



Briefing to the Minister of Tourism and Hospitality

Tourism New Zealand Officials Meeting, December 2023

Agenda and attendees

Agenda

1. Introductions
2. Minister of Tourism and Hospitality's priorities
3. Briefing to the Incoming Minister
4. Next meeting
5. Any other business

Attendees

- Paul Brock, Chair
- René de Monchy, Chief Executive
- Natalie Haines, GM People & Corporate Affairs

Government priorities

From the pre-election manifestos and coalition agreements:

- Lifting New Zealand's productivity and economic growth to increase opportunities and prosperity for all New Zealanders (coalition agreements)
- New Zealand's prosperity depends on increasing export revenues from international visitors (national.org.nz/boostingtourism)
- Set an ambitious target to double the value of exports including from agriculture and forestry, services, international education, technology and tourism within ten years.
- Make India a strategic priority (trade policy).

How we can help you achieve your priorities?



**100% PURE
NEW ZEALAND**

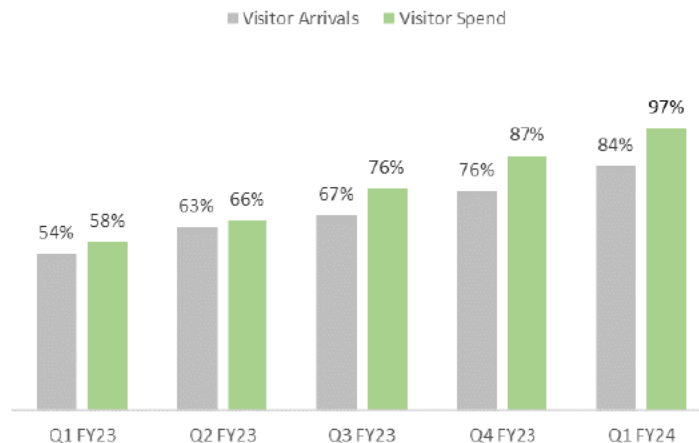
The Importance of Tourism

Scale of Tourism Pre-Covid 2018-19

- #1 Export - 20% of exports (\$15B foreign exchange)
- #1 employer 10% of jobs (190k directly employed)
- 5.6% of GDP output (\$39B direct)
- 4.3% direct value added (+\$10B indirect)
- \$1.8B GST (international visitors)

Source: Statistics New Zealand Tourism Satellite Account (TSA) YE Mar 2019

Pace of Recovery 2022-23 as a % of 2018-19



Source: International Travel and Migration (ITM) Arrivals September 2023
International Visitor Survey (IVS) Total Expenditure to Q1 FY24 (September 2023)

Tourism New Zealand's role and impact

Our Role

- TNZ is New Zealand's national destination marketing organisation
- Established to ensure that New Zealand is marketed as a visitor destination as to maximise the long-term benefit to New Zealand

Strategic Intentions (SOI 2021-2025)

1. Build extraordinary value in New Zealand's destination brand and reputation
2. Accelerate tourism's recovery and transition to a more sustainable, productive and inclusive future
3. Shape demand to maximise the contribution of international visitors to economy, nature, environment and culture

Our Impact

International Visitor Survey (IVS) 2018-2019	Total Visitors	Holiday Visitors	TNZ Visitors	Impact Measure
International visitors	3.4m	1.8m	s 9(2)(f)(iv)	
Average spend per visit	\$3,348	\$3,951		
Regional dispersal # of regions visited	2.9	3.6		
Seasonal productivity % of arrivals off peak	66%	65%		
Brand advocacy Net Promoter Score (NPS)	+77.2	+77.4		

Source: International Visitor Survey (IVS) microdata for the period Jan 2018 to Dec 2018 (two years of data to maximise sample size, n=17,956)

Outlook

Near term outlook for 2023/24

- Value and volume recovery are tracking well. The September quarter shows recovery is at 84% arrivals and 97% spend compared to pre-Covid.
- Although the pace of recovery has been fast, it is not yet felt evenly across the sector – some regions and operators are above pre-Covid levels while others are yet to recover. There is still a job to be done.
- In FY24, TNZ targets accelerating the recovery and maximising the contribution from tourism including:
 - growing value over volume (target: >\$9.7bn spend),
 - seasonal productivity (>56% of visitors off-peak)
 - regional contribution (>36% visiting 4+ regions)

Longer term outlook for 2024/25 and beyond

- FY24 will be a pivotal year for tourism. Westpac and other forecasters predict exceeding pre-Covid levels in 2024.
- The sector is recovering and can have a key role in helping rebuild New Zealand's economy.
- Development of TNZ's next Statement of Intent is underway, it will cover the 2024-2029 period.
- Opportunities and challenges:
 - Support sector productivity through reducing seasonality.
 - Support regional development by driving regional dispersal.
 - Respond to consumer sustainability expectations and support industry sustainability.
 - Maintain a diverse portfolio of markets for resilience and to respond to opportunities.
 - Help ensure airline connectivity is maintained.

