labour force issues” (Baum et al. 2016, p. 3).

In terms of measurement, Smith et al. (1998) raise the issue that the sector’s complexity has consequential difficulties with poor quality data, which reflects negatively upon the sector’s credibility. Economic impact is often measured in terms of direct and indirect benefits. The workforce also follows this trend, with tourism employment classed as direct or indirect employment. The former encompasses workers directly in the subsectors where tourists spend money and the latter, for workers in businesses that offer supporting roles that have some effect on tourism indirectly (TIA, 2016a). Governments have made efforts to collect data from this industry, such as through the development of Tourism Satellite Accounts.

2.3 Tourism Workforce Characteristics

Human Resource Management (HRM) and tourism workforce research to date, often paints a negative picture of this industry's workforce and employment characteristics. When coupled with the complexity and definitional issues mentioned above, the sector is often placed in the ‘too hard basket’. On an industry-wide level, the fragmented nature of the sector, including a multiplicity of businesses and industries, has a reputation for not being cooperative (Smith et al. 1998). This is a consequence of varied interests. However, when they do cooperate it’s in the form of associations, destination marketing organisations, or partnerships to build credibility and strength (Smith et al. 1998). At an organisational level, Getz and Carlsen (2005) highlight that many tourism businesses are small to medium enterprises and many owners and operators often have no formal business training or experience. This is due to the sector’s low barriers to entry and typically low capital requirements. Additionally, the sector attracts

business owners due to lifestyle, locational and leisure preferences (Getz & Carlsen, 2005). This results in a lot of small and family businesses who have no formal education or management experience (Getz & Carlsen, 2005). Additionally, businesses operate in environments which suffer from seasonality and regional dispersal issues. According to Getz and Petersen (2004), seasonal flows affect tourist activity due to certain periods of the year being agreeable times to travel. This is influenced by factors such as weather and holidays. The issue of regional dispersal is a consequence of tourist flows within the destination itself where travellers tend to visit popular areas; causing some regions to flourish and others to struggle.

What results from these factors, is an employment environment and working conditions which are often described as challenging. Deery and Jago (2009) summarised the industry as being labour intensive with “long and unsocial hours, low pay and often low-status jobs” (p. 100), Richardson (2010) adds that the sector attracts a largely young, part-time, or migrant workforce. These factors create issues around staff retention and labour shortages, especially within businesses in peripheral regions. Businesses in this sector rely heavily on their personnel to gain a competitive advantage due to high host-guest interaction and delivery of the tourism ‘product’, which is experiential and highly substitutable (Hallak, Assaker, & O’Connor, 2014; Hjalager, 2009; Vrontis, Bresciani, & Giacosa, 2016).

Therefore, we are presented with a workforce which suffers from complexity, challenging conditions and “uncritical generalisations” (Baum, 2007. P. 1384). Yet it remains an important driver in a country’s economic growth (Baum et al. 2016). In a review of tourism workforce research to date, the 2016 paper by Baum et al. summarises that this is a field which is “neglected relative to its importance” (p. 1), stressing the need for further research. The reasons for this neglect have been covered above; due to the sector’s complexity, its challenging characteristics which creates difficulty in problem-solving, and finally the combination of these two factors creating “a general ambivalence regarding persistent workforce issues” (Baum et al. 2016, p. 2). Additionally, literature to-date in the field of the tourism workforce is identified by Baum et al. (2016) as falling into the trap of focusing only within hospitality and at a managerial or organisational level, which ignores the wider influences. Understanding this, it becomes apparent that tourism’s workforce issues are either oversimplified in the literature to the point of becoming too shallow, or placed in the ‘too hard’ box.

2.4 The New Zealand Context

The South Pacific nation of New Zealand has a population of 4.7 million and a tourism history that dates back to before the early European settlers (Statistics NZ, 2016). This section outlines the history and growth of the tourism industry and its workforce within New Zealand, then explains its current situation.



Figure 1: Map of New Zealand. Retrieved from: <http://www.backpack-newzealand.com/mapofnewzealand.html>

Before the early European settlers of the late 1700's, the Rotorua-Taupō region's (highlighted in red, Figure 1) geothermal activity drew spiritual significance and interest from the Māori people (Tahana, Grant, Simmons, & Fairweather, 2000). As European settlement grew during the early 1800's, so did tourism activity as the country's exotic landscape and fascinating local culture drew the interest of wealthy British and American travellers (McClure, 2010). Māori had significant involvement in the tourism industry at this time, considering that key tourism attractions, such as the Pink and White Terraces, were largely controlled by the Māori people. Most notably, were the tribes of Ngāti Tūhourangi and Te Arawa (Tahana et al. 2000). Tourism made a lucrative trade through the development of accommodation, guiding, souvenir and entertainment businesses (Te Awēkotuku, 1981). After the destruction of the Terraces from the 1886 eruption of Mt Tarawera, the area saw an influx of Pakeha activity and government control (McClure, 2010).

It could be claimed that New Zealand's natural features were the cause of tourism development across the country. Tourists were initially drawn to the likes of Rotorua and the spectacular Southern Alps (highlighted in blue, Figure 1) for their natural beauty, but it became quickly apparent that this was not enough (McClure, 2010); prompting the development of tourism and hospitality businesses. Access and staffing issues within the industry arose early on, as McClure (2010) notes that "rugged terrain made infrastructure and transport expensive, and remote resorts were difficult to staff" (p. 1). New Zealand's geographical distance from other destinations around the globe was its largest barrier to tourism growth, until the arrival of the passenger jet opened up the ease and opportunity of travel.

As tourism's potential grew, so did the involvement of New Zealand's government, coupled with conflict against the Māori people. Issues of control and commodification of the Māori culture created tensions, as attempts to appeal to tourist expectations reduced the Māori people to a mere spectacle (McClure, 2010). Before the First World War, the tourism product had begun to diversify but suffered a slow growth until the 1960's due to local scepticism, the barrier of distance, and a national culture around the preference for the 'bach'¹ holiday', leading to a distaste for wealthy tourists (McClure, 2010; Callister & Didham, 2010). The wider workforce picture until then was shifting from a predominantly primary and manufacturing workforce, to one involved in the services. This pattern was reflective of other developed

¹ A small holiday home

countries around the globe shifting into a post-industrial society (Stroombergen, 2006). New Zealand's workforce experienced growth overall with the exceptions of the First and Second World Wars and the 1930's depression (Callister & Didham, 2010). Major reasons for this were the country's strong flow of inward migration, the post-war baby boom, Māori rural to urban drift, and the increase of women in the workforce (Mare, 1996; Rankin, 1993).



Figure 2: Example of early New Zealand tourism advertising. Retrieved from:
<https://publicaddress.net/speaker/selling-the-dream-the-art-of-early-new-zealand/>

Post 1960's New Zealand saw the introduction of the passenger jet which increased the country's accessibility. Major issues for the industry and its workforce at this time was its relatively poor quality of products and services against international standards, as well as its heavy regulation. "International hotels were deterred by the cost of labour and New Zealand's restricted working hours" (McClure, 2010, p. 6). Despite this, the workforce was growing and doubled its 1951 population of 740,000 to reach 1.6 million in 1986 (Callister & Didham, 2010). The 1980's marked a positive shift, with the jumbo jet increasing accessibility for tourists, economic restructuring relaxing regulations, and a growing global awareness setting

higher standards for tourism products and services. These products and services diversified further with the growth of the adventure tourism sector and the ecotourism trend. By 1999, New Zealand had created what would become a globally recognised and extremely successful national brand of '100% Pure New Zealand'. Further workforce trends after 1990 saw some structural and social changes around work. This included changes in the typical hours and location of work as a desire for work-life balance increased and work arrangements with employers became more diversified. This decade also saw the increase in recognition of unpaid work and the growth of self-employment and smaller businesses (Stroombergen, 2006).

Today, tourism holds an extremely important position within New Zealand's economy, being the country's largest export earner (Statistics NZ, 2015). The total tourism expenditure reached 29.8 billion in 2015, a number which the industry aims to increase to \$41 billion by 2025, according to the Tourism 2025 strategy document. The official tourism statistics indicate that the industry is on track to reaching this goal (Statistics NZ, 2015). In terms of tourism activity, as at January 2017, the country's top three visitor arrival markets were from Australia, China and the USA, with holiday and visiting friends and family as the top two reasons for travel (TIA, 2016b). The emerging markets from India, Indonesia and Latin America are drawing attention from the industry and domestic travel still remains the backbone (TIA, 2016a). New Zealand's tourism product markets itself internationally through Tourism New Zealand's 100% Pure campaigns. Its focus still utilises the country's natural environment, adventure activities, unique Māori culture, as well as the popular *Lord of the Rings* and *The Hobbit* films for promotion (Tourism New Zealand, 2016).

In terms of the workforce, despite the industry's growth, direct tourism employment has remained steady against total workforce employment since the year 2000 and workforce projection documents stress the skill shortages ahead (BERL, 2004). Issues on a national level include the ongoing seasonality and regional dispersal problem. For New Zealand, its geographical distance, size and population heightens these issues as workers are more difficult to source in busier periods. International tourists also tend to follow a similar travel route; sticking to a few key regions or cities such as Auckland, Rotorua and Queenstown (highlighted in purple in Figure 1) (MBIE, 2007). The industry's attempts to counter these issues are mentioned within the Tourism 2025 strategy document. These include targeting higher-value tourists who will spend more, driving shoulder period promotion, and encouraging regional spread through the tourist segments they target and itineraries they promote (TIA, 2016a). At

a workforce level, Davidson et al. (2011) highlight that the common issues within this sector include high staff turnover, poor training and understaffing, reflecting issues prevalent in the wider tourism workforce literature. Additionally, the reliance on migrant labour and New Zealand's casual service standards repeatedly draw attention within the media (Cropp, 2016; McBeth, 2016; Pullar-Strecker, 2015).

Future projections for this industry are conducted by the Ministry of Business, Innovation and Employment, with the latest projects looking to the year 2022 (MBIE, 2016). Visitor arrivals are expected to increase by 5.4 percent per year, increasing tourist numbers from the current 3.1 million, to 4.5 million. The markets of Australia and China are expected to be the dominant figures within this year. The nature of the industry poses many workforce issues that could only heighten as the industry expands. Both the industry's importance to New Zealand economically, coupled with the sector's current strategy for growth, emphasise the need for further research within this field.

2.5 Conclusion

This chapter summarised the current state of tourism workforce literature and the context within New Zealand, including the workforce's characteristics and issues. Overall, this field suffers from complexity and definitional issues which heighten the difficult working conditions within these workplaces. It is apparent that globally, tourism workforces suffer from similar issues due to the nature of the industry. New Zealand in particular, is welcoming growth within tourism but suffers from workforce issues that may worsen without adequate strategic planning. This chapter highlighted the important role of providing further research for the future of this workforce. The following chapter outlines the specific methodological approach utilised to undergo this futures research.

Chapter Three

METHODOLOGY

3.1 Introduction

This chapter introduces the methodology utilised in this thesis: a Delphi-based scenario planning process which is influenced by the researcher's cultural/interpretivist paradigm which accepts there is not one future, but many. This process is used within the exploratory study by Solnet et al. (2013) and was therefore deemed appropriate for this study of a similar nature. The task of predicting the future is impossible. However, scenario planning provides the researcher with a disciplined method of envisioning such a complex phenomenon as the tourism workforce. When combined with the Delphi method of group consensus, the researcher is able to establish elements of truthfulness and trustworthiness to the research process. This chapter outlines the process, history and importance of both scenario planning and the Delphi method, followed by an explanation of the three-person advisory group which was used throughout the study. Finally a detailed step by step description of how these processes were carried out within this study will be explained.

3.2 Introduction of Research Methodologies

This study is guided by the researcher's cultural/interpretivist paradigm. Walton (2008) highlights the diversity in paradigms within scenario planning, of which the cultural/interpretivist stance accepts that the future cannot be 'known', but "truth and reality are relative" (p. 154). The goal is not to predict but to gather insight from various perspectives. The researcher in this respect, draws upon the knowledge and opinions of experts within this field and accepts their perspectives as a form of truth.

3.2.1 Scenario Planning

Page, Yeoman, Connell, and Greenwood (2010) note that scenario planning as a method of strategic planning is becoming increasingly popular amongst businesses and policymakers to improve foresights in an ever-changing business environment. Within HR development there "is an increasing interest in building scenarios for scanning beyond the horizon" (Walton, 2008, p. 147). The popularity of such a method derives from its ability to "simplify the avalanche of

data into a limited number of possible states” (Schoemaker, 1995, p. 26), by systematically identifying key drivers of change in the present to inform a range of possible scenarios for the future. In doing so, it accepts that there is no one future, but multiple possibilities. These scenarios are communicated through narratives rather than a mass of data (Schoemaker, 1995) which creates a space for discussion and challenges people to think outside the box.

The scenario planning technique has risen in popularity from its development in the 1960’s and 1970’s; most notably from its use within the Shell company (Page et al. 2010). Future scenarios were created to stretch the thinking of managers around the possibilities that lay ahead, based on the key drivers of change in the present. In academic terms, Chermack and Swanson (2008) suggest that scenario planning falls under Mintzberg, Ahlstrand, and Lampel’s (1998) learning school from their seminal work in the field of strategy. The learning school is one of ten dominant schools of thought for strategy within academic literature, and accepts that strategy results from organisational learning and is a tool for analysing the new environment. Chermack and Swanson (2008) add that scenario planning is ultimately about ‘seeing’. What this method holds as an advantage against other planning strategy methods, such as contingency planning, is its ability to recognise the complexity of conceptualising the future by accepting that there is not one future, but many. “It demands above all an understanding of the forces that drive the system rather than reliance on forecasts” (Wack, 1985, p. 143) which is exceptionally important when studying a topic as complex as the workforce.

Page et al. (2010) address the range of contexts this method can be utilised, from crisis management and public sector policy maker’s decisions, to businesses and the scientific community. Within the field of tourism, Solent et al. (2013) explain that a range of topics have utilised this method but most notably in tourism by Yeoman and his colleagues, including his work for Visit Scotland. Yeoman completed a significant amount of work conceptualising future scenarios in tourism based on current political, social, economic, financial and infrastructural issues. Despite mentioning effects on the workforce and publishing work on future scenarios for New Zealand tourism (Yeoman et al. 2012; Yeoman & McMahon-Beattie, 2014), futures scenario work based solely around the New Zealand tourism workforce is absent. However, in terms of the wider geographical area, a number of papers focus on the tourism workforce in the Asia-Pacific region (Heicks, 2010; McLennan, Pham, Ruhanen, Ritchie, & Moyle, 2012; Orchiston, 2011). Most notably is the study by Solnet et al. (2013), of which this thesis’s design is influenced by.

The technicalities of the scenario planning process can differ based on the researcher or the appropriateness of the technique for the topic at hand. Duinker and Greig (2007) explain that there is a variety of approaches which could be applied when developing scenarios. These can be an “informal imaginative exercise by a single individual to a systematic group process” (p. 210). They explain that techniques could be either quantitative or qualitative, include back casting or forecasting, and involve inductive or deductive techniques. Page et al. (2010) add that a range of hard and soft practices are also present. Most labour or workforce forecasts focus on the quantitative approach by estimating population size and its subsequent labour needs. Considering this, this thesis adopted a qualitative and holistic approach to projections, rather than focusing solely on the economics.

3.2.2 Delphi Technique

This study adopted a modified Delphi method in conjunction with the scenario planning as used by Solnet et al. (2013). It involves utilising knowledge from a diverse group of experts (Pill, 1971) to guide the steps and decisions within the scenario planning methodology, rather than purely relying on the researcher’s personal judgement. The Delphi method is concerned with arriving at a group consensus on difficult and complex issues, usually within the form of surveys or questionnaires which are repeated over numerous rounds. Three surveys were employed within this study to narrow down the key drivers of change sourced in the literature to the two most important which form the basis for the scenarios. The Delphi panel also provides feedback and consensus on the scenarios themselves.

The Delphi method has been applied as early as the 1940’s as an answer to overcoming common problems associated with group communication, as well as for military purposes during the Cold War (Brown, 1968; Nowack, Endrikat, & Guenther, 2011). Similar to scenario planning, the Delphi technique can be applied in a variety of ways, given its function or purpose. This has included the Classical Delphi, Policy Delphi, Argument Delphi, Disaggregate Policy Delphi and a Real Time Delphi (Nowack et al. 2011). This thesis adopted a modified Delphi method which is also used by Solnet et al. (2013). In a review of Delphi based scenario studies, Nowak et al. (2011) suggest that using this technique in scenario planning can help to improve scenario quality. This is because using group consensus and decision making can help build rigour and truthfulness to research within futures studies. Nowack et al. (2011) add that this method can aid creativity, credibility and objectivity to

scenario development. Pill (1971) explains that the Delphi method has three key features; anonymity, controlled feedback and statistical group response. These features prove its effectiveness in removing common group issues of the bandwagon effect, where dominant personalities sway the decisions or arguments of the group (Nowack et al. 2011). Within this study, anonymity was upheld between respondents rather than the researcher, so responses could be analysed with respect to respondent's organisation or sector. This is important due to the wide range of stakeholders within tourism who each have various objectives. Feedback was presented to the respondents within the following survey, where the results of the previous round were communicated. Finally, the statistical group response was recorded by the researcher after each survey to analyse the frequency and spread of response rates across panellists.

Despite its wide use, the Delphi technique is not without criticism. Hasson and Keeney (2011) note its problematic mix of positivist and naturalistic paradigms which creates a juxtaposition and questionable validity. Changes in the members of the Delphi panel can also create issues of continuity for the researcher, as well as the difficulties of recruiting panellists who are willing to participate in all three rounds. Despite these critiques and as stated by Solnet et al. (2013), this method is still "promising for informing future scenario studies and deemed appropriate for this study" (p. 695).

3.2.3 Advisory Group

An advisory group was also utilised to establish another level of trustworthiness to the research process. This was an additional step that wasn't present within the study by Solnet et al. (2013). The advisory group consisted of three individuals who due to their position and experience within the fields of either tourism, the workforce or policy, provide valuable insight, feedback and advice throughout the course of the study. For the purpose of privacy, the pseudonyms of advisory members A, B and C will be used in this thesis. The first individual, member A, is a Managing Director for a nature tourism business, with extensive experience within the tourism industry throughout their career. They held roles on the Māori Tourism Export Council, Tourism New Zealand, and was a founding member of the World Indigenous Tourism Alliance. They brought an important Māori perspective to the study and as a business owner they offered an employer perspective with knowledge of current consumer trends and behaviours. The second individual, B, holds a senior role at Tourism Industry Aotearoa, which advocates employers' needs. This individual offered an industry wide perspective and also an

understanding of the Tourism 2025 strategy document which is currently guiding industry thinking. They also stressed a demand and supply logic to their perspective on workforce issues. The third and final advisory member C, holds a senior position at Victoria University's Centre for Labour, Employment and Work, and has experience within the fields of employment and labour. Their perspective took a more holistic interpretation due to not being directly involved with the tourism sector and offering the perspective of the employee. This was valuable for stretching the researcher's own perspective on the topic

While the advisory group was a small number of individuals who do not realistically represent all stakeholders within the tourism industry (for example, the group lacked a government perspective), it is important to underline that the role of the group was to provide in-depth feedback and reflection on the researcher's decisions.

3.3 Thesis Structure with Delphi-Based Scenario Planning

This section explains how the aforementioned Delphi method and scenario planning approach is utilised within this study, including a step by step explanation of the process. Due to the structure of the thesis, this section introduces the reader to the process, whilst the following chapters follow the logical progression of the study; explaining the process and findings in richer detail. A three-step process was followed, with the environmental scanning phase (Chapter 4), followed by the consensus building phase (Chapter 5), then the scenario construction phase (Chapters 5 & 6). Each of the phases involved data collection and analysis. Figure 3 depicts the thesis process and shows the relationship of the Delphi panel and the advisory group to the research, as well as indicating the timeline.

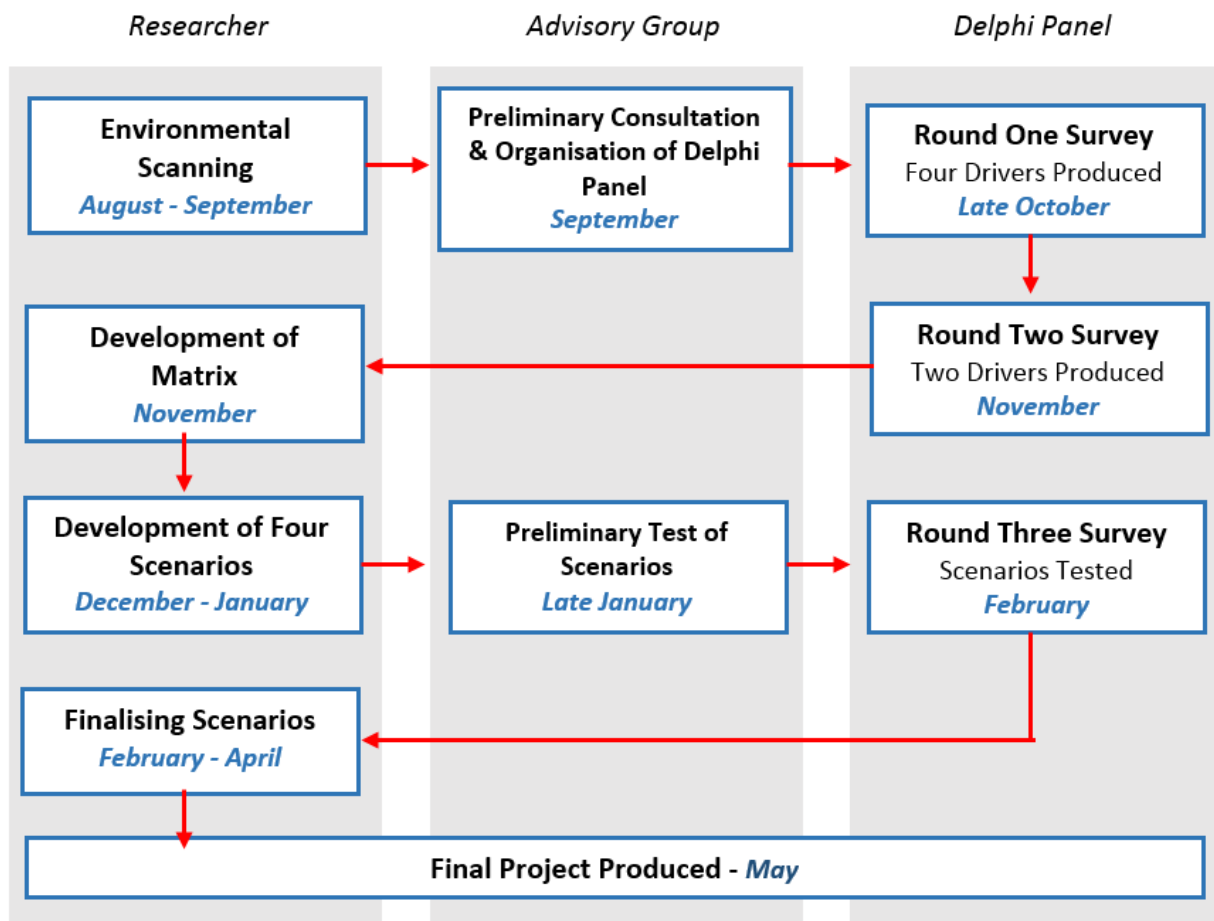


Figure 3: Thesis Delphi-based scenario planning process and timeline August 2016-May 2017.

3.3.1 Environmental Scanning

Whilst the particular processes of constructing the scenarios may differ from study to study, it generally follows similar steps. These are outlined by Schoemaker (1995) who explains that scenario planning compensates for two common decision making errors; “under prediction and over prediction of change” (p. 27). It does this through compiling the key trends and drivers of change occurring today, alongside aspects which we deem uncertain or unpredictable. The first phase is environmental scanning (Chapter 4) which involves an identification of these key drivers of change in the present which can be sourced through a review of literature, interviews or surveys. For this topic, this included any drivers surrounding the areas of New Zealand tourism and its workforce and was sourced through a literature review of academic and grey literature where the key drivers are drawn out.

3.3.2 Consensus Building

The second phase is consensus building (Chapter 5) which utilises experts or in the case of this study, a Delphi panel, to narrow down these key drivers to the most important. This study utilised experts in the fields of New Zealand tourism's workforce, businesses or policy who were asked to review the ten key drivers and rate them in terms of their importance and impact, thus narrowing down the drivers to just four. The selection process of these experts is discussed in section 5.1. Similar to the first round, the second round of the Delphi (section 5.4) called upon the same group of experts to rate the four key drivers on the same factors. This results in two final drivers which form the basis for developing the future scenarios.

3.3.3 Scenario Construction

The final stage is the construction of the scenarios (Chapters 5 & 6). This study applied a method often employed by Yeoman, which is Heijden's framework of a 2x2 matrix (Heijden et al. 2002; Yeoman & McMahon-Beattie, 2014). "The matrix positions factors relating to uncertainty and impact along each axis and scenarios based upon these factors are created" (Yeoman & McMahon-Beattie, 2014, p. 419). The two key drivers which emerged from the second Delphi round are placed upon this matrix, which shows the two extremes of each driver. For example, political views may be identified as a key driver, to which right wing and left wing would be utilised on the matrix spectrum. This process will be discussed in depth within Chapter Six. Once the four scenarios were created, the third and final Delphi round was executed; calling upon the same panel of experts to review and comment on the scenarios. These perspectives were taken into account within the final scenarios.

