



**Tourism New Zealand
Briefing for the Incoming
Minister**

3 November 2020

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1. Foreword from the Chief Executive

Minister,

Welcome to the tourism portfolio.

Tourism is vital to New Zealand and its success. From large corporates to individual Kiwis, tourism enriches our country across the four capitals, contributing to our economic, social, human and natural wellbeing while providing exceptional experiences to our domestic and international visitors.

Research about New Zealanders' views towards tourism's future, conducted by Angus and Associates in September 2020, showed that New Zealanders see tourism as vital to New Zealand's economic and social recovery from COVID-19, with a view to creating jobs at scale in the community and improving local infrastructure.

Prior to COVID-19, tourism made up 20% of New Zealand exports, making it our largest export earner. One in ten New Zealanders was either employed by the tourism sector, or indirectly by related sectors.

Tourism is a diverse and dispersed sector. It captures some of New Zealand's biggest and smallest businesses operating in wide ranging contexts, in cities, towns and rural areas. Tourism by its very nature supports businesses and jobs 'at place', disproportionately creating jobs and opportunities for all regions and communities in New Zealand.

Our analysis shows that every \$178,000 of tourism spend creates a job in New Zealand – that's 40 international visitors, or 480 domestic overnight trips. Māori account for approx. 15% of tourism jobs, which is 30% higher than the average Māori share of employment across the NZ economy overall (11.6%).

Core tourism operators are the attractions visitors experience around New Zealand, from Dive Tutukaka in the Far North to the Blue Penguin colony in Oamaru, and critically, operators providing access to the Department of Conservation estate across the country. These businesses have strong productivity and through international visitation increase the productivity of adjacent industries like hospitality, accommodation and retail. The average labour productivity (output per employee) of a core tourism industries is similar to agriculture, forestry and fishing at \$201,424.

An international visitor will spend on average \$232 per day, compared to a domestic visitor (\$155) or local resident (\$74). Through this spending, tourism supports amenities for Kiwis in towns and cities around New Zealand that would not otherwise exist.

Tourism further benefits New Zealand by boosting the exports of other Kiwi products through positively contributing towards the consumer perception of other exports such as dairy, meat and wine¹. A successful tourism industry and a strong destination brand keeps New Zealand firmly in the minds of consumers, businesses, and decision makers all around the world, enhancing New Zealand's international reputation and economic outcomes for all export sectors.

However, tourism does create pressure in some places and can disproportionately be seen as a victim of its own success. Regions of New Zealand that have experienced strong growth in visitation must be

¹ TNZ Project Halo Research April 2019

equipped to manage flow on effects for local authorities, communities, and environments in hotspots around the country. A holistic understanding of tourism demand and supply, including destination management, is needed to create the right balance of outcomes from tourism for New Zealand – to ensure tourism contributes more than it takes away.

Minister, 2020 has had a significant impact on tourism. Our advice to you is that post COVID-19, the future of tourism in New Zealand needs to deliver high value economic outcomes for New Zealanders, while also addressing the expectations of visitors and locals for meaningful, sustainable and culturally enriching experiences. New Zealand, with its reputation for both a beautiful environment and manaakitanga, is well placed to offer this.

Now, more than ever, it is important to capitalise internationally and leverage New Zealand’s brand. It is important for our exports (including tourism), our sense of purpose, empowering people and taking care of place.

This briefing will outline Tourism New Zealand’s role as a crown entity, the importance of the 100% Pure New Zealand Brand, the ongoing impacts of COVID-19 on this industry and our view for tourism as a vehicle for economic recovery.

The global Tourism New Zealand whānau looks forward to understanding your vision and partnering with you to achieve it.



Stephen England-Hall
Chief Executive



Tourism New Zealand: for our
people, for our place, for Aotearoa

Tourism New Zealand is a creative agency. We’ve included some QR codes throughout this document to give you a taste of the work we do. Simply scan the codes with your phone camera as you read, and they will take you to examples of our creative content.

2. Overview

Tourism New Zealand is a Crown Entity with a core purpose to enrich New Zealand by maximising the contribution of visitors

The New Zealand Tourism Board, trading as Tourism New Zealand, is a Crown Agent governed by the Crown Entities Act 2004.

Tourism New Zealand was established by the New Zealand Tourism Board Act 1991. Our specific statutory functions under this Act are to:

- Market New Zealand as a destination for the long-term benefit of New Zealand
- Develop, implement, and promote strategies for tourism
- Advise the Government and the New Zealand tourism industry on matters relating to the development, implementation, and promotion of those strategies.

Tourism New Zealand is focused on improving tourism's contribution to economic growth for New Zealand by increasing the number and mix of domestic and international visitors, when they arrive, the regions they travel to, how long they stay, and how much they spend. Tourism New Zealand is committed to the Treasury's Living Standards Framework and ensuring visitors contribute to natural, social, and human wellbeing as well as the economy.

As New Zealand's Destination Marketing Organisation, we are the only Government agency with the mandate and resources to promote 'destination New Zealand'.

Prior to COVID-19, Australia, China, USA, UK, Germany, and Japan made up New Zealand's six largest source markets (by size) and Tourism New Zealand's six priority markets. In addition, Tourism New Zealand targeted established markets of South Korea, Singapore, Canada and Malaysia, and emerging markets of India, Indonesia, Brazil, and Argentina in recognition of the growth and value opportunities they offered.

Tourism New Zealand makes every dollar work hard with a return on investment for the Government in FY20 of 1:24.

The Tourism New Zealand visitor

Tourism New Zealand's marketing builds brand equity in the minds of consumers over time. We target, convert and shape consumers to achieve a visitor mix that spends more, in more regions and off peak.

Tourism New Zealand conducts impact studies to measure the contribution of our marketing to the tourism outcomes we have been commissioned to achieve.

The Tourism New Zealand visitor, influenced by 100% Pure New Zealand:

- lifts holiday arrivals by 14%
- spends 18% more per visit
- visits 45% more regions
- visits 28% more in off peak months

The more holiday visitors are influenced by our marketing, the better the tourism outcomes for New Zealand.

Governed by Board appointed by Minister of Tourism

Tourism New Zealand is governed by a Board of Directors and has accountability through this Board to you. The Board meets approximately every six weeks, or about eight times per year.

The current Board Chair, Jamie Tuuta, was appointed to the role in April 2019. A list of current board members and their terms is included in Section 6. The composition of the Board reflects a balance of tourism industry and general commercial expertise.