NGĀ MIHI



100% PURE
NEW ZEALAND

From: [Natalie Haines](#)
To: ["*NZTB - Exec Team"](#) s 6(a)
Subject: Minister meeting notes CONFIDENTIAL
Date: Thursday, 7 December 2023 7:28:00 am
Attachments: [Briefing for Minister of Tourism & Hospitality TNZ Officials Meeting December 2023.pdf](#)
[image001.jpg](#)
[image002.png](#)
[image003.png](#)
[image004.png](#)
[image005.png](#)
[image006.png](#)
[image007.png](#)

Kia ora koutou

Rene, Paul and I had our first meeting with Minister Doocey yesterday.

The meeting went well, he was easy to engagement with. Key notes from the meeting were:

- s 9(2)(a)(i)
- At this point he has no firm views on tourism and hospitality combined under one Minister but hospitality having a Minister will mean they have someone who will listen, ensure they are valued and have someone to advocate for them.
- It's not clear yet how his role as Associate Transport will work but there are some convos about airline routes.
- He was very clear he didn't want to form any views quickly, he wanted to spend time listening and will be out visiting key tourism locations regularly for next couple of months. His first trip is to Queenstown on Friday.
- When he visits industry the 3 questions he will be asking are: How do we support you to grow? How do we support people and business? How do we enable bringing value to the regions?
- The focus is growth, good value growth and he talked about airline capacity, workforce (local + migration) and supporting the industry.
- s 9(2)(f)(iv)
-
- He grew up working in hotels with his father managing hotels and his grandfather owned them. He worked as a tour guide overseas and has travelled extensively offshore.

s 9(2)(g)(i)

Attached are the slides we used to brief him which was a summary of our BIM.

Thanks
Nat

From: s 6(a)
Sent: Tuesday, December 5, 2023 12:25 PM
To: Tessa Bartholomew <xxxxx.xxxxxxxxxxxxx@xxxxxxxxxxxx.xxxx.xx>
Cc: Paul Brock <xxxx.xxxxxxxxxxxxx@xxxx.xxxx>; René de Monchy <Rene.deMoncxx@xxx.xxxx.xx>; Natalie Haines <xxxxxxxx.xxxxx@xxx.xxxx.xx>; Michael Bird <xxxxxxxx.xxxx@xxxx.xxxx.xx>
Subject: RE: Briefing for Minister of Tourism TNZ Officials Meeting December 2023.pptx

No problem Tessa. Please see attached.

Ngā mihi,

s

From: Tessa Bartholomew <xxxxx.xxxxxxxxxxxxx@xxxxxxxxxxxx.xxxx.xx >
Sent: Monday, December 4, 2023 3:20 PM
To: s 6(a)
Cc: Paul Brock <xxxx.xxxxxxxxxxxxx@xxxx.xxxx >; René de Monchy <xxxx.xxxxxxxxx@xxx.xxxx.xx >; Natalie Haines <xxxxxxxx.xxxxx@xxx.xxxx.xx >; Michael Bird <xxxxxxxx.xxxx@xxxx.xxxx.xx >
Subject: RE: Briefing for Minister of Tourism TNZ Officials Meeting December 2023.pptx

s 6(a)

Bit pedantic of me but could we please update all references in the slides from the "Minister of Tourism" to the "Minister for Tourism and Hospitality"? No need to worry about doing that on the BIM.

Cheers
Tessa



Tessa Bartholomew

Tourism and Hospitality Private Secretary | Office of Hon Matt Doocey
Minister for Mental Health | Minister for ACC | Minister for Tourism and Hospitality |
Minister for Youth | Associate Minister of Health | Associate Minister of Transport

s 6(a)

Email: Tessa.bartholomew@parliament.govt.nz Website: www.Beehive.govt.nz
Private Bag 18041, Parliament Buildings, Wellington 6160, New Zealand

From: s 6(a)

Sent: Tuesday, 5 December 2023 12:06 PM

To: Tessa Bartholomew <Tessa.Bartholomew@parliament.govt.nz>

Cc: Paul Brock <paul.brockstratx@gmail.com>; René de Monchy <Rene.deMonchy@tnz.govt.nz>; Natalie Haines <Natalie.Haines@tnz.govt.nz>; Michael Bird <michael.bird@mbie.govt.nz>

Subject: Briefing for Minister of Tourism TNZ Officials Meeting December 2023.pptx

Kia ora Tessa,

Please see attached supporting slides for Tourism New Zealand's Officials Meeting tomorrow. I have also attached our BIM for convenience.

If you have any questions please feel free to contact Nat or I anytime.

Ngā mihi,

s

6(a)

newzealand.com
tourismnewzealand.com
@purenewzealand



htmlsig.com



PROF. MICHAEL B
PAUL B, ADM

NO
DATE

s 9(2)(g)(i)

Q - πQV - high value.
targeting visible.

Group - Air
Road bus
Bus across
10% travel
new bus way NR.

No firm view $\pi \pi \pi$ - will get out & listen.
listen, valued, advocate.

Asset transport - possibly airline routes yet & Goddard

About growth \rightarrow good value. ^{in airline capacity}
- multiple - local + migration
- support industry

Q to industry

now do not support π grow
people & bus
create bring value to regions

s 9(2)(g)(i)

interface with social licence + infrastructure

Q - spend grow faster than value

Q - how does business feel?

Regenerative - want to or forced to?
now do not interface with houses
do we have enough rights?