3.4 Conclusion

Chapter Three provided an introduction and history to the Delphi-based scenario planning methodology utilised within this thesis. When combined, these two processes aid trustworthiness and truthfulness within a futures project, with the Delphi method's ability to draw on group consensus within the scenario planning stages. The method of scenario planning "provides a complexity-reducing framework and reduces complexity to a finite number of divergent options" (Yeoman et al. 2012, p. 4). Following this introductory chapter to the thesis process, the next chapter explains the first step of environmental scanning.

Chapter Four

ENVIRONMENTAL SCANNING

4.1 Introduction

This section explains the first stage of the research; the environmental scanning phase. This is paramount in futures studies, as it “seeks to map out complex, layered causal powers” (Yeoman & McMahon-Beattie, 2014, p. 417) by outlining the key drivers of change in today’s New Zealand tourism workforce which will have some effect on this sector’s future. This phase required the researcher to review the mass of literature and make a judgement on which drivers would be the ten most important. The search and condensing process is discussed, followed by the advisory group reflections on the choice of drivers selected by the researcher. Significant space is then dedicated to communicating the importance of each of the ten drivers.

4.2 Determining Preliminary Drivers

The aim of the environmental scanning phase is to determine the ten most important trends or drivers of change which are occurring now and could affect the New Zealand tourism workforce in the year 2035. This is completed through an extensive review of the grey and academic literature. The aim of producing a list of ten is partially to replicate the process undertaken by Solnet et al. (2013), and due to the researcher’s judgment that ten is a manageable number to present to the Delphi panel in survey one. Considering the complexity of a phenomenon such as the tourism workforce and the numerous factors in the macro and micro environment which could affect it, the task of reviewing the literature required a well-documented and systematic method.

This method began by preparing a document in which the drivers could be recorded. The document segmented drivers through a PESTE analysis, which divides drivers into political, economic or financial, technological, social or demographic and environmental themes. While Walsh (2005) notes the many formulas of environmental scanning, the PESTE analysis remains a popular technique. Creating themes helped to organise the drivers and allowed the researcher to determine whether a range were being identified. The table also allowed for documentation of the source, the wider context and extra notes. The next task of scanning the literature began

with academic sources, then grey literature, which included reports, policy documents, strategy documents and media sources. For the former, online search engines of Google Scholar and the Victoria University of Wellington library catalogue were used, including the databases of Hospitality and Tourism Complete and Business Source Complete. The search terms included combinations of the words “New Zealand”, “workforce”, “tourism”, “future” and “trends”. However, considering the thin range of New Zealand-specific academic studies on the tourism workforce, the search reviewed studies excluding New Zealand as well. For the latter sources, the Google search engine was utilised to explore similar terms, with the addition of “strategy”. The literature was reviewed and the researcher noted down any trends or drivers of change of notable importance. Table 1 shows the driver table which was used, producing 48 drivers in total. What followed, were numerous rounds of refinement, in order to condense this list to just ten drivers.

These 48 drivers depicted in Table 1 were refined to ten through a process of elimination. This process began by removing double-ups or merging those which were similar. Then the researcher worked through each segment theme and eliminated drivers that were not as important in the literature, as well as utilising personal judgement. This produced the 21 drivers which are shown in Table 2.

CATEGORY	DRIVER/ TREND	SOURCE	EXPLANATION
POLITICAL	Working Visa pressure Govt policies on superannuation Immigration policies Movement from beneficiaries to migrants Terrorism Increase in employer power Deregulation Brexit HRM shift to strategic roles Overseas political unrest & immigration INZ partner with Chinese visitors	McBeth (2016) Callister & Dudham, (2010) Callister & Dudham, (2010)) People & Skills 2025 (2015) Solnet (2015) Employment NZ (2016) Sharp & Crawshaw (1994) Coats (2016) Bartlett (2016) Phillips (2015) Immigration NZ (2016)	Govt wants this to attract foreigners to ease demand. There are currently efforts to attract Indian profs and their families Influences employment choices. Ages has extended – people retire later – less money when they retire. Encourages inflow of skilled migrant labour (high source in tour and hospo) More migrants are a source of hires rather than beneficiaries. ISIS as a barrier to tourism? Has an effect on the safety of destinations. Xenophobic behaviour as well. Contracts to relations (employment act) shifting of power towards employers. Collective to individual. Tightening of VISA making it more difficult to work in the UK – knock on effects of this around flow of labour Shifting role of HRM professionals from administration roles to more strategic roles within companies NZ has a history of immigration when there is political unrest overseas Streamlining Visas in government for certain markets.
	More attractive industries taking workers Growing desire to recruit/retain NZ's Growth in demand for health services Role of the strength of the economy Growth of Māori Tourism Industry Growth of sharing economy Health and core industry will boom Economic growth and low inflation Increasing wealth/middle class in Asia Fluctuating oil prices	Cropp (2016) Cropp (2016) Callister & Dudham (2010) MBIE (2013) Internet Wire (2014) Solnet (2016) Karamea (2016) Tourism 2025 (2015) Smyth (2016)	Health sector becoming more important, other sectors may pay more EG. Construction. "People don't want to travel around the world to be served by someone from home". Desire for authenticity in service in tourism Ageing population creating a greater need for health services, taking importance away from tourism? Relative employment reflects strength of economy. Redundancy off-putting for people Contribution, strength of ventures and going international Impacts on sub-sectors of tourism as a new type of competition EG. Transport and hotels As a competing industry to tourism and probably will pay better. Growth in bottlenecks in housing, city roads, infrastructure, inequality and poverty. Increasing wealth/middle class in Asia making them the next big market to cater for. Economies are more vulnerable to global economic shocks
TECHNOLOGICAL	Pressure to innovate Tech advancement vs human labour Increase technology driver 24/7 world Technology drives customisation Self-service technology	Karamea (2016) Dept. of Labour (2008) Solnet (2016) Solnet (2015) Bartlett (2016)	Speed of business and consumers have greater needs and buying power – policy, education, businesses need to make technology and innovate, adoption of information is a priority. As tech progresses, jobs will be substituted with tech to save money. But tourism's core product is good service becomes a tradeoff This will have pressures on operator's time (Already see this in hospo). Hard for smaller family businesses. Technology opens up opportunities for personalisation and customisation for the consumer. Greater pressure son businesses Drives a need for a technology literate workforce.
SOCIAL/ DEMOGRAPHIC	Demand for foreigners to cover shortfall Travellers enjoying Kiwi staff Gen Y influence of control Workforce affected by baby boomers Increasingly educated workforce Baby boomers in retirement Increased mobility of workforce	McBeth (2016) Cropp (2016) Wallop (2014) Callister & Dudham (2010) Employment NZ (2016) Solnet (2016) Solnet (2016)	Govt still trying to attract off peak visitors to ease uncertainty. Needs 36000 extra employees Part of the authentic experience but may be unrealistic. Drive to be in control, boredom of 9-5 hours, wanting something different. Also tend to turn up nose as lower skill jobs. Workforce growing since 1990's and expected to grow up until 2020 Brain drain? Lack of supply for lower skilled work/tourism jobs Baby boomers will be in retirement homes and dependency rate meaning later retirement.

Continued next page.

	<p>More elderly in workforce Value co-creation</p> <p>Increased diversity Immigrants setting up their own businesses</p> <p>The rise in female empowerment Unwillingness from NZs to work tourism</p>	<p>Solnet (2016) Solnet (2015)</p> <p>Bartlett (2016) Herald (2015)</p> <p>Tourism 2025 (2015) Stroombergen (2006)</p>	<p>Living longer, service expectations, product needs, keep travelling into their old age People are working longer. Pensioner poverty Growing demand for experiences, experience economy, customer as a co-creator of their own experience. Affects the design of products/service Cross cultural knowledge needed and understanding of second languages. Immigrants tend to set up their own businesses. Family businesses. Already common within tourism and hospo. Is there enough support? More females are travelling by themselves, working, changing work life balance and priorities within work. NZ'ers have a poor attitude towards lower skill work, meaning that foreigners who are willing to work take these jobs.</p>
ENVIRONMENTAL	<p>Climate change</p> <p>Exposure of Māori economy</p> <p>Natural disasters</p>	<p>Solnet (2015) Ghader (2005) Karama (2016)</p> <p>Wood (2012)</p>	<p>Growing concern around climate change and the harmful effects of travelling. Customers are more of risks and company behaviour. Climate change agreement in Paris 2015, encouraging low emission practices. Disproportionately exposed to the direct impacts of a warming planet from their involvement in primary industries. For example Christchurch and the effect this has on the workforce. Growing concern around Wellington's 'big one'.</p>

Table 1: First round of 48 drivers from the literature.

CATEGORY	DRIVER
POLITICAL	Govt policies around superannuation (leading to pensioner poverty) Immigration policies affecting labour mobility (and Visas) * HR leaders shifting to strategic roles Growing international political unrest Individualised employment (less unions, power shifting to employer) *
ECONOMIC/FINANCIAL	Growth of the Māori economy * Growth/rebuilding of Christchurch Undiversified NZ economy vulnerability/strength * Competing sectors/industries * Increasing wealth and middle class in Asia * Oil Prices
TECHNOLOGICAL	Growth of the sharing economy * Technological advancements pushing increased customisation/personalisation * Growth of self-service technology Increasing pressure for innovative behaviour
SOCIAL/DEMOGRAPHIC	Aging workforce and consumers * Demand for local employment vs. reliance of migrant labour * Increasing levels of education and mobility * Experience economy *
ENVIRONMENTAL	Climate change issues growing concern * Māori economy vulnerability towards climate change

* Indicates 13 most important drivers

Table 2: Second round of driver refinement,

The next step involved a similar process to reduce the 21 drivers to a smaller number. This involved the researcher systematically analysing each of the themes separately, then highlighting the drivers that were most important within the literature. This step was more challenging than reducing the 48 drivers to 21, because as the list grew smaller, each driver was perceived as important. To aid the process, the researcher reflected upon which drivers would have the most impact upon a workforce directly and consulted with their supervisor. The resulting 13 drivers are indicated in Table 2 with a star. These were then taken to each of the three advisory group members independently to reflect upon and offer advice as to which should be the final ten.

4.2.1 Advisory Group Reflections

The first round of consultation with the advisory group sought to gain expertise and advice surrounding the final ten drivers. Each member was met at a time and location of their preference. They were each shown the drivers in advance and during the meeting the research process was explained to give them a richer understanding of both what the study was aiming to achieve, and why. This first meeting unveiled interesting perspectives on the drivers, which were at times contrary to the researcher's expectations.

DRIVER	Most Important Drivers From Advisory Group		
	MEMBER A	MEMBER B	MEMBER C
1. Immigration policies affecting labour mobility (and Visa?)	*	*	*
2. Individualised employment (less unions, increasing power to employer)			
3. Growth of the Māori economy			*
4. Increasing wealth and middle class within Asia	*	*	*
5. Undiversified New Zealand economy vulnerability/strength			
6. Competition between industries	*	*	
7. Technological advancements pushing increasing customisation/ personalisation	*	*	*
8. Ageing consumers and workforce		*	
9. Increasing levels of education and mobility			
10. Demand for local employment against reliance on migrant labour	*		*
11. Growing concern for climate change issues			*
12. Growth of the sharing economy	*	*	*
13. Growth of experience economy	*	*	*

Table 3: Final 13 drivers presented to advisory group with the intention of narrowing to ten.

Advisory member A offered the perspective of an employer, with both personal and business Māori relations. As expected this member took a business-orientated, and consumer-focused reflection on the drivers. This was apparent from their first comment which highlighted that due to the diversity of the sector, judging these drivers could be difficult with their various implications on different businesses and areas. Member A agreed that both the Māori economy and climate change were important factors in general, but questioned their effect on the workforce. Competition for workers was highlighted as important, particularly with the health sector. Finally, their views around the demand for local employment reflected a desire to look after New Zealanders. They commented that “we need to provide jobs for local workforce at competitive rates so we don’t have to rely on migrant labour, which does not provide the product or service level we desire”.

The second meeting was with member B, who took a holistic industry perspective from the view of the employer. Their view also stressed the demand and supply logic of workforce issues. In terms of the drivers, member B emphasised the Asian market and their influence on the workforce, both in terms of the changing visitor mix and hiring Asian staff. Both cultural integration and cultural awareness were highlighted as important issues and technology and the sharing and experience economies were also stressed as important drivers. These were expanded by noting that the interpersonal aspect of tourism will always prevail. Tourists seek authentic, personal and experiential trips which businesses must cater for, and cannot always be substituted with technology. Member B also alluded to Goffman’s (1959) stage approach to authenticity, mentioning that technology will affect backstage jobs more than front stage, due to the latter’s reliance on the personal touch which will always be valued by customers.

The final meeting with member C, who brought the perspective of the employee, with their experience of union, employment and labour issues. In terms of the drivers, they believed immigration, the Asian market, technology, climate change, the Māori and the sharing economy were key. They questioned the impact of individualised employment due to the lack of union presence in many tourism businesses and also heavily stressed the negative working conditions of this sector. The economic drivers of industry competition and New Zealand’s undiversified economy were thought to only have an impact in terms of the power of New Zealand’s dollar. Most surprisingly, the driver of an aging workforce was dismissed as relatively unimportant, whilst in the literature this was highlighted as the opposite. They

questioned whether people in the future would be travelling as much as they are now, due to values of sustainability and the drop in disposable income.

These reflections provided the researcher with valuable perspectives on each driver (summarised in Table 3) and led to the final ten drivers depicted in Table 4 (in no order of importance). Individualised employment was removed as every advisory member deemed it unimportant. Despite the mixed views on the Māori economy, it remained in the final ten due to its unique significance to New Zealand. *The undiversified economy* and *competition between industries* were combined upon reflection of the advisory's comments and produced as driver four in Table 4. The ageing consumer and workforce remained due to its ongoing presence within the literature and the current political and employment discussions within the industry.

- 1 The role of Immigration policies and their effect on labour mobility
- 2 The growing strength and significance of the Māori economy
- 3 The impact of Asia's growing wealth and middle class, changing the visitor mix and workforce requirements
- 4 New Zealand's reliance on a few key industries creating potential labour competition & economic vulnerability
- 5 The impact of technological advancements on the tourism industry and therefore workforce.
- 6 The impact of both an ageing consumer and workforce
- 7 The effect of increasingly educated and fluid workforce within New Zealand
- 8 The growing demand for local employment against the industries traditional reliance on migrant labour
- 9 The growth of a 'sharing economy' affecting businesses and their workforce needs
- 10 The growth of an 'experience economy' pushing increasing customisation/ personalisation preferences from tourists

Table 4: The final ten drivers to be presented to the Delphi panellists.

4.3 Final Ten Drivers

The previous section provided an explanation of how the final ten key drivers were systematically derived and narrowed down from the literature. This section continues with a richer description of each driver and their importance towards the New Zealand tourism workforce both in the present as well as in the future of 2035.

4.3.1 The Role of Immigration Policies & Their Effect on Labour Mobility

One of the defining factors of the tourism workforce is its reliance on migrant labour. Simultaneously, this driver is extremely important to tourism employment studies, since the industry “sits within the dominant service economy of developed countries” (Baum, 2007, p.1383) and is labour intensive. The research on the role and consequences of immigration are immense and heavily involved within political discussion. Unfortunately the “public attitudes about immigration reflect substantial misconceptions” (Cornelius & Rosenblum, 2005, p. 103). Cornelius and Rosenblum’s (2005) paper on immigration and politics summarises that immigration affects and concerns a multiplicity of stakeholders, is shrouded in misconceptions and is increasing as the world becomes more fluid and globalised.

This growth is occurring in tourism where the sector’s seasonal and structural challenges make migrant labour attractive (Joppe, 2011). This factor benefits employers as migrant employment often correlates to flexible, cheaper employment, simultaneously, the employment of immigrants has the potential to lead to greater knowledge, higher service levels, and greater cultural awareness (Joppe, 2011). This driver was present within substantial amounts of literature and government reports around the tourism workforce, indicating it could be an important driver in the year 2035 (Solnet et al. 2013; McBeth, 2016; Callister & Didham, 2010; MBIE, 2016; Immigration NZ, 2016). New Zealand has a strong history of immigration and the country’s stance and policies around immigration will affect its tourism workforce. Closed regulations create difficulty in accessing the traditional lower skilled workers who are demanded in tourism; whilst open regulations create a more fluid labour market.

It is important to note that immigration is currently a popular topic within the media and literature due to the highly polarising issues of Isis, Brexit and Trump; creating enormous debate around the stance on immigration policies. Whilst New Zealand is separate to the likes

of Great Britain and the United States of America, it raises the possibility of such populist thinking to occur here in the future. These events also highlight the very important role that immigration policies can play on the shape, size and composition of workforces.

4.3.2 The Growing Strength & Significance of the Māori Economy

Te Amo (2015) notes that with its current worth of \$40 billion the Māori economy has large economic potential. This driver is significant to tourism due to its uniqueness to this country and its continual growth, which has been occurring over the last 100 years and most notably in the last 20 (MBIE, 2016). It has gained public and private sector interest due to its unique characteristics and business strategies. The Māori economy is now operating successfully in a diverse range of sectors but most importantly for this study, is their growing presence in the tourism industry (MBIE, 2016).

The uniqueness of these businesses is due to their ownership structure, characteristics and business strategies, as well as New Zealand specific issues like the Treaty of Waitangi. Considering the former point, many businesses are owned by an Iwi in the form of trusts. The most notable being the Ngāi Tāhū tribe which “manages a diversified portfolio of investments that include equities, property, seafood and tourism” (Ellison, 2010, p. 5). Considering this structure it becomes apparent why many Māori businesses operate with similar characteristics to that of family businesses, valuing trust, relationships and long term thinking (Te Amo, 2015; Getz & Carlsen, 2005). Māori businesses also have a strength in “storytelling to carve out a unique proposition with global consumers” (Te Amo, 2015, p. 1) and pride themselves in the four values of Whanaungatanga, Kaitiakitanga, Rangatiratanga and Manaakitanga. These translate to: relationships, care for the environment, self-determination, and the care and hospitality of people (Te Amo, 2015). These unique businesses are growing in strength and value, and with continual growth could have an effect within tourism and more specifically, its workforce.

4.3.3 The Impact of Asia’s Growing Wealth & Middle Class

A commonly mentioned issue in the literature is that of Asia’s continually growing middle class and wealth (TIA, 2015; Callister & Didham, 2010). This is because Asia has grown to become New Zealand's second highest inbound market, sitting at 939,238 arrivals in 2016 (TIA, 2016b). Of this number, 422,256 are travelling from China. Farrell, Gersch, and

Stephenson (2006) explain that this increased travel is due to fast economic growth in China creating a rapidly growing middle class within a country that traditionally suffered from large amounts of poverty. As Farrell et al. (2006) state, China will be one of the largest global consumer markets by 2025.

Asian consumer wealth and purchasing behaviour is shifting. An article in *The Economist* (2016) entitled ‘The class war’ outlines this issue, claiming that many are “individualistic, empowered and keen to shape society around them” (p. 1). In terms of tourism, they are seeking new experiences of all kinds, changing our traditional view of them as package tourists (TIA, 2016a). Simultaneously, as air routes continue to open up, this market is predicted to grow as New Zealand becomes a more attractive destination. New Zealand needs to be prepared as this market will shape the type and quality of tourism product which New Zealand offers, which will inevitably have an effect on workforce skills in demand (TIA, 2016a).

4.3.4 New Zealand’s Reliance on a Few Key Industries Creating Potential

Labour Competition & Economic Vulnerability

The shape of New Zealand’s workforce has evolved alongside the changing nature of the country’s key industries. In 1901 the primary industries employed 40% of the workforce (Callister & Didham, 2010). These employees were also predominantly male, due to the physical nature of work and societal pressures on women at the time. In 2006, primary industries only employed 7% of the working population as the sector became more mechanised. Similar to most developed countries, New Zealand’s service sector has been on the rise since the early 1900’s as countries switch from a manufacturing to service-led economic model. It becomes apparent that important industries are a high source of employment and throughout the literature some concerns were raised around New Zealand’s possible over-reliance on a few key industries (Callister & Didham, 2010; Donaghy, 2014; Cropp, 2016; Karamaea, 2016).

According to the 2016 New Zealand Treasury economic and financial overview, primary industries contribute over 50% of the country’s export earnings, playing a very important role as an earner and an employer. Within this sector, dairy sits at 39% of the total gross production. However, some areas of the literature suggest that this reliance is problematic, noting current global instability and economic uncertainty (Donaghy, 2014; Callister & Didham, 2010). The question arises around what will happen if this industry collapses, be it due to economic or natural reasons. O’Connor (2016) points out that “an equivalent slump in share value on the

NZX would be considered a crisis” (p. 1). In terms of tourism employment, this is a question of whether changing workforce structures will either benefit or damage tourism’s workforce. Simultaneously, the country is seeing growth in demand for other industries such as health care, due to an ageing population. Demand in other industries could take away potential employees from tourism.

4.3.5 The Impact of Technological Advancements on the Tourism Industry & its Workforce

The impact that technology will have on the future workforce is a commonly deliberated issue. This is due to the immense impact technology has already had upon work, as well as the shroud of uncertainty when imagining what technologies will emerge in the future. Consider the impact on work from the emergence of the internet, opening endless opportunities for information and communication. Technology has aided the workforce to become more mobile, globalised and connected whilst enabling organisations to “improve operating efficiencies, improve communications, reduce costs, increase their global presence, and gain competitive advantage through the implementation” (Mamaghani, 2006, p. 846). On the contrary, technology has also advanced to replace jobs performed by people, and doing so more efficiently and effectively which has led to discussions around fear of job security (Baum et al. 2016; Bartlett, 2016; Solnet et al. 2013). This also raises the question regarding the tourism sector, of whether this will affect more of the ‘backstage’ roles as opposed to the ‘front-stage’ (Neuhofer, Buhalis, & Ladkin, 2013; Goffman, 1971).

Technology has also affected all stages of the tourism experience (pre-trip, during and post-trip) and the way businesses operate to cater to this change. Information Communication Technologies (ICT) have been affecting this sector since the 1980’s and have “given scope for the development of a wide range of new tools and services that facilitate global interaction between players around the world” (Buhalis & Law, 2008, p. 609). Consider that due to Computer Reservation Systems (CRSs) and the internet, a consumer now has a limitless amount of knowledge and options available which will influence their purchasing decisions (Buhalis & Law, 2008). When thinking about the effect on the tourism workforce of the future, technology has the ability to change the worker's role in terms of what they do and how they do it.

4.3.6 The Impact of Both an Ageing Consumer & Workforce

When considering the workforce size, structure and composition in the future, literature continually highlights the changing global age structure (Zimmer, 2016). This demographic phenomenon presents a challenge which will affect policy-makers and businesses over the next few decades. New Zealand's Department of Labour released a report (2010) concerning the country's future workforce and estimated that by 2050, the ratio of the population aged 65 years and over compared to those aged 20 to 64 years will be around 50%. This will have immense repercussions for health care systems, fiscal policies and business policy and strategy. The causes of this shift are largely due to reductions in fertility rates, meaning that larger family structures are growing older whilst preceding generations are smaller (Pakulski, 2016). In western societies this is often referred to as the post-war baby boomers. Simultaneously, improved living conditions and health care has meant that life expectancy is increasing as people live longer than those from previous generations.

From the multiplicity of studies, literature, government reports, and academics addressing this issue, it can become an almost daunting and negative issue. However, Zimmer (2016) explains that whilst an ageing population brings challenges, it also brings opportunities. For tourism, understanding behaviours and preferences of the elderly has gained increasing importance (Hung & Lu, 2016). People are living longer, travelling more, and are desiring exciting and active experiences in their later life. In terms of the workforce, Burke (2015) notes that change of culture, tensions between age groups, loss of knowledge when older workers leave, and increased stress of older workers are a few factors which occur with an ageing workforce. Within tourism, some challenges may arise due to the traditionally younger workforce it employs. Businesses may need to become flexible and innovative in their employment practices to encourage an older generation towards this industry.

4.3.7 The Effect of an Increasingly Educated & Fluid Workforce both Globally & Within New Zealand

It would be quoted that on average, one would have seven different jobs in their lifetime. Today, "91% of Millennials (those born between 1977 and 1997) expect to stay in a job for under three years" (Meister, 2012, p. 1), which means they would have an average of 15 to 20 jobs in their lifetime. This attitude stems from a generation within an increasingly globalised, mobile and insecure working world. Their focus is not on job-security, stability and building a family which drove their parents, but a search for happiness and fulfilment from their work in

an increasingly competitive and flexible workforce (Meister, 2012). The demand for flexibility within the workforce is also a result of the changing demographics and social norms within society.

Globalisation is a large reason for this increasingly fluid and mobile workforce and it opens up opportunities and issues for the New Zealand labour market as it affects job demand and supply of labour (Department of Labour, 2010). This mobility can help with skill shortages within the country but also result in offshoring. In conjunction with this trend, the New Zealand workforce has become more educated (Department of Labour, 2010) as more New Zealanders are continuing on to tertiary education after high school (Callister & Didham, 2010). This raises the question that if New Zealanders continue to become more educated and mobile in their working lives, will they remain within the country or seek greater opportunities offshore. The tourism industry, with its traditionally lower skill requirements and poor working conditions will need to position itself as a valuable and worthwhile employment option.

