

TOURISM INDUSTRY TRANSFORMATION PLAN

He Mahere Tiaki Kaimahi Draft Better Work Action Plan

AUGUST 2022



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CO-CHAIRS' FOREWORD

We are pleased to release this draft Better Work Action Plan (“draft Action Plan”) for consultation on behalf of the Tourism Industry Transformation Plan Leadership Group.

The Leadership Group is made up of representatives from the tourism industry, unions, government and Māori. We have worked collaboratively since November 2021, when Minister Nash asked us to work on a plan for regenerative tourism in Aotearoa New Zealand.

This draft Action Plan builds on significant work that has already been completed. The *New Zealand Tourism Futures Taskforce interim report ‘We are Aotearoa’* has helped shape the vision of a regenerative industry. The *New Zealand-Aotearoa Government Tourism Strategy* helped articulate the future we could be working towards. With the launch of the draft Action Plan, it’s now up to all of us to advance this work.

COVID-19 led to significant disruption. Border closures and the absence of international visitors have significantly impacted tourism. That context is now changing, and gradually we are starting to welcome back international visitors.

Tourism can be an incredibly rewarding industry to work in, but we don’t have everything right. In this draft Action Plan, we are consciously aiming to create a regenerative future for tourism where the industry consistently gives back more than it takes from people, communities, and the environment.

At the core of enabling this future are people who work in the industry.

That is the reason Better Work has been the focus of the first phase of the Tourism Industry Transformation Plan. Transformation will not be possible without nurturing and investing in people as the foundation of our system.

Creative thinking underpins this document. The Leadership Group knew that we needed new ideas and a long-term vision if we were going to achieve genuine transformation. We hope you share our excitement about these new ways of thinking about the future. You’ll see this reflected in our choice of the phrase ‘He Tirohanga Hou’, which translates to a new outlook – a new way of viewing and thinking.

The success of the draft Action Plan is dependent on the ownership of the proposed actions by all stakeholders. Due to the connected nature of tourism, we hope this plan will also be transformational beyond the tourism industry.

To achieve true transformation, we need you to get involved. This draft Action Plan outlines challenges in the industry and proposed new pathways. We’d like to hear from you whether we have these right or if we have missed anything.

We are looking forward to hearing from you. The information you provide will inform the final Action Plan released later in the year.

Ngā mihi,

Gráinne Troute
Chair of Tourism Industry
Aotearoa
Industry co-Chair

John Crocker
National Secretary of Unite Union
Union co-Chair

Heather Kirkham
General Manager of
MBIE Tourism
Government co-Chair

THE TOURISM ITP LEADERSHIP GROUP



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*Ngati Toa, Te Ati Awa,
Ngati Raukawa ki te
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Officer of Hind
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Chief People Officer
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Rongomaiwahine
Chief Executive of
New Zealand Māori
Tourism



Paul Retimanu
Managing Director
of Manaaki
Management Limited



Sheryl Cadman
Central Regional
Secretary for FIRST
Union



Trent Yeo
Executive Director
and Owner of Ziptrek
Ecotours

MINISTERIAL FOREWORD

He aha te mea nui o te ao? He tangata,
he tangata, he tangata.

What is the most important thing in the
world? It is the people, it is the people, it
is the people.

I am delighted to welcome this draft Better Work
Action Plan from the Industry Transformation
Plan Leadership Group.

When I was appointed Minister of Tourism in
November 2020, the tourism industry was
uncertain about the future – as were the majority
of New Zealanders. The impacts of COVID-19 were
being felt acutely, but every day since then has
brought a little more certainty. Today, the borders
are open, international visitors are gradually
returning, and tourism is picking up again.

But this does not mean a return to doing things
the old ways. Other fundamental shifts, such
as those presented by climate change and new
technology, will present new challenges and
opportunities. The world is changing, and we can
either let that change happen to us, or we can be
part of the change, and use this opportunity to
make things better.

I have identified a regenerative tourism system as
an ambition because I am excited about a future
where tourism is giving back more than it takes
from people, communities, and the environment:
an industry that is less focused on volume and
more on value. Talking to the tourism industry,
I know it can deliver on this ambition and is
motivated to do so.

But why Better Work? Because the Government's
objective of a higher wage, lower emissions
economy is particularly relevant to tourism,
where it is vital that the industry works together
to step up if it is to compete for labour and
operate on a more sustainable basis.

Many New Zealanders start their careers in a
tourism or hospitality job, and many work in the
industry throughout their lives. Tourism gives
these people valuable opportunities and skills
that help them throughout their careers. But I
believe we can make the employee experience
better and by doing so, build a stronger and
more resilient tourism industry.

Industry Transformation Plans are all about
partnership – they involve industry leaders,
unions, Māori, and government. This draft Action
Plan was developed together by all parties, and
I thank everyone who has contributed to this
piece of work. Particularly, I want to thank our
dedicated Leadership Group, who gave up their
time when the industry was going through a
particularly challenging period, to come together
and work on this important agenda.

Ultimately, the success of these initiatives relies
on continued partnership. We need all of you to
get involved. If you haven't already, now is your
chance. I encourage you to share your feedback
and contribute to the discussion.

While this has been a tough time for tourism
around the world, I am excited for the coming
months and years for tourism in Aotearoa
New Zealand. This Industry Transformation
Plan process gives me confidence that tourism
has the leadership and vision required to make
the changes needed. I look forward to seeing
this draft Action Plan contribute to a stronger,
more regenerative, and more resilient future for
the industry.

Ngā mihi,

Hon Stuart Nash
Minister of Tourism

THE JOURNEY SO FAR



TOURISM'S INDUSTRY TRANSFORMATION PLAN (ITP) IS ONE OF EIGHT ITPS ACTIVE ACROSS AOTEAROA NEW ZEALAND

ITPs were created when the Government committed to a policy which seeks to grow and transform industries with significant potential to contribute to a high-productivity, high-wage, low-emissions economy. All ITPs are created in partnership by the industry, unions, Māori, and government. Together, they set a long-term vision for transformative change through near-term actions.

The Ministry of Business, Innovation and Employment (MBIE) is the lead government agency for the Tourism ITP, supporting the Leadership Group through secretariat services.

THE TOURISM ITP IS TAKING A PHASED APPROACH

The Tourism ITP is taking a phased approach to the problems and opportunities in the industry, enabling a more focused approach to each phase. The first phase is the Better Work Action Plan - He Rautaki Tiaki Kaimahi (to care for people who work in our industry). The next phase will be focused on the environmental challenges and opportunities for tourism.

THIS DRAFT ACTION PLAN IS A RESULT OF OUR THINKING AND PARTNERSHIP OVER THE PAST EIGHT MONTHS

The Leadership Group has met five times since late 2021 to discuss workforce problems and opportunities, analyse the root causes of these problems, and think about future trends that will impact on the tourism workforce. Coming out of these conversations, we have suggested a package of actions that we think will help address the problems and harness the opportunities. We have used the Te Reo Māori phrase 'He Tirohanga Hou' to describe the set of actions.

He Tirohanga Hou means a new outlook and ways of viewing or thinking. The use of the term Tirohanga Hou in this document refers to each of the eight ideas we have come up with to have a better outlook for the tourism workforce.

It recognises that our aim for this draft Action Plan is to identify new ideas tourism can pursue to reach to a better future.



Photo: newzealand.com



Photo: Camilla Rutherford

THIS DRAFT ACTION PLAN SITS WITHIN A RICH ECOSYSTEM OF OTHER INITIATIVES, AND IS INFORMED BY PREVIOUS STRATEGIES

This Plan does not sit in isolation. It builds on and aligns with other government workstreams including the Government's Employment Strategy and its seven supporting Employment Action Plans¹, other ITPs², the Innovation Programme for Tourism Recovery³, the Reform of Vocational Education (including the formation of Regional Skills Leadership Groups, Workforce Development Councils and Te Pūkenga)⁴, and the introduction of Fair Pay Agreements⁵. This draft Action Plan builds on and aims to enhance existing work.

As many will be aware, there are separate but related changes underway to our Immigration system. While these align with the strategic goals of the Better Work Action Plan, this draft Action Plan specifically does not include any recommendations regarding any such changes. The Immigration Rebalance⁶, being led by the Minister of Immigration, aims to make it easier to attract and hire high-skilled migrants, while supporting some sectors to transition to more productive and resilient ways of operating,

and to lessen reliance on low-paid/waged migrant workers. The set of He Tirohanga Hou in this Action Plan will support tourism businesses by identifying ways they can attract and retain more skilled workers from both the domestic and international labour markets.

The draft Action Plan also builds on the foundation of Go with Tourism, an initiative aimed at building Aotearoa New Zealand's tourism and hospitality workforces by connecting great talent with quality employers and getting New Zealanders thinking positively about tourism and hospitality careers. Go with Tourism hosted a Workforce Wānanga at the end of 2021⁷, bringing together: representatives from the industry, associations, educators, unions, students, local and central government to create solutions for the challenges facing the tourism and hospitality workforce. The Wānanga has been an important input into the ideas covered in this draft Action Plan, especially the Tourism and Hospitality Accord (page 22).

We would also like to acknowledge and recognise the work of the *New Zealand Tourism Futures Taskforce interim report: We are Aotearoa*⁸ and the strong foundation it laid for many of the conversations we have had to date.

