

# Briefing for the incoming Minister for Tourism and Hospitality

27 November 2023



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# 1. Welcome to the Tourism and Hospitality portfolio

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1. As the incoming Minister for Tourism and Hospitality, you have a number of priorities focused on growing the contribution of tourism and hospitality to New Zealand. We have set out our understanding of your immediate priorities in the table below. We would value an early opportunity to discuss their relative priority with you and to support you to develop a portfolio work programme.

Source	Manifesto Commitment/Coalition Agreement	High level cost estimate \$million	FTE implication
National-ACT Coalition Agreement	Stop work on Industry Transformation Plans	(\$16.6m) (over four years)	0
100 point economic plan	E-bike chargers on Great Rides	\$3.0m (over four years)	0.5
100 point economic plan	Regional Events Promotion	\$5.0m (over four years)	0.5

2. Other government priorities relevant to Tourism and Hospitality include:
- Growing exports
  - City and regional deals (local government)
  - Prioritising the relationship with India
  - A new Great Walk
  - Reform of DOC concessions
  - Immigration reform
  - Workplace relations reform
3. While you don't lead these reforms, MBIE can assist you to ensure that your priorities for Tourism and Hospitality are reflected in the work.
4. The purpose of this briefing is to:
- Provide background information about the Tourism and Hospitality portfolio (contained in sections 2, 4, 5 and 6 of this briefing).
  - Provide initial advice on the strategic issues facing New Zealand's tourism and hospitality sector (section 3 of this briefing).
  - In addition to helping you to implement your priorities for the portfolio, identify key areas where the Ministry of Business, Innovation and Employment (MBIE) considers policy settings within the portfolio could be improved to optimise the impact of these sectors on the New Zealand economy (section 3 of this briefing). These areas could be considered for inclusion in the work programme alongside your stated priorities.
5. Further briefings will be provided to you as needed, focussing on specific topics in greater depth.

## 2. Portfolio overview

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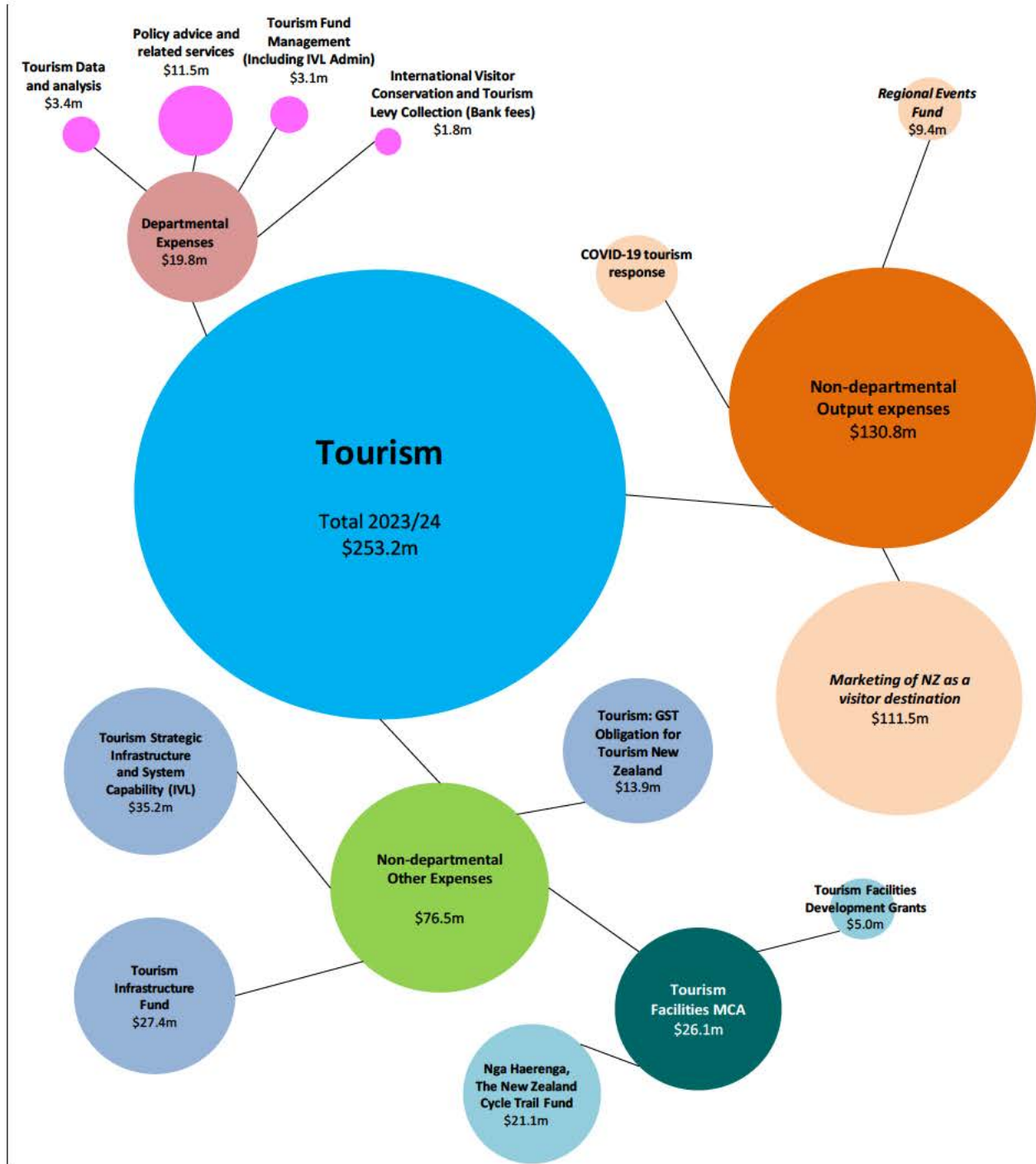
### Purpose of this section