4.3.8 The Growing Demand for Local Employment against the Industry's Traditional Reliance on Migrant Labour

An interesting dissonance within New Zealand tourism workforce issues is its ongoing reliance on migrant labour against a growing desire to employ New Zealanders (Cropp, 2016; McBeth, 2016). As previously mentioned, tourism businesses often require the support of foreign workers “to cover a gap in the workforce as government and industry look at ways to attract visitors off-peak to create more certainty for full-time jobs and generate local career pathways” (McBeth, 2016, p. 1). The current Tourism 2025 strategy document aims to increase tourism expenditure in the future, which will mean increased demand for workers. With the example of the hotel sector, Cropp (2016) explains that hiring staff is “getting harder for an industry on the cusp of massive growth” (p. 1) and currently a substantial amount of migrants fill staffing gaps.

Authenticity in the tourism experience is one of its key determinants (Pine & Gilmore, 1998) and businesses recognise that a part of this authenticity is derived from staff. Numerous media articles are highlighting the sector’s desire to hire New Zealand employees for this reason (Cropp, 2016; McBeth, 2016; Pullar-Strecker, 2015), with one industry professional claiming that “visitors don't travel all the way around the world to talk to someone from home.” (Cropp, 2016, p. 1). Other perspectives reflect a desire to protect the local workforce by recruiting New

Zealanders, as migrants tend to be willing to work for lower wages (Cropp, 2016). However, difficulties arise in terms of the sector's innate poor working conditions which appear to put-off many New Zealanders from entering the industry. Looking forward to 2035, the sector will be faced with policy and strategy decisions concerning local and migrant recruitment.

4.3.9 The Growth of the Sharing Economy Affecting Businesses & Their Workforce Needs

The peer-to-peer (P2P) phenomenon of the sharing economy is a consequence of technological innovation and the Web 2.0. It “has enabled individuals to collaboratively make use of idle or underutilised inventory via fee-based sharing” (Segato, 2016, p. 4). This has revolutionised the business environment within tourism, considering the likes of Airbnb and Uber. However, as Segato (2016) explains, this disruptive technology is as much new as it is controversial, due to the potential “exploitation of labour, tax evasion and monopolistic behaviour” (p. 2). For the consumer or the tourist, the sharing economy provides a cheaper and easier method of purchasing goods and services which often cuts out the middleman. It has risen in popularity within a society which is less concerned about the permanent ownership of materials, but rather “temporary access to possessions and real time access to a range of experience economy commodities” (Dredge & Gyimothy, 2015, p. 292).

Concerns from governments and unions have arisen around the consequences that this new economic model could have upon the tourism sector and the labour market (Fang, Ye & Law, 2016). Fang et al. (2016) note that sharing platforms such as Airbnb could push out lower-end hotel businesses and consequently cause job loss. Avital, Carroll, Hjalmarsson, Levina, Malhotra, and Sundararajan (2015) raise the issues of rights and protection to those working within these companies, as they are usually classified as freelancers, thus void of typical employment rights. As the sharing economy grows in strength and numbers, its potential to change tourism's workforce increases as well.

4.3.10 The Growth of an Experience Economy Pushing Higher Standards & Increasing Customisation/Personalisation Preferences from Tourists

The term ‘experience economy’ is often utilised to explain how today's consumers value the intangible features of a product or service; namely quality, personalised, memorable experiences that surpass customers' expectations (Hayes & MacLeod, 2007; Pine & Gilmore, 1998; Mehmetoglu & Engen, 2011). It has been described as the next economic offering, or

the ‘fourth shift’ in terms of the most valuable economic activity at the time (Mehmetoglu & Engen, 2011). Whilst this driver is primarily an explanation of consumer behaviour, Dwyer-Owens (1999) explain that the reason experiences have become so important is due to a combination of external and internal influences. The three main reasons are: new technology, increased competition, and the rising affluence of consumers (Dwyer-Owens, 1999). As information is more readily available to consumers, the buying power has shifted in their favour, causing businesses to become more innovation and competitive with their product and service offerings. Simultaneously, more consumers are attracted to a less materialistic lifestyle and crafting their own identity (Mehmetoglu & Engen, 2011).

Within the tourism industry, this driver is especially important considering the sector is characterised by the creation and selling of experiences. Businesses within this sector will need to adopt their product and service offerings to match the expectations of tourists and this will have an influence on the skills and size of the workforce. As Hayes and Macleod (2007) explain, tourism experiences are shifting from standardisation, such as coach tours, to where “the visitor is encouraged to immerse, and perhaps find, themselves in unique self-tailored experiences that reflect their personality and interest” (p, 48).

4.4 Conclusion

Chapter Four discussed the environmental scanning phase of the research process. This explained the process of reviewing academic and grey literature to produce 48 drivers of change which were narrowed down to ten. It exemplified a method which was systematic and utilised valuable reflections from the advisory group. A final reflection of the ten drivers notes the lack of an environmental driver, yet a large portion of social and demographic. This is understandable considering the more visible effect demographic changes can have upon a workforce, compared to the more removed or indirect effects which the environment may have. With ten final drivers identified and justified, the next phase of consensus building through the Delphi panel occurs.

Chapter Five

CONSENSUS BUILDING

5.1 Introduction

The next stage within the research is consensus building, in which this study utilised a method replicated from the study by Solnet et al. (2013). This stage involved three consultation rounds of the Delphi method; drawing upon expert knowledge to narrow down the ten drivers to just two. These two drivers formed the groundwork for the development of four future scenarios which were critiqued again by the Delphi panel. This chapter will explain the process in detail which occurred over a five month period; including the selection of panellists, the questionnaire development, and the details, results and analysis of each round.

5.2 Selection of Panellists

Selecting the individuals who would be asked to participate in the surveys was an important step. This task required decisions around the number and type of experts to be contacted. For the former point, Nowack et al. (2011) recommend that the number of experts should consider the study design. Considering the survey based design of this study, a large pool of experts were chosen. Additionally, the limited amount of information which can be gathered from surveys required contacting a larger number. A wide range of experts from various fields were required to give more realistic feedback on this topic, due to the complex nature of tourism and workforce issues. With this in mind, the initial target was 100 experts. The researcher broadly followed the process recommended within Okoli and Pawlowski's (2004) paper for selecting experts. It begins with a Knowledge Resource Nomination worksheet to categorise experts. This step formulated a network of participants (Table 5) which would be a desirable reflection of this industry.

Public Sector	Government	10
	Academics	10
	Iwi/Māori Development	7
Private Sector	Accommodation	15
	Activities & Tours	12
	Transport	11
	Retail	2
	Attractions	11
Industry Representatives	Industry Training	10
	Associations	5
	Regional Tourism Organisations	6
	Unions	4

Table 5: Identified areas of participants and spread by organisation.

Following Okoli and Pawlowski's (2004) second step, each area was 'populated' by a systematic search for participant names, followed by email addresses online. This was more difficult than expected. When email addresses could not be found, organisations were sometimes phoned to request this information. All information was documented on an excel spreadsheet stating the individual's name, organisation, role, category as listed above, email address, and notes around why they would be valuable to this study. This also gave the researcher a resource to document who would respond to the surveys. The number of individuals per category is shown above in Table 5, indicating the spread of expertise, with a total of 103 emails collected. A limitation of this list was the sole involvement of New Zealand based respondents, as overseas individuals with a knowledge of New Zealand could have valuable knowledge on this topic.

5.3 Questionnaire Development

The next step required formulating and designing the questionnaires which would be sent out through email to the panellists. Three surveys were to be constructed, however the second and third would depend on the results of their predecessors. These surveys were designed using the programme Qualtrics due to the researcher's previous experience with this software. The first survey aimed to ask panellists to narrow down the ten drivers to four. The second was similar in nature, asking the panel to narrow the four drivers to just two. The third and final survey

presented panellists with four scenarios of which they were asked to comment on. A number of factors were important to successfully do so. Considering that these panellists were busy professionals, the surveys needed to be simple and easy to use, whilst communicating enough information so that they understood the study and drivers. The former points would be achieved through the style of the questions, length of the survey, as well as an aesthetically appealing design. The latter would be communicated through the initial invitation email and descriptions of the drivers and scenarios within the surveys.

The initial email was the first contact with potential panellists, welcoming them to participate in this study. Within this, the purpose of the study was communicated as well as what participants could expect (most importantly, that they would be asked to complete three surveys). Personal judgement around convenience led the researcher to differ their technique from the Solnet et al. (2013) study and include a survey link in the first email, rather than waiting for a response to indicate they were interested. The next three sections explain each of the three rounds of Delphi surveys in detail, followed by the analysis of the results.

5.4 Delphi Round One

The first Delphi round was executed in October 2016 and as mentioned above, the survey was linked in the welcoming email. Each email was personalised to the panellists, including a note as to why the researcher thought their contribution would be valuable in this study. For example, “I am writing to you for your valuable experience and expertise within tourism policy”. This email was sent out on a Friday morning in the hope that at the end of the working week, panellists would be more likely to engage in a non-work related activity. The survey was left open for ten days and a reminder email was sent on the following Wednesday to those who had not completed it yet.


The survey began with a brief introduction of the study and the ten key drivers, before asking participants to rate each driver on a seven-point Likert scale, in terms of how much impact they believed it would have on the future New Zealand tourism workforce. There was extra space provided for further comments. This combination of open and closed questions is identified by Nowack et al. (2011) as a useful function in studies requiring consolidation as well as “a source of creative input for the idea generation function” (p. 1612). The question design of Solnet et

al. (2013) was used as a guide for this study. However, the decision was made to use two questions instead of the three used by Solnet et al. (2013), which asked for importance, likelihood and additional comments. Feedback from the advisory group indicated that two would be simpler. At the conclusion of the survey, participants were asked to add any other drivers they thought would be influential to this workforce's future. An example of the question design and layout is shown in Figure 4.

DRIVER ONE

The role of immigration policies and their effect on labour mobility.

New Zealand's future immigration laws and policies could affect the movement of labour through a shift to either open borders or a closed/protectionism stance.



Little ImpactLarge Impact

1234567

How much impact will this driver have on the NZ tourism workforce in 2035?
(slide the blue button along to your preferred driver)

Please write any additional comments or thoughts you have about this driver.

Figure 4: Example of question in survey one.

5.4.1 Results & Analysis

When the survey went live, some respondents indicated their interest in the study and recommended other individuals within their organisations which should also be contacted. Some respondents also forwarded the survey on to someone else if they were unable to complete it. After calculating emails which did not work, this resulted in 97 potential panellists. Of this number, 45 individuals participated in the first survey, giving a response rate of 46%. This was a satisfactory result considering the type of respondents and the requirement of completing three rounds. As noted by Okoli and Pawlowski (2004), “the Delphi study does not depend on a statistical sample that attempts to be representative of any population” (p. 20). Table 6 summarises the response rates by organisation for each survey.

		Survey 1		Survey 2		Survey 3	
		Sent	Received	Sent	Received	Sent	Received
Public Sector	Government	10	10	10	8	10	6
	Academics	10	2	10	2	2	1
	Iwi/Māori Development	7	2	5	1	3	1
Private Sector	Accommodation	15	7	14	4	7	3
	Activities & Tours	12	5	11	5	5	4
	Transport	11	2	8	1	2	2
	Retail	2	0	2	0	0	0
	Attractions	11	2	11	1	3	2
Industry Representatives	Industry Training	10	5	10	4	5	0
	Associations	5	5	5	5	5	3
	Regional Tourism Organisations	6	2	6	2	4	2
	Unions	4	3	4	1	3	0

Table 6: Survey 1, 2 & 3 response rate by organisation.

Survey one indicated a positive response rate from experts working within government, tourism association bodies and unions, which is not surprising considering these individuals work within areas that are concerned with longer term, holistic, workforce issues. Individuals from the accommodation sector, activities and tours, industry training and regional tourism organisations had a satisfactory response rate, however the areas with the smallest response came from academia, transport, activities and retail. This could be an indication of either busy schedules or lack of interest in the study; a factor which could reflect thoughts from many private sector businesses who are more concerned with the day-to-day business operations rather than thinking 20 years into the future.

Similar to Solnet et al. (2013), “descriptive statistics were used to identify the overall means and frequency of response types” (p. 696) for each driver. Then the responses for the open ended questions were analysed, drawing out common comments or concerns from the panellists. The results for the driver ratings are shown in Table 7 with the top four drivers highlighted in yellow. These will be discussed, followed by an analysis of the open ended comments.

Drivers with the highest mean indicated that respondents rated these as having the most impact. From the results it shows that the top four drivers were *Asia’s growing wealth and middle class*, *the role of immigration policies*, *the experience economy* and *technology*. It is also interesting to note that every driver was rated seven by at least one respondent, yet the driver of Asia’s growing wealth was never rated lower than a three, indicating a general consensus of importance. A deeper level of analysis was derived from the responses to the open ended questions about each driver. This was helpful as it highlighted varying opinions across different fields (government, industry, etc) and is discussed below. Comments for Asia’s growing wealth and middle class indicated that experts across fields agree this is already happening and will be “potentially massive” (Government); aligning with the fact this was one of the top rated drivers. However, some industry respondents cautioned an over-emphasis on this market, stating that “this is not necessarily at the expense of other more traditional markets” (Regional Tourism Organisation (RTO)). Respondents highlighted the characteristics of this market coupled with the language, service and product needs to cater to the Asian traveller. One academic panellist noted the balance required from businesses as “maintaining a kiwi experience while matching this new demand will be challenging”.

The immigration driver attracted many comments around the industry's over-reliance on migrant labour and the vulnerability of workers if immigration policies were to change. This was suggested to only increase as New Zealand tourism visitor numbers grow. Many government panellists highlighted the policy aspects; New Zealand’s current tightening of immigration, and a need to employ and train New Zealanders first. Industry panellists raised another point of vulnerability surrounding the typical characteristics of tourism workers being “lower-paid and semi-skilled” (Industry training), which are not usually the focus in tightening immigration settings. Some private businesses raised the positive side of immigration as a source of competitive advantage through multicultural understanding and knowledge. “Just like

we deal with multicultural guests, we expect our workforce to be multicultural to give a better understanding of cultural needs and language ability” (Accommodation). One HRM professional went further to suggest as a country we need to change and a large barrier to this is our culture. The eighth driver of demand for local employment against the reliance on migrant labour was commonly referenced back to this driver.

The experience economy driver was rated the third most important with similar comments to the Asian wealth driver. These indicated that currently and within the future, New Zealand’s tourism product quality and service levels will need to increase to match these customer expectations in niche, personalised and authentic products. An HRM panellist explained that better training and working conditions would be needed to achieve this. “How do you expect poor workers to show warmth, authenticity and a personal interest when they are over-worked, underpaid and treated badly by employers?”

The overarching themes within the technology driver surrounded its ongoing advancement and its potential effect on tourist behaviour and how businesses operate. This driver received the most qualitative feedback, perhaps due to the very relatable subject of technology. The fear of job loss which commonly appears in technology and workforce literature was largely deemed irrelevant to tourism. Automation and self-service technology was claimed to potentially “reduce the size/cost of the tourism workforce” (Government), but only with low wage jobs. It was continually highlighted that people are key to authenticity and the jobs which would be affected the most would be non-front line jobs. The sharing economy driver was also referenced here, warning of a change in business models and “likely to change the nature of the workforce rather than its size” (Accommodation). One union panellist also warned that despite the benefits of such an economy for tourists, this “could easily transfer control, profits, jobs and sovereignty overseas and the worst aspects of the tourism industry will be intensified”.

The seventh driver of an increasingly educated and fluid workforce drew comments around the commonly cited issues of lower pay, lower skill and poor working conditions within tourism employment which make it an unattractive sector (Baum et al. 2016; Burns, 1997). One association panellist described tourism “as a job you do while you look for a real job”, highlighting career progression and retention issues which the sector commonly faces. As the workforce becomes more educated, respondents agreed that tourism would struggle to keep up with its current characteristics.

An ageing population, despite unanimous agreement of its occurrence, did not make it to the top four drivers. This was reflected in the comments which noted tourism's traditional reliance on a younger demographic of workers. Respondents tended to comment on the impact of the ageing consumer on the products and services that tourism businesses offer; with one accommodation panellist saying: “adapting to ageing consumers will be easier than adapting to an ageing New Zealand population - the latter may bring labour shortages”.

The second to least important driver was that of New Zealand’s over-reliance on a few key industries. Many respondents agreed that this was an issue in New Zealand's economy with one HRM panellist stating that “New Zealand’s short-termism, non-strategic approach and failure to diversify leaves us very open”. The reason for this driver’s low rating was due to most respondents claiming this is not something to worry about in regards to tourism, because the industry requires differing skills sets to others.

The growing strength and significance of the Māori economy drew a divide in the comments. There was an almost unanimous response that this sector was indeed growing, diversifying and represents a key factor for tourism in New Zealand. However, many thought this would not have a significant impact on the tourism workforce. Private sector comments surrounded the tourism product and that integration of Māori culture is key “for destination attractiveness and the authentic tourism experience” (Accommodation). A final point of interest was the general ambivalence and lack of clarity around this part of the economy, with many respondents admitting their own gap in knowledge.

	Mean	Minimum Rating	Maximum Rating	Standard Deviation
Driver Three <i>Asian Wealth/Growth</i>	5.66	3	7	1.11
Driver One <i>Immigration</i>	5.62	2	7	1.37
Driver Ten <i>Experience Economy</i>	5.29	2	7	1.19
Driver Five <i>Technology</i>	5.18	2	7	1.39
Driver Nine <i>Sharing Economy</i>	5.00	2	7	1.39
Driver Eight <i>Local Employment</i>	4.68	2	7	1.19
Driver Seven <i>Education & Fluid</i>	4.62	2	7	1.28
Driver Six <i>Ageing Population</i>	4.61	2	7	1.20
Driver Four <i>Key Industry Reliance</i>	3.95	1	7	1.41
Driver Two <i>Maori Economy</i>	3.87	1	7	1.30

Table 7: Driver rating results from survey one.

5.5 Delphi Round Two

At the conclusion of the first Delphi round, the ten key drivers of change were successfully narrowed down to four. These were, *Asia's growing wealth and middle class, the role of immigration policies, the experience economy, and the role of technology*. The second round survey aimed to refine these to the two most important. The second survey was sent out in late November, at the same time of day and time frame as survey one. An introductory email gave panellists a brief re-cap of the first survey and what was to be expected within the second. The same panellists were emailed except for those who indicated their desire not to be involved.

The design of the second survey was similar to the first in terms of colour and structure. However, the questions were slightly different due to their intentions. Participants were shown the four drivers from the previous survey, then each driver was presented as an extreme to show

their possible states: *high vs. low technology influence within tourism businesses*, *high vs. low tourism industry push for quality experiences*, *Asian tourist market growth/decline*, and *immigration policies closed/open*. The panellists were asked to rank each of the four drivers in terms of likelihood and then importance; following the technique used by Solnet et al. (2013). An example of the survey question is shown in Figure 5. There was space given for comments on each of the four drivers to encourage richer detail for the researcher.

Q1. Please rank the four drivers in order of their likelihood to be an issue for the workforce. Bear in mind this could mean positive or negative.
(drag and drop the answers into your preferred order. 1= most likely, 4= least likely)

- 1 Immigration policies closed and regulated/ open
- 2 Asian tourist market growth/ decline
- 3 High vs. low technology influence within tourism businesses
- 4 High vs. low tourism industry push for quality experiences

Q2. Please rank the four drivers in order of how important you believe them to be.
(1= most important, 4= least important)

- 1 Immigration policies closed and regulated/ open
- 2 Asian tourist market growth/ decline
- 3 High vs. low technology influence within tourism businesses
- 4 High vs. low tourism industry push for quality experiences

Figure 5: Survey two question example.

5.5.1 Results and Analysis

A total of 96 emails were sent out for the second survey, with 34 responses, indicating a response rate of 35%. This was a drop in response rate from the first round which according to Nowack et al. (2011) is to be expected within the multiple round nature of Delphi studies. The response rate indicates that whilst most areas experienced a drop in participation, the areas of government, industry bodies and associations remained the highest (Table 6).

The results from the second survey (Figures 6 and 7) show that respondents ranked immigration policies (marked in blue) most important and most likely to have an effect on the future New Zealand tourism workforce. The driver of the growing Asian market (marked in orange) came second in both questions, exemplifying consensus around both of these drivers. The drivers of technology and the experience economy tied for third place in terms of likelihood, indicating that both drivers could be as likely to affect the future workforce as the other. However, for level of importance, the consensus was much clearer, with technology sitting in third place and experiences sitting in fourth.

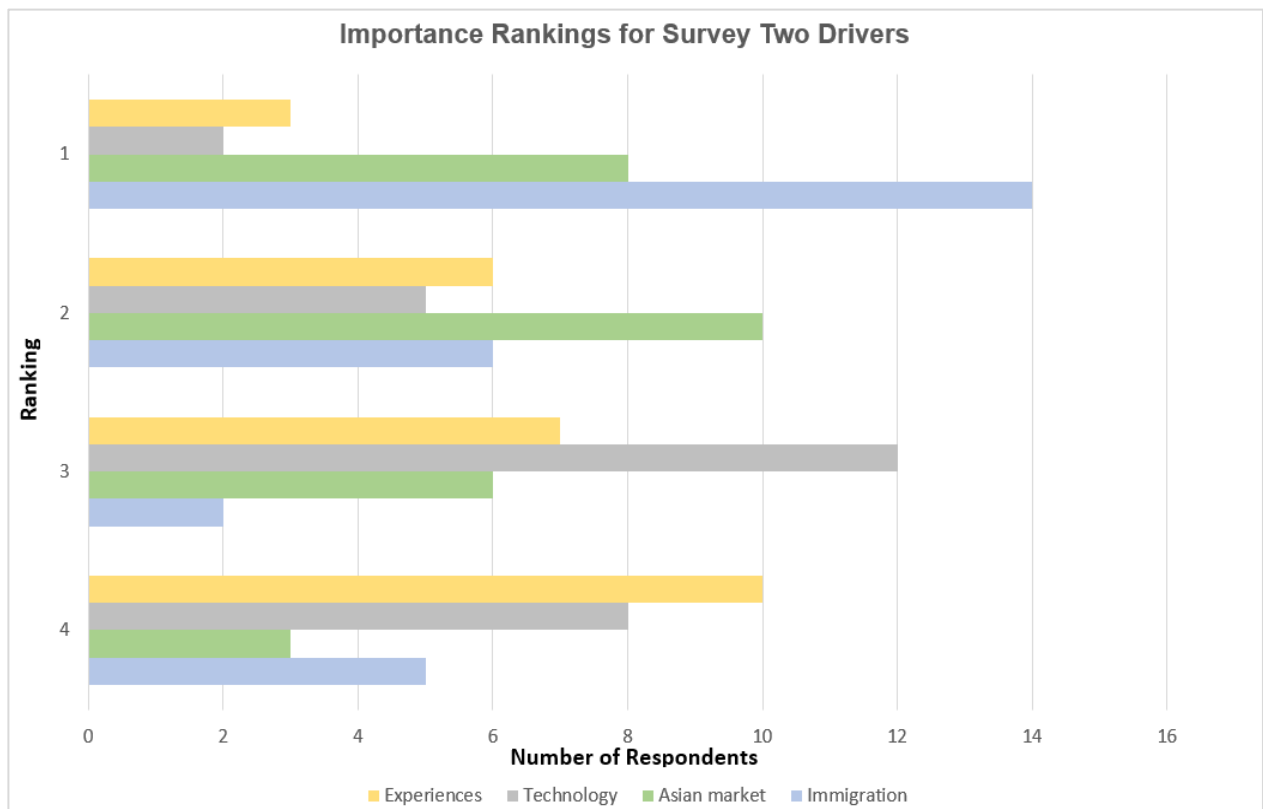


Figure 6. Results from survey two - driver importance.