The current appointments of the following Board members will expire by the end of 2021 (full details are included in Section 6):

- Roger Sharp
- Michael O'Donnell
- Jan Hunt
- John Thorburn
- Colleen Neville
- Kauahi Ngapora

Located in 11 offshore markets

Tourism New Zealand has around 150 full-time staff members, located in 15 offices globally. In some of those offices we co-locate with other New Zealand government agencies. Offices are in the following locations:



Auckland
Guangzhou
Los Angeles
Seoul
Sydney

Beijing
Jakarta
Mumbai
Shanghai
Tokyo

Buenos Aires
London
São Paulo
Singapore
Wellington

3. Tourism New Zealand's key activity

Tourism New Zealand undertakes destination marketing by delivering activity through four converging channels – those that are paid for, those that are owned, those that are earned and international travel trade.

Paid is typically advertising campaigns either direct to consumer, direct to agents, or in collaboration with partners (such as airline and trade partners), with the majority of this spend through digital media.

Owned is using our consumer website newzealand.com and social media channels to promote New Zealand, engage with potential visitors, refer them on to industry operators to book travel and activities and gain their advocacy once they are home.

Earned involves helping global media and travel agents to experience New Zealand either live or virtually, sending news content to international media, utilising opinion leaders in selected markets to advocate on our behalf.

Trade is a B2B model whereby we utilise content, events, training and partnerships to inspire domestic and international travel trade, so they are better places to sell New Zealand to their clients

Tourism New Zealand also targets the Business Events sector (for the hosting of international meetings, conferences, and incentives) and the premium travel sector.

The visitors attracted to New Zealand by Tourism New Zealand deliver higher value than the average holiday maker be it through a higher daily spend, arrival in the shoulder seasons, or because they visit more regions.

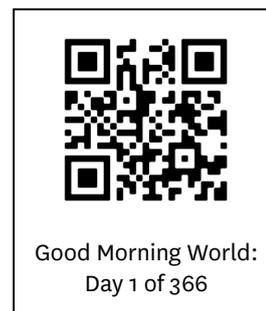
Tourism New Zealand markets New Zealand under the umbrella of 100% Pure New Zealand. While marketing and PR activity was where most of our financial resources were focused prior to COVID-19, we also worked closely with travel trade and airlines, engaged with the New Zealand tourism industry, provided information for visitors, and provided quality assurance for New Zealand's tourism product and experience. COVID-19 hasn't changed this – we continue to do all of this activity, albeit at a temporarily reduced level internationally, and now with a strong domestic focus.

'100% Pure New Zealand' campaign

The campaign was first launched in July 1999, and at 21 years old it is one of the longest running and most highly regarded tourism campaigns in the world. It regularly wins awards and is often held up by the industry globally as an example of success.

The 100% Pure New Zealand campaign is a way to promote New Zealand as a visitor destination. It tells the story of how New Zealand's landscapes, people, culture, and activities combine to deliver something that cannot be experienced anywhere else in the world – a 100% Pure New Zealand experience. It's an 'only in' and 'uniquely New Zealand' experience. It is not intended to be an environmental standard.

In 2019 100% Pure New Zealand evolved to showcase our '100% Pure Welcome', with the subsequent launch of [*Good Morning World*](#), a multiple award-winning global campaign that showcased every day New Zealanders welcoming the world to their part of New Zealand. The campaign ran



throughout FY19-20, taking a pause in the early stages of COVID-19, with the final clip showing in June 2020. 100% Pure Welcome remains an underpinning theme of our current international activity.

In May 2020, the 100% Pure New Zealand campaign extended its reach to a domestic audience following the closing of borders to international visitors. This resulted in the highly effective launch of [Do Something New, New Zealand](#), a national campaign targeted at kiwis to get out and participate in the local tourism economy; immerse themselves in their own backyards.



Campaign and PR puts New Zealand into the conversation in key markets

Prior to COVID-19, Tourism New Zealand spent the largest amount of its funding on international marketing campaigns, supported by PR activities that are integrated into marketing efforts.

Our campaign work primarily utilises digital marketing tools to target Active Considerers (ACs – see box below), including Search Engine Marketing and Optimisation (buying search terms and optimising [newzealand.com](#) so New Zealand appears front and centre for people researching holidays online), as well as investing in online banner and advertisement space on websites utilised by ACs to draw them to newzealand.com. Activity is designed to engage ACs, bring to life what a New Zealand holiday will look like, remove any barriers to travel, and connect them to a travel provider that can book them a holiday. We also use TV, Out of Home (OOH) and other social media channels to reach our target consumers.

Tourism New Zealand also uses communication channels, such as PR, to deliver messages through third parties to contribute to New Zealand's popularity as a destination and to strengthen conversion (when a person planning a holiday is 'converted' into booking a holiday). Domestically and internationally, Tourism New Zealand delivers fully integrated campaigns that contain elements of digital, PR, social media, and trade activity to improve the effectiveness of our campaign delivery. The end goal of our campaign work is to close the gap between desire and action amongst ACs.

Our consumer targets

At Tourism New Zealand, we call people who have a high propensity for coming to New Zealand **Active Considerers**. These are classified as people who have New Zealand on their top 5 must visit list (preference), intend on visiting in the next 3 years (urgency) and also intend to spend over a certain threshold when they get here (higher value).

We have over 130 million people across our key markets who meet these criteria who we can actively market to. To make our marketing more relevant, effective, and efficient we are evolving and deepening our customer understanding so we can segment this audience pool, based on psychographics, into different mindsets. This will give us a competitive advantage by allowing us to talk to the different mindsets based on their personal values, attitudes, needs and motivations in addition to what we know about them demographically. It will also help us better define our global core creative target audience as we continue to evolve and refine our brand strategy.

This global audience strategy, which commenced research in February, is designed to ensure we are targeting a high value visitor mix for New Zealand that delivers to the four capitals, enriches New Zealand and is aligned with the future of tourism in a COVID-19 context.

Engaging with travel partners to help them convert visitor interest into action

Tourism New Zealand's trade marketing work partners with both international and domestic travel sellers and agents to increase the trade's motivation and capability to make bookings for New Zealand. Tourism New Zealand carries out a range of trade activities (both in New Zealand and in our key markets) such as events, partnerships, content creation for marketing and training aimed at motivating, connecting, and enabling trade partners towards converting and selling the right types of holidays. These have a focus on longer stay days, visitation to multiple regions, and holidays in all seasons with participation in a range of activities.

Ensuring the visitor experience is high quality

Our marketing helps get visitors to New Zealand, and once they are here Tourism New Zealand has a role in ensuring they have an exceptional experience in order to advocate on our behalf when they return home. Tourism New Zealand is involved with several programmes which influence and ensure quality visitor experiences for international visitors; in effect delivering on the promise made to visitors through our marketing campaigns.