6. This section sets the scene for the Tourism and Hospitality portfolio by outlining what you are responsible for, the associated appropriations and MBIE staffing arrangements.
7. This portfolio overview is supplemented by section 4 of this briefing, which provides a more detailed breakdown of the legislation, entities and appropriations that sit within this portfolio and section 3, which contains information on the challenges and opportunities available in the tourism sector.

### Departmental arrangements

8. MBIE services the Tourism and Hospitality portfolio. However, most of the issues and opportunities that face the two sectors are the responsibility of other portfolios. Relevant MBIE portfolios include Immigration and Workplace Relations (including Adventure Activities).
9. Key examples that aren't within MBIE include Conservation (concessions to operate tourism businesses on conservation land), Justice (Sale and Supply of Liquor), Internal Affairs (Gambling).
10. Areas of common interest for Tourism and Hospitality include immigration, employment relations, short-term rental accommodation and local government funding (e.g., targeted rates and bed taxes).
11. Regional tourism organisations, local authorities and local economic development agencies are responsible for local and regional tourism planning and delivery, and much of the regulation of hospitality. These relationships and opportunities are described in section 3.
12. In addition, Tourism New Zealand is a Crown entity with responsibility for marketing New Zealand as a tourism destination internationally. You have responsibility for overseeing and managing the Crown's interest in, and relationship with, Tourism New Zealand.
13. The previous Tourism portfolio sits within Vote Business, Science and Innovation. For 2023/24, the appropriation for Vote Business, Science and Innovation is \$5.3b, of which \$253.2m is for the Tourism portfolio. The portfolio appropriation is split between departmental funding (funding received by MBIE to provide services directly) of \$19.8m, and non-departmental funding (funding provided via MBIE to others for them to provide services) of \$233.4m.
14. The appropriation includes revenue from the International Visitor Conservation and Tourism Levy (IVL) which is hypothecated for both tourism and conservation initiatives. You are responsible for the tourism component of the IVL (around \$40m annually) which is discussed in section 4. A diagram showing the breakdown of departmental and non-departmental spend is provided in figure 1, below.
15. Much of the non-departmental funding is time-limited and is required to meet contractual commitments from funds that have now closed (Regional Events Fund, Tourism Facilities Grants, and Tourism Infrastructure Fund), so the portfolio budget allocation will shrink to \$173.7m in 2024/25.
16. Confidential advice to Government