1 MBIE, *Employment Strategy*. www.mbie.govt.nz/business-and-employment/employment-and-skills/employment-strategy

2 MBIE, *Industry Transformation Plans*. www.mbie.govt.nz/business-and-employment/economic-development/industry-policy/industry-transformation-plans

3 MBIE, *Innovation Programme for Tourism Recovery*. www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-recovery/innovation-programme-for-tourism-recovery

4 Tertiary Education Commission, *Reform of Vocational Education*. www.tec.govt.nz/rove/reform-of-vocational-education

5 MBIE, *Fair Pay Agreements*. www.mbie.govt.nz/business-and-employment/employment-and-skills/employment-legislation-reviews/fair-pay-agreements

6 New Zealand Immigration, *Rebalancing New Zealand's Immigration System*. www.immigration.govt.nz/documents/media/rebalancing-new-zealands-immigration-system.pdf

7 Go with Tourism, *Workforce Wānanga*. www.gowithtourism.co.nz/knowledge-hub/go-with-tourism-workforce-wananga-2021

8 MBIE, *New Zealand Tourism Futures Taskforce*. www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-recovery/tourism-futures-taskforce

Defining the tourism industry

MBIE defines tourism as a cross-cutting industry defined by the consumer, rather than goods or services that are consumed. Most other industries are defined by the products that are manufactured and sold. For example, the forestry sector is defined by wood products, and the fisheries sector is defined by seafood. For tourism, the definition is based on who is buying the goods or services. MBIE follows the United Nations World Tourism Organisation definition of tourism⁹ – “tourism is a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes.” Therefore ‘domestic tourism expenditure’ is any spending within New Zealand that occurs outside the purchaser’s usual environment (whether that is residence or place of work); regardless of what the goods or services are. As a result, tourism cuts across a multitude of sectors. Tourism spending is most prevalent in the activities, entertainment, accommodation, hospitality, transport, and retail sectors.

The hospitality sector has featured prominently in our thinking about the tourism workforce. This is because hospitality represents a large proportion of the Tourism workforce and because there is data and evidence readily available in relation to the hospitality workforce.

The Tourism ITP did not set out to address the full range of the issues facing hospitality. However, we recognise that when it comes to the workforce, tourism and hospitality share many characteristics. Several of the Tirohanga Hou (new outlook, way of viewing and thinking) in this report will apply equally well to both. The Tourism and Hospitality Accord, for example, includes hospitality for that reason.

Defining regenerative tourism

A regenerative tourism system is one that leaves people, communities, and the environment better than it finds them, and can be understood as an extension of sustainability.

Regeneration occurs in systems that are healthy, thriving, and self-healing, in contrast to systems that continuously degrade and, as a result, become more vulnerable to shocks. A regenerative tourism system will inherently be more resilient than other systems.



Photo: Camilla Rutherford

HOW TO HAVE YOUR SAY



We want to hear from you! This is your opportunity to tell us what you think of the proposed He Tirohanga Hou to create Better Work for the tourism industry.

We want to hear which Tirohanga Hou in the draft Action Plan you believe are most important, how they should be prioritised, whether something critical is missing, and whether the draft Action Plan captures the opportunities and challenges for Aotearoa New Zealand's tourism workforce.



TELL US WHAT YOU THINK

- › Do you think each of the Tirohanga Hou will lead to better work outcomes in tourism? Why?
- › How can we improve each Tirohanga Hou?
- › What do you think is the most important Tirohanga Hou?
- › Are there any other Tirohanga Hou we are missing that you think should be considered for development?
- › Do you have any other comments?

HOW TO PROVIDE YOUR FEEDBACK

MBIE will be gathering feedback on the draft Better Work Action Plan on behalf for the Tourism ITP Leadership Group. You can share your views by completing an online survey or providing a written submission.

We are also hosting in-person or online workshops you can attend.

Please visit www.mbie.govt.nz/betterworkactionplanconsultation for details, or scan below to be directed to MBIE's have your say webpage.



What happens next?

MBIE and the Leadership Group will consider and process submissions and feedback received. The Leadership Group's goal is to release the final Action Plan before the end of 2022. It will then be up to all of us in tourism to work towards a strong future together.

MBIE will publish a summary of submissions

After submissions close, a summary of submissions will be published at www.mbie.govt.nz.

WHY BETTER WORK?



HE MAHERE TIAKI KAIMAHI TO CARE FOR PEOPLE WHO WORK IN OUR INDUSTRY

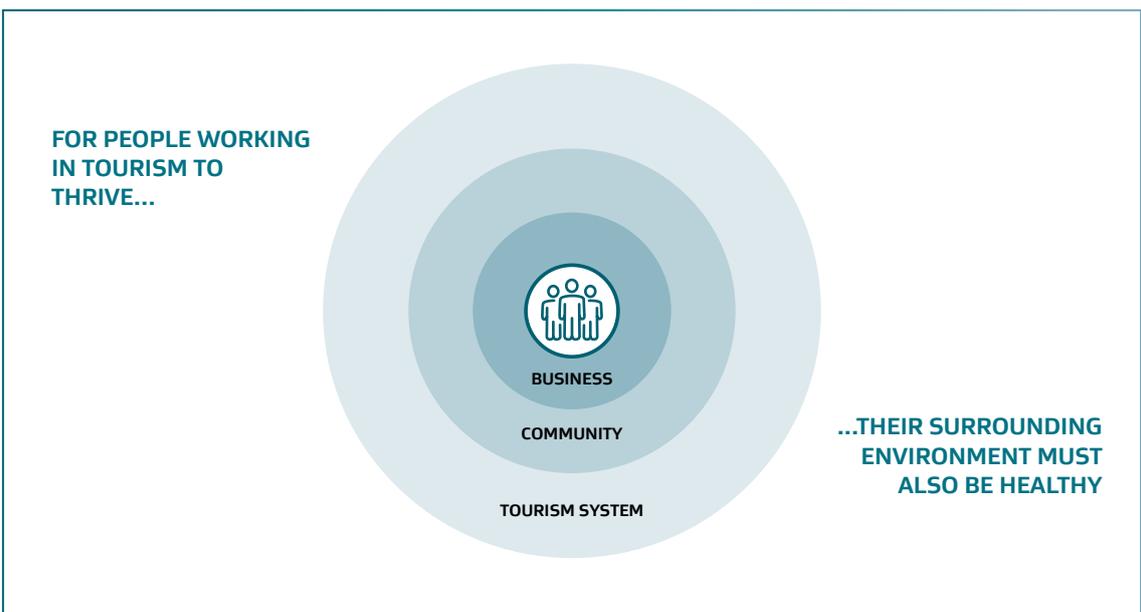
To make transformational shifts in the tourism system, we must look at the foundation of the system: people. Investment in those who work in tourism is fundamental to the achievement of other transformational shifts.

There are countless positive stories from the tourism workforce. Many people have successful and rewarding careers in tourism or use their experience in tourism as a foundation for rewarding careers in other sectors. However, not everyone has these experiences, and a range of systemic challenges can impede our vision (as outlined in the next section) from being fully realised.

Better Work requires a thriving tourism ecosystem

People who work in tourism are at the centre of the draft Action Plan. Without a thriving workforce, we will not have a thriving tourism industry.

While we have focused on creating Better Work, we know that people working in tourism can only thrive when the businesses they work for are healthy, as is the wider system. We have aimed to keep this 'systems perspective' in mind: for our people to thrive, a positive environment of opportunity needs to surround them. The eight Tirohanga Hou in this plan reflect the systems view.



OUR VISION FOR BETTER WORK

WE ARE HERE TO NURTURE THIS PLACE, ENRICHING GENERATIONS WITH LIVELIHOODS, EXPERIENCES AND STORIES TO SHARE. WE MUST OWN THE IMPACT OF OUR ACTIONS AND ENABLE AOTEAROA NEW ZEALAND TO THRIVE BY GIVING BACK MORE THAN WE TAKE.

New Zealand Tourism Futures Taskforce¹⁰

This Plan will enable people working in tourism to thrive and drive a regenerative tourism system, one that gives back more than it takes.

THIS PLAN AIMS TO PAVE THE WAY FOR A FUTURE WHERE. . .

- › Those who work in tourism are consistently treated well and can easily identify which businesses to work for and where they'll find rewarding work. Consumers can identify and choose to support tourism businesses that are treating their people well.
- › Businesses are driven by purpose and values, and contribute to a regenerative tourism system with thriving, engaged employees.
- › Businesses develop or make better use of emerging technologies to become less labour intensive, leading to higher productivity and more rewarding work for those in the industry.
- › The tourism workforce is regarded as one of Aotearoa New Zealand's most culturally competent workforces, renowned for culturally appropriate and authentic storytelling.
- › Tourism is recognised as an industry which provides skills for life, where there are many ways to learn that suit employees and employers well. There is an effectively skilled workforce, prepared for the future of tourism.
- › Entities within tourism collaborate with each other, and with other industries, to embrace opportunities presented by peaks and troughs of consumer demand. This attracts people to work in the industry who find working across different roles, businesses and industries rewarding, as well as having the opportunity to upskill when demand is low.
- › Tourism is recognised for its capable and knowledgeable leaders, operators and owners. Employers are skilled in creating enriching employment environments, which create positive employee experiences.
- › People are proud of working in tourism, and it is an industry that people want to work in.
- › Tourism is able to welcome all people into the industry – not only those who are gender and ethnically diverse, but also people starting out in their careers and older/returning workers, people living with disabilities, and workers who are seeking flexibility in the timing and location of work.

¹⁰ MBIE, *New Zealand Tourism Futures Taskforce*. www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-recovery/tourism-futures-taskforce

We want to make sure people know it is possible to have a rewarding lifelong career in tourism. However, we don't define success as keeping people for the entirety of their careers. The tourism industry will provide a space for people to move in and out (and back in), as they please – and this exchange of people, ideas, and skills will be celebrated. Tourism will give people skills for life and this will contribute to the overall health of the tourism system, the economy, and the development and wellbeing of workers.