Qualmark

Qualmark is New Zealand tourism's quality assurance agency, 100% owned by Tourism New Zealand. It measures operators against assessment criteria and provides guidance and advice to assist tourism operators in New Zealand exceed visitors' expectations. Qualmark raises the standard of the industry and reduces the industry's reputational risk by addressing safety, quality, and environmental concerns. Qualmark currently has 1628 license holders and 78 allied members.

i-SITE New Zealand

i-SITE New Zealand is New Zealand's official Visitor Information Network and is governed by a Board of Directors. Tourism New Zealand provides staff, support services, business systems, training to local staff, and marketing to raise the profile of the i-SITE network. The network is locally owned and operated, meaning that earnings (\$70 million in sales per year) are directed back to our communities and New Zealand. The network attracts around 7.6m in-person walk-in visits: 56% international, 25% domestic and 19% locals. 44% of Kiwi's also say they have used an i-SITE in the last 12 months.

The i-SITE network is currently looking at its strategy to ensure that it meets the needs of future visitors including increasing its digital and online services. In addition to providing information and bookings about products the network plays a vital role supporting people during times of crisis like flooding and other emergencies. It also serves as a direct channel to domestic and international visitors for crucial information such as how to travel safely and care for our home and how to camp responsibly. This summer the network will also partner with Tourism New Zealand to encourage New Zealanders to 'do something new'.

Approved Destination Status (ADS)

ADS is a bilateral tourism arrangement between the Chinese Government and a foreign destination, permitting Chinese holiday travellers to visit a destination in a tour group. Only 'ADS approved' operators can conduct ADS tours. Approval, monitoring, and compliance are delivered via Tourism New Zealand on behalf of the Ministry of Business, Innovation and Employment (MBIE). ADS tours were the first tours in New Zealand to be affected by COVID-19 when China stopped government endorsed tours leaving China (and subsequently New Zealand closing borders to flights originating in China).

Tiaki - Care for New Zealand

The flip side of caring for visitors, is visitors caring for New Zealand. The Tiaki Promise is a set of guiding principles for all visitors to follow, showing them how to contribute to preserving and protecting New Zealand. New Zealanders have a special connection to the land and want to help visitors travel safely and responsibly. Seven private and public sector organisations came together to create the Tiaki Promise: Tourism New Zealand, Air New Zealand, the Department of Conservation, Tourism Industry Aotearoa, Local Government New Zealand, New Zealand Māori Tourism, and Tourism Holdings Ltd. *Tiaki - Care for New Zealand* is currently being reviewed in the context of applying it to a domestic New Zealand audience to inspire Kiwis to be at the forefront of caring for New Zealand and to role model responsible behaviour to visitors.

The role of data and insights underpinning our work

There are a range of tourism data sets and reports available from both Tourism New Zealand and the Ministry of Business, Innovation and Employment (MBIE).

Tourism New Zealand's insights work falls into the following activities:

- **Understanding our audience:** With the addition of the domestic market to our remit, and a international reset of tourism due to Covid-19, it is increasingly important to understand what motivates our audience to travel, why they do or do not choose New Zealand as a destination, and how to connect with them with the right content in the right channels. Over the past several months we have been refreshing our global audience strategy to shift our consumer segmentation and targeting approach to a richer mindset driven approach that will persevere over time. This will inform our creative output, channel selection and partnership considerations.
- **Increasingly using data to drive decision making:** There is increasingly more opportunity to leverage a wide range of data to get an accurate assessment of consumer behaviour, organisational, and industry performance. This includes but is not limited to data sourced from financial technology, mobile phone use, and digital analytics.
- **Partnering across government and industry:** Tourism New Zealand brings its understanding of the visitor and insights expertise to partner with government and industry. We have led research for multi-agency/organisation projects as diverse as: the impact of carbon consciousness of attitudes to air travel; understanding how visitors behave in their own and our natural environment; and more recently research for the Tourism Futures Taskforce on what New Zealanders want out of the tourism industry in the future.
- **Providing insight for industry:** Publishing research and insights with the wider industry and key partners is critical to ensuring those insights can be leveraged by others. Tourism New Zealand is in very early stages of developing a "Tourism Intelligence Network" to act as a central portal to access a wide range of data and research, overlaid with our own insights IP. This will be developed as "Minimum Viable Product" (MVP) in the coming months before taking on feedback and developing further.

Tourism New Zealand has also maintained our core brand tracking across top markets throughout COVID-19 to consumer assess sentiment towards New Zealand and willingness to travel post-COVID-19.

Key performance objectives for this Financial Year

Tourism New Zealand's objectives are outlined in the organisation's Statement of Intent FY18-21 and the annual Statement of Performance Expectations. The key objectives for this financial year, outlined in the Statement of Performance Expectations, are to:

- a. Drive domestic tourism demand

- We will extend our marketing, brand, commercial, and insight capabilities to shape and stimulate domestic tourism demand
- b. Restart international tourism demand (post-COVID-19)
 - We will keep the New Zealand brand alive in the hearts and minds of global consumers and buyers, positioning New Zealand globally to be one of the top countries to recover and thrive in a post-COVID-19 world
- c. Strengthen sector supply (a resilient tourism sector)
 - We will invest in business support to tourism operators, while also accelerating the transition to 'smart tourism', using technology to enable the intelligent design of the system for better natural, social, human, financial, and physical outcomes for tourism
- d. Advise Government and the tourism sector recovery
 - Tourism New Zealand will provide insight, evaluation, and advice to government.

Current budget and future outlook

The Government's funding for Tourism New Zealand is \$112 million for FY20. Within our operating budget, currently [REDACTED] has been reallocated from international marketing activity to the domestic tourism market, a new role for Tourism New Zealand and our largest ever market investment.

In addition to Tourism New Zealand's operating budget, an additional \$10 million has been provided to Qualmark for Tourism Transitions and Digital Enablement services through the Tourism Recovery Support Package.

Tourism New Zealand measures its results through the following ways:

- Sustainable growth (by growing spend over volume)
- Productive growth (growing the off-peak season)
- Inclusive growth (growing spend in the regions)
- Number and cost of campaigns delivered
- Appeal and preference for New Zealand
- Equivalent advertising value achieved through media visits and partnerships
- The value of partnerships
- Stakeholder satisfaction
- Traffic to Tourism New Zealand's conversion channel newzealand.com.
- Referrals to businesses listed on newzealand.com and through other partnership activity.

Outcomes of the 2019 Review – Tourism New Zealand is a global centre of excellence for destination marketing

In 2019, MBIE commissioned an independent review of Tourism New Zealand to consider how the organisation can best support the country's tourism needs into the future. This review found Tourism New Zealand is exceptional at marketing New Zealand as a destination and it further considered how Tourism New Zealand's role could be expanded.

The review's final report stated:

"Tourism New Zealand is widely respected for its work, both domestically and internationally, and is viewed by its peer organisations as one of a small number of global benchmark destination-marketing organisations. Tourism New Zealand has strengths in customer insights and digital marketing, resulting in it being a partner of choice for a number of large global digital platforms. Tourism New Zealand's

core capability represents a digital marketing and customer insights centre of excellence in the New Zealand Government portfolio, bringing world-leading innovations in marketing activity to its role for the benefit of New Zealand.”