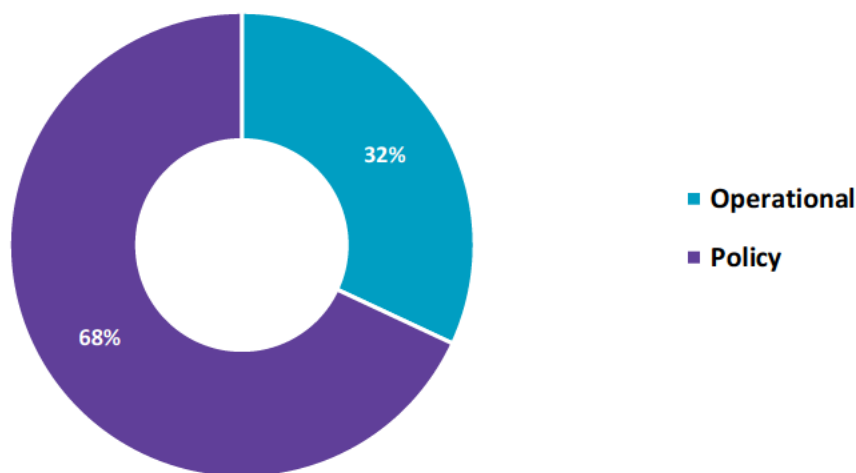
Figure 1: Tourism portfolio Budget allocation (after October Baseline Update) 2023/24



17. The Tourism and Hospitality portfolio is supported by MBIE, with 40.4 full time equivalent (FTE) staff, which is 0.6% of the total MBIE workforce<sup>1</sup>, as of September 2023. This is broken down in figure 2, below:

<sup>1</sup> Excludes enablement functions such as finance and information technology.

Figure 2: Tourism and Hospitality portfolio by policy/operational function



Portfolio FTE by Function

Function	Portfolio FTE	Portfolio %
Operational	12.9	32%
Policy	27.5	68%
<b>Total staff</b>	<b>40.4</b>	<b>100%</b>

18. Operational staff are largely engaged in investment management, including working with the IVL and Ngā Haerenga New Zealand Cycle Trails’ Great Rides of New Zealand (Great Rides).

## Your responsibilities

19. As Tourism and Hospitality Minister, you are responsible for the broad support and promotion of tourism and hospitality for New Zealand’s economy.
20. The tourism sector can be complex to define, with overlapping portfolios and interests. It is not an industry sector per se, rather tourism expenditure is defined as any spend which takes place more than 40km from the customer’s home. Expenditure is counted from New Zealanders and international visitors. As a result, it is hard to define a ‘tourism’ business. Governments have generally managed the performance of tourism in New Zealand through policy co-ordination and investment tools. There is very little sector-specific regulation in the tourism portfolio.
21. Hospitality is primarily made up of several industry sectors – accommodation, food and beverage and some gambling businesses. They have different relationships to tourism. Most demand for accommodation can be attributed to tourism, whereas less than half of demand for food and beverage is attributable to tourism.
22. The main levers you can use as Tourism and Hospitality Minister are:
  - Tourism New Zealand (a Crown entity) operates at arm’s length from you, but can influence the mix of visitors, when they come and what they do once they are here. You are able to set objectives and measures of success for Tourism New Zealand in a Letter of Expectations. You also choose the members of the Board and can participate in strategic discussions with the Board and Chair.



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- The IVL provides ring-fenced funding for tourism and conservation initiatives. You, the Minister of Conservation, and the Minister of Finance are responsible for this expenditure.
  - There is funding available as grants for the maintenance and repair of the 'Great Rides' Cycle Trails.
  - You are on the joint Ministers groups for the Milford Opportunities Project and the Major Events Fund.
  - You have decision-making power over grants under the Innovation Programme for Tourism Recovery.
  - You or Cabinet colleagues likely have some levers available in the Hospitality sector, which we can advise on as your priorities develop.
23. You are also responsible for a range of tourism data products including the International Visitor Survey, Monthly Regional Tourism Estimates and Accommodation Data Programme. MBIE will brief you separately on tourism data.
24. Because visitors undertake a wide range of activities in a wide range of places you will need to work with your Ministerial colleagues to advance some of your objectives. The key Ministerial areas with cross-over into the Tourism portfolio are:
- Conservation – a key part of the tourism offering, where publicly funded facilities are also important for our brand and visitor experience.
  - Transport – across air, land and sea, which enables visitors to access and tour New Zealand. Work led in this portfolio is critical for reducing tourism's emissions.
  - Local Government and the Department of Internal Affairs – own and implement legislation which can affect tourism activity (for example, the Freedom Camping Act).
  - Infrastructure and Local Government – local authorities provide infrastructure and many public amenities used by visitors; planning and regulatory decisions shape patterns of business activity; and local entities work with the sector to promote and manage their areas as destinations. The cross-over with Infrastructure and Local Government will also be especially relevant where City and Regional Deals may be developed and implemented in key tourism destinations.
  - Immigration – policy settings and operational processes matter for workforce and visitors.
  - Small Business – the majority of tourism firms have 20 or fewer employees and are significantly impacted by regulation or supports offered to small businesses.
  - Major Events – a key part of our offering to visitors and provide a valuable role in spreading visitation to regions and outside of peak visitation periods. Officials from Tourism and Major Events work closely together, and we recommend you collaborate with the Minister of Economic Development on these issues.
  - Justice, Internal Affairs and Food Safety are the key portfolios that regulate the Hospitality sector.
25. MBIE is keen to work with you to ensure that we are focused on your priorities.