In the future, the Aotearoa New Zealand public, especially the those with influence over young people (such as parents, school teachers and career advisors) will have an enhanced perception of what tourism is, and what work in tourism can offer.



Photo: Camilla Rutherford

CURRENT STATE OF THE TOURISM WORKFORCE



INDUSTRY SNAPSHOT

AGE:

45%

of employees that work in tourism are under the age of 34¹¹.

GENDER:

54%

of employees in the tourism industry are female¹¹, and the number of women employed in tourism-related industries dropped by 8% in 2020 compared to 2019, while the percentage of men in the industry increased slightly¹².

MĀORI WORKFORCE:

15%

of people working the industry identify as Māori¹¹.

EMPLOYEES:

146,295

people were employed in tourism in the year-ended 2021¹³.

MIGRANT WORKFORCE:

22%

of tourism employees were migrants¹⁴ in 2019¹⁵.

EARNINGS:

\$6.18

was the estimated hourly income gap between tourism pay rates and the Aotearoa New Zealand median in the June 2021 quarter. The estimated tourism industry median hourly income is \$21.58¹¹, compared to \$27.76 for pay rates across New Zealand.

The numbers in this table are estimates. Please refer to **Appendix One** for a description and caveats relating to these estimates. The impacts of the global pandemic have significantly affected Aotearoa New Zealand's tourism industry and these definitions may no longer reflect the tourism industry accurately. We advise interpreting these figures with caution.

¹¹ Estimate created using data sourced from Stats NZ, *Household Labour Force Survey (June 2021)* and tourism product ratios from the Tourism Satellite Account (2021).

¹² Stats NZ, *Fewer women working in tourism industries*. www.stats.govt.nz/news/fewer-women-working-in-tourism-industries

¹³ Tourism Satellite Account, year ending March 2021 www.stats.govt.nz/information-releases/tourism-satellite-account-year-ended-march-2021

¹⁴ Individuals are not counted as a migrant if they have a New Zealand passport or have had a residence visa for five or more years.

¹⁵ Estimate created using data sourced from MBIE, *Migration Data Explorer* mbienz.shinyapps.io/migration_data_explorer/ and tourism product ratios from the Tourism Satellite Account (2021).

THIS PLAN SEEKS TO ADDRESS SYSTEMIC CHALLENGES IN THE TOURISM WORKFORCE



We identified the systemic challenges facing the tourism workforce, summarised by the four problem statements and supporting data.



Demand fluctuations: due to the seasonal nature of tourism, demand for tourism employees fluctuates through the year, weeks, days and between regions, meaning employees can lack job security and are sometimes underutilised or overworked.



Pay and conditions: low pay and poor conditions can be a barrier to attracting and retaining people to work in tourism. Sometimes pay and conditions are not compliant with minimum legal standards.



Firm maturity and scale: due to the industry being composed of mostly small and medium sized enterprises, some tourism businesses lack the scale, systems and capacity to effectively manage human resources and have low levels of investment in workers' training and development.



Current and future skills gap: tourism struggles to attract and retain people with the skills the industry needs, particularly from the domestic workforce, and does not sufficiently invest in training for both current and future needs.

Workforce survey

To help ensure the ITP has a solid understanding of the current workforce situation and to help inform our final Action Plan, the ITP Leadership Group commissioned Dr David Williamson from Auckland University of Technology to conduct a survey of the tourism and hospitality workforce. This survey is based on the methodology of the recent *Voices from The Front Line 2021*¹⁶ research but encompasses the breadth of the tourism industry (as opposed to the focus of the original report on the hospitality sector). Results from the survey will be available in late 2022.

¹⁶ Dr Williamson, D., Rasmussen, E., and Palao, C. (2022), *Voices from the Front Line*, AUT University School of Hospitality and Tourism, Faculty of Business, Economics and Law, news.aut.ac.nz/aut-news-site/Voices-From-The-Front-Line.pdf

DATA BEHIND THE KEY CHALLENGES



DEMAND FLUCTUATIONS

Tourism spend is seasonal - in 2019, total spend was 52% higher in summer than in winter¹⁷.

The number of **filled jobs in tourism-related industries was estimated to be higher in the summer than the winter**. This included 13.9% higher in activity, travel and tour services, 8.6% higher in transport services, and 5.3% higher in accommodation and food and beverage services between winter in 2019 and summer in 2019-2020¹⁸.

Women are estimated to have a more seasonal pattern in employment than men.

Women's percentage share increases in the December quarter, and decreases in the June quarter (as much as a 17% decrease in June 2020, compared to a 7% decrease for men)¹⁹.



PAY AND CONDITIONS

Tourism sees a higher proportion of roles at the lower end of the pay scale. It is estimated that the median hourly income for the tourism sector was \$21.58, 22% less than the median hourly income across all sectors (\$27.76)¹⁹. A large proportion of the tourism sector workforce are in retail trade, accommodation, and food service industries, which has a large influence on the lower median wage of the tourism sector.

Reasons **people found working in tourism unappealing included low pay and a perception it would be an unsustainable career**. Hours for working in tourism are often unsociable (e.g. evenings and weekend)²⁰.

In a survey of hospitality employees, **20% of 400 survey respondents did not receive holiday pay**, 22% were not paid or given time in lieu for working during statutory holidays, and 22% did not receive rest breaks²¹.



FIRM MATURITY AND SCALE

At end of March 2020, **87% of tourism businesses had fewer than 20 employees**²².

In a survey of hospitality employees, **81% of 400 survey respondents said they were not provided any training in their past or current roles**. 48% reported they did not have the opportunity for a pay rise or promotion at work²¹.

MBIE research has found that historically, some businesses in tourism (particularly retail, hospitality, and arts and recreation) have had **low profit margins that mean they have struggled to afford paying higher wages**²³. This is also likely to be impacting on business' ability to invest in training and development.

17 Ministry of Business, Innovation and Employment (2020), *Monthly Regional Tourism Estimate 2016-2020*, Ministry of Business, Innovation and Employment, www.mbie.govt.nz/immigration-and-tourism/tourism-research-and-data/tourism-data-releases/monthly-regional-tourism-estimates

18 Stats NZ, *COVID-19 Data Portal, Monthly Filled Jobs – Tourism* www.stats.govt.nz/experimental/covid-19-data-portal

19 Estimate created using data sourced from Stats NZ, *Household Labour Force Survey (June 2021)* and tourism product ratios from the Tourism Satellite Account (2021).

20 Edwards, P. (2018, August), *Perceptions of careers in the tourism industry*, ATEED and TIA, www.aucklandnz.com/sites/build_auckland/files/media-library/documents/Perceptions-of-careers-in-the-tourism-industry-quantitative-research.pdf

21 Dr Williamson, D., Rasmussen, E., and Palao, C. (2022), *Voices from the Front Line*, AUT University School of Hospitality and Tourism, Faculty of Business, Economics and Law, news.aut.ac.nz/aut-news-site/Voices-From-The-Front-Line.pdf

22 Service IQ (2021), *Hinonga Kōkiri Tourism Industry Skills Summary*, Ringa Hora, www.serviceiq.org.nz/about-us/wfd/headstart/

23 Allen, C., Mare, D. (2022, March), *Who Benefits from Firm Success?*, Ministry of Business, Innovation and Employment, www.mbie.govt.nz/dmsdocument/20016-who-benefits-from-firm-success-summary-pdf



CURRENT AND FUTURE SKILLS GAP

The number of tourism learners declined by 55% (2,535), from 4,625 in 2017 to 2,090 in 2021, with a large drop of 35% (1,135) during COVID-19, between 2020 and 2021²⁴. This drop of tourism learners over COVID-19 is an outlier from the 11% overall increase of enrolments in tertiary education.

The Tertiary Education Commission (TEC) **decreased investment in tourism education and training** by 57% over 2017-2021²⁴. Prior to COVID-19, TEC was reducing investment in some tourism education and training, but from 2020, TEC made further reductions. This decrease in investment was largely in response to COVID-19 impacts which meant that fewer staff were being hired. However, the tourism industry has never had significant learner numbers, largely due to many roles not requiring formal education and training.



Photo: NZOne Skydive

²⁴ Ive, N. (2022, February 28), *Aide-Memoire: Recent trends on investment in education and training for the tourism sector*, Tertiary Education Commission, tec.govt.nz/assets/Ministerial-papers/AM-22-00010-Update-to-the-Minister-on-Provision-to-the-Tourism-Sector-....pdf

PREPARING FOR THE FUTURE

While no one knows exactly what the future holds, there is a body of evidence about key trends that will shape the future of the tourism workforce.

The tourism labour market is shrinking. The total number employed in the industry dropped from 221,000 in 2019 to 146,000 in 2021²⁵. The number of New Zealanders in full-time study in tourism and hospitality has also fallen from 7,860 in 2013 to 5,085 in 2020²⁶. Another metric is only 2 out of 5 people who trained as chefs are still working in the hospitality sector five years after graduating²⁷. This is not unique to New Zealand: global shortages of willing, professionally qualified chefs have created a scarcity of labour.

Demographic changes could exacerbate shortages in the tourism labour force in the future. The majority of the current tourism workforce are young (almost half are under the age of 34²⁸), but our overall population is ageing - in 2073, half the Aotearoa New Zealand population will be older than 47 years²⁹. Without addressing the issue of labour scarcity, any future growth of the sector will be constrained³⁰.