The review stated that Tourism New Zealand was in a good position to provide in-depth insight into domestic tourism and regional dispersal, as well as to prioritise the case for domestic and Australian visitors in driving regional dispersal.

It recommended that Tourism New Zealand should continue to partner with MBIE, New Zealand Māori Tourism, and the Department of Conservation on a range of common issues.

4. COVID-19 – the impact on Tourism and Tourism New Zealand’s response

COVID-19’s impact on tourism

The COVID-19 response has required a halt to international tourism. This, alongside the restrictions on domestic movement, has devastated the sector.

The impact of border closures on the economy has highlighted the economic value of international tourism to New Zealand. According to the Pre-Election Economic and Fiscal Update (PREFU), the loss of international tourism will significantly contribute to the projected 5.6% contraction in GDP by the September 2021 quarter, with risks of economic scarring from the loss of jobs that support international tourism. The PREFU also indicated that the uncertainty regarding international tourism resuming will negatively impact the Government’s tax revenue over the forecast period.

There is no New Zealand recovery without tourism. No other sector can replace the revenue, regional jobs and social and cultural impacts of tourism for the economy and communities.

The longer borders are closed, the larger the job to be done for Tourism New Zealand. Other destinations will progressively open borders affecting New Zealand’s competitive position and this will have a potentially long-term impact on New Zealand’s economy. Domestic tourism spend across New Zealand’s regions will never fill the gap from lost international tourism spend. The total visitor economy is expected to contract by between \$8.7B and \$17.2B annually without international tourism, with a midpoint of \$12.9B. That midpoint assumes New Zealanders redirect 50% of their pre-Covid outbound spend into domestic tourism, spend which is competing against other product categories e.g. home improvement, and savings rates. Domestic tourism expenditure would need to increase by 72% to completely fill the void left by international tourism.

New Zealand’s tourism sector pre-COVID-19

Prior to COVID-19, the global tourism sector was expanding, driven in large part by rising middle class prosperity, low fuel prices, and increased aviation capacity fuelled by new entrants and more efficient airplanes.

In the 10 years up until December 2019, international visitor arrivals to New Zealand grew from 2.45 million to 3.88 million. However, this was a tiny number of visitors compared to global visitor arrivals. New Zealand received approximately 0.3% of all international travellers and enjoyed 0.8% of

international traveler spend, which reinforced, and will continue to reinforce in future, that New Zealand is a premium higher-value destination.

2019 saw Tourism New Zealand consolidate efforts to drive value growth in our top three markets of China, Australia, and the United States. The USA in particular was on course to see strong value growth as the result of expected increased capacity with new American Airlines and Air New Zealand flights to US cities Dallas, Houston, and New York.

Examples of how Tourism New Zealand showcased New Zealand to the world pre-COVID-19: – campaigns in 2019

- 2019 saw the latest brand evolution of the 100% Pure New Zealand campaign: [100% Pure Welcome](#) with its hero campaign *Good Morning World* that launched in July. The point of 100% Pure Welcome was to showcase what makes us unique: our warm and welcoming people alongside our stunning landscapes. *Good Morning World* ran daily videos for 366 days (2020 being a leap-year) with occasional pauses, such as for the Whakaari White Island eruption and the early stages of COVID-19. It featured every day New Zealanders saying Good Morning to the world and featured all our regions.
- In the **United Kingdom**, Tourism New Zealand used radio for the first time as our primary medium, partnering with Bauer Media Group to send two prominent morning radio DJs to tour NZ for a week. Through this partnership, we reached an audience of approximately 10 million – 20% of all adult listeners across the UK. Our campaign concluded with strong results, with 31% of listeners recalling the campaign and 70% of those listeners reporting they took action to research New Zealand holidays online as a direct result of the campaign.
- In the second half of 2019, Tourism New Zealand worked with The Late Show with Stephen Colbert in the **United States of America**. The show's '[New Zealand Week](#)' was a huge success, airing more than 50 minutes of New Zealand content to 3.5 million nightly viewers across 5 weeknight shows. The show also aired in several additional Tourism New Zealand markets including Canada, Australia, and the Philippines with an Equivalent Advertising Value of \$12m. This content was designed to build appeal for New Zealand as a destination in part to build demand in advance of the anticipated launch of new airline services to the United States.
- In **China** we continued our new audience segmentation to build appeal for New Zealand. Our leveraging of the China-New Zealand Year of Tourism 2019 culminated in a major partnership with Alibaba, lighting up the Canton Tower and showcasing New Zealand destinations and travel offers, resulting in a significant boost to attraction sales leading into 2020.
- The '[New Zealand Says 39](#)' campaign for the Rugby World Cup in **Japan** launched on 12 September in partnership with Air New Zealand and the All Blacks. The campaign, inspired by the similarity between the Japanese concept of 'omotenashi' and the Maori concept of 'manaakitanga', aimed to raise awareness of New Zealand as a welcoming destination and included a social media campaign and festival pop up events with the All Blacks and Prime Minister Ardern. The campaign concluded with Equivalent Advertising Value of over \$40 million.



- In October 2019, we launched our first consumer campaign in **Taiwan** since 2010, focused on increasing awareness of New Zealand and leveraging the broadcast of the New Zealand-filmed episodes of the highly rated TV show 'Mr Player'. This was strategically timed with the increase of direct flight services between New Zealand and Taiwan by Air New Zealand.
- In **Australia** we partnered with Hello World, an Australian travel and lifestyle programme, to film four stories for the South Island Welcome campaign, reaching 5.6 million people per episode. We also supported Destination Rotorua to bring Channel 7's Sunrise to New Zealand in September.

Tourism New Zealand responds with agility when the world is in a state of ambiguity

The impact of COVID-19 on the global tourism sector has been unprecedented. In New Zealand, from March 2020, borders have been closed for the first time ever, halting international tourism. Domestic travel restrictions under Alert Levels Three and Four also stopped domestic tourism for about two months.

The impacts of COVID-19 were evident from February 2020, initially on Chinese holiday arrivals and spreading through all markets and confidence to travel more broadly, before the impact of global border closures were felt, and New Zealand's borders closed in March.

In the year to December 2019 total arrivals went from 3.86m to 3.88m (an increase of 0.7%) and holiday arrivals 2.02m to 1.95m (a decrease of 3.3%). Since March 2020, holiday arrivals have been reduced to essentially zero. This is especially challenging as many of our international marketing activities were geared towards driving demand in the first half of 2020.

Tourism will be harder hit and recover slower than the wider economy due to the impact of ongoing border closures. New Zealand's tourism industry relies on international visitors, which made up 42% of the sector in 2019. Tourism also relies on people movement and interaction which are subject to restrictions (including some domestic restrictions) as part of the COVID-19 response. Even as lockdown levels have lifted, border closures, unemployment, and domestic sentiment may suppress travel demand until well after other sectors such as forestry, retail, and services begin to recover.