## Legislation

26. As the Minister of Tourism, you are responsible for the following legislation:

- The *New Zealand Tourism Board Act 1991*, which establishes Tourism New Zealand.
- Sections 399A and 399B of the *Immigration Act 2009*, which is the legislation underpinning the IVL. The rate of the IVL is due for review in 2024 and any change in this rate will be legislated by you (see section [6]).
- The *Freedom Camping Act 2011* and associated sections of the *Plumbers, Gasfitters and Drainlayers Act 2008* [ss87H, 172(1A), 172A, 172B, and 172C]. These concern your role in relation to the Plumbers, Gasfitters and Drainlayers Board's regulation of the certification of self-contained vehicles, which are used for freedom camping.



### 3. Strategic choices in the Tourism and Hospitality portfolio

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#### Overview of this section

27. The Government has a clear priority to deliver practical support to lift the contribution of tourism to the New Zealand economy and export performance. Tourism is already a major export for New Zealand and in the short-term we expect visitor volumes to rise.
28. You have immediate direct priorities around e-bike chargers on Great Rides, a Regional Events Fund and a range of reforms in other portfolios that will support tourism and hospitality.
29. This section provides further economic context for the role of tourism within New Zealand's broad economic outlook. This section recommends the following key actions, which, in addition to your manifesto commitments, will address strategic challenges and ensure that tourism can fully contribute to New Zealand's economic success:
  - Ensuring visitors contribute to the amenities that they use and costs they create.
  - Ensuring the sector can both adapt to and contribute to the mitigation of climate change.
  - Supporting regions to manage congestion and infrastructure pressures at place, using tools such as destination management and freedom camping reforms.
30. Reforming how commercial activity on conservation land is managed to drive better outcomes for the economy and environment.
31. As Hospitality is a new addition to the portfolio, we lastly discuss the similarities and differences between Tourism and Hospitality, and key issues raised by the Hospitality Sector.

#### The economic context

32. As outlined in MBIE's separate briefing on the economic context, New Zealand's economy faces a number of long-term challenges. These include weak productivity, increasing stresses on our economic resilience, negative impacts on the natural environment, and significant disparities between different population groups.
33. Compounding these, are global 'megatrends', such as changes in climate, technology, and demography, and rising geopolitical tensions. In addition, in the short-term, our economy also faces immediate headwinds.
34. These challenges and trends present both risks and opportunities to the economy. MBIE can help you to work collaboratively across portfolios and with stakeholders, such as business and local communities, to achieve your immediate portfolio priorities and address these challenges.

#### Tourism is important to New Zealand

35. As well as playing a valuable role in our economy, tourism brings significant non-financial benefits to New Zealand by supporting regional potential, helping to preserve our natural environment and supporting people-to-people linkages across the globe. Airline capacity is made up of both passengers and freight.