Consumer preferences are also changing. The Colmar Brunton Better Futures Report found that 76% of New Zealanders would

stop buying a company's products or using their services if they heard about them being irresponsible or unethical³¹. This mirrors global trends, with a 2021 study finding that at least a third of consumers are willing to pay more for sustainable products, and companies should prepare for sustainability to become the expectation and not the exception³².

Meanwhile, technology is becoming increasingly sophisticated. In some cases, this will enhance what humans can do, and in others it will replace what humans do. According to experts, we are currently experiencing the first of three 'waves' of technology in the workforce³³. This first wave, an algorithmic wave, is largely about computational tasks becoming automated. The second wave, an augmentation wave, is expected to transform clerical support and decision-making, and take over more routine physical labour. The third wave, called the autonomous wave, is predicted to last until the mid-2030s and will result in the automation of physical labour. While estimates vary, some predict that waves two and three will disproportionately affect the less educated.

Robots are already being used in some aspects of tourism and hospitality. In early 2021, British start-up Moley Robotics released its consumer-facing robotic kitchen. The setup includes a

25 Tourism Satellite Account, year ending March 2021 www.stats.govt.nz/information-releases/tourism-satellite-account-year-ended-march-2021

26 Domestic Students - Studying Hospitality & Tourism at Tertiary Level, www.educationcounts.govt.nz/statistics/tertiary-participation

27 Ministry of Business, Innovation and Employment (2020), *Occupation Outlook - Chefs*, Ministry of Business, Innovation and Employment, occupationoutlook.mbie.govt.nz/service-industries/chefs

28 Estimate created using data sourced from Stats NZ, *Household Labour Force Survey (June 2021)* and tourism product ratios from the Tourism Satellite Account (2021).

29 Stats NZ (2020, December 8), *National Population Projections: 2020(base)-2073*, Stats NZ, www.stats.govt.nz/information-releases/national-population-projections-2020base2073#:~:text=population%20growth%20will%20slow%20as,5.27%E2%80%938.48%-20million%20in%202073

30 Inchausti-Sintes, F., Pérez-Granja, U., & Morales-Mohamed, J. J. (2021), Analysing labour productivity and its economic consequences in the two Spanish tourist archipelagos, *Tourism Economics*, 27(5), 1039-1059; Leaver, J. (2021), *The State of Utah's Travel and Tourism Industry 2020*, The University of Utah, gardner.utah.edu/wp-content/uploads/TravelTourism-Dec2021.pdf?x71849; Webster, C., & Ivanov, S. (2020), Demographic change as a driver for tourism automation, *Journal of Tourism Futures*, 6(3), 263-270.

31 Bolger, S. (2020), *Better Futures 2020*, Kantar, www.kantarnewzealand.com/better-futures-reports-2020

32 Simon Kucher and Partners, 2021 *Global Sustainability Study 2021: Initial insights* (simon-kucher.com)

33 Hawksworth, J., Berriman, R., & Goel, S. (2018), *Will robots really steal our jobs? An international analysis of the potential long term impact of automation*, PricewaterhouseCoopers, pwc.co.uk/economics

touchscreen interface, robotic arms (with over 100 sensors to mimic human hand movements), hobs, an oven, and a recipe library³⁴. Beyond simple automation of existing processes, robotics and Artificial Intelligence will have the potential to change the very nature of our tourism offering. Some predict that, in the future, tourism careers may not be about tour guides, chefs and room attendants but Artificial Intelligence Advisors, Human-Machine Engineers, Hotel Robotic Controllers, or Augmented Reality Journey Planners.

This reinforces the importance of building a regenerative (and therefore inherently resilient) workforce that can adapt to these future shocks and trends.

This section has been informed by research completed by Dr Ian Yeoman, Futurist at Victoria University of Wellington.



Photo: Miles Holden

34 Moley. The Future is Served. moley.com



Photo: Miles Holden

INTRODUCING THE TIROHANGA HOU



The Tirohanga Hou are our way to create 'Better Work' for people who work in the tourism industry.

Tirohanga Hou translates to a new outlook, a new way of thinking and doing things. The use of the term Tirohanga Hou in this document refers to each of the eight concepts and ideas we have come up with to take the tourism workforce to a new future.

The Tirohanga Hou aim to create 'Better Work' for people in the industry, by responding to systemic problems which tourism has faced, as well as future proofing the industry for the opportunities and challenges of tomorrow.

The Tirohanga Hou are purposefully light on details of implementation at this stage, as we want to give you enough space to shape the ideas and direction of the Action Plan. All Tirohanga Hou are intended to be driven in partnership through the ITP partners: the tourism industry, unions, government, Māori, and people who work in tourism. Following consultation, careful consideration will need to be given to the prioritisation, sequencing and resourcing of implementation.

Will this plan address tourism's current labour shortages?

We know that tourism is currently facing significant short term labour challenges, and many in tourism and hospitality are struggling to attract staff they need to meet the growing demand as international visitors are welcomed back into New Zealand. However, ITPs are by their nature more strategic and take a long-term focus, so this Action Plan is not designed to address these immediate issues but rather to address the underlying systemic issues that will enable our industry to rebuild in a more sustainable manner.

There will be significant benefits for the industry from the proposed eight Tirohanga Hou on the following pages, but these will be seen in the medium term, rather than addressing immediate labour shortages.



Photo: Tourism Holdings

SUMMARY OF TIROHANGA HOU

NGĀ TIROHANGA HOU E WARU

These are the eight Tirohanga Hou

DESCRIPTION

- | 1 | Tourism and Hospitality Accord | The Tourism and Hospitality Accord will involve businesses in tourism and hospitality signing up to a set of workforce standards, and thereby becoming an endorsed good employer. Consumers would be able to choose to support these businesses. By signing up to the Accord, businesses will send a clear signal that they prioritise their people. People know that by working for those businesses they will receive decent pay, appropriate training, and will enjoy a safe and supportive working environment. |
|---|--|---|
| 2 | Promoting a purpose-driven, intergenerational mindset | Driving better outcomes for the tourism industry and employees by promoting the value and achievements of purpose-driven, intergenerational business models. |
| 3 | Enabling better work through innovation and technology | The tourism industry can innovate and adopt technology to increase its competitiveness and future-proof itself. There are opportunities to improve worker experience, prepare people who work in the industry for the future of work, lift labour productivity, and increase the attraction of working in the tourism industry. |
| 4 | Building cultural competency | Build the cultural competency of the tourism workforce and businesses to enable the tourism workforce to better represent Aotearoa New Zealand's rich culture, ensuring all tourism operators positively contribute to their community. |
| 5 | Embracing the peaks and troughs of tourism demand | Re-framing the tourism industry's attitude and response to the peaks and troughs of tourism demand (seasons, weeks, and days). Rather than the peaks and troughs being perceived as a barrier to attracting and retaining employees, the industry can use peaks and troughs to its advantage to upskill people who work in the industry and provide consistent employment. |
| 6 | Fit for purpose education and training | There are a number of priority areas we would like to see for the vocational education and training system. These changes will help equip the tourism workforce to meet the demands of a rapidly evolving industry and help deliver a regenerative tourism system. |
| 7 | Better tools and resources for business owners and operators | Support management capabilities through increasing awareness and effectiveness of existing tools and resources. |
| 8 | A public campaign to showcase better work in the industry | A public-facing campaign that: challenges the reputation and perceptions of a career in tourism, promotes stories of people doing rewarding work in the industry with positive work stories, and lifts the understanding of the diverse nature of work in the industry. |

KEY:



Demand fluctuations



Pay and conditions



Firm maturity and scale



Current and future skills gap

RESPONDS TO PROBLEMS

CREATES A FUTURE WHERE...



Those who work in tourism are consistently treated well and can easily identify which businesses to work for and where they will find rewarding work. Consumers and choose to support tourism businesses that are treating their people well.



Businesses are driven by purpose and values, and contribute to a regenerative tourism system with thriving, engaged employees.



Businesses develop or make better use of emerging technologies to become less labour intensive, leading to higher productivity and more rewarding work for those in the industry.



The tourism workforce is regarded as one of Aotearoa New Zealand's most culturally competent workforces, renowned for culturally-appropriate and authentic storytelling.



Entities within tourism collaborate with each other, and with other industries, to embrace opportunities presented by peaks and troughs of consumer demand. This attracts people to work in the industry who find working across different roles, businesses and industries rewarding, as well as having the opportunity to upskill when demand is low.



Tourism is recognised as an industry which provides skills for life, where there are many ways to learn in a way that suits employees and employers well. There is an effectively skilled workforce, prepared for the future of tourism.



Tourism is recognised for its capable and knowledgeable leaders, operators and owners. Employers are skilled in creating enriching employment environments, which create positive employee experiences.



The Aotearoa New Zealand public has a positive perception and appreciation of what the tourism industry contributes, and what a career in tourism can offer.

1. TOURISM AND HOSPITALITY ACCORD

Together building the industry of choice by 2030

SUMMARY

The Tourism and Hospitality Accord (“the Accord”) will involve businesses in tourism and hospitality signing up to a set of workforce standards, and thereby becoming an endorsed good employer. Consumers would be able to choose to support these businesses.

By signing up to the Accord, businesses will send a clear signal that they prioritise their people. People know that by working for those businesses they will receive decent pay, appropriate training, and will enjoy a safe and supportive working environment.

Creating a future where... Those who work in tourism are consistently treated well and can easily identify which businesses to work for and where they will find rewarding work. Consumers and choose to support tourism businesses that are treating their people well.

WHAT

The Accord aims to create an ecosystem that supports Better Work in tourism and hospitality. Everyone will have a role to play in that ecosystem – people who work in the industry, business owners, unions, educational institutions, government, and consumers.