Tourism New Zealand's COVID-19 response has four pillars.

1. **Drive domestic demand.** Tourism New Zealand has reprioritised baseline budget to place an unprecedented investment in domestic marketing to stimulate economic activity in all regions of New Zealand. Domestic demand is the most equitable way to support the tourism sector and keep a framework of the sector alive while borders are closed. We quickly established a domestic marketing, research and insights function by reprioritising staff and resources.
2. **Restart international demand.** Tourism New Zealand is set up to maintain an agile plan to respond and prepare for international tourism. We must keep the brand alive offshore to avoid a drop in brand saliency and a slower recovery in value when borders reopen. Without this work, the return of high value international visitors is not a given, nor is it that New Zealand will remain a top choice for the most desirable visitors.
3. **Strengthen sector supply.** Tourism New Zealand-owned quality assurance organisation Qualmark, with the support of additional funding from the Government, has provided business support services to 1300 tourism operators. This includes a digital enablement service to ensure that the tourism sector is well-placed to capitalise on the 'digital tipping point' that COVID-19 has added to global value chains (it is expected that consumers will be more

confident booking and paying for goods and services online directly to tourism operators post-COVID-19).

4. **Advise government.** The path to a high value, sustainable tourism recovery will be complex and will require innovative thinking. Tourism New Zealand is mobilised to provide new levels of advice and analysis to you, MBIE and other government agencies to support this process.

We have approached our planning with the following principles:

- We must plan with agility and adapt according to new information and scenarios, ready to execute international plans when circumstances allow.
- The New Zealand visitor economy will be rebuilt on a domestic base first.
- Destination brand building is essential, even when people can't travel, to maintain brand saliency and accelerate economic recovery when borders reopen. Conversion of brand (desire) into demand (purchase) occurs between 3-9 months prior to departure.

Driving domestic tourism demand

Tourism New Zealand quickly pivoted to extending our expertise to shape and stimulate domestic tourism through launching our largest ever marketing investment in a single market. We launched our "Do something new, New Zealand" campaign in May. The intent of this campaign is focused on exciting New Zealanders about holidaying domestically and increasing the participation of New Zealanders in tourism, and their spend on commercial tourism products.

Four iterations of the campaign have been activated so far to address different needs for the New Zealand and regional economies:

- Do something new, New Zealand launch campaign
- Winter ski campaign
- Level 2 re-entry
- Auckland regional campaign.

The next stage of the domestic campaign was launched on Tuesday 27 October - a hero film to encourage New Zealanders to explore the country and do something new this summer, including a song written by and starring Madeleine Sami and Jackie Van Beek from the film *The Breaker Upperers*.

When planning this work, we were aware of our ability to impact industries outside tourism, for example, how Tourism New Zealand can use our campaign to support New Zealand media organisations. One of our first actions in our domestic campaign was to establish media partnerships with Stuff (#backyourbackyard) and NZME to sponsor tourism related articles promoting New Zealand tourism experiences.



The campaign has been well received so far. Results showed that the campaign has been reaching and engaging our target audiences, delivering intended messages, creating strong immediate persuasion, and long-term brand memories. 94% of New Zealanders had seen, heard, or read something about holidaying in New Zealand since the campaign began, with 65% of New Zealanders able to recall at least one of the campaign's assets.

We are also seeing concrete results in the economy. Domestic tourism spend in July was up 24.2% on last year, and provisional electronic card spend data showed that in July Auckland residents spent

\$206m outside their home region, an increase of 37% on last year. There are 75,000 visits to newzealand.com per week with a 51% increase in referrals to businesses from New Zealand-based consumers, creating real outcomes for the sector.

Tourism New Zealand has developed a framework for adapting the campaign to respond to changes in COVID-19 alert levels, which can be applied region by region. This was tested when alert levels were raised recently and was received well, but we will continue to monitor sentiment around this and adapt the framework when needed.

Restarting international demand – it is important for New Zealand’s brand not to go dark while we wait for borders to re-open

Tourism New Zealand is committed to both keeping the New Zealand brand alive in the hearts and minds of global consumers and buyers and driving the halo effects of increased demand for New Zealand goods and exports.

Months of the 100% Pure New Zealand brand not being seen in core markets could take years to recover, particularly due to the increased competition for tourism that is likely to arise during the COVID-19 recovery period. Since the emergence of COVID-19, we have also been focused on ensuring we maintain our relevance in our key markets, to ensure that tourism is well positioned to recover in the post-COVID-19 world. This has included launching new creative content focused on connecting consumers with New Zealand’s values during this time of global uncertainty.

The COVID-19 opportunity: trading on our brand

Tourism New Zealand’s destination brand, 100% Pure New Zealand, is New Zealand’s apex brand. Our positive and powerful destination brand creates disproportionate value for New Zealand, economically, culturally and allows us to celebrate who we are in the world.

New Zealand’s brand appeal in our top export markets has remained stable through the impact of COVID-19 with the exception of China. Maintaining and building our brand appeal is critical for not just the faster recovery of tourism, but also the growth of other export sectors, particularly food and beverage. Tourism New Zealand analysis in 2019 showed that consumers who have a desire to visit New Zealand for a holiday have a higher propensity to buy New Zealand products, including meat, dairy and wine – with a lift of 23% interest from US consumers. Along with other brand saliency best practice, this has contributed to our focus on maintaining our destination brand work even when conversion to holiday arrivals has not been possible. During COVID-19, Tourism New Zealand, as the government’s consumer-facing agency with the largest international reach, has brought government agencies together for the first time in a Brand NZ campaign to support other economic sectors – [Messages from New Zealand](#).



The agencies involved in Brand NZ are: Tourism New Zealand, NZ Story, MPI, NZTE, ENZ, and MFAT. The agencies will deliver a phased Brand Campaign incorporating “Messages from New Zealand”, “Made with Care” for Food and Beverage, and “Ingenious Together” which is focused on New Zealand’s ingenuity. The aim of this joint approach is to keep New Zealand alive in the minds of international consumers, buyers, and investors.

Proposals for PR initiatives over coming months (see Section 5) will be designed to maintain the New Zealand brand for the benefit of all sectors as well as the international tourism recovery. Now more than ever, consumers are looking to New Zealand's strong international reputation as somewhere that cares for people and place. This does not just impact tourism – it is our place in the world politically, it is our ability to trade and allow investment into our economy, and it is our national pride. People will want to visit New Zealand because of these strongly reflected values and we should use this as an opportunity to grow the economy and provide high value jobs, via tourism.

Trans-Tasman Safe Travel Zone (when the time is right)

Tourism New Zealand is building a partnership with Tourism Australia to coordinate marketing and demand development for the Trans-Tasman Travel Zone. We are working together to highlight the special camaraderie between Australia and New Zealand and meet weekly to discuss two key opportunities for major leveraging: the announcement of the Travel Zone, and its launch (including first flight).