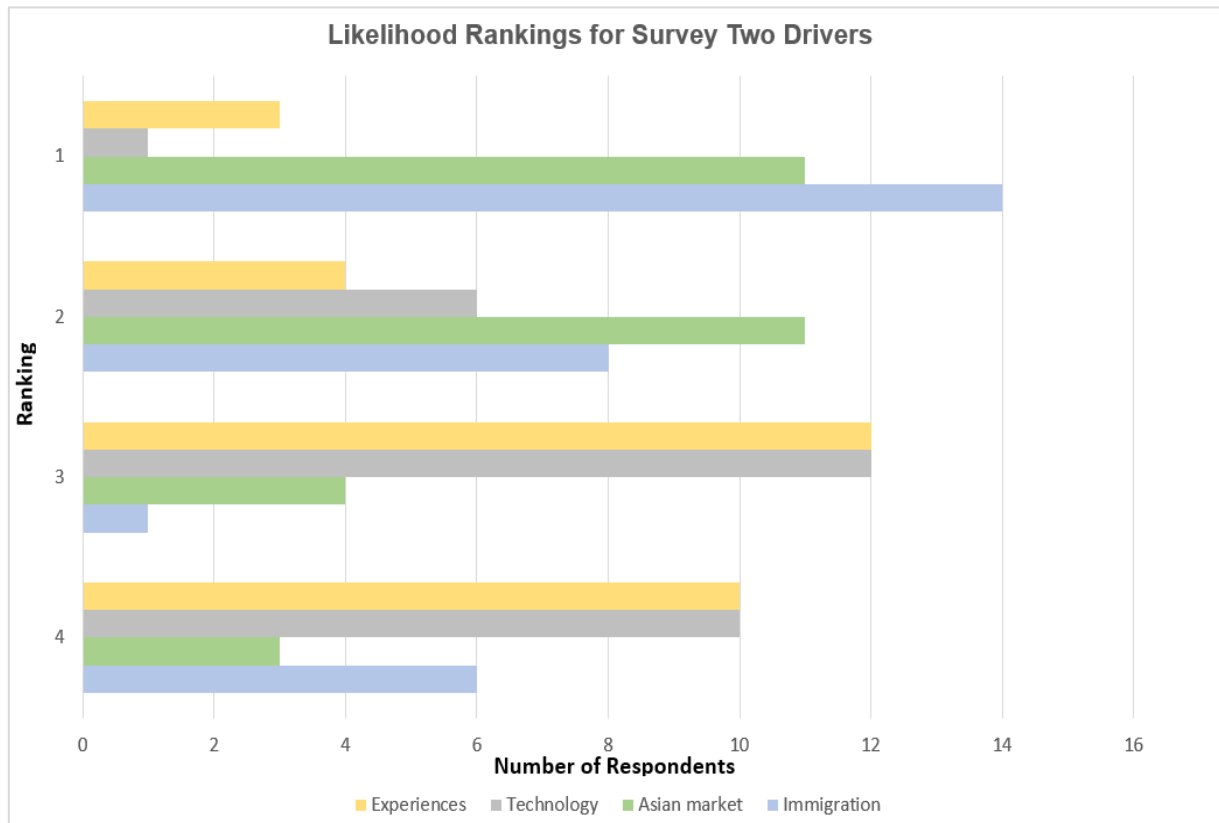


Figure 7. Results from survey two - driver likelihood.

An analysis of the open ended questions in survey two aimed to draw out richer detail on the expert's opinion surrounding each driver. It was understood by the researcher that the comments here would not be as long, as respondents had already commented on these drivers in the first survey. This question gave respondents a space for feedback on the choice of these four drivers. Answers for the first driver of immigration policies saw similar themes to survey one, with all respondents mentioning both the positive and negative aspects of immigration policies, noting its large dependence on economics. The main concerns highlighted the country's over reliance on migrant labour which shapes "wages, skills, quality and long term development of the sector" (Union) but can be beneficial through "their varied experiences, culture and language skills" (Accommodation). Private sector workers expressed views that praised open immigration, with some warnings around remembering to protect and employ the local workforce; whereas government and industry panellists commented on the effect of immigration as a sector-wide influence. The growth of the Asian market drew general consensus that this is an area for "opportunity which will need adaptation" (Association), affecting the experiences we provide and the staffing skills in demand. One respondent made

an interesting comment that the reason there is so much conversation around the Asian market is because we are used to “providing experiences that suit other western cultures” (RTO).

The technology driver drew many positive comments from businesses, as they are primarily concerned with profit and efficiency; both factors which technology can aid. Some comments highlighted the visitor experience which could be increased through technology, with a point around niche or “previously remote visitor experiences” (Government). Staffing issues were raised again in terms of how technology may bring an end to some, but not all jobs. There was a positive theme towards a push for more quality experiences within tourism in New Zealand, which is reflective of the current Tourism 2025 strategy document. Comments from a range of areas suggested that “growing value faster than volume” (Association) is fundamental considering the size of this country. A few panellists noted the term ‘quality’ and cautioned the expectation that it implies expensive, considering that it would “be different for different groups” (Union). Business responses drew similar comments that quality is essential and key to a competitive advantage, reflecting their profit motivations.

5.6 Delphi Round Three

The second Delphi round narrowed down the drivers to just two: *immigration policies* and *the growth of the Asian market*. The third and final Delphi round utilised these two drivers to construct four preliminary scenarios which were then presented to the Delphi. At this stage, the researcher sought the experts’ opinions of these scenarios which would then be analysed and incorporated into the final scenarios. This section explains how the researcher systematically constructed these four possible future states, followed by an explanation of the third survey and its results. It is important to note that the scenarios in this section are drafts and the final scenarios which incorporate the Delphi panel’s feedback will be presented within Chapter Six.

5.6.1 Scenario Construction Process

The scenario construction process followed a technique often utilised by Yeoman: the Heijden et al. (2002) 2x2 matrix. This “provides a basis for developing the initial draft scenarios” (Yeoman et al. 2012, p. 18), a technique which is frequently used (Nowack et al. 2011). Adopting such a technique is useful for a number of reasons. Firstly, as explained by Yeoman et al. (2012), it helps “to overcome the perceived weaknesses attributed to scenario

development” (p. 18) such as consistency and coherency, by providing a structured process of scenario development. Secondly, four scenarios is an important number and design decision (Nowack et al, 2011), as the purpose of scenario planning is not prediction, but to create a set of scenarios that communicate a range of possible futures (Goodwin & Wright, 2001). Creating just one or two scenarios may not achieve this.

The two drivers were placed upon a 2x2 matrix (Figure 8), which show the two opposite states that the driver could be. Within this study, the vertical axis represents the driver of the growing Asian market. The two opposite states exemplify two different markets, one that desires niche and quality experiences and products (shown at the top), and a mass market that demands standardised products and experiences (shown at the bottom). These states were chosen due to the respondent’s confidence that this market would continue to grow and therefore represents two different types of growth that could occur. On the horizontal axis, the driver of immigration policies was placed. The two opposite states of this driver are open immigration policies (shown on the right) or closed (shown on the left). Each scenario was then created within these spaces (Figure 9), combining the varied states of the drivers and representing “four different pathways and outcomes” (Yeoman et al. 2012, p. 20).

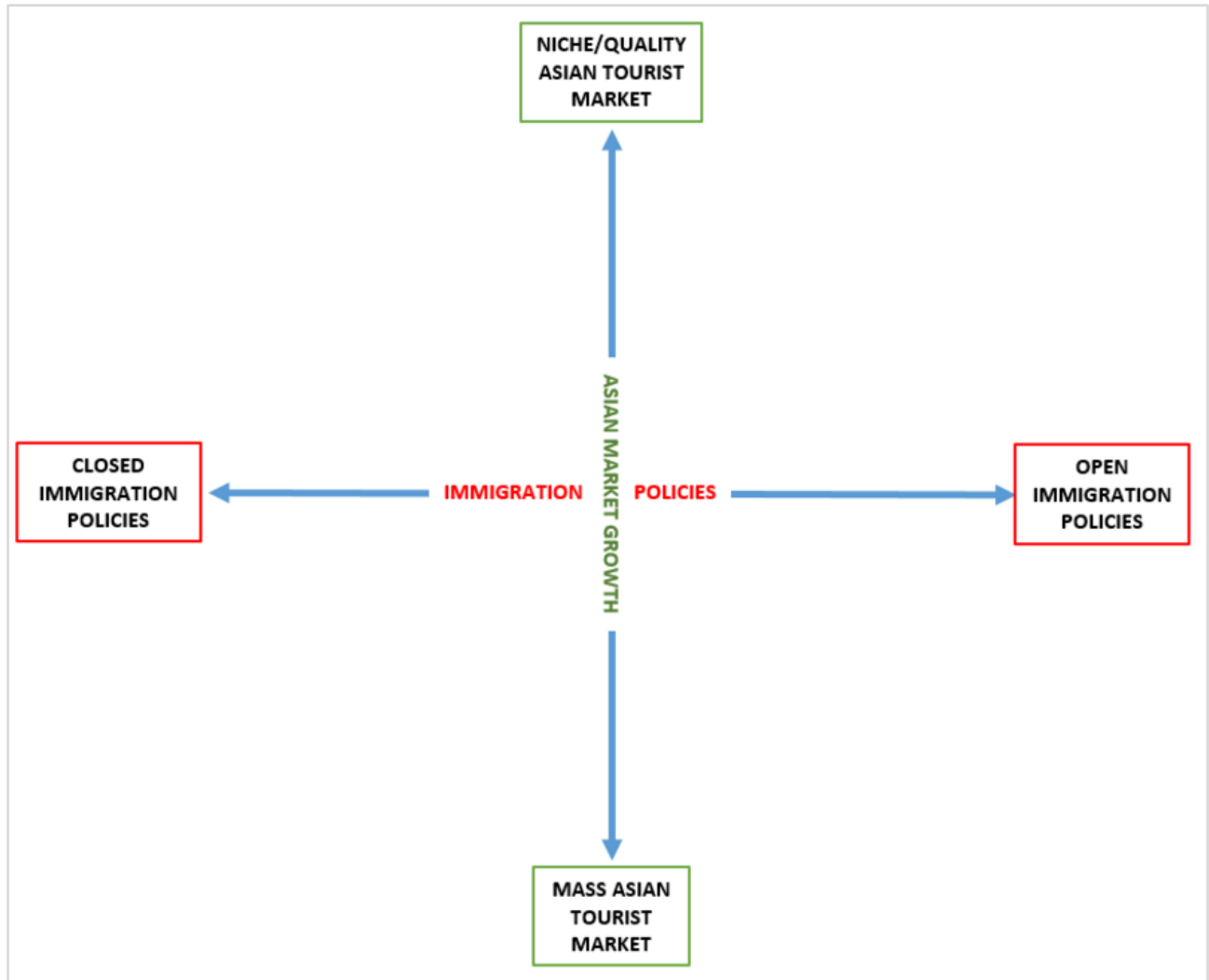


Figure 8: Scenario matrix with opposite states of drivers.

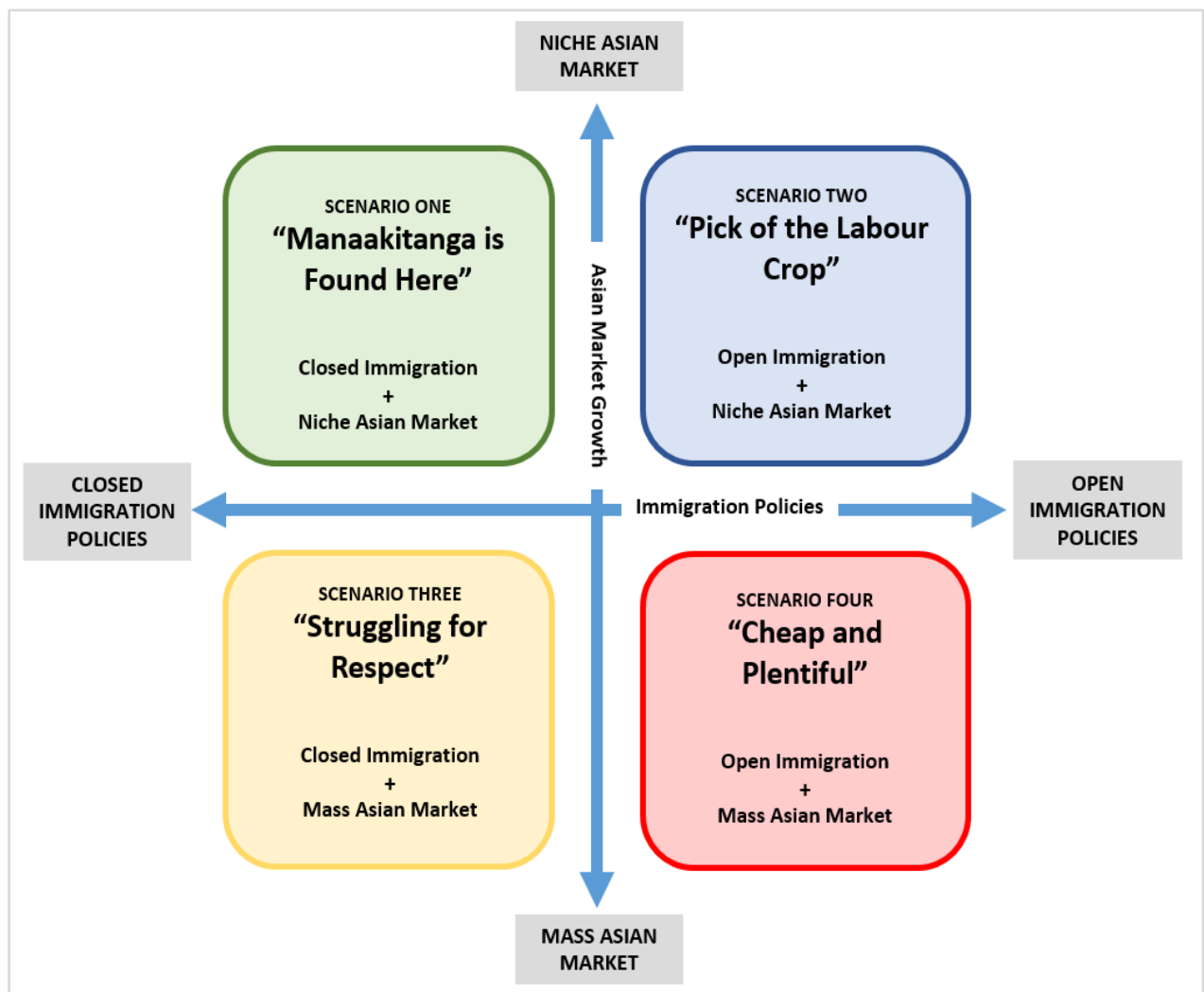


Figure 9: The four scenarios which are created utilising the various states of drivers.

The details within each scenario were created by following a modified framework technique used by Yeoman et al. (2012) called 'driving forces'. Within their study it involved listing the World, New Zealand specific, and Tourist behaviours which would be occurring within each scenario; and as Yeoman et al. (2012) explains, is useful for creating more "meaningful and complete, informed and internally consistent scenarios" (p. 20). For this study, the modified technique firstly involved a brainstorming of key factors associated with each driver. These were derived from the literature and surveys. An example of this is shown in Figure 10, but it should be noted that this is not an exhaustive list.

<p>IMMIGRATION POLICIES <i>Closed / Highly Regulated</i></p> <ul style="list-style-type: none"> • Harder Visa systems (points based). • Language skills more in demand as there is less supply. • NZ culture and the desire not to change. • Possible call for improvement in local workforce. • Increased innovation and flexibility. • Difficulty finding certain hospo jobs – could be more closely monitored. • Pressure for better training/quality. • Policies heavily reliant on economic performance/wages/labour supply/technologies. • Demand for better communication. between education providers and policies. • Growing political unrest. 	<p>IMMIGRATION POLICIES <i>Open / Freedom of Movement</i></p> <ul style="list-style-type: none"> • More open visa/immigration setting. • NZ culture of desire not to change. • Poorer pay for locals/ laziness of ‘smart’ solutions. • Over-reliance on migrant labour increased. • Quick to use low cost, short term, semi-skilled labour. • Limitations of development of high quality product in some areas. • Benefit of global workforce and increase in knowledge and a multicultural workforce. • Harder to find NZ employees? • Better for seasonality and businesses. • Fluid / flexible. • Issues of control. • Create need for unions?
<p>ASIAN MARKET GROWTH <i>Niche / Quality Tourism</i></p> <ul style="list-style-type: none"> • Need for language skills and greater understanding of cultures. • Free/independent travellers looking for authentic experience. • NZ seen as quality/unique/special destination. Can push higher quality product. • Māori tourism operators come into their own? Rise in power and influence. • Quality not quantity. • Focus on sustainable growth. • Integration and understanding. 	<p>ASIAN MARKET GROWTH <i>Mass / Standardised Tourism</i></p> <ul style="list-style-type: none"> • Basic language skill demand. • NZ product diminish in quality for standardisation– chasing quick dollar. • Commodification of Māori culture. • NZ becomes cheap/quick holiday. • Products which follow – mid to low level hotels, group activities, cheaper infrastructure. • Focus on spread will become issue. • Effect on other tourism markets? • Sustainability not a focus. • Awareness not understanding.

Figure 10: Example of brainstorm around key factors of drivers.

This activity helped the researcher to begin building the scenarios through another brainstorming process, by envisioning the state of the New Zealand tourism workforce in 2035 if these factors were apparent. The technique used by Yeoman et al. (2012) was applied, creating the scenario narratives through identifying the plot, drivers and implications. This required thinking about what each of the scenario's issues were, the policies, the tourism product, the inbound markets, and the state of the workforce. What resulted was the draft scenarios that were sent out to the Delphi panel within the third and final survey, of which will be explained in the next section.

5.6.2 The Four Scenarios Used in Survey Three

Scenario One is entitled “*Manaakitanga is Found Here*”, and is a scenario where closed immigration policies and a dominant high value Asian market have forced the industry to adopt a quality not quantity approach. Scenario Two is named “*Pick of the Labour Crop*”, envisioning a future where New Zealand’s tourism industry is thriving on the surface, yet labour issues and workers’ rights are being compromised to chase the dollar. Scenario Three called “*Struggling for Respect*”, pictures a future where tourism is no longer at the forefront of New Zealand’s national strategy. Closed immigration policies and a dominant Asian market which demands mass/standardised experiences has pushed tourism to be an unattractive employer and investment. Scenario Four is the final future, named “*Cheap and Plentiful*”. It depicts a future where tourism’s growth and the country’s laissez-faire stance have created an opportunistic business environment. Open immigration policies give employers a plentiful selection of labour and the race to make money off the mass Asian market has begun.

5.6.3 Survey Three Design

The third survey was sent out in early February and was left open for ten days for consistency with the previous surveys. It began by showing participants a simplified explanation of how the scenarios were constructed, then each scenario was explained with bullet points accompanied by pictures. This was a decision by the researcher to ensure participants weren’t overloaded with information and only received the important points. After each scenario, two questions were posed to the panellists: what did they believe were the opportunities of this scenario and what did they believe were the threats. This was an attempt to encourage answers which would expand on the detail in each scenario. An example of the question design is exemplified in Figure 11.

SCENARIO ONE: "Manaakitanga Is Found Here"

Closed Immigration Policies // Niche Asian Tourist Market

Tourism as an industry represents a key part of the country's economy with positive and sustainable growth. Manaakitanga is the guiding principle in this scenario and the country has adopted a quality not quantity strategy, targeting the dominant higher value Asian market. Tourism has become a desirable industry to work in; with greater social acceptance of tourism from locals and better working conditions from employers.



- Immigration policies have become closed and highly regulated, which has shrunk the labour market and forced employers to become flexible, innovative and competitive with their working conditions in order to attract employees.
- The dominant high-value niche Asian tourist market is catered for. They demand high quality, authentic, personalised and experiential products.
- Workforce skill set has increased as employers desire highly trained employees to cater to the market.
- Support from national government pushes greater strategy around education/training providers and support for New Zealand businesses.

What do you believe are the opportunities for the workforce in this scenario?

What about the issues for the workforce?

Figure 11: Survey three question example.

5.6.4 Results and Analysis

In terms of distribution, the researcher noted which of the identified panellists had responded to the first and second survey, choosing to remove those who had responded to neither. This left an audience size of 49, to which the survey received 24 responses, giving it a response rate of 49%. The resulting respondents in terms of organisations are shown in Table 6 and an analysis of the comments for each scenario is presented below.

Comments for the first scenario, “*Manaakitanga is Found Here*”, showed that most panellists thought better skills and working conditions would be the opportunities in this future. There was agreement that a higher quality product would demand higher skills (especially in language) and could even lead to the “workforce seeing tourism as a career option rather than a ‘holiday job’” (Attractions). Simultaneously, “less competition from migrant workers should lead to higher wages, clearer career pathways, and opportunities for development” (Government). In terms of the threats, cost was an issue that was repeatedly raised, as a higher quality pool of staff would require more training. Supply of labour was also a concern with the closed immigration, and tourism jobs may need to be substituted with technology. Another interesting point was raised around job roles, with one respondent suggesting that workers would be required to adopt various roles within a business and this could be an issue for those who “do not like the more manual tasks of cleaning etc” (Attraction).

“*Pick of the Labour Crop*” produced comments that revealed an agreement around the opportunities that this environment has for employers, migrant labour, and those with high level language skills. One RTO respondent noted that it is “seriously flawed” that open immigration policies will lead to employers being able to ‘hire and fire at will’. They explained that “open immigration policies do not automatically lead to this, or to the labour market suffering. It is possible to have both open policies and labour market protections”. Comments around the threats of this scenario touched on the worsening of working conditions, increased competition for work, tourism continuing to not be seen as a viable career, and a potential rise in ignorance towards migrants.

“*Struggling for Respect*” highlighted opportunities for the workers due to higher demand for labour, but as one attractions respondent noted, “there would be more jobs as there are more visitors and no migrant workers, but the jobs may not be of high quality”. Standardised tourism

businesses were thought to flourish and workers who traditionally found it hard to find jobs would benefit from this environment. The issues noted were large and envisioned the tourism industry becoming a very unattractive sector to work in. Issues mentioned in particular were, technology potentially substituting jobs, rural businesses failing and turning to other forms of income, work conditions deteriorating in high peak times, and a lack of investment.

The final scenario of “*Cheap and Plentiful*” saw a general agreement from respondents that this scenario would entail a greater number of jobs available for the labour market, especially lower-skilled and entry level. A multicultural workforce would emerge and mean local workers would need to improve their language skills. There was also a general consensus around this scenario’s issues which were an overall worsening of working conditions for employees, making it an unattractive industry to work in and tourism losing its “social licence” (RTO).

5.7 Conclusion

This chapter explained the role of the three round Delphi method executed in this study. Firstly, in terms of utilising expert knowledge to narrow down the ten drivers of change to just *the role of immigration policies*, and *the growth of the Asian market*. Then as a tool for reflection on the four draft scenarios. As noted by Yeoman et al. (2012), “scenario planning is a process that requires the participation of key stakeholders” (p. 13), therefore the selection of the Delphi panel aimed to include a variety of stakeholders from within the tourism workforce directly and individuals knowledgeable of the fields of tourism, labour, HRM and policy. Whilst it was important to get a wide spread of responses to represent the stakeholders within the industry, it was interesting to find that individuals who worked within more long-term, strategy, or holistic roles were more willing to participate. Nevertheless, the insights were valuable and provided the researcher with adequate feedback and verification to internally review the scenarios for their final presentation.

Chapter Six

SCENARIO CONSTRUCTION

6.1 Introduction

The previous chapter explained the process utilised by the researcher to formulate the four different yet plausible scenarios of: “*Manaakitanga is Found Here*”, “*Pick of the Labour Crop*”, “*Struggling for Respect*” and “*Cheap and Plentiful*” (Figure 12). After these scenarios were reviewed by the Delphi panel, their comments and criticisms were analysed and incorporated into the final scenarios, which are presented within this chapter. Each section begins with a storyline that captures the essence of the scenario and acts as an introduction to these futures. The stories are told from the perspective of an employee within this ‘world’. Every character is unique, working in a different business, with different backgrounds and living in different locations. The choice was made to utilise the employee’s perspective, as opposed to the employer’s, as the workforce is the focus of this thesis and an employee’s experience is able to communicate this well. The storylines are followed by deeper explanations of the scenarios, which are written as though it is the year 2035 and incorporate comments made by the Delphi panel.

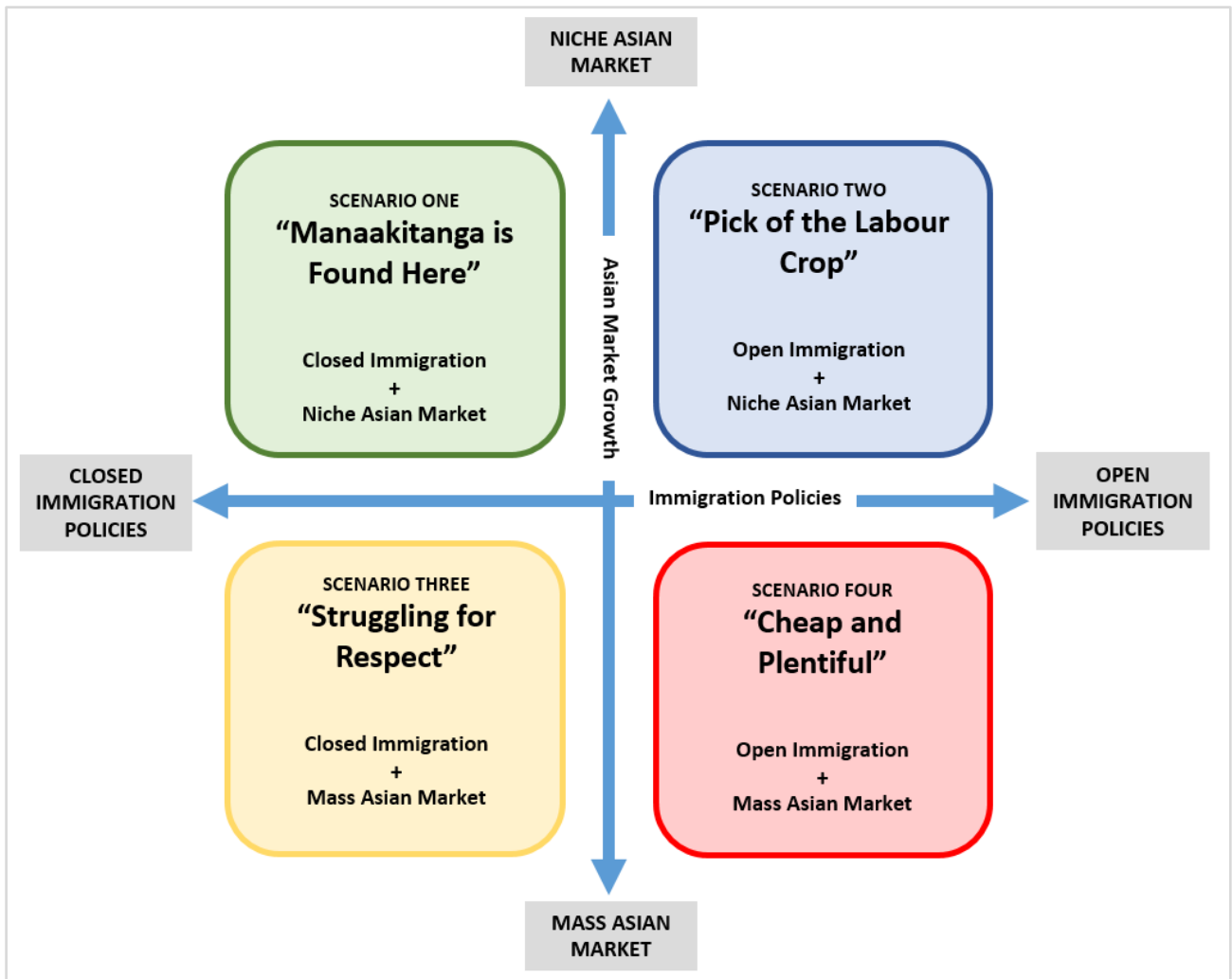


Figure 12: Scenario matrix.