**Tourism contributes to the New Zealand economy in multiple ways**

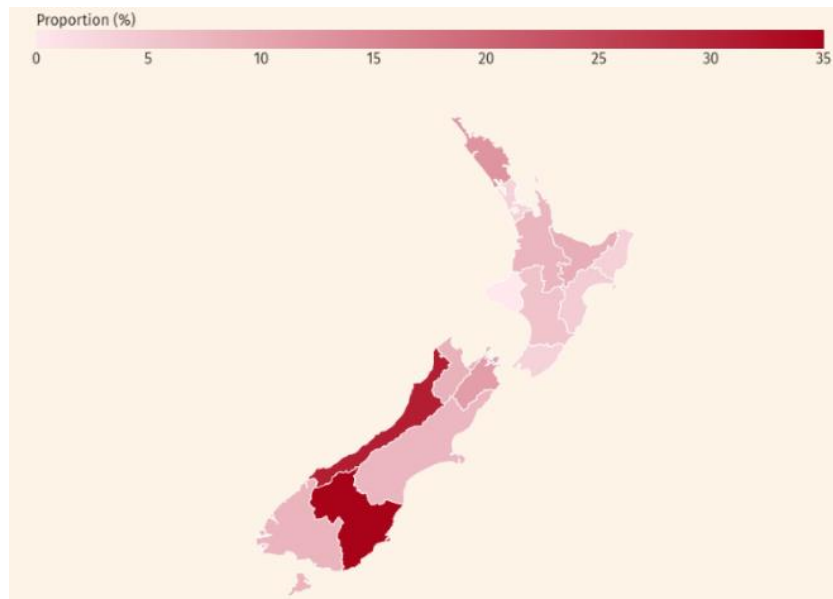
36. Globally, tourism has boomed due to growing global wealth and reductions in the real costs of travel. New Zealand's natural endowments (e.g., natural environment, culture) and our perception as a safe destination have enabled tourism to develop and become an important part of the New Zealand economy.
37. International tourism adds to aggregate demand, and visitors spend widely across the economy, including on fuel, groceries, and retail goods, as well as transport, accommodation, tourism activities and attractions. Pre-COVID-19, the direct impact of tourism (both international and domestic) was over five per cent of GDP.
38. Tourism demand also generates significant employment. Pre-COVID-19, eight per cent of those employed in New Zealand were employed directly because of tourism demand.
39. COVID-19 had a severe impact on New Zealand's tourism sector as international visitors dropped to almost zero. Increased domestic tourism (in part, a result of closed borders limiting options and domestic tourism marketing from Tourism New Zealand) and government support was able to retain key attractions and services.
40. International visitor volumes have recovered strongly following the reopening of New Zealand's borders, with new airline routes and increased competition on some routes. In the short-term, international visitor growth will likely continue to deliver benefits for New Zealand's economy.

**Tourism provides an opportunity to use New Zealand's natural environment sustainably**

41. The natural environment underpins much of New Zealand's international marketing and many regions' tourism offerings. Being able to tell the stories of the whenua is also of critical importance to many communities, including Māori groups.
42. In many cases, allowing visitors access to enjoy natural resources creates a more sustainable use of that resource, compared with more extractive historic usage such as forestry or mining. Over the last few decades both government and the private sector have invested heavily in experiences that enable visitors to engage with the landscapes, historic features and biodiversity (eg walking and cycling tracks).

**Tourism underpins many regional economies**

43. There are firms who rely on demand from visitors in every region. For some regions this is a significant share of the local economy. Figure 3, below, shows the relative exposure of New Zealand's regions.

**Figure 3: Tourism expenditure as a proportion of regional GDP, 2020**

44. For many smaller centres, visitor volumes enable the provision of services and amenities that the resident population could not sustain. This includes supermarkets, medical services, small retailers and hospitality businesses.
45. Tourism also brings significant employment to regions, increasing economic activity as well as improving outcomes for regional communities.

### **Tourism and hospitality is about people-to-people relationships**

46. We know from the work of TNZ that there are many people around the world attracted to what New Zealand offers, and our way of life. Tourism and hospitality is a way to cement these people-to-people relationships. Each return flight also enables New Zealanders to travel for business or leisure.
47. Brand promotion by TNZ is one of the most recognisable images of New Zealand internationally. The relationships and recognition built by their activity supports not only tourism, but broader business relationships and trade relationships.