In addition to the work with Tourism Australia, we have a three-phase plan to promote the Trans-Tasman Travel Zone. These are:

- 1 **Prime** the audience
- 2 **Reignite** travel
- 3 **Scale up** visitor arrivals and value.

While the Travel Zone is in place Tourism New Zealand will initially have an opportunity to grow the Australian market by capturing a proportion of the 10.1 million annual outbound trips to other destinations where Australians are currently unable to travel. We are ready to start our Australian campaign when governments agree that travel is appropriate, and we continue to work with government agencies regarding timing. Australians made up 40% of international arrivals in 2019, contributing \$2.7b to the New Zealand economy. Combined with New Zealand's domestic tourism market, a return of the Australian market could, over time, lead our tourism industry back to 70% of pre-COVID-19 levels.

Supporting the tourism sector – helping operators pivot to a domestic market and improve sector resilience

As part of our response to COVID-19, Tourism New Zealand consulted across the tourism industry, including over 1,000 phone interviews, 2,500 businesses surveyed and 3,000 webinar attendees. We agree with the businesses in the sector that New Zealand has an opportunity to reimagine tourism as it recovers.

In addition to our campaign activity we have released updated market insights information to assist with businesses' pivots to the domestic market. We have also launched a domestic version of newzealand.com allowing operators to promote offerings specifically for the domestic market via Tourism New Zealand's Tourism Business Database.

Since May's 2020 Budget, we moved at pace to deliver business advisory services to tourism operators through Qualmark. Over 1,300 operators have taken advantage of the opportunity to work with experts to support their business viability and transition. We are currently in the early stages of delivering the second wave of that support through the Digital Enablement package which is available to all New Zealand tourism operators.

Tourism New Zealand is currently looking at the potential of Qualmark to play a larger role in supporting a strong and resilient tourism sector for New Zealand. Qualmark already has significant capability in building quality tourism businesses that have high standards of health and safety, quality assurance, and sustainable environment protocols in place. We will keep you updated as this work evolves.

Reconnecting to the world through partnerships

The world is becoming more globalised and more connected. To access the best the world has to offer, consumers are adopting digital technologies at an accelerating pace and COVID-19 hasn't stopped this. This is disrupting traditional industries, intensifying competition, and raising the expectation of the global consumer who expects all their purchases to be convenient, authentic, personalised, and easy to transact through online and mobile channels. The global travel market is no exception.

Digital partnerships

As a niche marketer in this global marketplace, Tourism New Zealand continues to be an innovation leader in global destination marketing. We have established global marketing partnerships with Google and Facebook which enable us to deliver globally with fewer, more integrated initiatives where we can test, learn, and rapidly adapt our approach. We have extended this model into China (where Google and Facebook are not present) and are continuing to develop new online partnerships there as well. These partnerships continue, with Google and Facebook being active in the industry's recovery. For example, in August Qualmark and Google hosted a webinar on digital enablement, showing tourism operators how to make their experiences more visible in search engines.

Air connectivity

Prior to COVID-19 there was a significant increase in airline capacity, primarily from China and the USA. Generally, increased competition on routes provided more choice for consumers and more competitive pricing from airlines. We worked alongside aviation partners to support the viability of new and existing routes.

Strengthening these partnerships post-COVID will be key to tourism recovery, whether in previously established or new markets. The return of international passenger air routes to New Zealand is not a given, particularly as other countries in our region potentially open their borders and air routes sooner or may take priority by major airlines. We recommend early conversations with the Minister of Transport on this issue, and a strategic approach across agencies to determine the actions that will put New Zealand in a stronger position to re-establish international connectivity with key markets, when the health situation allows.

Our primary partner is Air New Zealand, with whom we have a \$20m annual Memorandum of Understanding committing the partners to shared marketing activity to the value of \$10m each – this has continued while both organisations commit to more domestic marketing. Strengthening Air New Zealand early, from ensuring that their planes are ready to fly when borders open, that pilots have the requisite flying hours to fly those planes, and that it can invest in a diverse range of markets, will be key to New Zealand's economic recovery.

Qualmark and Air New Zealand also cooperate on sustainability, quality and health and safety, which is key for lifting the quality of tourism in our regions. This includes a page on Air New Zealand's website aimed at promoting activities and attractions awarded a Qualmark endorsement for their commitment to quality, safety and sustainability. Amongst the activities sold on the site are winners of the Qualmark 100% Pure New Zealand Experience Awards, acknowledged for demonstrating excellence in

sustainable visitor experiences; Kaitiaki Adventures, Rotorua Canopy Tours, Redwoods Treewalks, Franz Josef Glacier Guides, Real Journeys cruises and Hanmer Springs Thermal Pools & Spa.

We had partnerships with United and American Airlines with relatively new routes established into Auckland and Christchurch

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We will continue to work in collaboration with the international airports (Auckland and Christchurch International Airports) in their network planning, ensuring we partner in key markets early in their reopening. The role for Tourism New Zealand will be to help the airlines sell their seats by clearly targeting people who are already seriously considering visiting New Zealand (Active Considerers or ACs). Other airline partnerships include American Airlines, Emirates, China Southern, and LATAM Airlines.

International Market Recovery: an agile plan to balance future shocks.

For international market recovery, Tourism New Zealand currently believes it is better to maintain an agile plan rather than assume knowledge about the global recovery or specific border status. While there are significant unknowns in the coming year, we have a flexible plan to support the recovery of the tourism sector.

High value visitors

Tourism New Zealand is currently working with strategic industry partners on unique ways for people to experience New Zealand without actually arriving. The aim of this is to encourage high-value visitors to consider booking travel when borders re-open. This is in the context of some markets having 9-18 month lead times to considering visiting New Zealand to booking travel.

Diversity of markets

It is important to have a diverse portfolio of markets and Tourism New Zealand will continue to support the tourism industry (including airports and airlines) on building an inclusive range of markets. We will continue to state the need to avoid over-reliance on any one or two markets, and exposure to single-market risks and shocks.

Tourism New Zealand's internal response to COVID-19 challenges

We are actively managing our footprint and operations to prioritise investment

While Tourism New Zealand is expanding its activities in New Zealand and preparing for the eventual opening of the Trans-Tasman Travel Zone, we have also reviewed our international staffing and operations.

We have hibernated some offshore functions

To fund Tourism New Zealand's extension and investment into domestic marketing, we are hibernating some of our offshore functions. Our travel trade activity has been reduced to maintenance level only, and no conversion activity will take place until potentially mid-2021. This has temporarily decreased the level of offshore staffing required to deliver services. We also recognise that when demand for offshore functions increases again, this may happen at different speeds in different parts of the world and could mean that the locations and focus of our operations needs to adapt to meet this change.