6.2 Scenario One: “*Manaakitanga is Found Here*”

“*Manaakitanga is Found Here*” represents a future for New Zealand where sustainable tourism growth is encouraged by focusing on the high value Asian tourist market and aiming for quality not quantity. Closed immigration policies have created a difficult environment for businesses trying to attract and retain skilled labour to accommodate this market. This has forced employers to be more flexible and innovative, alongside a public sector which fosters a supportive business environment through better communication and training.

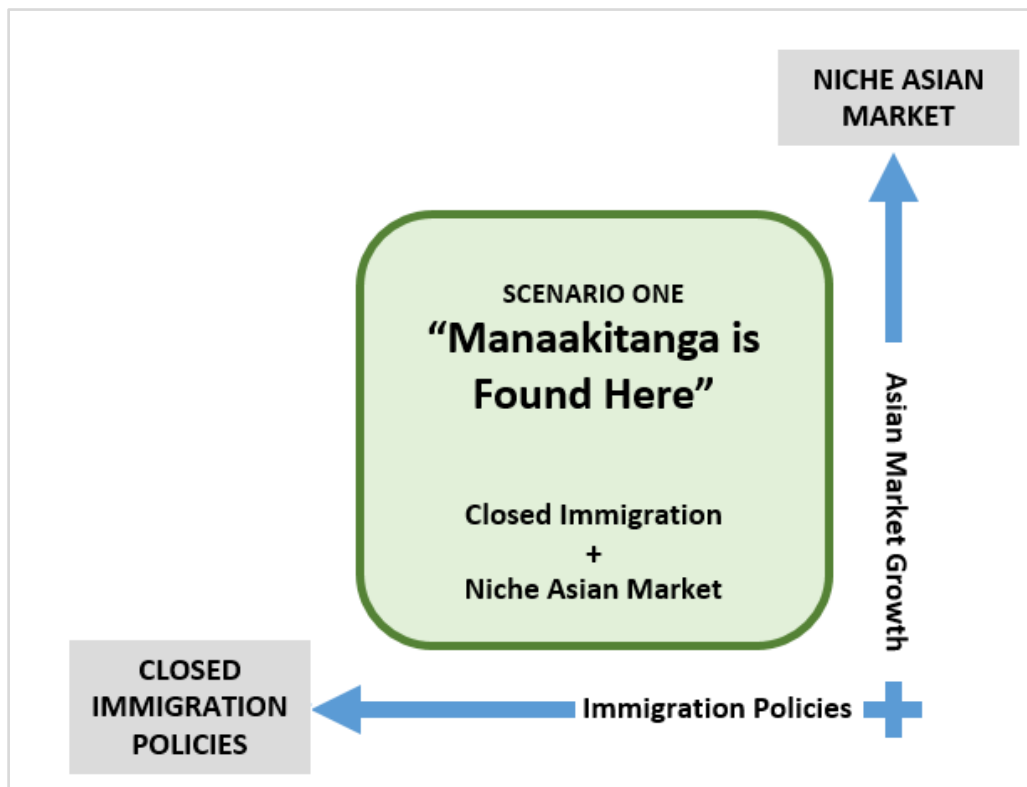


Figure 13: Scenario one placement on matrix.


6.2.1 Storyline

This storyline introduces the recent university graduate Michelle, who studied a Bachelor of Arts in Marketing and International Relations. She has moved back to her hometown of Russell in the Bay of Islands, New Zealand, where her family owns a high value sailing tourism business. This business has been in her family for two generations and they plan to continue this tradition by welcoming their daughter as a paid employee with a strategic role in the

company, due to her language and marketing skills. Michelle's experiences are communicated through an email to her friend who is currently on an exchange in Beijing.

Inbox **Sent Items** Junk Drafts

Touching base



Michelle Smith
Weds 24/04/2035 7:03pm
Emily McCarthy (em.mccarth@connect.com)

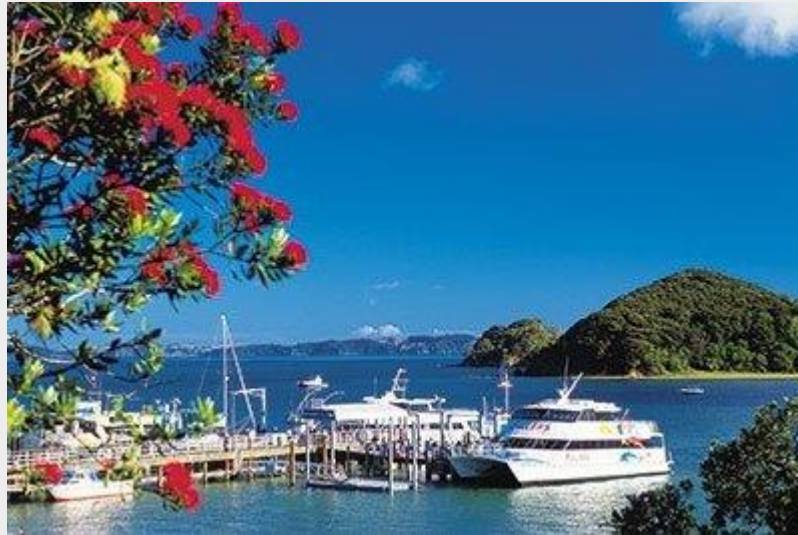
← Reply ✓

Hey Emily!

I'm sorry I haven't talked to you in ages, I've been so busy with finishing university and moving home! As you've probably heard, my parents finally convinced me to join the business. They have been looking to train someone to replace Ryan's role as he will be on two years paid leave to raise his new-born and they keep complaining about how difficult it is. At first I wasn't sure about working for my parents but I've grown up around the business so I know how everything works, plus the pay is so good! I wear many hats in the job; helping with tours, organising the day's itinerary to the preference of the guests, and next year I'll take over the foreign liaison job where I will market to our target Asian markets. (I also get really good bonuses to make up for the long days and sometimes absent weekends).

When you come home to New Zealand I could get you a job here, because your Chinese is much better than mine and we get many visitors from China. Then again, you'll be in hot demand with all the businesses around here because of that! Honestly though, you would love it here. Dad just spent 500,000 dollars refurbishing the sailing yacht and it looks incredible. We now have that virtual reality software which the Nelson Tahuroa Company is using, so the guests can see what Russell looked like back in the day. It's very realistic, the whole bay transforms into the old settlement and you can even see the old boats passing and settlers fighting!

Yesterday, for the first time I was in sole charge of the tour without Dad. This was a bit nerve-wracking because even though I've been on the tours with him millions of times before, we had a very wealthy Chinese family who booked out the whole boat. Despite not having any breaks for myself, it went really well and the weather was amazing! (I've attached a picture I took in the morning before we set off).



We took them wherever they wanted to go around the bays, telling them the history along the way with plenty of photo opportunities. They loved this and spent a lot of the trip syncing their online social media to the boat's live video feed (I installed this a few months ago, it's like their own personal movie). At lunchtime they were cooked local cuisine matched with regional wine. The on-board chef Piri, preaches the value of Manaakitanga. He always tells such a great story when he cooks and encourages the guests to get involved as well. After the meal, Piri taught the guests about the region's Māori history and gifted them with a small greenstone. They were then dropped off at Russell where half the family went exploring and the others were taken back in the electric car to their hotel.

When you come home I'll give you a personal tour myself! I hope the exchange in Beijing is going well, you're so lucky you got that scholarship from the Hospitality New Zealand to go over there. :)

Can't wait to hear from you,
Michelle xx

Michelle's story exemplifies a number of political, social, and workforce trends within this scenario from the perspective of a small family business which is thriving in this environment:

- A smaller labour market, creating difficulties for businesses finding workers.
- Greater innovation, flexibility, and remuneration from businesses for their workers, as they attempt to create an attractive working environment.
- Increased number of job roles required from workers, creating more job stress.

- A higher skill set required from employees, including good business, language, and interpersonal skills.
- Technological advancements which aid personalised, memorable, engaging and authentic experiences for the consumers.
- The attraction of a higher value Asian tourist market to New Zealand who are willing to spend large amounts of money for quality and authentic experiences.
- The respectful inclusion of Māori culture and values into the tourism product.
- Greater focus on employment of local workers.
- Greater communication and opportunities through education providers to match workforce skill supply with demand.

6.2.2 Scenario Explanation

It's 2035, tourist arrivals have grown steadily over the past few decades and the industry represents a key part of the country's economic growth. Policy makers understand the importance of this industry which has caused the national tourism strategy to focus on positive but sustainable growth. Their aim is to nurture an industry that respects the local culture whilst making sure visitors feel welcome, reflecting the values of Manaakitanga, which loosely translates to 'hospitality'. This is a delicate balancing act between attracting high value tourists who will support this sector, and ensuring the social license of tourism is not compromised through commodification or an overload of tourists.

Simultaneously, in New Zealand's wider economic and political environment, the country has adopted closed and highly regulated immigration policies. This occurred as an attempt to encourage specifically highly educated and skilled individuals into the country to raise the workforce productivity. Alongside this, the country is raising its immigration standards in response to the surge in foreigners wanting to migrate. New Zealand has become an extremely attractive option due to growing political unrest in other countries. As a result, the labour market has shrunk and tourism in particular is struggling to fill the typically lower skilled jobs which New Zealanders find undesirable and in the past many migrant workers would have filled (Cropp, 2016). The smaller labour market has caused employees to be pickier about their employment decisions and forced "employers to become more innovative, creative and flexible" (Government) to create a workplace where employees want to be.

The Asian tourist market represents New Zealand's top inbound market. This segment had seen dramatic growth over the years, as their booming middle class led them to become the world's largest consumer market (Farrell et al. 2006). As tourists and consumers, this market is driven by a desire for real, personal and authentic experiences, with the money to do so. This shift in consumer behaviour had been occurring as early as 20 years ago (in 2015), as New Zealand was recognising a change in this segment, from package tourists to free independent travellers. Part of the tourism strategy in 2035 involves targeting the higher value tourists from this market, as more money would enter the economy without necessarily more travellers. However, catering for this target market requires an "upskilling of language skills" (Government) so a high quality product can be delivered to their standards.

Considering the two factors of demand for a quality tourism product and a smaller labour market, national and regional governments recognise the importance of nurturing a labour market and business environment which celebrates tourism and makes it an attractive industry to work in. The result is a better focus on, and communication between, education providers and industry training institutions to match the skills demanded from the workforce. Innovation is encouraged and celebrated, as local governments work to create more support for smaller businesses. Businesses recognise that their product must be experiential, personal, unique and of the highest quality. They seek employees who are well-trained, with exceptional hospitality and language skills who can deliver this quality experience but will also be prepared to take on multiple roles within a company. This creates a push for "higher pay conditions, and increased education and training" (Transport), putting a strain on businesses that cannot afford to pay a decent wage but making high paying businesses an attractive career opportunity. The Māori economy has grown and come into its own in this scenario, as their product and long-term business strategy offers a competitive advantage. Some smaller, niche and family businesses which offer a unique product also thrive if they can market their services well.

6.3 Scenario Two: “Pick of the Labour Crop”

The second scenario entitled, “*Pick of the Labour Crop*”, envisions a world in 2035 which truly benefits the employer. Immigration policies within New Zealand have taken an open stance, encouraging freedom of movement which results in a larger pool of available labour. This allows businesses to accommodate and respond to the needs of the high value Asian market, drawing upon migrants with high service and language skills.

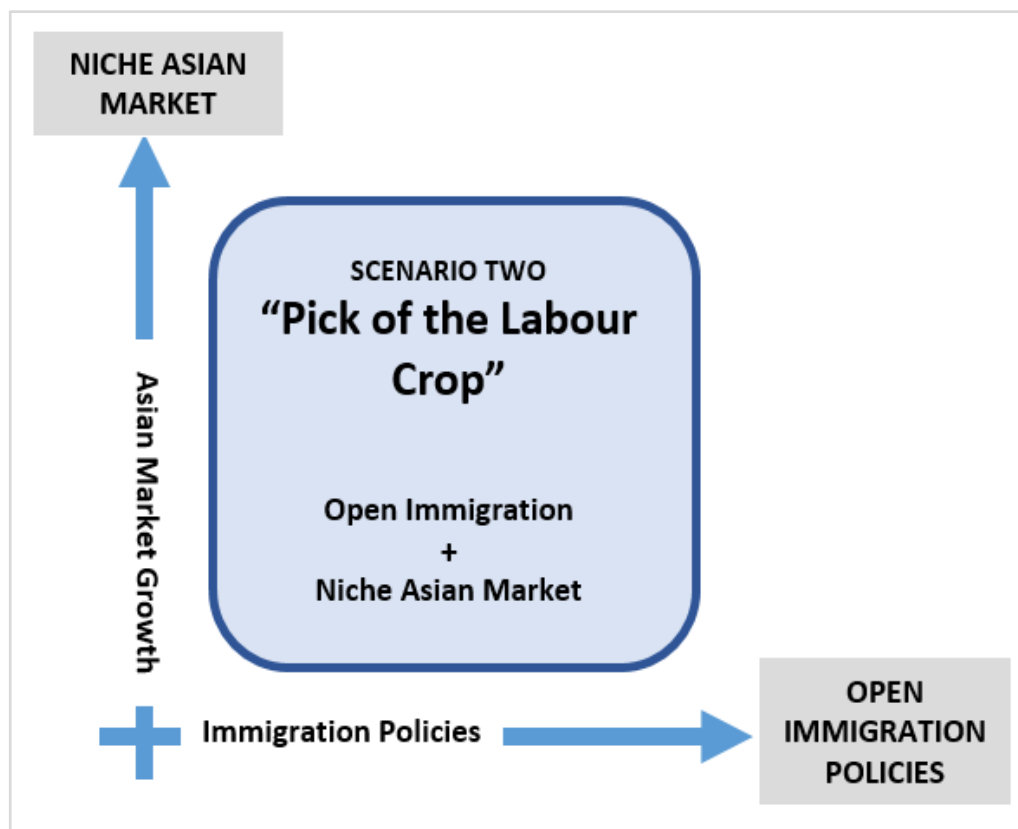


Figure 14: Scenario two placement on matrix.

6.3.1 Storyline

This storyline will follow Guang, a 26 year old Chinese migrant who has entered the country on a working holiday visa. Guang grew up in Shanghai and has worked within a number of high-end tourism businesses for very little pay and was attracted to working in New Zealand for its beautiful landscape and thriving tourism industry. A childhood friend of Guang told him that finding work wouldn't be difficult as his particular skills were in demand. This happened to be the case, as when he arrived he was employed by a five star hunting and tour company in the Tasman region. Guang's experiences are depicted below through his conversation with a friend via an online social media app.

Jian

Guang! How's it going in New Zealand? I heard you found a job quite quickly?

Guang

Hey! It's going well, thank you. Yes I'm living in the Tasman region and managed to find a job with a tour company which takes out very wealthy clients on hunting trips. A lot of the guests are Chinese which is why I think I was hired because most of the workers here are also Chinese.

Jian

That's good! What's it like?

Guang

Well, I am really grateful to have got the job, but the hours are so long. Yesterday I got up at 6am to prepare for the tour group who was arriving at 9am. We had to organise the lodge for their welcoming; making it spotless, setting up the food and drink, and changing into our uniform. When they arrived they are greeted with a pōwhiri from the local iwi, which is a traditional Māori welcome.

Jian

Sounds expensive! Are the people you work with nice?

Guang

It is very expensive. I think the tour costs around \$5000 per person? But it's a 5 star business after all, and they target very wealthy tourists. They are treated very well, fed the local cuisine, given New Zealand made clothes for hunting in and then flown to the hunting spot by helicopter. There are a lot of workers from Asia so we have that in common. Surprisingly, there aren't many Kiwi workers and the ones we do have complain about the pay and say they are only here until they find something better. I don't think the pay is too bad, it's certainly better than at home.

Jian

Yes, I heard that was the case. The job must be incredible though! I put your experience upload through my virtual headset yesterday and the views look amazing. It's great that you get to go up with the guests.

Guang

Yes not many of us do, but because I have experience serving in high class businesses they wanted me to fill the job. I have to be nearby to tend to their every need. Which is exhausting but it means I get a small pay rise in that role. Plus it's more interesting than having one set job everyday like many of the others. After we fly the guests back to the lodge I'm allowed a short break before lunch is served.

Jian

Lunch too? No wonder it costs 5000 dollars, why can't they afford to pay you more making that much money? Also, how many workers are there altogether?

Guang

Yes, it's a four course meal. The guests who were lucky enough to hunt something then take pictures with their 'prize' and are shown how to skin the animal and keep the fur.

Oh I don't know, there's so many of us, I haven't learnt everyone's names and I suppose they don't have to pay more there's so many people looking for work. One of the Kiwi workers, Jack, was telling me a few days ago about how there's a lot of backlash from the community around this sector's working conditions. From what he said, my pay rate and 12 hour shifts are actually lucky.

Jian

Hey it's not forever and it's worth the experience right?
Mum is actually travelling over in a few months so she wants to catch up with you. Her friends went on holiday to Bora Bora last year and supposedly New Zealand is 'the place to go'

Guang

Haha OK sounds good, I'm off to sleep. 14 hour shift tomorrow, we have the Prime Minister of Vietnam coming! Talk soon!

This storyline shows a number of trends present in this scenario:

- A larger pool of labour which benefits employers within the tourism industry who utilise migrant labour for their language skills and readiness to work for cheaper wages.
- The attraction of a high value Asian tourist market who are drawn to New Zealand for its authentic and high quality tourism experiences, and who are ready to pay top dollar for them.
- A multicultural workforce as a consequence of open immigration policies.
- Job design which requires long hours, poorer pay and singular job roles rather than a multiplicity of job tasks.
- A profitable environment for businesses which enables them to have appropriate amounts of staff and knowledge to deliver a high quality, experiential and technologically advanced product which tourists demand.
- A difficult job market for local employees, who have a negative view of the industry and express growing concerns around the reliance on foreign workers.

6.3.2 Scenario Explanation

In this scenario, New Zealand's tourism industry is thriving on the surface, attracting a high-value market from Asia who are willing to pay top dollar for tourism experiences, a trend which is a consequence of their growing middle class with higher discretionary income (Farrell et al. 2006). They are attracted to New Zealand as a holiday destination for its culture, people, activities and landscape. However, they demand high quality, personalised and authentic

experiences for the high price they pay. Money is therefore flowing into New Zealand as a top tourism destination and solidifying the sector's economic importance.

20 years ago, in 2015, immigration policies began tightening due to increased demand of migrants wanting to enter the country (Immigration NZ, 2016). However, the strengthening economy in Eastern countries has shifted migrant flows in this direction, causing New Zealand to open up its borders. An increasingly globalised world and workforce leads the New Zealand government in 2035 to believe that creating a fluid and flexible labour and business environment will create competition and profit for New Zealand businesses. This benefits the employer, by giving them the pick of the labour crop, however, labour issues for the local workforce have arisen in this race to chase the dollar.

This scenario truly benefits the employer. Tourism businesses now opportunistically rely heavily on migrant labour to fill jobs in demand. This gives the industry "flexibility to manage its workforce requirements" (Association) and tackle the traditional tourism labour issues around seasonality and regional spread. Migrant labour is also willing to work for lower wages and in lower skilled jobs that are often unattractive to New Zealanders (Cropp, 2016). Open borders have encouraged greater foreign investment and a more competitive business environment. With greater competition, "readily available skills" (Association), and economic prosperity, a higher quality tourism product is being produced. This is important for catering to the affluent and highly demanding Asian market. For businesses and certainly entrepreneurs, tourism is seen as an attractive investment with money to be made.

Despite the amount of money coming into the country, the implications for the local labour market are not as positive. This ease of labour movement makes the labour market a tougher environment for New Zealanders as competition for work is heightened and "they become marginalised" (RTO). Wages, working conditions and employee power drop. Employers seek skilled individuals with service and language skills that migrant labour can offer, which makes them extremely attractive for the industry. New Zealand workers have a lesser desire to work within this sector as it usually equates to long hours, poor pay and little career development. Tourism has become an industry which New Zealanders only view as worth working in if the business is a successful local enterprise, has good relations with their staff, and is ready to pay a decent wage and offer attractive working conditions.

6.4 Scenario Three: “Struggling for Respect”

The globalised and extremely accessible nature of the world in the scenario “*Struggling for Respect*”, has meant New Zealand is no longer perceived as a faraway holiday destination and has attracted high numbers of mass market Asian tourists. New Zealand’s political direction has opted for a closed immigration system in an attempt to target only highly professional and skilled migrants to the country. The overall respect and reliance on tourism has dropped as the sector is no longer at the forefront of the country's priorities.

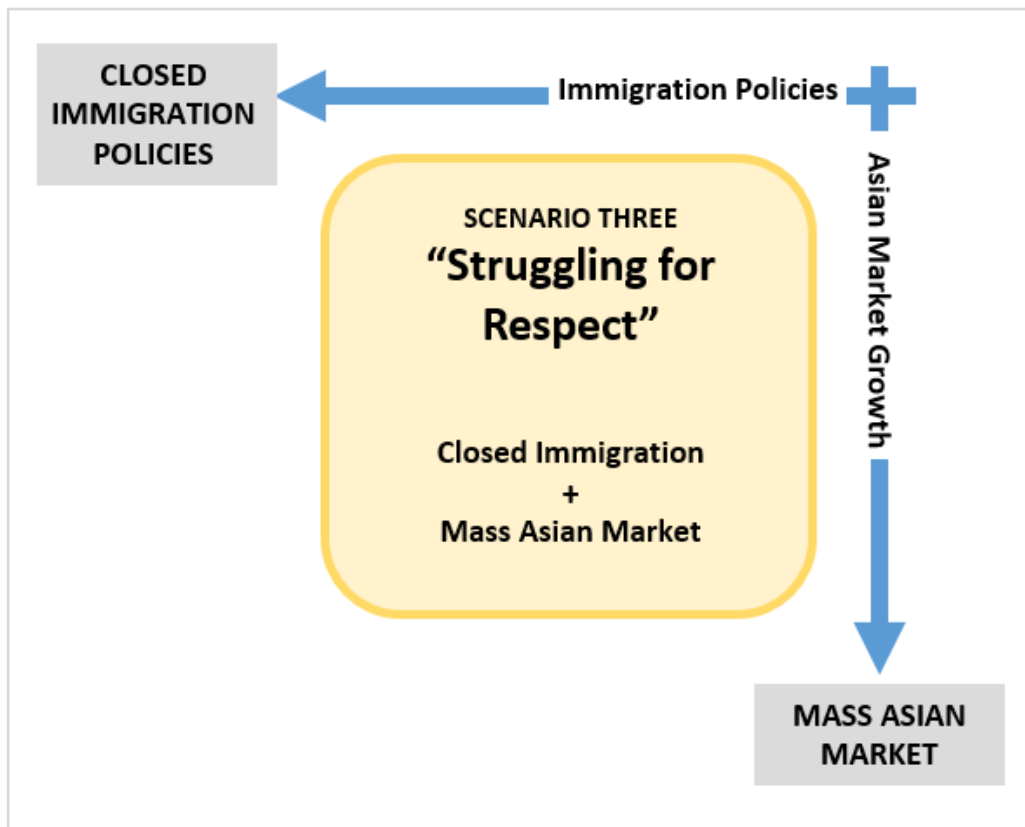


Figure 15: Scenario three placement on matrix.