### **Tourism is not costless – and this constrains its potential**

48. Tourism creates both direct costs to New Zealanders and there is an opportunity cost for other parts of the economy. Resolving these tensions and trade-offs is the key policy challenge for tourism. These costs include:
  - Public provision of the goods and services that visitors use
  - Impact on New Zealanders ('over-tourism')
  - Risk of shocks (and expectations of government support)
  - Carbon emissions
  - Productivity challenges and utilisation of labour

### **Tourism relies on publicly provided goods and services**

49. Visitors rely on a range of publicly provided goods and services that are paid for and used by local ratepayers and/or taxpayers. This includes everything from roads to water infrastructure to walking tracks. These are usually free at the point of consumption.
50. Because there is no direct revenue link between users and the use of public goods and services, if there is increased demand from tourism, you will tend to see both under-investment in and over-consumption of public goods and services. This manifests in several ways:
  - For local authorities, it leads to pressure on infrastructure. For instance, the daily population in Queenstown can, at peak times, be twice the resident population. This effective demand dictates the water and wastewater capacity required at a location, but councils or ratepayers might not have the ability or willingness to pay for this capacity.
  - For some popular Department of Conservation tracks, it can lead to congestion and a degradation of the natural environment.
51. Because tourism is both highly seasonal and labour intensive, it also creates housing and transport pressures at peak times.
52. The limited potential to charge tourists for the costs they create limits New Zealand's ability to maintain or enhance existing infrastructure, let alone adjust to the impacts of more extreme weather events.

### **As tourism volumes increase, over-tourism becomes a significant issue**

53. In most popular tourism destinations in the world, the issue of 'over-tourism' arose pre-COVID-19. Tourism 'hot spots' tend to attract more visitors, with their popularity drawing ever-increasing visitor numbers. This contributes to the under-investment and over-consumption issues raised above, but also prevents new or emerging locations from attracting new guests.
54. Over-tourism has a direct impact on New Zealanders as it has both economic costs (e.g., longer travel times) and social impacts (e.g., displacement from places and activities that they previously enjoyed). It is felt place-by-place, rather than for the country as a whole.
55. We have observed increasing articles – in both the media and from academia – on the topic of over-tourism post-COVID. A range of countries are making policy reforms to ensure that their destinations remain competitive, and retain domestic social licence.

### **The sector is exposed to economic and natural shocks, which results in calls for government support**

56. Over the last few decades, several events have highlighted that tourism (particularly at a local level) is vulnerable to shocks on both the demand side (e.g., the impact of COVID-19 limiting visitors) and supply side (e.g., extreme weather events damaging tourism infrastructure)<sup>2</sup>. This has resulted in pressure for financial support to the sector from central government. Central and local government are also regularly asked to support firms that lose revenue and market regions as 'open for business'.
57. Globally there have been a number of recent examples of geo-political risks to tourism demand as well. Through Tourism New Zealand the government takes a portfolio approach to international

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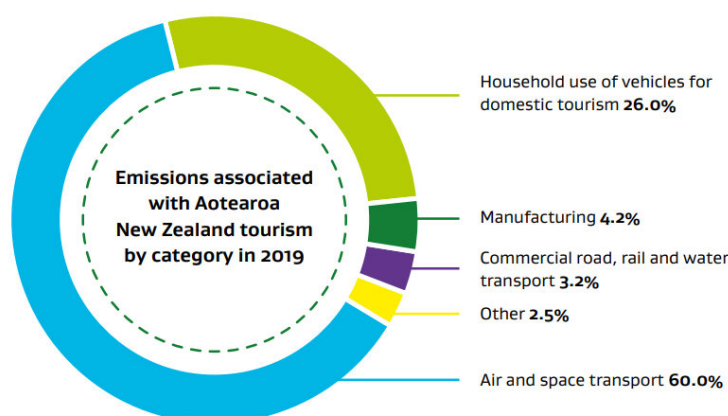
<sup>2</sup> Outside the COVID-19 pandemic, there have been regular calls for support and ad hoc funding.

markets, but notwithstanding this, risks remain. Australia, the United States and China are New Zealand’s largest source markets.

**Increased tourism to New Zealand will result in increased carbon emissions**

58. Carbon emissions connected with tourism, are dominated by emissions from air travel (see figure 4, below). There are currently no commercially available alternatives to substantially eliminate carbon emissions for long-haul air travel. International tourism therefore exacerbates the global climate risk. In terms of the government’s goals to grow exports it also creates a potential competitive disadvantage for tourism to New Zealand given the long-haul distances required to get here, and leaves New Zealand exposed to shocks brought about by both changes in consumer preference and environmental disasters.