We are supporting our people through secondments

We have worked with New Zealand Trade and Enterprise (NZTE) and other offshore agencies to find mutually beneficial opportunities for our offshore staff in cases where other offshore agencies are boosting international activity while Tourism New Zealand is winding back. This includes seconding staff to these agencies for a year while retaining the flexibility to recall staff to support Tourism New Zealand when required. As borders open, our New Zealand and offshore teams will be ready to push strongly into international markets for the benefit of New Zealand's economic recovery.

5. Work with government partners: advising government on economic recovery

Working across Government has never been more important

Since the impact of COVID-19 has been felt, we have been working with other agencies, including MBIE and New Zealand Trade and Enterprise, on the public sector's response. We have also been advising the Tourism Recovery Minister's Group and the Tourism Futures Taskforce regarding the range of initiatives to support the tourism sector to build back better from the COVID-19 crisis.

Tourism New Zealand has been engaging with NZ Inc. now more than ever. This engagement has covered a range of issues – from tourism business advisory support with NZTE and MBIE, to sharing strategies on market engagement with Education New Zealand, keeping up to date on visa processing with Immigration New Zealand, participating in trade and virtual APEC delivery discussions with the Ministry of Foreign Affairs and Trade, and a wide ranging partnership with the Department of Conservation. This work also includes the multi-agency partnership on Brand New Zealand as referred to in section 3.

Gaining the support of New Zealanders for tourism in a post-COVID-19 world

Research conducted in collaboration with Tourism Industry Aotearoa (the 'Mood of the Nation') indicates pre-COVID-19 that New Zealanders were mostly supportive of the tourism sector, with 92% of New Zealanders agreeing that tourism is good for the nation and 89% feeling proud that New Zealand remains an attractive destination². However, issues resulting from rapid growth, such as a lack of infrastructure, freedom camping, and visiting drivers were creating concerns around New Zealand's ability to cope with the growth. These issues require a number of government and private sector actors to work together and address these challenges.

Tourism New Zealand will continue with its programme of work to monitor the industry's social license to operate and ensure that measures are taken to sustain and enhance the experience of both visitors and Kiwis. Tourism New Zealand will continue to work with other government agencies (e.g. through the Tourism Chief Executives' Group) and the sector to respond to tourism pressures and help communicate the benefit that tourism delivers to New Zealanders and their communities.

² Mood of the Nation results published March 2020, with research conducted during the peak summer tourism season immediately prior to the emergence of COVID-19.

6. The next quarter

Decisions and feedback we need from you

We look forward to meeting with you to understand your priorities and how TNZ can help to deliver results aligned with these.

TNZ's Statement of Performance Expectations and Annual Report will shortly be ready for tabling in the House, and we will provide your office with the copies needed to complete this process.

Airline connectivity and support

Tourism New Zealand views the issue of airline connectivity as something that needs to be addressed across government and airline and airport partners with a coordinated strategy.

New Zealand enjoyed a peak of 28 international carriers operating routes to Auckland pre-COVID-19, the result of positive growth in air connections from 2015-2019. This was due to airlines being profitable elsewhere, able to take commercial risks, and New Zealand being one of the last places for some global airlines to add to their networks. This context is now reversed – airlines are not in a fit state to invest in less commercially-viable routes without other incentives being offered. It will also take time for airlines to rebuild their fleets to put them in a position to invest in long haul routes.

Other borders in the Asia Pacific will be opening before New Zealand, providing locations for airlines to place aircraft earlier, affecting our competitiveness.

To take advantage of border re-openings, significant advance planning is needed.

Tourism New Zealand's marketing investments may not be aligned with likely prospects for border re-openings unless it is included in the government border strategy process.

We recommend early discussions with your colleague, the Minister of Transport, on how agencies might collaborate to identify the steps that can be taken in key markets to position New Zealand to re-establish the passenger air routes that will be critical to our global connectivity in the medium to long term. As a first step, Tourism New Zealand has commenced workshops with Auckland Airport to start to build more detailed recommendations in this area ready for further engagement from the Ministry of Transport and other agencies.

Tourism New Zealand's budget position

As part of New Zealand's recovery, Tourism New Zealand is a key revenue generator – both in terms of stimulating the domestic market and supporting the regions, and bringing in foreign exchange for the New Zealand economy and GST for the Crown.

In response to COVID-19, Tourism New Zealand proactively reallocated ^{Commercial Int} from our baseline budget to establish a domestic function. This has been viable this year while our activity in offshore markets has been reduced.

Looking ahead to the job to be done for the tourism sector and New Zealand economy as borders reopen in the 2021-22 financial year, key decisions will need to be made to ensure Tourism New Zealand is able to prioritise both domestic and international visitor value in line with the Government's expectations. We expect the international market to be extremely competitive – but the opportunities for New Zealand to leverage its reputation from COVID-19 for positive export outcomes will also be significant. Tourism New Zealand will be preparing advice on the contribution we can make from an increased

budget investment in FY22. Tourism New Zealand's budget has remained flat, or has been reduced, for the last five years.

Key influencer exception programme

Tourism New Zealand is currently working with MBIE and Immigration NZ on a proposal to keep the New Zealand brand alive in key markets through major PR activity. This is intended to capitalise on our success with previous key influencers **Commercial Information**

These types of strategic activity would generate significant long-term economic value for multiple export sectors. We would welcome the opportunity to discuss this with you in person in an upcoming officials' meeting.

Briefings on key issues

There are several key issues that require a full briefing paper and a discussion with you. For Tourism New Zealand, these are currently:

- **Building Qualmark** to become a business advisory foundation for the tourism sector – COVID-19 has seen Qualmark support the tourism sector in stronger ways than ever before. Tourism New Zealand believes that Qualmark could act as a long-term foundation of support, focusing on a resilient sector with quality and sustainability at its core. A high-quality tourism sector attracts high quality visitors.
- **Support for Inbound Tourism Operators (ITOs)** – this is a sector that is vital for Tourism New Zealand to partner with for attracting International visitors as they target specific customers in key markets in a way that is more detailed than Tourism New Zealand is able to. While borders are closed, ITOs have little income and the ability to operate and maintain relationships in those markets will remain challenging. Some markets have 9-18-month lead times. Tourism New Zealand is currently considering a deeper partnerships programme with a select number of ITOs and will look to brief you on how a programme like this might look.
- **Business Events** - Prior to COVID-19, business events were a significant generator of economic, academic and social value to New Zealand. This is a unique sector with long lead times (some events bring in 3000 visitors to New Zealand but with lead times of several years, often competing against other destinations that have high government subsidies and incentives). The average international conference delegate contributed \$2434 per visit to New Zealand before COVID-19 with connections made academically that have contributed to New Zealand's science abilities. We will provide you with a briefing about this sector and how we are supporting the domestic business events sector in the context of COVID-19 in the coming weeks.
- **Tourism productivity** Tourism New Zealand is set to publish a report on tourism productivity this month. In partnership with economists Fresh Info the project measures the impacts of both tourism and the wider visitor economy across areas like productivity, employment and personal income, crown income, carbon footprint and how tourism and the visitor economy support communities and social amenities. This work will 'lift the lid' on the productivity and impact of the sector and challenge some long-held assumptions of tourism being a low-wage, low-productivity sector. The research aims to uncover the real story of tourism's impact on New Zealand society to create new indicators and insights for the sector. Tourism New Zealand would welcome an early opportunity to work through initial findings of this project with you. Further details about the upcoming report are attached in the Annex.