6.4.1 Storyline

Katie will be introduced in this storyline to give readers her perspective as an employee in this future. 68 year old Katie has recently retired after enjoying a fulfilling career in marketing. Despite having saved a substantial amount of money for her retirement, she realises that without a government pension scheme, her funds won’t be enough to support her active and social lifestyle. She decides to take a job in a hotel within her hometown of Rotorua. The shortage of staff means that the owners are very accommodating and offer her flexible hours to suit. Katie is contacting a friend overseas by sending a hologram audio recording, which is much easier than emailing and allows her friend to listen and store it.

● New Visual Message

Good Morning, Harry

Weds 24/04/2035

☀️ 14° Sunny

Katie Drummond
"Catch up"



"...Hi Harry, I just listened to your last message, sorry, I was away on a weekend trip with my sister. It's good to hear you're thinking of retiring too and Nelson sounds like a great place, there's lots of part time work available there to keep you afloat.

I've been working part time at a hotel here in Rotorua. They're very flexible with my hours which is good, it kind of makes up for the drop in pay. There's also a whole mix of people that I work with; retired, students on their breaks, stay at home mums... makes a nice mix of old and young, you know? I think that's why I enjoy it, it's quite social and the work isn't too demanding. The younger employees do all the running around, I don't know how they do it. One girl works here on her university holidays and she cooks, cleans, gardens, and works on the reservations. Whereas I only have to deal with the office work and some front of house business, most of which is fully automated anyway.

That does frustrate me though. They installed a self-check-in machine in the entrance last year, which is supposed to help with the big tour groups that come through. It does help with language barriers because a lot of the tour groups are Asian and I only know school level Chinese, let alone any other Asian languages. I just find it a bit garish and it means no one asks us, the locals, where all the good spots are. The machine tells them! Oh well, that's tourists for you. They only seem interested in the big attractions anyway.

Summer's coming up soon so we'll be extremely busy, the place packs out and we are always understaffed. I was speaking to the owner Lizzie yesterday, and she was mentioning something about starting up some kind of work experience programme with one of the local high schools. From the sound of it, it's just their attempt to get free workers when it's busy season. I think

they'll have a hard time convincing those kids to volunteer in tourism to be honest, they're more interested in the environment and community wellbeing these days. Oh well, desperate times call for desperate measures!

*Anyway, let me know if you're free soon Harry and we can have a catch up. Will be good to see you in person rather than on a hologram. *laughs**

Talk soon...bye!..."

Katie's experience in this scenario highlights a number of trends which affect this scenario and its workforce. These include:

- Pensioner poverty as the population ages and government cannot afford retirement funding, which is forcing those who are retired into part time work.
- Shortage in labour due to closed immigration policies, which has forced employers to be more flexible with their employment options to remain an attractive employer.
- Businesses reaching out to groups other than the traditional younger employees, such as part timers. This includes retirees, part time mothers or fathers, and students seeking work experience.
- Some employees experiencing an increase in the number of tasks required in their job roles.
- The advancement of technology which is affecting the consumer experience and used as a substitute for some jobs.
- A mass Asian tourist market demanding standardised products and services, and are concerned with seeing the main attractions rather than the real local lifestyle.
- Workforce skills are basic and language skills only limited. Businesses are concerned with an awareness of culture rather than an integration and understanding.

6.4.2 Scenario Explanation

This scenario depicts a future where the tourism industry no longer holds a strategic focus within New Zealand. This is a reaction to the noticeable cheapening of the country's tourism product over the last 20 years. Firstly, in 2021, the sector suffered a large public relations disaster around the legitimacy of its '100% Pure' image, as an increasingly sceptical world

highlighted the unsustainable nature of the country's dairy industry. In the same decade, the increased accessibility of travel led to a boom in New Zealand tourist numbers, with an increase in a mass market of tourists from Asian countries. The sector “suffered a lack of investment and became irrelevant” (Attractions), in response, the 2035 New Zealand government adopts closed and highly regulated immigration policies, which seeks only highly skilled, professional individuals in its goal to focus on more sustainable and higher-skilled industries.

For tourism, this has meant businesses are cut off from the key source of migrant and working holiday labour which were traditionally used, leaving them high and dry. Many businesses struggle to fill jobs and find employees with the appropriate skills. Employers are now battling against other more attractive industries, with a national workforce that is increasingly educated (Department of Labour, 2010). This is forcing them to focus on offering flexibility in their employment opportunities and finding innovative solutions for hiring local employees, which is difficult considering the tarnished reputation of the sector. Employers are forced to look beyond their traditional younger pool of employees to other sources of labour, such as “members of the workforce who have traditionally found it difficult to secure work” (Association). Those who are employed in the industry experience their job roles increasing which puts a strain on the workers.

In terms of visitors, a mass Asian market is the country’s main visitor segment. Tourists are attracted to New Zealand as the cost of travel has become cheaper and they have a desire to tick New Zealand off their ‘places to visit’ list. This market pushes a demand for standardised tourism products which offer guests the chance to experience ‘all things New Zealand’ in a few days with the comforts of home, yet lacks the authenticity it once had. Regional dispersal is low and heavily concentrated in the main tourist areas of Queenstown, Rotorua and Auckland. Because of this, tourism has lost its social licence from the community due to a growing frustration towards tourists. The demand for a standardised tourism product means that skill demand from the workforce is “base level” (Attractions) and technology is utilised as a substitute for front line workers. In terms of providing for the Asian market, businesses require merely an awareness from employees, as opposed to integration and understanding. Businesses often utilise the Māori culture as a crutch for their product, yet results in concern around commodification.

6.5 Scenario Five: “*Cheap and Plentiful*”

The fourth and final scenario, “*Cheap and Plentiful*”, depicts a world in 2035 where New Zealand’s open immigration and commerce policies create an opportunistic business environment for tourism businesses. A plentiful selection of labour and increased competition means the race to make money off the mass Asian market has begun.

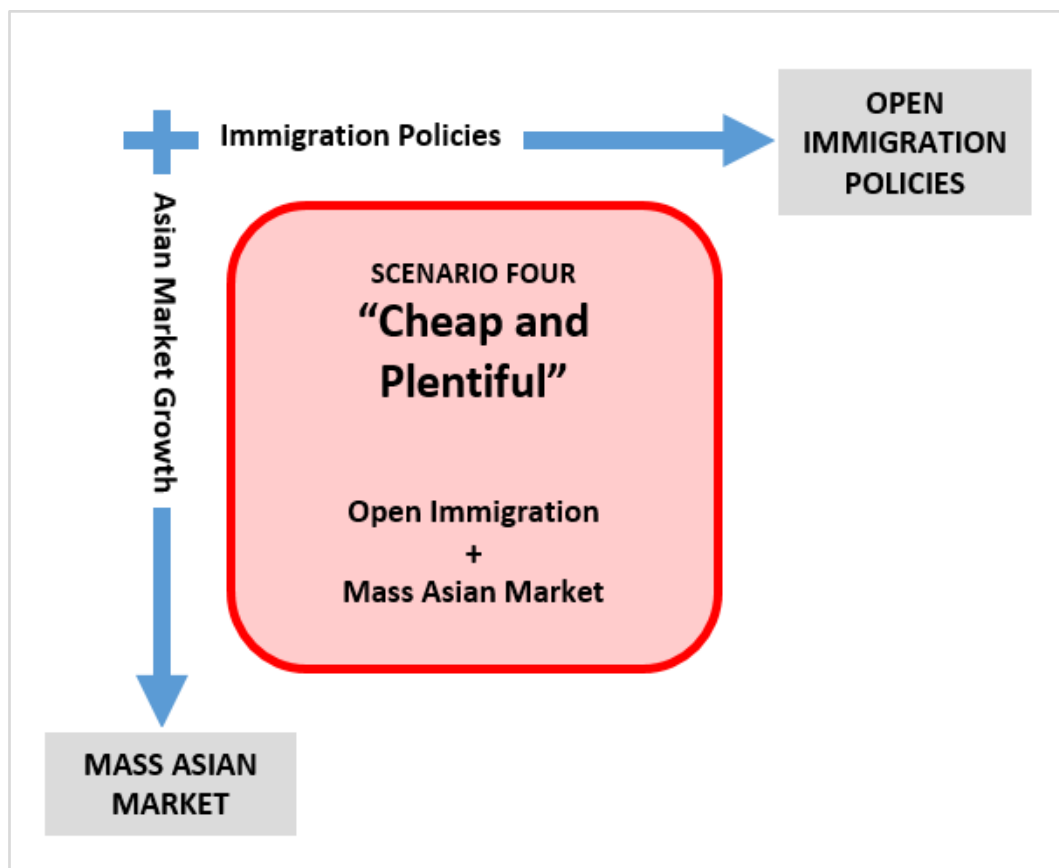


Figure 16: Scenario four placement on matrix.

6.5.1 Storyline

This final scenario follows the story of Tipene, a New Zealand citizen of Māori descent. Tipene is saving up money to move to Australia with his family in the hopes of better working conditions. In the meantime, he is working as a Functions Manager in a foreign-owned Queenstown restaurant and bar. The business is very popular with Asian tourists as it boasts a Māori-Asian fusion theme. Tipene’s experience in this employment is not always positive and an email to his family already living in Australia exemplifies the reality for some workers in the scenario “*Cheap and Plentiful*”.

Kia ora whanau

← Reply ✓



Tipene Parata

Weds 24/04/2035 8:00pm

Wiremu Parata (w.parata@connect.com)

Kia ora whanau!

Thanks for your email. Anahera, the kids and I are doing well. The date for the big move is finally set for next year in July. We are very excited!

Yes, you heard correctly, my days as a stay at home Dad are over. I've been back in the workforce for a few months to help save for the move. Anahera's hours were cut at her hotel and financials were getting a bit tough with just one income. I've been working at a restaurant/bar here in Queenstown as a Functions Manager. It's a Chinese owned company (there's a lot of them here now) which does Asian-Maori fusion food and drink...weird I know, but the tourists love it. There are very few Kiwis who work here, I think I replaced the last guy who was Māori because they wanted my insight on the products and services.

Don't get me wrong, I'm lucky to have the job. Competition is very tough and most locals just don't have the language skills employers want. It just saddens me to see this side of the tourism industry. The Māori culture is being commodified to make a profit, from the fake Marae entrance, crass sculptures, down to the small plastic tikis in the drinks. It feels ridiculous! But like I said, the tourists love it and this place is making a killing although it'll be all going back to China where the owners live. I've never met them.

We're really looking forward to leaving, the pay isn't great anymore and the hours are rough with the kids. I don't have much power to say no because they'll just find someone else. Job role-wise it's pretty straightforward though. I organise and set up functions, which usually consist of larger tour groups, birthdays, or family reunions. We even have wedding parties who have come to New Zealand for a treat. Queenstown and Wanaka have turned into a bit of a rat race these past years. There's new tourism businesses, big and small, popping up everywhere. Everyone knows there's money to be made.

Won't be long until we see you now! Maybe I'll bring you over a plastic greenstone key ring.....Just kidding. ;)

Aroha nui, Tipene.

Tipene's experience working in a foreign owned, Queenstown tourism business, shows the following trends in this scenario:

- Open immigration policies creating a more flexible, competitive and opportunistic business environment for employers.
- A smaller labour market as a result of open immigration policies, making it more difficult for local workers to find jobs.
- Employers are able to choose from a larger pool of workers globally, which enables them to meet the service and language skills demanded.
- Mass tourists from Asia represent the largest inbound market who seek to experience as much of New Zealand as they can, quickly and cheaply. This leads to the demand for standardised services and products.
- Commodification of the Māori culture occurs as businesses are concerned with profit, not cultural awareness. Simultaneously, increased levels of foreign owned enterprises lack the understanding and sometimes respect needed to incorporate this culture.

6.5.2 Scenario Explanation

The New Zealand government in 2035 believes that creating a laissez-faire stance on immigration and commerce policies will create a beneficial and profitable business environment in this globalised and fluid world. By opening up its borders it welcomes more freedom of movement for labour and greater foreign investment. Tourism industry businesses reap the benefits of this agenda, now having access to a larger labour market that possess the language and service skills in demand. Issues such as seasonality and regional dispersal are more manageable and migrant labour is heavily utilised, which has pushed down the sector's wages. Foreign investment is increasing, particularly from Asian multinational businesses that recognise the opportunities within this country. This has increased competition and lowered the product price.

This "*Cheap and Plentiful*" future has created a divide over the industry of tourism. On one hand, the open and flexible policies around immigration and commerce are turning New Zealand into a hotspot for foreign and local business owners and entrepreneurs. Tourism numbers are rising, with a significant portion from the Asian market. These tourists are attracted to New Zealand as a destination which is cheap, accessible, and offers many familiarities of home, thanks to the influx of Asian businesses and brands.

On the other hand, the growth of this industry and mass tourist market has become unsustainable. Despite the money entering communities, the “local perception of tourism is negative” (Association); seeing only the malicious working conditions which are emerging and the cheapening of a once culturally-proud nation. The wider labour market is “pushing down wages and working conditions” (Attractions) in an industry which is already struggling with this image. The once-dominating F.I.T visitor has been overtaken by a mass market of tourists who can enjoy a cheap New Zealand holiday with all the must-do activities at their fingertips. Overall, tourism is adopting a lazier stance to its business and strategy. Many smaller New Zealand businesses are struggling to keep up, while the New Zealand labour market is in a position of “take what you can get”.

6.6 Conclusion

Four varied scenarios have been presented and explored for the future of the New Zealand tourism workforce in the year 2035. The perspective from an employee within each scenario is utilised to give the reader a more intimate understanding of these futures. Each scenario consists of opportunities and challenges for the tourism workforce, and the next chapter will answer the final research sub-question, which explores the strategic implications for each scenario.

Chapter Seven

STRATEGIC IMPLICATIONS

7.1 Introduction

This chapter explains the strategic implications of each scenario. These implications need to be considered today, to understand how government and industry professionals can respond to these various environments. For each scenario, the strategic implications will be discussed utilising an adapted Strategic Direction Framework by Yeoman et al. (2012). This has been adapted to communicate the consequences of each scenario upon the workforce in terms of employers and employees, by analysing the key influencing factors, their consequential factors, the effects for employees and employers, and finally the strategic direction. This includes the adopted tourism strategy, guiding principles, and risks. The chapter concludes with five overarching comments and reflections from the researcher, which have arisen from this project and should be taken into consideration from industry decisions makers when regarding workforce strategies.

7.2 Tourism Workforce Strategic Direction

To take a step back, the four futures communicated in Chapter Six are built upon two drivers of change which are external to the tourism industry. Firstly, immigration policies are largely dependent on national government decisions, with considerations of international migration trends. Therefore, the tourism industry has a limited influence over this driver, yet can have a powerful voice in terms of the sector's economic prosperity or through methods of lobbying. Secondly, the growth of wealth within the Asian market is a global trend concerning economics and consumer behaviour. This driver is also removed from the direct influence of New Zealand's tourism industry, but can be influenced through the sector's marketing and positioning efforts. The particular nature of these drivers in the future could vary, as represented along each axis in the 2x2 matrix. Successfully predicting which form these drivers could take is impossible to do, thus highlighting the purpose and appropriateness of scenario planning. Yeoman et al. (2012) explain that "we cannot predict an exact future at a particular time or location. But what we can do is to paint feasible and plausible pictures and narratives of the future based on understanding what we regard as the drivers of change" (p. 97).

As mentioned above, each scenario holds both opportunities and threats to the tourism workforce, with some scenarios more attractive than others. Therefore, regardless of which future materialises, policy and industry professionals “should recognise the needs and challenges evolving from a particular future” (Yeoman et al. 2012, p. 99) and be prepared to respond to them. For each scenario, the strategic implications regarding the New Zealand tourism workforce will be discussed utilising an adapted Strategic Direction Framework by Yeoman et al. (2012), shown in Figure 17. This has been adapted to communicate the consequences of each scenario upon the workforce, the strategy which has been taken within each scenario, and the possible risks which could arise from this. It provokes an area for discussion among decision makers to “make sense of a number of circumstances associated with different futures” (Yeoman et al. 2012, p. 107).



Figure 17: Adapted Strategic Direction Framework

7.3 Scenario One: “*Manaakitanga is Found Here*”

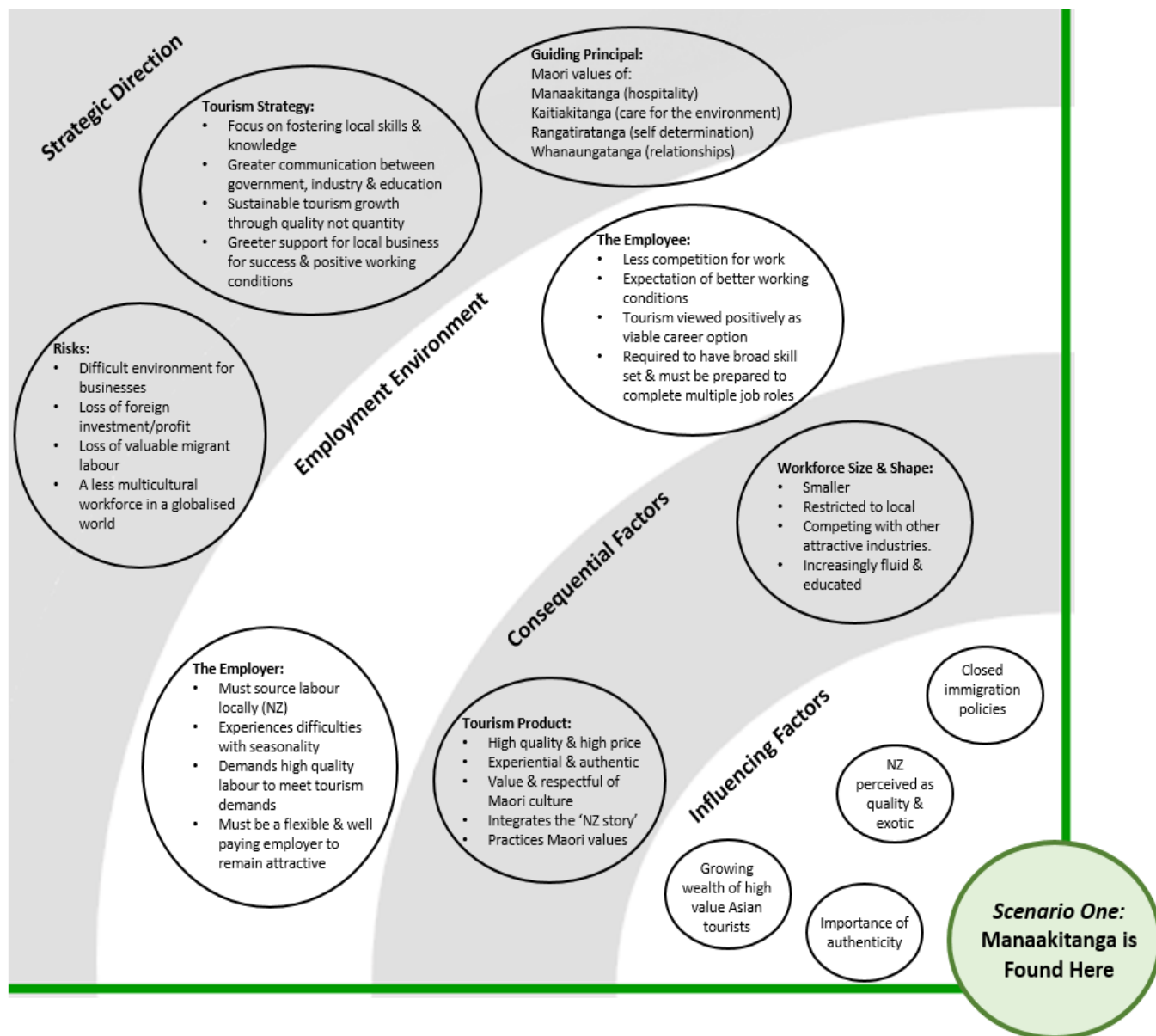


Figure 18: Scenario one strategic implications.

Scenario Factors

The first scenario considers a future where the New Zealand government adopts a closed immigration policy. New Zealand’s smaller size and geographical location helps it to be perceived as an exotic and faraway destination. This is attracting the growing market of consumers within Asia, who are experience-driven and concerned with authenticity and quality. As a consequence of these issues, closed immigration policies have shrunk the workforce and increased competition for the tourism industry as an employment option. The tourism product required to cater to these visitors needs to meet high standards and deliver a

memorable, authentic experience. This scenario is beneficial for the employee because in order for businesses to deliver this high quality service/product within a competitive labour market, they must improve the working conditions to attract workers. However, whilst labour issues may burden most tourism businesses, those who adapt and are flexible will provide a workforce which is able to provide high quality and satisfying experience to the affluent Asian market.

Strategic Direction

Considering the above factors, the industry adopts a slower, sustainable, and more long-term strategy guided by traditional Māori values. In order to flourish within a tightly constrained labour market without the aid of migrants, greater communication between stakeholders is encouraged. This creates a greater focus on developing skills in demand through education providers to upskill a local workforce with language, service and business knowledge. More support is given regionally and nationally for tourism businesses to operate sustainably with better working conditions. This includes the introduction of a living wage and the increase in job roles which require highly skilled individuals. This scenario is not without its challenges and some business struggle to operate in this environment. Nationally, economic consequences will include a loss of foreign investment due to the sector's tough labour market and the industry may see a drop in business numbers overall but not dramatically. Additionally, this sector will now rely on the recruitment of skilled individuals who will also consider other sectors for employment. Increasing training and education efforts would be a costly strategy that may backfire if workers choose not to enter the tourism industry.

7.4 Scenario Two: “Pick of the Labour Crop”

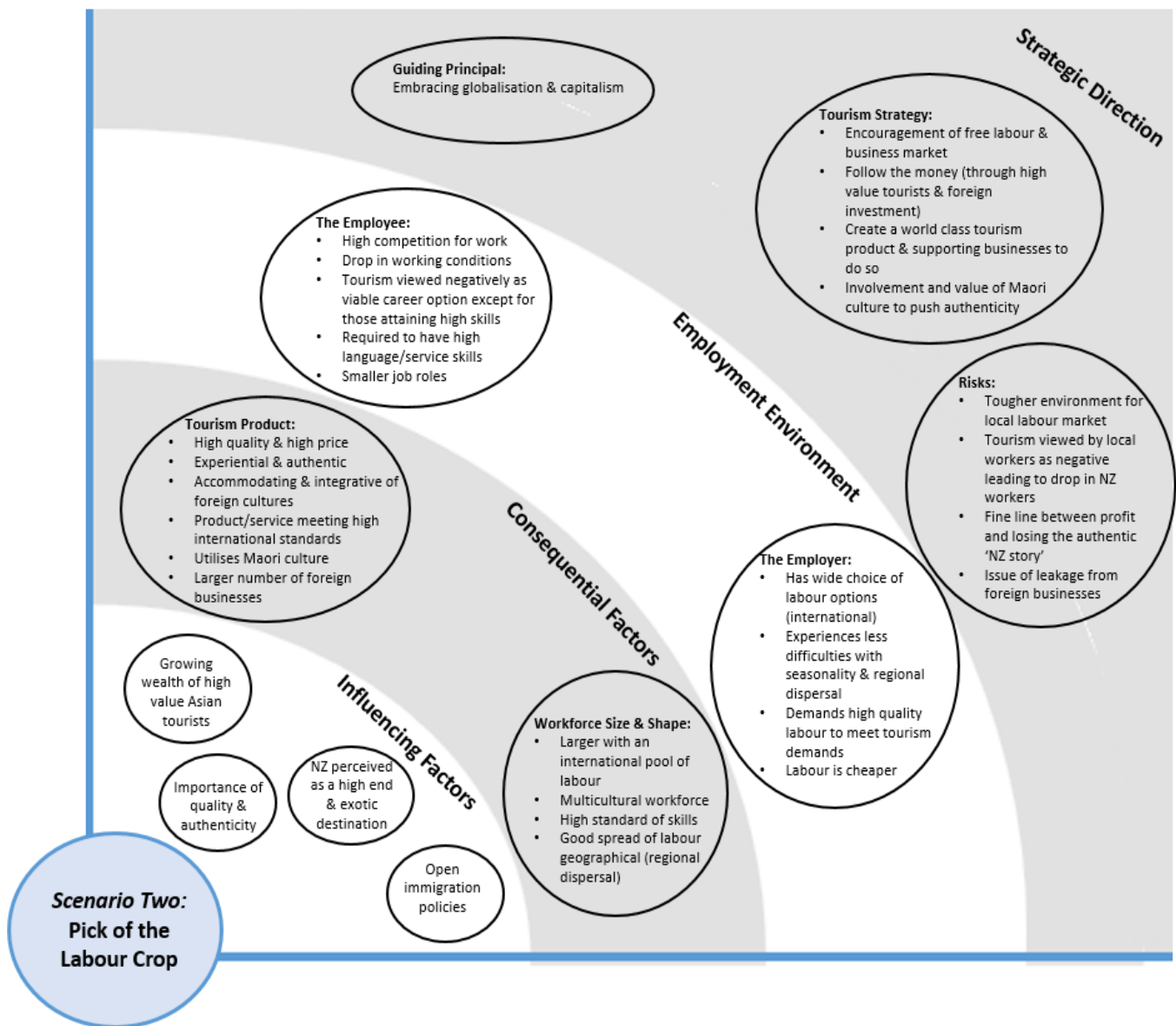


Figure 19: Scenario two strategic implications.