Businesses that join the Accord will be named on the Accord website and be able to use Accord branding in their own marketing for consumer recognition. In this way they will receive appropriate recognition for being a ‘good employer’ – something that is not currently happening consistently across the industry. This will increase the potential for the business to be recognised as an attractive employer. Education institutions could steer their graduates to businesses that have signed the Accord.

The Government regularly spends large amounts on hotels, restaurants, and transport as part of its operations. We propose exploring options for the Government to support Accord businesses as preferred ethical suppliers.

WHY

Tourism and hospitality in Aotearoa New Zealand have long experienced challenges in attracting and retaining sufficient and skilled labour. The Accord aims to address this problem through the following outcomes:

- 1) To establish a set of standards in areas such as job security, wage levels, training, progression, diversity, and inclusion.
- 2) To identify and provide a pathway to achieving higher standards by identifying exemplars.
- 3) To celebrate positive, leading stories or workplaces practices to drive innovation and lift the image of tourism.
- 4) To provide a framework that supports tourism businesses to operate ethically.
- 5) To allow consumers to identify and support businesses that are treating their staff well.
- 6) To build the industry’s connections with and support within all communities.
- 7) In joining the Accord, participating businesses will submit data about their employment practices that over time will become a useful source of information for wider analysis and insight on workforce trends.

As is the case in all sectors, workplace health and safety are fundamental to ‘Better Work’ in tourism and hospitality. The Accord would acknowledge work health and safety requirements³⁵, and look to establish a best practice health and safety standard for the industry that best meets the needs and wellbeing of its workers.

³⁵ For example, the Health and Safety at Work Act 2015 (HSWA), and the Health and Safety at Work (Adventure Activities) Regulations 2016.

HOW

Governance structure

The Accord will be governed by a body that mirrors the partnership structure of the ITP. Consideration will be given to ensuring the governance body includes and/or is supported by the required key skillsets (technical expertise, experience, and strategic foresight) to ensure the Accord is: successfully established, held to account and adaptable and sustainable into the future. The Accord would also need input from industry interests across subsectors and regions.

Design of the unit which will administer the Accord, including which organisation is best place to host it, will need further consideration and discussion with industry, union partners, and relevant Ministers.

How businesses will be assessed

All participating businesses will commit to a minimum set of standards in areas such as job security, wage levels, training, progression, diversity and inclusion. Additionally, in recognition of the importance of health and safety to achieve 'Better Work' in the tourism industry, participating businesses will commit to continue to uphold work health and safety requirements and to establish a best practice health and safety standard for the industry that best meets the needs and wellbeing of its workers.

Our preference is to launch the Accord with self-reporting by businesses. This makes joining the Accord as simple and easy as possible, especially at a time when businesses are recovering from the setbacks of COVID-19. Over time (one year or more), options for an auditing function (spot auditing, peer review or other) will be introduced to strengthen the integrity of the Accord.

The Accord's aim is not just to set a minimum standard but also to highlight and celebrate positive, leading practices in tourism workplaces, to drive innovation. It is envisaged that in addition to the main group of businesses who have met the standard commitment, there would also be a category of 'exemplars' whose employment practices go above and beyond.

Interdependencies

The Accord recognises Tourism Industry Aotearoa's *Tourism Sustainability Commitment: Employer of Choice* initiative, and we believe the Accord can build on that mechanism by being a complementary initiative that lifts standards further, provides greater accountability, and has the added support of union and government backing.

We want to change perceptions of a career in tourism and hospitality. Roles have often been viewed as casual, low-skilled, low-paid and not secure, with poor development opportunities and progression pathways³⁶. However, we are also aware of many examples of tourism and hospitality firms partnering with local communities, iwi, schools, and training institutions to provide better career pathways. To this end, the '*Public campaign to showcase better work in the industry*' Tirohanga Hou will be linked to the Accord and launched six months to a year after the Accord. The campaign will focus on the exemplars in the industry – those businesses which are modelling the leading workforce practices.

³⁶ Edwards, P. (2018, August), *Perceptions of careers in the tourism industry*, ATEED and TIA, www.aucklandnz.com/sites/build-auckland/files/media-library/documents/Perceptions-of-careers-in-the-tourism-industry-quantitative-research.pdf

SNAPSHOT: ROLES OF FOUR KEY ACCORD STAKEHOLDERS

BUSINESSES

What will they do?

Businesses sign up to the Accord by committing to a series of standards. If necessary, this will involve making changes to their workforce practices.

Businesses leading the way with innovative practices share their stories with others in the Accord, and the wider industry, through the Accord online platform.

How will they benefit?

- › More business due to consumer recognition.
- › Business becomes a more attractive employer, making it easier to attract and retain staff.
- › Potentially being supported through the Accord to lift employment practices.
- › Publicity around the Accord, including the *Public campaign to showcase meaningful work in the industry* Tirohanga Hou.

CURRENT AND FUTURE EMPLOYEES

What will they do?

Choose to work for businesses from the Accord network.

How will they benefit?

- › Employees have confidence in undertaking work with an employer that values the employee experience and receives training and progression opportunities where appropriate.
- › Publicity around the Accord, including the proposed public campaign to showcase better work in the industry, helps challenge perceptions and cultural attitudes towards people who work in the service industries.
- › Tourism host communities benefit from stronger pathways into employment and partnerships with local tourism operators.

EDUCATIONAL INSTITUTES

What will they do?

Promote the Accord and the participating businesses to their graduates.

How will they benefit?

- › The Accord publicity and campaign will help inspire more people to study tourism and hospitality.
- › Partnerships with good employers and businesses with leading practices will help align educational offerings with our vision for regenerative tourism.

CONSUMER

What will they do?

When booking travel, or choosing a restaurant, consumers will be able to select businesses with strong or leading employment practices.

How will they benefit?

- › Consumers benefit from better service delivery, and from engaging with knowledgeable, experienced, confident people in the industry throughout their journey.
- › Consumers can make informed, ethical choices.



TELL US WHAT YOU THINK

- › Do you think this Tirohanga Hou will lead to better work outcomes in tourism? Why?
- › How can we improve this Tirohanga Hou?
- › What else do you think needs to be included in the Accord?



Photo: Camilla Rutherford

2. PROMOTING A PURPOSE-DRIVEN, INTERGENERATIONAL MINDSET

SUMMARY

Drive better outcomes for the tourism industry and employees by promoting the values and achievements of purpose-driven, intergenerational business models.

Creating a future where... Businesses are driven by purpose and values, and contribute to a regenerative tourism system with thriving, engaged employees.

WHY

Research on business models is showing that purpose-led organisations that take an intergenerational approach to their operations have more engaged employees. At the same time, they create value for their operators and shareholders³⁷ - “values creating value”. Consumer attitudes towards supporting businesses are also changing, with 76% of New Zealanders saying they would stop buying a company’s products or using their services if they heard about them being irresponsible or unethical³⁸ (see the section on *Preparing for the future*).

While the focus of this action plan is on employees, the success and purpose of a business has a significant impact on employee wellbeing. If purpose-led businesses can create more value, this can potentially be shared with employees (MBIE research has found that, historically, some businesses in tourism had low profit margins that meant they struggled to afford paying higher wages³⁹). Lower wages disproportionately impact Māori, who represent approximately 13% of total wage earners and 15% of total minimum wage earners⁴⁰. Low wages also affect other groups such as women and ethnic minorities.

In Aotearoa New Zealand, Māori entities and businesses lead the way in incorporating purpose and intergenerational wellbeing into their business operations. This approach balances multiple values and objectives — spanning social, cultural, financial, environmental, spiritual, and political domains⁴¹.

These business models are not the exclusive domain of Māori businesses. For example, large segments of our rural sector operate similar models and, like Māori, are driven by longer-term, sustainable, intergenerational values. There is an opportunity for businesses to learn from these approaches where having people at the centre encourages the nurturing and growth of employees. There is also an opportunity to showcase those tourism operators who practice these values already and can share the value created with their employees.

Despite the value of a longer-term purpose-driven model, it does come with some challenges, and potential vulnerabilities that businesses need to carefully work through to realise the opportunities⁴².

WHAT

The proposal is to build a programme of work that tells the stories of the application of intergenerational thinking, and the application of purpose-led business models. An initial approach could be to share the stories of the operators taking a Te Ao Māori values approach (such as kaitiakitanga, manaakitanga, whanaungatanga).

37 Deloitte Insights, *2020 Global Marketing Trends*, www.deloitte.com/us/en/insights/topics/marketing-and-sales-operations/global-marketing-trends/2020; MBIE (2022). *The future of business for Aotearoa New Zealand: An exploration of two trends influencing productivity and wellbeing – purpose-led business and use of blockchain technology*. www.mbie.govt.nz/dmsdocument/20250-the-future-of-business-for-aotearoa-new-zealand.

38 Bolger, S. (2020), *Better Futures 2020*, Kantar, www.kantarnewzealand.com/better-futures-reports-2020

39 Allen, C., Mare, D. (2022, March), *Who Benefits from Firm Success?*, Ministry of Business, Innovation and Employment, www.mbie.govt.nz/dmsdocument/20016-who-benefits-from-firm-success-summary-pdf

40 MBIE, *Mahere Whai Mahi Māori: the Māori Employment Action Plan*, www.mbie.govt.nz/dmsdocument/18759-te-mahere-whai-mahi-maori-maori-employment-action-plan-english

41 MBIE (2022). *The future of business for Aotearoa New Zealand: An exploration of two trends influencing productivity and wellbeing – purpose-led business and use of blockchain technology*. www.mbie.govt.nz/dmsdocument/20250-the-future-of-business-for-aotearoa-new-zealand

42 Ashen, A., Gauch, K. (2022), *Opportunities and Challenges of Purpose-Led Companies: An Empirical Study Through Expert Interviews*, www.link.springer.com/article/10.1057/s41299-021-00122-8

Initial actions include:

Showcasing positive stories

- › Identify and promote case studies of business and entities leading the way in taking an intergenerational, sustainable approach to business operations and developing people who work in tourism.