6. How Tourism New Zealand communicates with Ministers; Board Members and Key Tourism New Zealand Executive Contacts

Communication with Ministers

Along with the Chair of the Tourism New Zealand Board Jamie Tuuta, the Chief Executive meets with the Minister of Tourism regularly at the Minister's discretion.

Regular contact with the office of the Minister and Associate Minister is managed by Acting General Manager New Zealand and Government Relations, Billie Moore.

Communications that Ministers can expect to receive from Tourism New Zealand include:

- Weekly Briefings – upcoming activity, matters arising over the week and achievements.
- Quarterly Reports – information on how Tourism New Zealand is tracking towards its performance measures outlined in our Statement of Performance Expectations. Tourism New Zealand's financial performance is also summarised along with an update on key tourism outcomes such as international visitor arrivals in these reports. The dates the Quarterly Reports are provided to Ministers are committed to in Tourism New Zealand's Output Agreement with Ministers.
- Statement of Intent – Tourism New Zealand's intent for a four-year period. The next SOI will be provided in 2021.
- Statement of Performance Expectations – is provided annually in June and describes the key activity and outputs, including performance measures that Tourism New Zealand will deliver. This was delayed due to COVID-19 – it was finalised and approved by Hon Davis in September 2020 and will be tabled in Parliament when it resumes.
- Annual Report – close to finalisation and to be tabled in Parliament when it resumes.

Board

Jamie Tuuta was first appointed to the Board in March 2013 and was appointed Chair in April 2019. Jamie also chairs the conservation project Taranaki Maunga and Māori Television, and was the Māori Trustee and Chief Executive of Te Tumu Paeroa. Jamie has held a range of governance positions in iwi development, agribusiness, fishing, investment, health, Māori development, tourism, and education.

Roger Sharp (Deputy Chair) has over 30 years' experience in travel, technology, and capital markets, and chairs global digital travel business, Webjet. Roger became an aviation banker in the 90s, advising on flagship transactions including the privatisation of Air New Zealand and Qantas. After working for one of the world's largest financial institutions, he founded a technology investment banking firm in 2003. Since then he has invested in and chaired several stock exchange listed companies including ASX-listed online travel agent travel.com.au Limited, which was sold to Wotif.com in 2008. Roger was officially appointed to the board on 1 December 2018.

Colleen Neville (Ngati Maniapoto, Waikato-Tainui) is the CEO of Te Arawa Group Holdings Limited, the commercial arm of Te Pumautanga o Te Arawa Trust. She has 16 years' experience as a Chartered Accountant in diverse sectors including tourism, forestry, agribusiness, and health services, and has extensive expertise in Māori post-settlement governance entities, Māori incorporations and Māori land

trusts. Her governance experience has covered Scion, Poutama Trust, Te Ohu Kaimoana, Te Kakano Whakatipu Ltd, Te Arawa Agribusiness Ltd, and Te Matai Pacific Iwi Collective. She was appointed to the Board in September 2018.

Kauahi Ngapora is General Manager of Whale Watch Kaikoura Ltd and has 25 years of experience in the Māori tourism sector. His governance experience includes directorships at Tourism Industry Aotearoa and Whale Watch Australia. He has also been Chair of Destination Kaikoura and is a member of the Tourism Infrastructure Fund panel. Kauahi was awarded the Outstanding Māori Business Leader Award at the 2018 University of Auckland's Aotearoa Māori Business Leaders Awards. He was appointed to the Board in September 2018.

Mike "MOD" O'Donnell is a full-time director with a background in eCommerce, technology, tourism, and funds management. Mike is chairman of cloud-based booking platform Timely, and is a director of Kiwibank, Kiwi Wealth, G2G Know-How, Serato Music, Raygun Performance Software, and Radio New Zealand. The former Chief Operating Officer of Trade Me and vWork, MOD previously chaired Positively Wellington Tourism and has managed several online travel businesses. MOD was appointed to the New Zealand Tourism Board in October 2013.

Jan Hunt is a director at Skyline Enterprises and Jumping New Zealand. Previously she was a Board member of the Queenstown Chamber of Commerce and worked as a General Manager at Millbrook Resort, Sky City Hotel & Convention Centre, and Millennium Queenstown. Jan was appointed to the New Zealand Tourism Board in June 2017.

John Thorburn is Chief Executive of Entrada Travel Group and was previously the Chief Executive of Ngāi Tahu Tourism. John is also Director of InterCity Group Australia Pty Limited. He has held senior positions in a range of industries, including manufacturing, marketing and telecommunications. John has also held previous board positions with Tourism Industry Aotearoa and the New Zealand Conservation Authority. John was appointed to the New Zealand Tourism Board in August 2012.

Executive Contacts

The Chief Executive is Stephen England-Hall. The CE is supported by an Executive Leadership Team including:

Wellington Office

- Rebecca Ingram – General Manager, New Zealand and Government Relations.
- Natalie Haines – General Manager, People and Culture

Auckland Office

- Brendan Downey-Parish - General Manager CX, Technology & Data
- Brodie Reid – Director of Marketing
- René de Monchy – Director Commercial
- Sue Parcell – Chief Financial Officer
- Tony Rogers – Incoming Acting Director of Marketing (9/11/20 – 19/01/22)

Under Rene de Monchy, Director Commercial, our Global Regions are managed by three General Managers:

- Sarah Handley – General Manager Americas and Europe (Los Angeles)

- Andrew Waddel- General Manager Australia (Sydney)
- Gregg Wafelbakker - General Manager Asia (Singapore)

Annex

Te Ōhanga Productivity Report – key messages and early results

This report is our latest research into the tourism sector, in partnership with Fresh Info and Statistics New Zealand, to understand how visitors contribute to New Zealand’s wellbeing. We include some overview slides from the research for your review.

The analysis provides new ways of thinking about and communicating the value of tourism as the Government considers its approach to New Zealand’s economic recovery.

We will be producing two reports from this research and will keep you posted on the development and release of both reports:

1. Stage One will be a foundation report designed to test existing thinking about the sector.
2. Stage Two will develop new measures and data, analyse regional tourism dependency and the contribution of tourism to social amenities.