Scenario Factors

The second scenario imagines a future where the New Zealand government has adopted open immigration policies in response to an increasingly globalised and fluid world. The country attracts high value tourists from the Asian market, who are attracted to New Zealand for its quality, authenticity and exotic nature. Therefore, in order to deliver a tourism product which meets international standards, New Zealand implements a free market approach which accommodates and encourages profit and competition, as tourism is seen as a viable sector for economic growth. As a consequence, the workforce has grown as employers now have access

to international labour. This has increased labour competition, especially among New Zealanders, who require a higher level of service and language skills which employers demand. The tourism product is high quality, with labour and monetary resources to support this. As an attempt to encourage authenticity, Māori culture is integrated, however issues arise through foreign businesses doing so through misuse. The business and labour environment therefore benefits the employer, as they have a wide pool of labour to choose from. Migrant labour possess the language skills in demand and are willing to work for less than many New Zealanders, which leads to cheaper labour costs overall. This has created negative views from local workers, who struggle to meet international service and language standards, and suffer from poorer working conditions.

Strategic Direction

New Zealand decides that following this economic model will ensure greater profits from tourism, and have therefore embraced a globalised and capitalist way of thinking. In order to create a world-class tourism product, businesses must have the flexibility and power to run efficiently and effectively. For local labour, they must invest in training and education in order to meet this standard and migrant labour brings valuable knowledge and skills. The industry targets the high-value Asian market who are willing to pay top dollar for a quality experiences. The sector's marketing and positioning efforts present New Zealand as an exotic and elite holiday destination. The risk of focusing on profit could occur at the expense of good working conditions and remuneration levels for workers. This could also lead to a negative view of the industry which would discourage the local workforce from entering. New Zealand also runs the risk of increased leakages as more foreign businesses would send profits back to their country of origin rather than into the New Zealand economy.

7.5 Scenario Three: “Struggling for Respect”

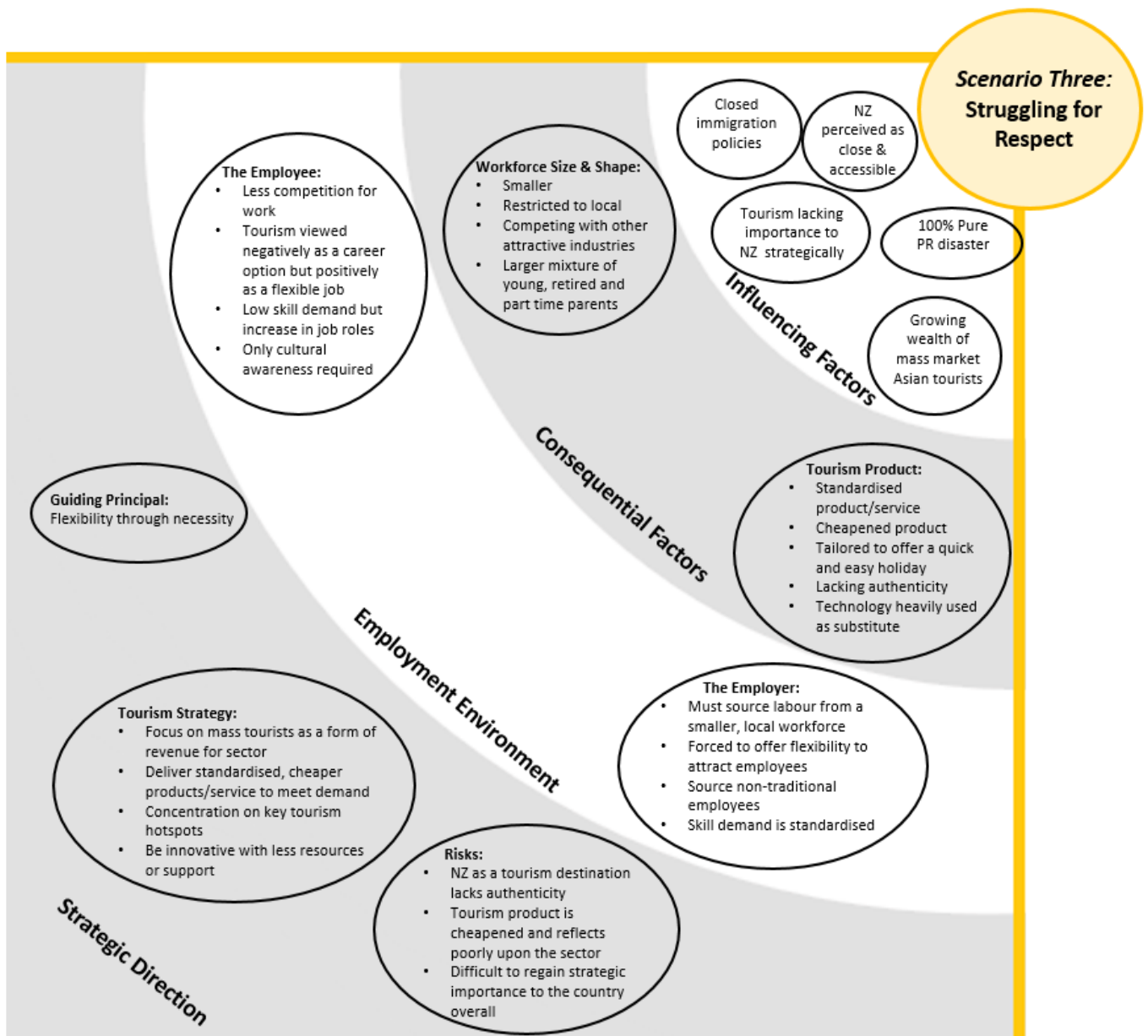


Figure 20: Scenario three strategic implications.

Scenario Factors

This scenario questions the tourism industry's response to a fall in its economic and national importance. It envisions an environmental disaster which affects New Zealand's 100% Pure image and leads to tourism coming under attack. The New Zealand government decides to tighten immigration policy and target only highly-skilled individuals, which affects the industry's reliance on migrant labour. The growth of wealth in Asia, coupled with more accessible travel, has encouraged a mass market of tourists from this region to come to New

Zealand. Because of these factors, tourism no longer has the support or resources to provide a high quality product and service. This forces them to make innovative employment decisions; accommodating this mass market with standardised products and positioning as a quick and easy holiday destination, where tourists can “see it all in a day”. The workforce is smaller and risks entering more attractive industries forcing employers to become more flexible to counter this. This scenario suggests a difficult environment for employers, as the labour market is smaller and the workforce is pickier about employment decisions. On a positive note, the requirement of standardised products and services mean that skills in demand are lower and less specialised. For employees, tourism is relatively easy to find work in, but is not viewed as a viable career option and is attractive mostly to part-timers.

Strategic Direction

The guiding principle in this scenario is flexibility through necessity as the industry struggles. Tourism has responded to the incoming market of mass tourists and considered that a lack of support and resources means this market is the most viable strategic option. As interest in the industry drops nationally, tourism activity is targeted in the key hotspots of Auckland, Rotorua and Queenstown. Standardised products and services are easier to deliver within a constrained environment. Adopting this strategy out of necessity means that the industry runs the risk of failing to regain strategic importance as a sector in the near future. Taking a cheaper and easier approach with a workforce that requires less training and specialised skills will cheapen the product and could further damage the attractiveness of tourism as a job.

7.6 Scenario Four: “Cheap and Plentiful”

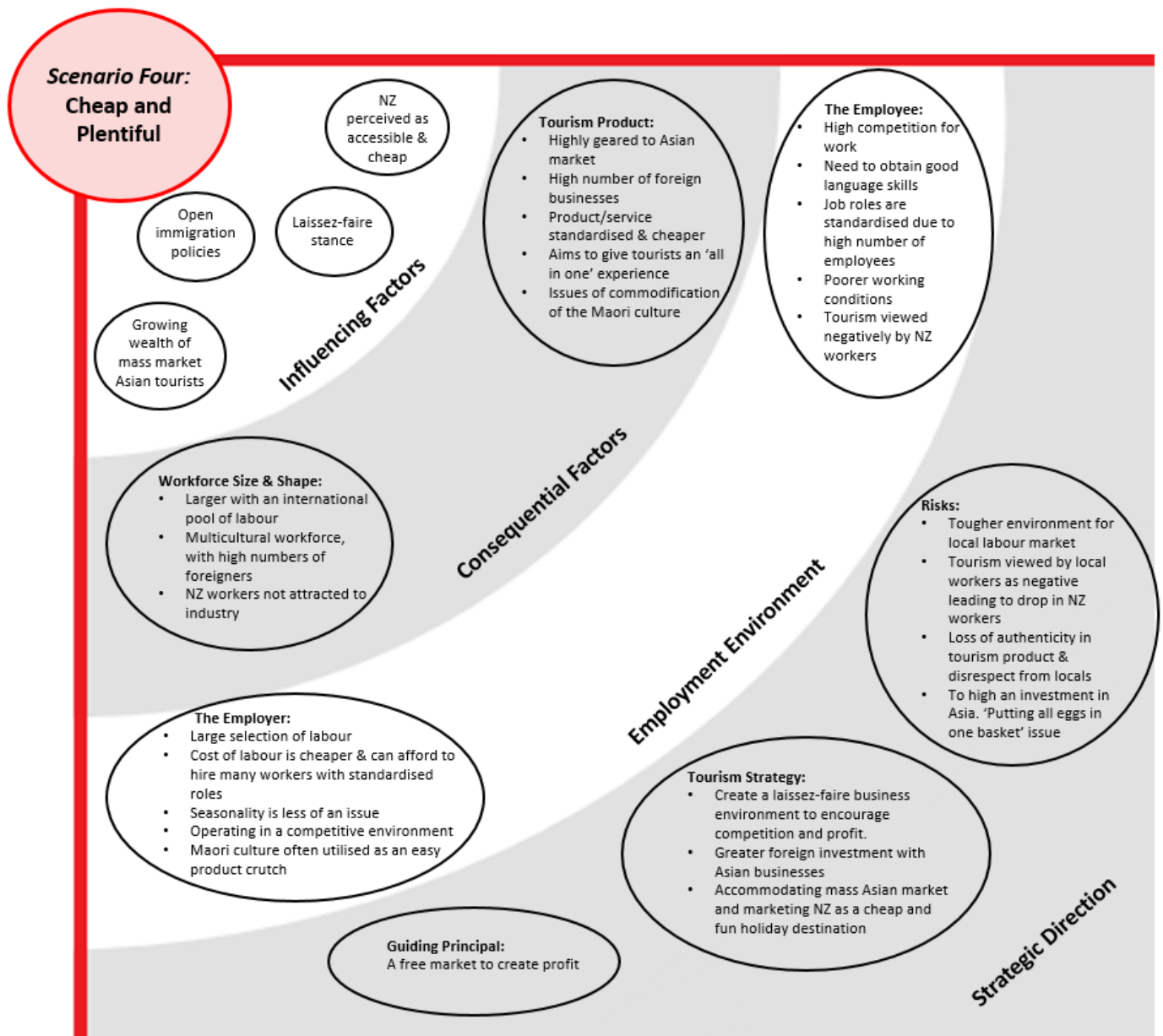


Figure 21: Scenario four strategic implications.

Scenario Factors

This final scenario depicts a future where immigration policies and the business environment has opened up with the government adopting a laissez-faire stance. This is done in the hopes of encouraging a competitive and profit-driven environment while the country attracts a mass market of tourists from Asia. An opportunistic environment has been created and businesses are quick to capitalise on this tourist market. This results in a tourism product and service that is cheaper, standardised, and heavily geared towards this mass market. Unfortunately, in this

race to make a dollar, Māori culture is increasingly commodified as a quick and easy selling point for businesses. Additionally, the workforce has grown, with an international pool of labour creating a multicultural workforce but a competitive labour market for local workers. For the employer, this scenario is beneficial for operating a business, with lower labour costs and flexibility. Workers can be employed in standardised roles that don't require a breadth of skills. This environment also helps businesses to tackle the issues of seasonality and the increased competition between businesses drives the tourism product price down. The market allows easier entry and exit for businesses, which is favourable for entrepreneurs. Unfortunately, this scenario is not as beneficial for the employees, where increased competition and poorer working conditions makes tourism an unattractive employer.

Strategic Direction

The tourism strategy involves a realisation of the potential that open immigration policies can have on the sector. This environment allows businesses to utilise migrant labour to smooth over traditional issues of seasonality and ultimately turn a greater profit. Greater foreign investment will allow products and services to be introduced to the industry that suit the incoming Asian market, creating a more attractive and comfortable destination for these guests. New Zealand is marketed and positioned as a cheaper and fun holiday destination for the whole family. Risks arise around the authenticity which the New Zealand tourism product once prided itself on. This could be lost as the goal of profit overrides quality. Simultaneously, if the working conditions decrease further, then local workers will shift to other sectors for work, leaving a largely foreign workforce. Finally, if the country puts too many resources or focus on the Asian market, then it runs the risk of putting 'all their eggs in one basket'; leaving it vulnerable to market changes.

7.7 Concluding Thoughts

Considering the very different futures presented within this thesis, it becomes apparent that there are a number of directions the tourism industry could follow. It is also important to recognise that as an industry, tourism will always be affected by external drivers of change. When considering the future, decision makers must be aware that the industry needs to be flexible in order to respond and adapt to changes, whilst recognising that any changes will ultimately affect the workforce. From reflection on the research project and the final four

scenarios, a number of concluding thoughts can be made which should be addressed in strategic discussions.

Firstly, workforce issues needn't be employer versus employee. This thesis often divided the consequences of each scenario into employee and employer, as these two groups will have different perspectives of the workforce situation. However, while the goals of each group are different (employers have a focus on business success, whilst employees desire a favourable working environment), it is dangerous to assume that both groups cannot achieve a harmonious solution to workforce issues. The scenarios often depict that some workforce conditions may favour one group over the other, but decision makers need to strive for solutions that benefit both employers and employees as the overall success of a sustainable industry relies on the support of both parties. The scenarios also exemplified the benefits and issues of an overreliance on either local or migrant workers. Therefore, a practical solution is to find a balance between the two. Both types of labour hold valuable knowledge, skills and benefits to the industry. Local workers bring authenticity and local knowledge, as well as an important contribution to the local economy. Focus on developing the skills of New Zealand workers is important in developing the country's own labour market for the future. Migrant labour is essential for the structural issues within the industry; namely seasonality. However, this labour is vital in developing a multicultural workforce with greater knowledge and skills. This allows businesses to respond to the needs of different markets.

The diversity and complexity of the tourism sector means that stakeholder communication is key. Achieving a high quality tourism product and workforce requires communication from all actors involved. The first scenario, of "*Manaakitanga is Found Here*", demonstrated an industry which had recognised this factor and worked towards developing the role of education providers in providing the industry with appropriate skills. These skills in demand were a response to those needed from businesses to deliver a high quality product and further still, from a national tourism strategy which guided the direction of the sector. Furthermore, New Zealand's distance and size creates the perfect opportunity to develop niche, quality, and experiential tourism. Consumer consumption trends have indicated a growing desire for these aspects and it is important that New Zealand captures and caters to this market. Decision makers need to consider the benefits of investing time and energy into the tourism industry and its workforce before they focus on cutting costs and chasing a quick dollar. In the long term,

focusing on quality over quantity will ensure a more sustainable industry which can be a viable career option for workers.

A final note concerns one of the country's most important assets; our unique, indigenous, Māori culture. Its significance within the tourism industry is immense; guiding our product, marketing, and positioning as a tourism destination. A number of scenarios presented futures where the culture fell victim to commodification as a lazy attempt to make money. Preserving, respecting and developing this culture should be actions which tourism businesses and policy-makers factor into their strategies. "*Manaakitanga is Found Here*" presents a future where Māori values guide the industry, suggesting that our tourism workforce should obtain the knowledge and values of the Māori culture before integrating it into business.

7.8 Conclusion

Chapter Seven addressed the third and final research sub-question of the strategic implications for, "*Manaakitanga is Found Here*", "*Pick of the Labour Crop*", "*Struggling for Respect*" and "*Cheap and Plentiful*". It stressed that due to the unpredictability of the future, the tourism industry should be flexible in order to respond and adapt to changes. These changes relate to both the ten drivers identified in Chapter Four, as well as the key drivers which emerged from the Delphi process and formed the basis for the scenarios; *the role of immigration policies* and *the growth of the Asian market*. The contrasting futures which could emerge from these drivers exemplify a number of strategic directions which the tourism industry could take. These each have a different effect on its workforce, with some more desirable than others. Concluding thoughts from the research stressed the importance of finding balanced solutions for the workforce and striving for a quality tourism product that respectfully integrates our Māori culture.

Chapter Eight

REFLECTIONS & CONCLUSIONS

8.1 Introduction

This final chapter concludes the thesis and presents reflections upon the research project as a whole. It begins by summarising the research process and reflecting on its strengths and limitations alongside comparisons to the study by Solnet et al. (2013), which the methodology was adapted from. The next section explains the value of this research and its contribution to knowledge within the fields of futures work and the New Zealand tourism industry workforce, as well as highlighting potential areas for future research.

8.2 Thesis Reflections

Workforce planning and projections are necessary tools for industries and governments to ensure that the labour requirements in the future will be adequately met by preparing and creating strategies in the present. This thesis focused specifically on the New Zealand's tourism industry workforce, a topic which is currently circulating industry strategy discussions due to its expected growth. Academia continually highlights the specific difficulties that this particular workforce faces, including lower paid work with lower skilled roles, whilst requiring highly interpersonal service. As a result, the working conditions within the sector have a poor reputation with a lack of easy solutions (Baum et al. 2016). The methodology of a Delphi-based scenario planning process was therefore chosen as a tool to explore this workforce's future as a valuable and disciplined method of envisioning the future; a task which is shrouded in complexity and uncertainty. This method involved a three-phase process of environmental scanning, consensus building and scenario construction.

The 2013 study by Solnet et al. also utilised a Delphi-based scenario planning method to envision a similar topic, of the future of the Asia-Pacific tourism workforce in the year 2030. That study's techniques were replicated to focus solely within the New Zealand context in the year 2035, as this type of study, with this particular date had not been performed before. The qualitative methods used within both Solnet et al. (2013) and this study, aimed to take an alternative approach to workforce projections as they are traditionally economically-laden and

highly quantitative. It was the researcher's desire to provide richer and more holistic visions for the future. The following research question was therefore posed:

Using a scenario planning process, what will the future of the New Zealand tourism workforce look like in the year 2035?

In order to answer this question, the following sub-questions were created:

- 1. From an analysis of key trends, issues and drivers that will affect the New Zealand tourism workforce in 2035, which two have the highest likelihood of occurrence and greatest importance?***
- 2. What four possible future scenarios could evolve from these trends, when placed on a Heijden 2x2 matrix?***
- 3. How will each of these scenarios have implications in regard to policy and management of the New Zealand tourism workforce?***

The thesis began outlining the nature and characteristics of the New Zealand tourism workforce in Chapter Two. This explained the scope, scale and complexities of the industry's workforce as a multifaceted, ambiguous phenomenon with numerous stakeholders, subsectors and definitional issues as a result. The New Zealand context was then discussed to highlight the country's history with tourism and its workforce's current situation. This built the groundwork for the next phase of environmental scanning. In order to answer the first research sub question, the rigorous technique of environmental scanning analysed current drivers of change through the literature. After consolidation from the advisory group, a list of ten key drivers were produced which could influence the future of this industry's workforce.

Compared to the drivers within the study by Solnet et al. (2013), seven out of their ten driver themes were similar to this study, exemplified in Figure 22. This reflects an alignment of key influential drivers between studies which is not surprising considering New Zealand is part of the Asia-Pacific region. These seven drivers could represent the dominant forces of change for the future tourism workforces both regionally and nationally within New Zealand. Drivers within the Solnet et al. (2013) study that did not emerge in this thesis, reflect issues that are not as prominent within New Zealand literature, or perhaps not viewed as important compared to the wider Asia-Pacific region. These were political instability, the gap between rich and poor, and rising labour costs. These drivers reflect tourism workforce issues which are important

when analysing a wide region because of its geographical reach, including a large variety of countries. However, these drivers become less prevalent when focusing just on the New Zealand context, where issues such as political instability and wealth distribution are less dominant concerns in the country. On the contrary, drivers not apparent in Solnet et al. (2013) reflect New Zealand-specific issues which become obsolete at a regional level. Currently the growth of the Māori economy will have little effect on the wider region and the concern of an undiversified economy reflects New Zealand's vulnerability in terms of size compared to many other Asia-Pacific countries. Additionally, the demand for local employment could also be a reflection of size, geographical distance, and the current political discussions around immigration. This enforces the importance of conducting a study at this level.

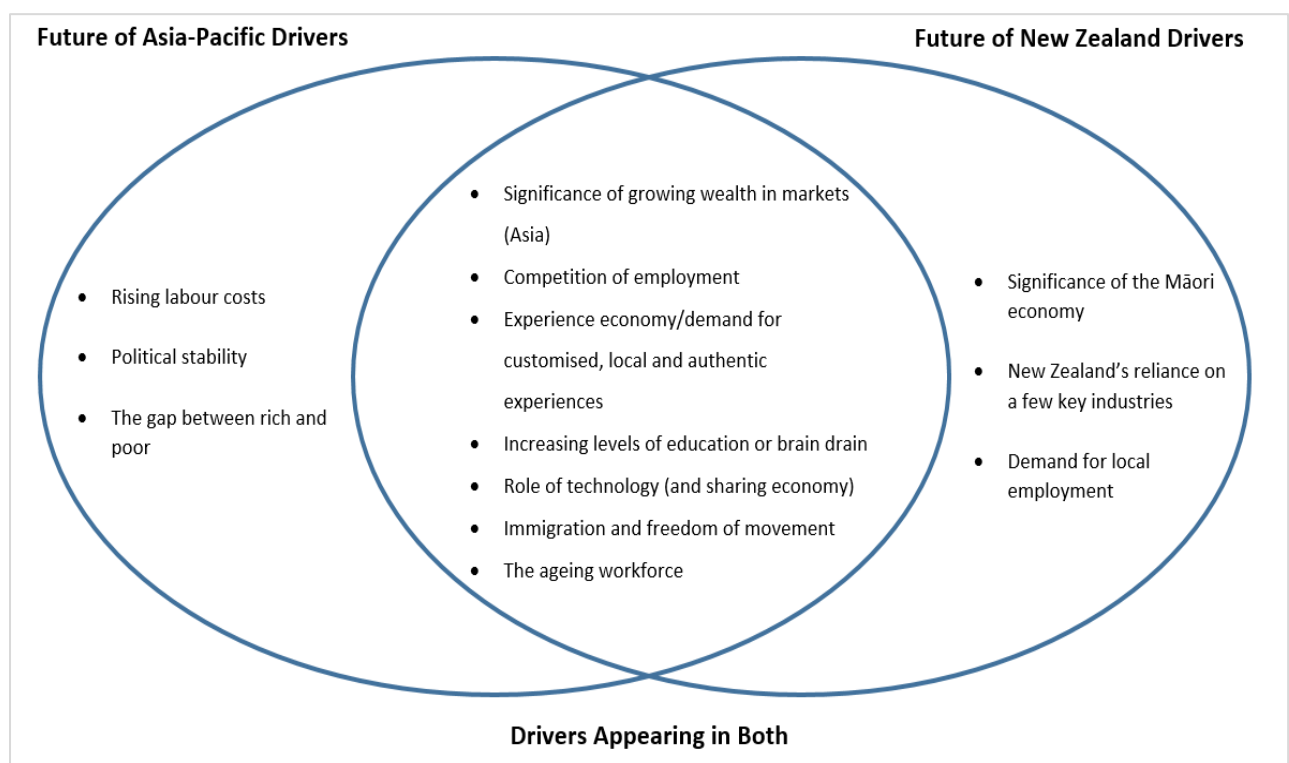


Figure 22: Spread of drivers across this study and Solnet et al. (2013)

The ten drivers were reduced to two which formed the basis for the four scenarios. A Delphi method of group consensus through surveying was employed here, drawing on expert knowledge within this field to guide the task of driver condensing. The use of an advisory group was also employed to aid the process, which was a modification from the study by Solnet et al. (2013). This was employed to add further trustworthiness to the method and was an additional strength of this study. The final two drivers with the highest likelihood and importance emerged from this process, which were *immigration policies* and *the growing wealth of the Asian*

market. The second sub-question involved the creation of four future scenarios which would evolve from these two drivers which were placed upon a Heijden et al. (2002) 2x2 matrix. This presented opposite states of the drivers, including a *mass Asian tourist market*, *niche Asian tourist market*, *open immigration policies* and *closed immigration policies*. The two drivers produced within the study by Solnet et al. were *the level of economic prosperity* and *customisation of tourist experiences* (with the acknowledgment of technology). Some similarities can be drawn between the two studies. For example, the role of the Asian market reflects the driver of economic prosperity within Solnet et al. and the state of this driver as either mass or niche, reflects Solnet et al.'s customisation driver. Interestingly, an immigration driver did not reach the final four drivers within Solnet et al. This indicates that New Zealand perceived this issue as more important, and could be a reflection on the country's size and the timeliness of the study, as immigration is a much debated current topic both in New Zealand and globally with the likes of Brexit and President Trump's election.