**Figure 4: Emissions profile for tourism in New Zealand, 2019**



**There are inherent productivity challenges with tourism**

59. Growth in tourism in the short-term will be economically significant, and it is likely that visitors to New Zealand will continue to spend, even as New Zealanders spending declines. Over the last decade, labour and capital has flowed to tourism, suggesting it has been one of the highest value uses of the resource available in New Zealand.

60. However, MBIE is of the view that unmanaged tourism growth over the medium- to long-term is unlikely to tackle New Zealand’s broader economic challenges, including productivity and lifting per-capita incomes. This is discussed further in MBIE’s overall economic BIM. There are several reasons for this:

- Tourism expenditure flows to activities and sectors that tend to have lower productivity (eg retail goods).
- Key parts of the tourism experience are labour intensive, with human interaction and manaakitanga is part of the experience (e.g., hospitality, tour guiding). Tourism expenditure directly contributed 5.4% of New Zealand’s GDP in 2020, but employed 7.9% of the workforce<sup>3</sup>.
- International demand for New Zealand is highly seasonal leading to capital lying idle (e.g., rental vehicles that are parked up for winter) and a reliance on temporary labour.

<sup>3</sup> 2020 Tourism Satellite Account.

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- For key parts of the sector with high fixed costs – airports, transport and accommodation – productivity gains will only come with volume growth (exacerbating congestion and capacity costs elsewhere in the system as noted above).
61. Wages in the tourism sector are on average \$6.68 per hour lower than the New Zealand median wage, with the estimated tourism median wage at \$24.98 compared with \$31.66 across New Zealand<sup>4</sup>. This is lower than rates in the horticulture sector.
  62. Even leaving aside environmental and infrastructure limits, any sustainable growth of the tourism sector will rely on both a sustainable source of labour and investment in productivity enhancing technology (e.g., using technology tools to forecast demand and create staff rosters). Work in the sector tends to be perceived as low pay, limited to peak season and with unsociable hours. New Zealanders are often put off taking work in the sector and it has relied on overseas workers. Large numbers of small firms can also mean there is less capital to invest in productivity-enhancing technology and practices.
  63. These factors have led to calls from the industry to successive governments for assistance with skills and immigration issues. We will brief you separately on work we have done with industry on this.

### **Reliance on temporary migrant labour exacerbates infrastructure pressures**

64. The COVID-19 shock had a major impact on the supply of labour in the sector. This has been a global phenomenon. While the total number of temporary migrant workers in New Zealand only fell slightly, there were larger reductions and gaps in arrivals of international students and working holiday visa travellers that some parts of the sector heavily utilise. At the same time, there were increased employment opportunities for people to work in other sectors that paid higher wages<sup>5</sup>.
65. In recent years (outside the COVID-19 response), there has been an emphasis on using immigration settings to facilitate skills attraction with a stronger focus on restricting lower skilled workers to encourage productivity improvements and using it as a more active labour market lever to lift incentives to train and improve wages and conditions for New Zealanders.
66. Conversely, while greater availability of lower cost, temporary labour can facilitate faster short-term growth and better utilisation of existing capital, it can also lead to reduced incentives to train staff and invest in technology to improve productivity. In addition, in some smaller towns there are also challenges with housing temporary workers.
67. The role of immigration settings in New Zealand's economic performance is a subject that we recommend Ministers work on across portfolios.

## **Opportunities to advance the Government's economic objectives**

### **Further tourism growth is likely in the short- to medium-term which will shape the New Zealand economy**

68. Global tourism growth has been significant as technological change has lowered the costs of travel. Rising global incomes and productivity growth have created a growing global cohort with the time and