Sharing purpose driven business models

- › Sharing details of how purpose driven business models build systems to develop people who work in tourism and create value for shareholders while balancing the need for financial returns to sustain the business.

As part of this proposal, there is an opportunity to leverage other Tirohanga Hou in this draft Action Plan such as the *Tourism and Hospitality Accord* and the *Public campaign to showcase better work in the industry*.



TELL US WHAT YOU THINK

- › Do you think this Tirohanga Hou will lead to better work outcomes in tourism? Why?
- › How can we improve this Tirohanga Hou?



Photo: Camilla Rutherford

3. ENABLING BETTER WORK THROUGH INNOVATION AND TECHNOLOGY

SUMMARY

It is important the tourism industry innovates and adopts technology to increase its competitiveness and future-proof itself. There are opportunities to improve worker experience, prepare people who work in the industry for the future of work, lift labour productivity, and increase the attraction of working in the tourism industry. All of these enhance the consumer experience.

Creating a future where... Businesses develop or make better use of emerging technologies to become less labour intensive, leading to higher productivity and more rewarding work for those in the industry.

WHY

We have heard that the tourism industry sometimes struggles to innovate and adopt technology. This is often due to a lack of understanding of the underlying technology, trends, and potential uses, and a lack of capability or capital to implement and scale solutions.

This is in part a product of the large proportion of small and medium enterprises in the industry who are unlikely to have the capability or resources (e.g. 87% of tourism businesses had under 20 employees in March 2020⁴³). Larger firms in the industry are relatively small compared to global counterparts. Collaboration will be key to overcoming these scale-related hurdles. Innovation and adoption of technology can lead to productivity gains.

WHAT

Innovation and technology are an enabler to Better Work. Tourism is fundamentally about human interaction that is often highly valued by consumers. Efforts to innovate and deploy technology need to complement these interactions rather than replace them. There are a range of opportunities that innovation and technology adoption can enable, including:

- › Increasing labour productivity – by allowing employees to focus on what they are good at, and automating other tasks, it is possible to increase the output of each worker.
- › Preparing people who work in the industry for the future of work through future-focused educational opportunities, including preparing them for jobs that will have a larger technology component.
- › Improving worker experience and the attractiveness of working in an innovation and technologically competent industry.

Stronger collaboration between the tourism industry and the technology industry will enable this change. Examples of actions that could be done within a 'Better Work' focus include:

- › A mentorship programme or network – those in the technology industry and tourism industry could sign up and be matched appropriately.
- › A single or recurring trade promotion event – an expo where technology firms could showcase their offerings and how they could add value in a tourism context.
- › Supporting the development of virtual reality products for some of Aotearoa New Zealand's iconic tourist attractions.
- › Showcasing best practice case studies to highlight and celebrate tourism firms which are already effectively implementing emerging technologies.
- › Providing incubator/accelerator services for innovative tourism start-ups.

43 Service IQ (2021), *Hinonga Kōkiri Tourism Industry Skills Summary*, Ringa Hora, www.serviceiq.org.nz/about-us/wfd/headstart/

- › Ensuring tourism upskills and trains people who work in the industry to meet future innovation and technology skill needs and attracts new people and skills to the industry (links to the *Fit for purpose education and training*, and *Embracing the peaks and troughs of tourism demand* Tirohanga Hou).
- › Leveraging existing initiatives, such as the Innovation Programme for Tourism Recovery.



TELL US WHAT YOU THINK

- › Do you think this Tirohanga Hou will lead to better work outcomes in tourism? Why?
- › How can we improve this Tirohanga Hou?



Photo: Graeme Murray

4. BUILDING CULTURAL COMPETENCY

SUMMARY

Build the cultural competency of the tourism workforce to better represent Aotearoa New Zealand's rich history and culture.

Creating a future where... Build the cultural competency of the tourism workforce and businesses to enable the tourism workforce to better represent Aotearoa New Zealand's rich culture, ensuring all tourism operators positively contribute to their community.

WHY

Building the cultural competency of the tourism workforce is necessary to appropriately represent Aotearoa New Zealand's culture and to attract employees who feel a connection with the cultural aspects of their work.

Many tourism operators incorporate Te Ao Māori in their offering. This is generally done with good will and positive intent but there are cases of sharing stories and history without consideration or acknowledgement of their cultural significance.

The New Zealand Tourism Futures Taskforce identified the importance of increasing unity and understanding between people and cultures and celebrating our diverse heritage and multicultural communities⁴⁴.

WHAT

This Tirohanga Hou initiates a programme to help the industry become more authentic at story telling of Māori and non-Māori history in Aotearoa. Increased knowledge and understanding of histories will help to provide meaningful work through providing a connection for employees with history and whenua, and further enrich the tourism experience for business operators and visitors.

There is a wealth of cultural capability within the tourism industry, particularly in many Māori-owned and -operated tourism businesses. However, expertise and understanding across the broader tourism industry is variable. The same can be said of the knowledge of, and telling of, non-Māori history.

There is an opportunity to upskill tourism operators in their understanding and application of Te Ao Māori, tikanga, Te Reo Māori, the history of the land they operate on (and the responsibilities which come with this), and the local hapū and iwi history.

Non-Māori histories outside of museums and education institutions can also be inconsistent and this is a significant opportunity for the tourism industry to build its cultural capability.

This Tirohanga Hou will build a programme of work to drive improvement in cultural competency and consider:

- › Agreeing key core cultural competencies for tourism operators
- › Measuring performance and progress in cultural competency
- › Avoiding 'tick a box' compliance
- › Encouraging an ongoing conversation and evolving standards and practice
- › Celebrating best practice of tourism operators celebrating Aotearoa New Zealand culture
- › Identifying and empowering regional "champions", both Māori and non-Māori operators, to demonstrate the benefits and share experiences of building cultural competency

⁴⁴ The Tourism Futures Taskforce (2020, December), *The Tourism Futures Taskforce Interim Report: December 2020*, Ministry of Business, Innovation and Employment, www.mbie.govt.nz/assets/the-tourism-futures-taskforce-interim-report-december-2020.pdf, at page 36.

In 2019 the Government announced that pre- and post-colonial history, likely including the arrival of Māori, Te Tiriti o Waitangi/Treaty of Waitangi, colonisation, and the New Zealand Wars, would be introduced to schools and kura, with implementation in 2023⁴⁵. This will provide an important foundation for people working in the tourism industry in the future.

Understanding and embracing our own culture will enable the tourism industry to engage with, and provide culturally appropriate experiences for, our domestic and international visitors.



TELL US WHAT YOU THINK

- › Do you think this Tirohanga Hou will lead to better work outcomes in tourism? Why?
- › How can we improve this Tirohanga Hou?



Photo: Camilla Rutherford

45 Beehive (2019, September). NZ history to be taught in all schools. www.beehive.govt.nz/release/nz-history-be-taught-all-schools.

5. EMBRACING THE PEAKS AND TROUGHS OF TOURISM DEMAND

SUMMARY

There is an opportunity to reframe the tourism industry's attitude and response to the peaks and troughs of tourism demand (seasons, weeks, and days). Rather than the peaks and troughs being perceived as a barrier to attracting and retaining employees, the industry can use peaks and troughs to its advantage to upskill people who work in the industry and provide consistent employment.

Creating a future where... Entities within tourism collaborate with each other, and with other industries, to embrace opportunities presented by peaks and troughs of consumer demand. This attracts people to work in the industry who find working across different roles, businesses and industries rewarding, as well as having the opportunity to upskill when demand is low.

WHY

In the tourism industry there is fluctuation in availability of work across seasons, weeks, and days. At a national level, the number of filled jobs in tourism-related industries was estimated to be higher in the summer than the winter. This included 13.9% higher in activity, travel and tour services, 8.6% higher in transport services, and 5.3% higher in accommodation and food and beverage services between winter in 2019 and summer in 2019-2020⁴⁶. There are of course some regions that experiences their peaks in winter because of the ski industry. Many businesses work to major peaks in demand at the weekends and at times of day.

The peaks and troughs of tourism demand, and variances in workforce requirements, create a challenge for businesses hoping to maintain a stable workforce and offer consistent employment. Employees can become underutilised (or let go) when demand is low; and potentially over-worked when demand is high. These factors contribute to the perception (and actuality) of the workforce being a transient industry and not a viable career option.

There have been significant gains made over the last decade to smooth the seasonal peaks of tourism demand. However, it isn't practical or desirable to eliminate seasonal demand - some roles will always be highly seasonal, and a healthy degree of staff turnover is important to ensure a flow of new ideas and experience into the local labour pool. Instead, there are opportunities to embrace the peaks and troughs of tourism demand.

WHAT

This Tirohanga Hou doesn't aim to further smooth the peaks or troughs in demand, but instead explores the opportunities presented by embracing seasonality. The industry can use seasonality to provide more consistent employment, through employee sharing, and upskilling and investing in the current tourism workforce. Leaning into seasonality will help to address some of the reasons prospective workers seek employment elsewhere.