The four scenarios were then systematically constructed utilising the survey respondent's comments and supporting literature. To ensure the scenarios were plausible, a third and final survey asked respondents to review these scenarios. After taking into account the respondents' comments, the final four scenarios of *Manaakitanga is Found Here*, *Pick of the Labour Crop*, *Struggling for Respect* and *Cheap & Plentiful* were produced. Compared to the scenarios within Solnet et al. (2013), there are some similarities despite the usage of different key drivers. These include the elements of mass versus customised products and services for tourists. These tourist preferences in both studies reflected the subsequent workforce requirements. For example, mass markets demanding only low levels of skill and routine job design. There is also an inclusion of immigration policies with similar consequences on the workforce if the region adopts open policies. However, because their matrix was not based upon this driver, this was not the focus of the scenarios. It would be interesting to note how similar the scenarios would be if the same drivers were utilised.

The third and final sub-question was addressed in Chapter Seven through a discussion of the strategic implications of each scenario in terms of their opportunities and threats to the workforce. This was followed by a reflection of the research project and five concluding thoughts from the researcher. The research highlighted the complexity of the industry and its workforce, and as a consequence, the importance of reaching balanced solutions that benefit its multiplicity of stakeholders and employees. It also stressed the importance of

communication, as well as the suggestion of aiming for sustainable solutions within tourism and its employment to avoid the negative aspects of some scenarios.

The strengths of this research are its systematic approach through the three research stages of environmental scanning, consensus building and scenario construction, of which each involved documentation, consultation and analysis to ensure rigour. The incorporation of expert knowledge and additional input from the small advisory group added trustworthiness to the process as opposed to solely relying on the researcher's judgment. The study sought a systematic approach to compiling the Delphi panel members to reflect the numerous stakeholders within the tourism workforce. Nevertheless, there are some limitations, which include the lack of a government voice within the advisory group as well as a lack or underrepresentation of some groups within the Delphi panel. This was a possible result of the varying values and priorities for different groups. For example, smaller businesses may be more concerned with the day-to-day running of their business rather than the future in 20 years. Finally, the drop in respondents through the three rounds of the Delphi was a limitation, however as previously mentioned this is to be expected within this certain methodology.

8.3 Contribution to Knowledge

This study adds valuable insight and contribution to both academic and industry knowledge, by addressing a gap in research concerning futures studies for the New Zealand tourism workforce, by specifically looking at the year 2035. There are a small number of studies which have employed scenario planning to envision tourism workforce futures in the Asia-Pacific region (Heicks, 2010; McLennan et al. 2012; Orchiston, 2011; Solnet et al. 2013), but no such study has focused specifically on New Zealand's tourism workforce. The future of this sector's workforce is relatively unexplored compared to its importance. Therefore this study filled this void by presenting four various yet plausible futures for this workforce, creating a platform for discussion amongst industry decision makers and pushing the current focus on 2025 a further ten years into the future.

In terms of academia, this research contributes to existing broader literature on the subject, which has already been identified as being “neglected relative to its importance” (Baum et al. 2016, p. 1) and requiring further research. This neglect has stemmed from a workforce within

an industry which is extremely complex; consisting of multiple sub-sectors and stakeholders who often do not share a unified strategy or goal (Smith et al. 1998). Its enormity and complexity has led to difficulties in both defining and measuring the sector; all issues which trickle down to the sector's workforce. Tourism workforce literature identifies this area as problematic, with certain characteristics of the industry creating challenging working conditions. This study identified that these particular workforce characteristics were present within New Zealand. However, research at a national level also raised New Zealand-specific issues which would have been lost at a global or regional level. These included specific economic, cultural, social, demographic, and geographical issues which could affect the workforce. For example, tourism's role in the economy against other industries, New Zealand service levels, the Māori culture and economy, New Zealand-specific regional spread, current policies, attitudes to immigration, education levels, and inbound markets. This highlights that whilst the traditional workforce issues are present in New Zealand, there are unique issues specific to the country that require attention and brings value to this research.

This thesis did not aim to produce a 'utopic' or 'dystopic' future; rather it raised *immigration policies*, and *the growth of the Asian market* as two important drivers for the future of this workforce. It framed the plausible influences that they could have and begs the question, directed at tourism decision makers, around which strategic direction they should take. The study highlights that whilst both drivers are not within the direct control of the tourism industry, they must be responded to and acted upon through positioning efforts or lobbying. Firstly, immigration policies are largely dependent on national government decisions, with considerations of international migration trends. The influence of the immigration policies is substantial, affecting the tourism product and labour force. Currently the New Zealand government is in a process of tightening these regulations which will affect the tourism industry. The industry needs to decide which direction it wants to take and recognise it can have a powerful voice in terms of lobbying due to the sector's economic importance. The second driver of growing wealth within the Asian market is identified as something that is, and will continue to occur. Similar to immigration, this driver is out of the direct control of the tourism sector as it concerns economics and consumer behaviour. However, it can be influenced through the industry's marketing and positioning efforts by making decisions on how, where, and who they target.

This study has contributed knowledge to the seemingly difficult area of the tourism workforce within academia, an increasingly popular method of scenario planning, and the relatively unexplored future of New Zealand's tourism workforce. However, this research also identifies areas for further research within scenario planning, where this method could be employed within localised areas of New Zealand which could highlight local-specific factors. Additionally, other destinations would benefit from country-specific workforce scenario planning. Outside of this methodology, the two key drivers in this study have highlighted the need for further research surrounding the workforce mix (namely local and migrant workers) and whether different degrees of this effect the tourist experience. Considering the focus on mass and niche markets, further research could investigate the profiles and expectations of these varied markets.

8.4 Conclusion

Predicting the future is impossible, but envisioning it can open the mind to the possibilities that lie ahead. This study considered the very complex phenomenon of the New Zealand tourism workforce and questioned what the future could hold in the year 2035. At first, such a question seems unanswerable, considering the vast, multifaceted and challenging nature of this workforce, coupled with the seemingly impossible task of imagining the future. However, through utilising scenario planning, this complicated question was answered. Four scenarios were presented in this thesis, which were neither predictions, nor preferences. Instead, they produced four possibilities based on key drivers of change occurring today, each with various opportunities and challenges. They encourage decision makers within tourism to stretch their thinking, whilst considering which direction the industry should take. For New Zealand, tourism marks such an important role as a sector and an employer. This thesis recognised the need for further research surrounding the workforce to ensure its future continues to be discussed. Notably, each scenario despite their varied consequences, holds a future for tourism and whilst industry decision makers cannot ultimately predict it, they have the power to respond, shape, and influence it. Looking forward, tourism industry policy makers and professionals need to decide on the values which they bring to the future of this workforce.

Appendices

Appendix 1: Invitation email to participants

Victoria University of Wellington

Pipitea HEC Application Form



The future of the New Zealand tourism workforce: 2035

Good morning [participant's name].

My name is Laura Petersen, I'm a Victoria University Masters of Commerce student studying management and I am currently undertaking my thesis project under the supervision of Prof. Karen Smith.

I am looking at **the future of the New Zealand tourism workforce in the year 2035**; a very interesting and topical issue!

I am writing to you for your valuable experience and expertise within [organisation's name and field of expertise] and to ask if you would be interested in participating in **three short surveys over the next four months** for my research.

The study will develop four possible future scenarios for the workforce. These are developed from the 10 key trends/drivers of change which I have identified. Through these three surveys you will help to narrow these down to the **two most important with the most impact**. I will then ask for your opinions on the scenarios in the final survey. Your answers will remain confidential to myself and my supervisor.

To give you an idea of what is involved, the three survey will be as follows:

1. **Survey One** – 10-15 minutes. (Survey link in this email).
2. **Survey Two** – 5-10 minutes. (Will be sent out next month).
3. **Survey Three** – 15-20 minutes. (Will be sent out late January/Early February).

If you would like to participate you will find a link to the first online survey at the end of this email. There is also an additional information sheet attached for you to read. In each round you can choose whether to participate, and you can choose to remove yourself from the panel and not be contacted again.

The study is using a three member advisory group to guide the process. Alongside your specialisation around [relevant field], this will ensure rigour in the research. The resulting scenarios should provoke some interesting discussions about the future of this workforce!

It would be fantastic to have you on board and I understand this is a big ask with busy schedules! If you have any further questions before you complete this survey or throughout the process, please let me know.

[Link to survey here]

Warm regards,
Laura Petersen

Appendix 2: Information sheet attached within invitation email

Victoria University of Wellington

Pipitea HEC Application Form



The future of the New Zealand tourism workforce: 2035 **DELPHI PANEL SURVEYS: ABOUT THE RESEARCH**

What is this research?

This research project is being undertaken for my Masters thesis which will be submitted to Victoria University of Wellington. It aims to explore a number of possible futures in the year 2035 for the workforce of New Zealand's tourism industry. You have been approached as a potential participant in this study due to your expertise and influential position within either tourism or workforce issues. This handout provides information about the study, as well as your rights to confidentiality if you choose to participate.

What is required of me?

An analysis of the literature has identified 10 key drivers of change which are/will be affecting the New Zealand tourism industry workforce. What I am now undertaking is called a Delphi method, which involves a panel of experts that will help to narrow down these drivers to the two most important and which will have the most impact. I will then take these two drivers and develop four alternative visions for the future which the panel will comment on.

Your experience and opinion on this topic would be invaluable and if you choose to participate there will be three rounds of online survey. These surveys will be emailed to you over the next four months.

A break-down of the survey content is as follows:

- **Survey One** – 10-15 minutes. (Link within this email). You are given 10 drivers of change (eg. The gap between prosperity and poverty within New Zealand). You are asked to rate the likelihood and perceived impact of each, and add any comments you have.
- **Survey Two** – 5-10 minutes. (Emailed next month) You will be given four drivers and be asked to rank their likelihood and perceived impact; with room for additional comments.
- **Survey Three** – 15-20 minutes. You will be shown the four different scenarios for the future of the New Zealand tourism workforce and asked for your opinion on each.

Will my answers be confidential?

Yes, your name and the name of your organisation will not be disclosed within the publication and they will be kept confidential to the researcher and the supervisor of the project. Your answers will not be associated with your name. I may however, be referring to the *type* of organisation which you are from. For example, central government.

In each round you **can choose** whether to participate, and you can choose to remove yourself from the panel and not be contacted again. You may also indicate if you would like a summary of the final scenarios.

Please do not hesitate to contact the researcher or the project supervisor if you have any questions. Approval for this research has been granted by the Victoria University of Wellington Human Ethics Committee with approval number: ****.

If you have any concerns about the ethical conduct of the research you may contact the Victoria University HEC Convener: Associate Professor Susan Corbett. Email susan.corbett@vuw.ac.nz or telephone +64-4-463 5480.

Thank you,



Laura Petersen

Researcher contacts:	
Researcher: Laura Petersen, School of Management, Victoria University of Wellington peterslaur@myvuw.ac.nz	Supervisor: Prof. Karen Smith, School of Management, Victoria University of Wellington, (04) 463-5721, karen.smith@vuw.ac.nz

Appendix 3: Participant consent form attached within survey one

Victoria University of Wellington

Pipitea HEC Application Form



The future of the New Zealand tourism workforce: 2035 **ONLINE SURVEY ONE**

Thank you for your interest in this research.

This survey is the first of three over the course of this study and will take around **10-15 minutes** to complete.

If you have any questions before you complete this survey or at any stage throughout the process, please feel free to email peterslaur@myvuw.ac.nz (researcher) or karen.smith@vuw.ac.nz (04 463-5721) (supervisor).

.....
By undertaking this online survey, you must read and agree to the following statements:

- I have read the information sheet within the email.
- I will be asked to complete three surveys over the course of the next four months.
- Any information I provide will be kept confidential to the researcher and the supervisor.
- The results will be used for a Masters thesis and a summary of the results may be used in academic reports and/or presented at conferences.
- A summary of the research will be provided at the completion of the study.
- In each round I can choose whether to participate, and I can choose to be removed from the panel and not be contacted again.
- The information I have provided will be destroyed one year after the research is finished.
- My name will not be used in reports, nor will any information that would identify me. The only descriptive information may be describing the *type* of organisation I work for.

I understand the previous statements and agree to participate in this research ☐

I would like to receive a summary of the scenarios ☐

Appendix 4: Survey one layout

Survey One

From an analysis of industry and academic literature, 10 trends have been identified as being key influencing factors for the New Zealand tourism workforce in the **year 2035**. A summary of these have been listed below.

This survey asks you to rate the level of importance of each of the drivers, in terms of **how much impact** you think they could have on the 2035 workforce of the New Zealand tourism industry.

Consider each driver independently, so for example you can rate multiple drivers as having a "large impact".

There is room after each question for you to provide any **additional comments** or thoughts you may have about these drivers.

Space provided at the end of the survey also allows you to **add any other drivers** you believe to be an influencing factor on the future of this workforce.



Summary of 10 drivers:

1. The role of immigration policies and their effect on labour mobility.
2. The growing strength and significance of the Maori economy.
3. The impact of Asia's growing wealth and middle class, changing the visitor mix and workforce requirements.
4. New Zealand's reliance on a few key industries, creating potential labour competition and economic vulnerability.
5. The impact of technological advancements on the tourism industry and its workforce.
6. The impact of both an ageing consumer and workforce.
7. The effect of an increasingly educated and fluid workforce both globally and within New Zealand.
8. The growing demand for local employment against the industry's traditional reliance on migrant labour.
9. The growth of a 'sharing economy' affecting businesses and their workforce needs.
10. The growth of an 'experience economy' pushing higher standards and increasing customisation/ personalisation preferences from tourists.

4A) Question following each driver:

Little Impact
1 2 3 4 5 6 Large Impact
7

*How much impact will this driver have on the NZ tourism workforce in 2035?
(slide the blue button along to your preferred driver)*



Please write any additional comments or thoughts you have about this driver.

4B) Drivers:

DRIVER ONE

The role of immigration policies and their effect on labour mobility.

New Zealand's future immigration laws and policies could affect the movement of labour through a shift to either open borders or a closed/protectionism stance.



DRIVER TWO

The growing strength and significance of the Maori economy.

The Maori economy is currently worth 39 billion dollars and is growing.



DRIVER THREE

The impact of Asia's growing wealth and middle class, changing the visitor mix and workforce requirements.

Emerging tourism markets from Asian regions could alter the product/service requirements from our tourism businesses and consequently the workforce



DRIVER FOUR

New Zealand's reliance on a few key industries creating potential labour competition and economic vulnerability.

Currently New Zealand's economic reliance is on 2 to 3 key industries. This over-reliance could place New Zealand's workforce in a vulnerable position if this changes.



DRIVER FIVE

The impact of technological advancements on the tourism industry and it's workforce.

As technology advances we are seeing the rise of an increasingly self-service/interactive business world. This is already having an effect on the workforce with technological job substitution.



DRIVER SIX

The impact of both an ageing consumer and workforce.

An ageing workforce brings specific needs from employers and an ageing consumer seeks specific experiences and requirements when travelling.



DRIVER SEVEN

The effect of an increasingly educated and fluid workforce both globally and within New Zealand.

People are becoming more educated and mobile in their working life as traditional job hours and locations become less common.



DRIVER EIGHT

The growing demand for local employment against the industry's traditional reliance on migrant labour.

The tourism industry is heavily reliant on migrant labour however employers are seeking more local employment to deliver the authentic Kiwi experience.



DRIVER NINE

The growth of a 'sharing economy' affecting businesses and their workforce needs.

The sharing economy is changing the nature of how we do business, with the likes of Uber and Airbnb.



DRIVER TEN

The growth of an 'experience economy' pushing higher standards and increasing customisation/ personalisation preferences from tourists.

With increasing affluence and consumer choice, quality products and services have now become an expectation.

Consumers are now valuing experiences above all, seeking those which are personalised, authentic and unique.



Please add any **further drivers of change** which may affect the future of the New Zealand tourism workforce in 2035:

Appendix 5: Survey two layout

The Future of the New Zealand Tourism Workforce: 2035

Thank you for your participation so far

A few weeks ago you completed the first of three surveys for the *Future of the New Zealand Tourism Workforce: 2035* study. The results from the first survey have been analysed and the four drivers which participants indicated would have the most impact have been identified. You will be now asked to rank each of these four drivers, with room to provide any additional comments you may have.

This second survey will only take around **5-10 minutes** to complete.

Survey Two

The following four drivers were identified by participants as potentially having the most impact on the 2035 New Zealand tourism workforce.

This second survey asks you to **rank** the drivers both in terms of their perceived likelihood and level of importance. This will help narrow down the four drivers to the final two.



The four drivers from the previous survey (in no particular order):

1. The role of immigration policies and their effect on labour mobility.
2. The impact of Asia's growing wealth and middle class, changing the visitor mix and workforce requirements.
3. The impact of technological advancements on the tourism industry and its workforce.
4. The growth of an experience economy pushing higher standards and increasing customisation/personalisation preferences from tourists.

These four drivers will now be shown as **extremes** along a spectrum, to indicate the range of possibilities which each of them could have in the future.

1. The role of immigration policies - **closed and highly regulated/ open and encouraging free movement.**

2. The Asian tourist market - **growth/decline.**

3. **High vs. low** technology influence within tourism businesses.

4. New Zealand tourism industry taking a **high vs. low** focus towards quality experiences.



Q1. Please rank the four drivers in order of their likelihood to be an issue for the workforce. Bear in mind this could mean positive or negative.

(drag and drop the answers into your preferred order. 1= most likely, 4= least likely)

- 1 Immigration policies closed and regulated/ open
- 2 Asian tourist market growth/ decline
- 3 High vs. low technology influence within tourism businesses
- 4 High vs. low tourism industry push for quality experiences

Q2. Please rank the four drivers in order of how important you believe them to be.

(1= most important, 4= least important)

- 1 Immigration policies closed and regulated/ open
- 2 Asian tourist market growth/ decline
- 3 High vs. low technology influence within tourism businesses
- 4 High vs. low tourism industry push for quality experiences

Please add any additional thoughts/ comments you have on each of these drivers in terms of what they could mean for New Zealand's tourism workforce.

Immigration policies closed and regulated/ open.



High vs. low technology influence within tourism businesses.



Asian tourist market growth/ decline.



High vs. low tourism industry push for quality experiences.



Appendix 6: Survey three layout

The Future of the New Zealand Tourism Workforce: 2035

Survey Three

Thank you for your participation so far



This is the **third and final survey** for this study.

Four possible scenarios have been developed for the future of New Zealand's tourism workforce in 2035. They will be presented to you in this survey and you will be asked to comment, in your own view, what you believe could be the **opportunities and threats** of each scenario.

The nature of scenario planning recognises that there is no one future, as this is impossible to predict. Instead, four scenarios are created as 'possibility spaces' to stretch your imagination as to what the future could hold. This means some will be more likely/realistic/desireable than others

As a reminder, the scenario creation process so far will be briefly explained, followed by an explanation of each of the scenarios.

This survey will take around **15-20 minutes** to complete.

Scenario Creation Process

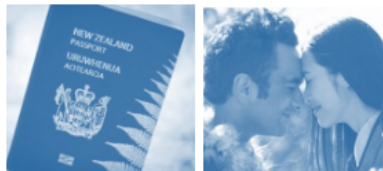
1. 10 key drivers of change that could affect the New Zealand tourism workforce in the future were identified through the literature.



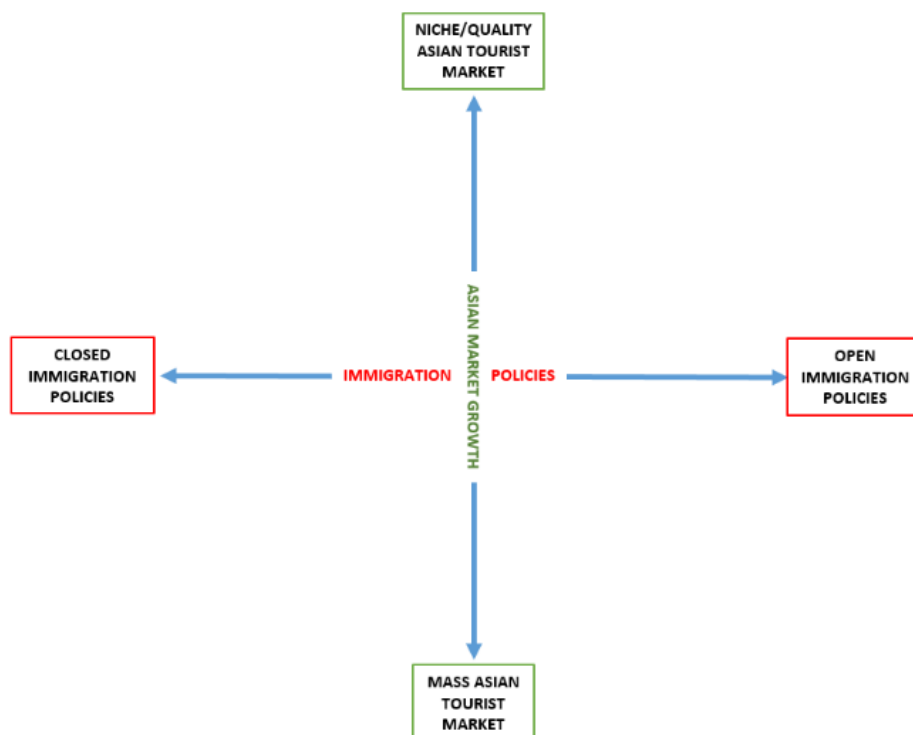
2. Through two surveys, these 10 drivers were narrowed down to the two most important.



3. They were: The growth of the Asian market and The role of immigration policies.



4. These two drivers were put on a matrix; showing both of their extremes.



5. These form the basis for the **four scenarios** or 'possibility spaces' for the future of this workforce. They are each a different combination of the two key drivers; creating four varied scenarios.



- The four scenarios will now be discussed in more detail, with room for your comments on each. ▪

6A) Questions following each scenario

What do you believe are the opportunities for the workforce in this scenario?

What about the issues for the workforce?

6B) Scenarios

SCENARIO ONE: "Manaakitanga Is Found Here"

Closed Immigration Policies // Niche Asian Tourist Market

Tourism as an industry represents a key part of the country's economy with positive and sustainable growth. Manaakitanga is the guiding principle in this scenario and the country has adopted a quality not quantity strategy, targeting the dominant higher value Asian market. Tourism has become a desirable industry to work in; with greater social acceptance of tourism from locals and better working conditions from employers.



- Immigration policies have become closed and highly regulated, which has shrunk the labour market and forced employers to become flexible, innovative and competitive with their working conditions in order to attract employees.
- The dominant high-value niche Asian tourist market is catered for. They demand high quality, authentic, personalised and experiential products.
- Workforce skill set has increased as employers desire highly trained employees to cater to the market.
- Support from national government pushes greater strategy around education/training providers and support for New Zealand businesses.

SCENARIO TWO: "Pick of the Labour Crop"

Open Immigration Policies // Niche Asian Tourist Market

New Zealand's tourism industry is thriving on the surface; attracting a high-value market from Asia who seek the authenticity which New Zealand has to offer as a holiday destination. Open immigration policies have created a fluid and flexible labour market which benefits the employer by giving them the pick of the labour crop. Undereath this facade however; labour issues and workers' rights are being compromised in a race to chase the dollar.



- Open immigration policies benefit the employers by opening up the labour market, increasing the use of migrant labour and given employers the ease to hire and fire at will.
- Increased foreign investment has increased competition and the quality of the tourism product.
- The high value asian market is targeted successfully and employers demand highly skilled employees to suit.
- Local labour market is suffering as wages, working conditions and ease of finding work drop.

SCENARIO THREE: "Struggling for Respect"

Closed Immigration Policies // Mass Asian Tourist Market

In this scenario, the tourism industry is no longer at the forefront of New Zealand's national strategy. The country has adopted closed and highly regulated immigration policies which has cut off tourism businesses from the key source of migrant and working holiday labour. Simultaneously, the cheaper and more accessible nature of travel in 2035 has pushed New Zealand to become a very popular destination for a mass Asian market. Unfortunately, the lack of support, strategy or focus from the top has left tourism and its workforce high and dry.



- The smaller labour market has made hiring employees more difficult for businesses. Employers are now battling against other more attractive industries, forcing them to offer flexibility in their employment opportunities and look beyond traditional employees.
- The skill set has standardised making entry into the industry easier and lowered the demand for education providers.
- The mass Asian market demands standardised products and services and travel to New Zealand merely to 'tick it off' as a destination to visit.
- Regional dispersal, seasonality, local frustration with tourism, and issues around commodification worsen without the support from national government.

SCENARIO FOUR: "Cheap and Plentiful"

Open Immigration Policies // Mass Asian Tourist Market

Tourism's growth and the country's current laissez-faire stance have created an opportunistic business environment. Open immigration policies give employers a plentiful selection of labour and the increase in foreign investment, businesses and labour has encouraged competition among tourism businesses. The race to make money off the mass Asian market has begun.



- The country experiences a divide over the industry of tourism:
- On one hand, the open and flexible policies around immigration and commerce have turned New Zealand into a hotspot for business owners and entrepreneurs, both local and foreign. There is a mindset that there is money to be made off tourism.
- The mass Asian tourism market seeks a standardised experience with a 'do it all in a day' attitude. This is easily accommodated for by businesses with money rolling in and high numbers of foreign brands attracting the mass market.
- On the other hand, tourism has become economically, socially and environmentally unsustainable; as the local perception of tourism cheapens, culture is being commodified, and working conditions are worsening.

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