We believe partnerships (both within the industry, and with other industries) are essential for employee sharing to be a successful model. This opportunity requires strong collaboration. Other initiatives (such as those emerging from the Regional Skills Leadership Groups and Jobs for Nature programmes) are also exploring the potential of a new way of managing staffing pressures by enabling partnerships between employers within, and between, industries experiencing complementary peaks and troughs in demand.

⁴⁶ Stats NZ, COVID-19 Data Portal, Monthly Filled Jobs -Tourism, www.stats.govt.nz/experimental/covid-19-data-portal

Below are four initiatives we think will help the tourism industry better manage, and benefit from, the peaks and troughs of demand.

- 1) **Complete a system analysis of structural barriers** to participate in employee-sharing models. We have heard that while businesses are interested in employee-sharing models (where employees are shared between projects and/or businesses over seasons, months and/or days), structural barriers such as complexity of secondary taxation, and unclear understanding of Health and Safety obligations disincentivise or limit implementation. Through this systems analysis, we could explore if it is possible or appropriate to remove the barriers, bridge the communications gap, and help provide a viable way forward. Following the analysis, next steps could include supporting employers and employees to achieve effective employee sharing. This should be focused on solutions for both regions and cities.
- 2) **Build on the partnerships established and the lessons learned from employee-sharing through the Jobs for Nature programme as part of the COVID-19 response.** Jobs for Nature⁴⁷ was designed to provide nature-based employment to communities and industries (such as tourism and hospitality) in response to COVID-19 (see the case study for a description of a project and its impacts). The conservation and environmental outcomes of the Jobs for Nature programme are well understood. But we have also heard there have been extensive positive economic and social impacts for people and communities. We propose commissioning an outcomes assessment which documents these outcomes in an area/s where tourism is a dominant industry. Pending findings of this assessment, there may be an opportunity to consider how to replicate this model of partnership between the tourism and conservation workforces on an ongoing basis.
- 3) **Support existing and emerging employee sharing programmes** including funding and conducting outcome assessments to inform future design of employee-sharing models, such as how these pilots could be scaled up, replicated, and enabled to achieve systemic change.
- 4) **Design a seasonal upskilling programme**, a learning and development framework to complement the seasonal nature of the industry. The training largely already exists – this programme is focused on the facilitation, nature, and timing of delivery. This could connect with the other Tirohanga Hou such as *Building cultural competency and Fit for purpose education and training*.



TELL US WHAT YOU THINK

- › Do you think this Tirohanga Hou will lead to better work outcomes in tourism? Why?
- › How can we improve this Tirohanga Hou?

⁴⁷ Ministry for the Environment (2022, March 31), *Mahi mo te Taiao – Jobs for Nature*, Ministry for the Environment, environment.govt.nz/what-government-is-doing/areas-of-work/jobs-for-nature



CASE STUDY

JOBS FOR NATURE IN THE GLACIER COUNTRY

Jobs for Nature was designed to provide nature-based employment to communities and industries in response to the impact of COVID-19 in the tourism industry.

Jobs for Nature was a huge success in the Glacier Country through a strong partnership between Te Papa Atawhai (the Department of Conservation) and tourism businesses. The concept in this region was to provide employment for the tourism workforce, across a broad range of conservation-based tasks, with enough flexibility that people working in the industry can switch, as needed, to their main employer.

Since the programme began on 1 July 2020, 169 people have been involved and more than 64,000 hours of conservation work have been completed (up to 31 March 2022). The benefits of the programme have been widely felt. Participants in the programme were able to stay employed in their region, which mean community ties were maintained, and working outdoors had a positive impact on wellbeing. Through the conservation-based work, participants gain new knowledge and skills as well as a sense of satisfaction and pride which they then bring back into their core business role, improving the value and expertise they can share with visitors.

For businesses in the region, Jobs for Nature provided significant peace of mind in a turbulent time. Business owners and operators could confidently employ staff, knowing that they could rely on Jobs for Nature to guarantee a decent wage and hours for staff when demand for their tourism product was low.

Fox Glacier Guiding, one of the tourism businesses who participated in the Jobs for Nature programme, attributes many positive outcomes to Jobs for Nature: *“Staff members, who have lived in the area for many years . . . were retained in Fox Glacier thanks to Jobs for Nature. In many ways, Jobs for Nature has saved the local community through ensuring people remain connected and have security of employment.”* – Rob Jewell, CEO, Fox Glacier Guiding.

Rob also highlights that Jobs for Nature provided flexibility for his businesses to efficiently manage staffing levels, accounting for daily operational requirements, customer demand, and seasonality: *“If a last-minute booking came through (which is usually how the domestic market operates), we could quickly swap a guide from Jobs for Nature work to guiding work to ensure we do not lose the sale. Flexibility of managing the workforce is one of the most important factors in Jobs for Nature’s success.”*

While this case study was part of a government funded programme and in a COVID-19 context, the South Westland is exploring ways to develop an enduring model at place.

WHAT CAN WE LEARN FROM THIS CASE STUDY?

- › Improving recruitment and retention opportunities by overcoming seasonality challenges through partnership.
- › Improving local conservation knowledge and skills of tourism staff, and in turn improving the value and genuine story telling for visitors. This is a great example of regenerative tourism in practice and could be seen as building a regenerative tourism workforce.
- › Exploring a new way of working in partnership not only between tourism businesses and Te Papa Atawhai, but also iwi, the local community, and other government departments.

6. FIT FOR PURPOSE EDUCATION AND TRAINING

SUMMARY

We have developed priority areas we would like to see for the vocational education and training system. These changes will help equip the tourism workforce to meet the demands of a rapidly evolving industry and help deliver a regenerative tourism system.

Creating a future where... Tourism is recognised as an industry which provides skills for life, where there are many ways to learn in a way that suits employees and employers well. There is an effectively skilled workforce, prepared for the future of tourism.

WHY

The vocational education and training system must meet the needs and ambitions of future learners and upskill people working in the industry to help deliver a quality regenerative tourism system. A vocational education and training system that responds to these goals will help to attract and retain people with the current and future skills that the industry needs.

Significant resources have been invested into the Reform of Vocational Education, which aims to create a strong, unified, and sustainable vocational education system fit for the future⁴⁸. We do not wish to duplicate this valuable work. Instead, we are proposing a suite of priorities to be incorporated into this work programme.

Ringa Hora (Services Workforce Development Council) has been established to ensure the new national vocational system meets industry needs⁴⁹. We have worked closely with Ringa Hora, who have welcomed the guidance and input from the Leadership Group and the tourism industry more broadly. We are keen to support Ringa Hora to progress these ideas, including helping them prioritise short term needs and long-term actions.

WHAT

We have identified several priority areas to tailor education and training design and delivery to better suit the current and future needs of the tourism industry. Areas where important gains can be made include:

- › stackable micro-credentials and apprenticeships that help support continuous development within career pathways
- › developing strong business skills training for people to progress into leadership roles
- › skill standards and/or learning practices that would equip people in the industry to 'walk the talk' on topics such as conservation, biodiversity and a genuine Te Ao Māori approach, including Māori history and stories, tikanga Māori, Te Reo Māori, and Te Tiriti o Waitangi, in the specific context of the history of the whenua (land) they operate on (and the responsibilities which come with this)
- › capturing the transferrable and soft skills gained through tourism, through recognising the skills formally or exploring how to better showcase soft skills gained in the industry
- › ensuring tourism education and training is industry/worker/student led
- › mapping the future skill needs of the industry, especially regarding the digitalisation of the industry
- › exploring new training and onboarding opportunities within the tourism industry e.g. a tourism graduate programme which rotates people around different roles and opportunities in the tourism industry
- › ensuring that information about education and training are not just targeted at the prospective/current workers, but also those who influence them (parents/guardians/career advisors)
- › enabling the seasonal and local delivery of education and training programmes

⁴⁸ Tertiary Education Commission, *Reform of Vocational Education*. www.tec.govt.nz/rove/reform-of-vocational-education

⁴⁹ Ringa Hora services – Workforce Development Council (2021), *About us*, Ringa Hora services – Workforce Development, www.ringahora.nz/about-us

Key players to create a better education and training system for the tourism workforce include Ringa Hora, Te Pūkenga and other education providers, Tertiary Education Commission, Regional Skills Leadership Groups, Ministry of Education, and more.

Significant progress in the education space for tourism was made when the Government announced a new NCEA Tourism achievement standard ⁵⁰. Historically, the study of tourism has lacked credibility and been perceived as less rigorous compared to more traditional subjects. This transition from the unit to achievement standard will help address this issue. Any work done in the education and training space should align with the design of the new achievement standard.



TELL US WHAT YOU THINK

- › Do you think this Tirohanga Hou will lead to better work outcomes in tourism? Why?
- › How can we improve this Tirohanga Hou?



Photo: Miles Holden

50 Education Gazette editors (2022, February 2), *Raising the bar for study of tourism education*, Education Gazette, gazette.education.govt.nz/articles/raising-the-bar-for-study-of-tourism

7. BETTER TOOLS AND RESOURCES FOR BUSINESS OWNERS AND OPERATORS

SUMMARY

Support management capabilities through increasing awareness and effectiveness of tools and resources.

Creating a future where... Tourism is recognised for its capable and knowledgeable leaders, operators and owners. Employers are skilled in creating enriching employment environments, which create positive employee experiences.

WHY

This Tirohanga Hou aims to resolve the problem facing some tourism businesses regarding the lack of scale, systems, and capacity to have effective human resources management or to invest in training and progression. In 2020, 87.4% of tourism businesses had fewer than 20 employees⁵¹. It is important that we promote tools and resources for small to medium enterprises in the tourism industry. Small enterprises may also not be well informed of the changing trends, challenges and opportunities for the sector. We believe that if owners are utilising effective and relevant tools and resources, businesses will be able to deliver good employment practices and processes, improving the experience of the worker.

WHAT

Initially, we propose to assess tourism industry awareness and engagement with existing tools and resources. If research shows that awareness can be improved, then we propose to increase the reach of existing tools and resources to tourism businesses. If awareness is high but effectiveness of existing tools and resources are low, products could be created or tailored to meet tourism businesses' specific needs.

We would look at enriching and refining existing products where there is a demonstrated need for improvement or tourism-specific content (in partnership with industry associations). We would also explore opportunities for partnership - getting people together to solve a common problem could be a powerful complementary initiative to online tools and resources. Existing channels could also be explored to disseminate information on trends, challenges and opportunities for the sector. Existing tools and resources include those available on:

- › [Business.govt.nz](https://www.business.govt.nz) – who provide capability building and compliance support resources. Resources available are designed with experts for kiwi businesses and used 7.4 million times annually.
- › [Digital Boost](#) - a free online education platform that gives small businesses the skills they need to succeed in a digital world. All the ITPs have the opportunity to collaborate with Digital Boost and utilize the platform to create and promote industry specific digital skills for businesses.
- › [Employment New Zealand](#) – who provide information to help employees and employers understand their employment rights and responsibilities, and resources to help those engaging with businesses to ensure that they are treating workers fairly, ethically and sustainably.
- › [Regional Business Partners Network](#) - a programme that connects New Zealand businesses to the right advice, people, funding and resources.



TELL US WHAT YOU THINK

- › Do you think this Tirohanga Hou will lead to better work outcomes in tourism? Why?
- › How can we improve this Tirohanga Hou?

51 Service IQ (2021), *Hinonga Kōkiri Tourism Industry Skills Summary*, Ringa Hora, www.serviceiq.org.nz/about-us/wfd/headstart/

8. A PUBLIC CAMPAIGN TO SHOWCASE BETTER WORK IN THE INDUSTRY

SUMMARY

A public-facing campaign that: challenges the reputation and perceptions of a career in tourism, promotes stories of people doing rewarding work in the industry with positive work stories, and lifts the understanding of the diverse nature of work in the industry.

Creating a future where... The Aotearoa New Zealand public has a positive perception and appreciation of what the tourism industry contributes, and what a career in tourism can offer.

WHY

We believe that positive perception of the industry (backed by best practice) will ensure that the tourism industry attracts and retains the right people and skills.

Done well, a campaign will help address the skill shortage by raising the professional profile of tourism as a career. Prospective new workers, and workers who have worked in the industry before but have since left, will be attracted to the tourism industry. This will complement and reinforce other reforms underway to improve the worker experience in the tourism industry.

WHAT

The campaign will showcase tourism employees gaining a sense of pride and purpose from their jobs, for example: sharing Aotearoa New Zealand's history and culture with visitors, having strong ties to the community and iwi, gaining life-long transferable skills, and contributing to environmental conservation outcomes. The campaign will showcase the diversity of roles and rewarding career pathways across the industry.

The campaign will be underpinned by the future vision we have for regenerative tourism in Aotearoa New Zealand. The campaign would be designed to challenge the perception that tourism jobs are necessarily lower skill, lower wage, and/or more transient. It would show prospective workers (including those who are gender and ethnically diverse, young and older/returning workers, people living with disabilities, and workers seeking flexibility) that it is possible to have a meaningful, rewarding career in tourism, and to gain transferable skills. The campaign could also focus on influencing those who influence young people, such as parents and family, school teachers and career advisors.

An important aspect of this campaign will be an identification and promotion of shared values for the industry (building on the work of the New Zealand Tourism Futures Taskforce⁵² and Tiaki Promise⁵³). We believe a values driven industry will attract people who hold those values themselves, and want to promote them to visitors.

Such a campaign will only be successful if other aspects of this draft Action Plan are implemented (i.e. that change has occurred, and the campaign reflects a new reality).



TELL US WHAT YOU THINK

- › Do you think this Tirohanga Hou will lead to better work outcomes in tourism? Why?
- › How can we improve this Tirohanga Hou?

52 MBIE, *New Zealand Tourism Futures Taskforce*. www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-recovery/tourism-futures-taskforce/

53 Tiaki – Care for New Zealand. www.tiakinewzealand.com



CASE STUDY

100 AMBASSADORS OF HAPPINESS

An example of a powerful tourism careers campaign is the '100 Ambassadors of Happiness'. The Singapore Hotel Association together with the Singapore Tourism Board created this campaign for the hotel industry, where they interviewed 100 people across the hotel industry over the course of a year. The aim of this campaign was to get young people of Singapore to look beyond the long hours and underwhelming starting salaries of the hotel industry. This campaign showcases the wide range of jobs in the industry, as well as different job progressions and positive experiences in the industry. The Singapore Tourism Board indicates that this has led to a 245% increase in job applications.

For more information, visit: sha.org.sg/workforahotel/stories/100-ambassadors

WHAT CAN WE LEARN FROM THIS CASE STUDY?

- › Working directly with businesses and people working in the industry to showcase career opportunities and the positives of working in the tourism industry.
- › Using easily consumable mediums such as social media to deploy powerful imagery and inspiring stories to engage potential people to work in tourism and customers.

CASE STUDY

COUNTRY CALENDAR

Hyundai Country Calendar is an example of great storytelling changing the perceptions of an industry. The nation's longest running TV show celebrates the farming industry against the backdrop of rural Aotearoa New Zealand. As one of the nation's most popular shows, more than half a million people watch each week.

In recent years the show has showcased agriculture and horticulture stories that have a stronger emphasis on sustainable practices, for example, regenerative farming and fishing, certified carbon zero farms, improving soil quality and biodiversity, and farmers that are restoring farmland to native bush to create havens for native birds. The show shapes the national perception of rural Aotearoa New Zealand industries and lifestyles. It highlights farmers and growers giving back to communities and the environment as part of their daily life, as well as shining a light on their businesses.

There is currently no equivalent for Tourism in New Zealand, despite Tourism also being part of the fabric of our culture. While the focus of our proposed campaign is on highlighting meaningful work in the sector, we want to change perceptions of the tourism industry in the broader sense as well.

For more information, visit: www.nzonscreen.com/title/country-calendar-1966/series

WHAT CAN WE LEARN FROM THIS CASE STUDY?

- › Country Calendar provides kiwis with new insights and a positive understanding of our farming sector as people are becoming more attuned to the values of sustainability and regeneration.
- › If the tourism industry doesn't take steps to showcase how it also promotes these values, it will fall behind other industries, including in its ability to attract talent.
- › The campaign suggested through the draft Action Plan will showcase stories of tourism businesses connecting with people, communities, and the environment, taking a more values-driven approach to changing perceptions of the industry.
- › In turn, this will show people who are considering working in tourism (and those who influence them, such as parents) that they can have a meaningful career in tourism.

NEXT STEPS



WE WANT TO HEAR FROM YOU

This is your chance to help build the future of the tourism industry. Have your say, contribute and collaborate. Please visit www.mbie.govt.nz/betterworkactionplanconsultation for ways to engage with the draft Action Plan.

YOUR FEEDBACK WILL BE ANALYSED, AND A FINAL ACTION PLAN WILL BE PREPARED

This draft Action Plan is a point-in-time capture of our thinking. It describes the most challenging issues for the tourism industry's future workforce in an evolving context. In developing the draft Action Plan, some Tirohanga Hou address well-understood problems where solutions are relatively clear. However, others require first a better understanding of a complex, uncertain, evolving problem in order to then develop concrete solutions that can be implemented.

A monitoring and evaluation framework will be developed to measure the success of the Action Plan.



Photo: Miles Holden

APPENDIX ONE: EVIDENCE AND INSIGHTS

Evidence and Insights in the draft Action Plan have been derived from a range of sources, including existing research pieces and reports, as well as analysis of Migrant Employment Data and the Household Labour Force Survey.

When interpreting data from the **Migrant Employment Data**, it is important to note that the estimates presented in these studies are the work of the author, not Stats NZ or individual data suppliers. The tourism sector was mapped based on tourism product ratios for the year ended March 2020 from the latest Tourism Satellite Account⁵⁴. However, COVID-19 has significantly affected Aotearoa New Zealand's tourism sector and we anticipate that these definitions may no longer reflect the tourism sector accurately. These ratios are also calculated at the national level, and do not account for any differences in industries between regions. It is assumed that the proportion of migrants, and the demographical composition within each industry matches those proportions in tourism within the same industry. We advise interpreting these figures with caution.

When interpreting data from the **Household Labour Force Survey**, it is important to note that the estimates presented in these studies are the work of the author, not Stats NZ or individual data suppliers. The tourism sector was mapped based on tourism product ratios for the year ended March 2020 from the latest Tourism Satellite Account⁵⁴. However, COVID-19 has significantly affected Aotearoa New Zealand's tourism sector and we anticipate that these definitions may no longer reflect the tourism sector as accurately. These ratios are also calculated at the national level, and do not account for any differences in industries between regions. It is assumed that the demographical composition within each industry matches those proportions in tourism within the same industry. Data was tied to respondent's main job, so if a person's second (or third etc) job is tourism related, that would not have been captured in this data. We advise interpreting these figures with caution.

54 Tourism Satellite Account, year ending March 2021 www.stats.govt.nz/information-releases/tourism-satellite-account-year-ended-march-2021



Te Kāwanatanga o Aotearoa
New Zealand Government