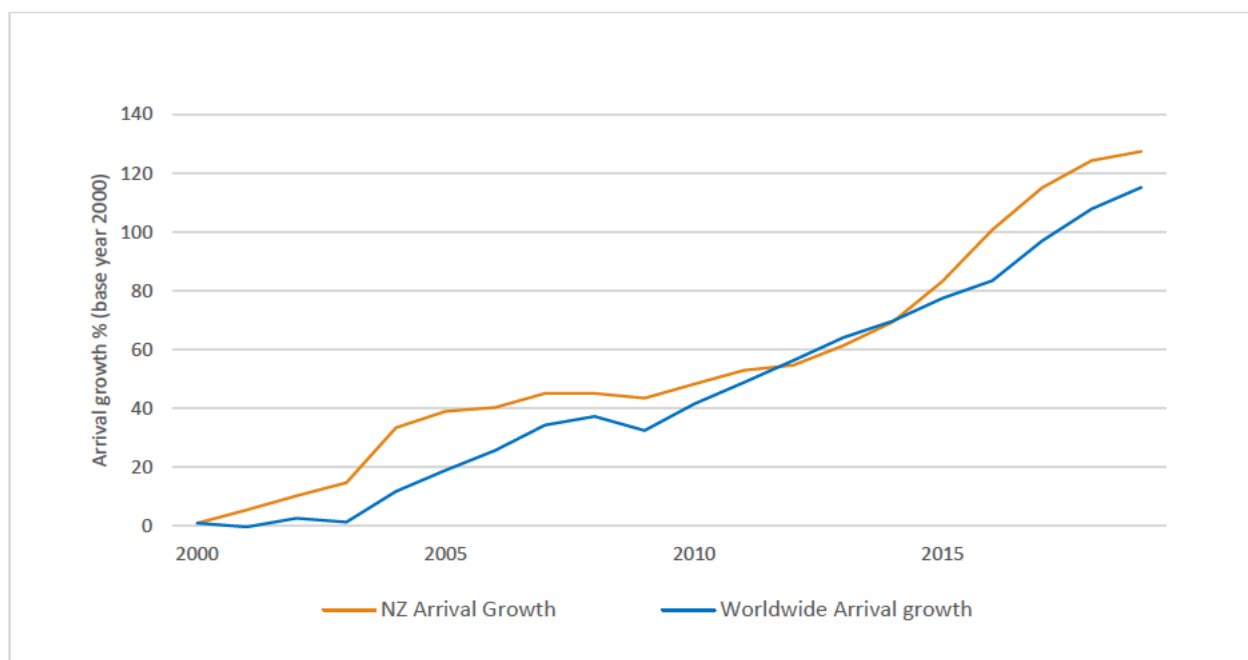
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<sup>4</sup> Estimate created using data sourced from Stats NZ (June 2023) Household Labour Force Survey

<sup>5</sup> Another example of this is that during the rebuild of State Highway 1 following the Kaikōura earthquake, many local tourism and hospitality workers in Kaikōura shifted to working on the rebuild as the wages were higher.

money to travel. This has resulted in worldwide growth of tourism which is mirrored in New Zealand (see figure 5).

Figure 5: Growth in New Zealand and worldwide arrivals, 2000 – 2019



69. Despite higher airfares, tourism recovery from the impact of COVID-19 has been quick. Tourism was New Zealand’s second highest export in the March 2023 quarter, and international visitors brought \$3.2 billion into the country.

70. The World Travel and Tourism Council predicts an increase in international travel of, on average, 5.8% per year between 2022 and 2032 worldwide. It is reasonable to assume that even if government was to ‘do nothing’, tourism demand for New Zealand will continue to rise.

**Government has options to ensure increased visitor volumes deliver increased economic value**

71. Following COVID-19 we have observed that tourism demand is recovering swiftly despite increasing costs. Despite the cost of air travel tracking broadly in line with or slightly ahead of global consumer price index<sup>6</sup>, volume of travel to New Zealand has rebounded more quickly than expected. This current relative lack of sensitivity to price, and the likely increase in visitor volumes creates a significant opportunity to make improvements to New Zealand’s tourism sector without significantly impacting visitor volumes or economic returns.

72. In addition to your manifesto commitments and a general focus on quality of regulation (which will be of significant interest to the Hospitality industry) we recommend five key areas for action. These areas will not only help to address some of the issues identified in this paper, but will also support the productive running of the tourism sector so that benefits of tourism are captured and negative impacts are minimised:

- Ensuring that visitors contribute to the amenities that they use and costs they create.
- Ensuring that the sector can both adapt to and contribute to the mitigation of climate change.

<sup>6</sup> [iata.org/en/iata-repository/publications/economic-reports/global-outlook-for-air-transport---june-2023/](https://www.iata.org/en/iata-repository/publications/economic-reports/global-outlook-for-air-transport---june-2023/).



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- Supporting regions to manage congestion and infrastructure pressures at place, using tools such as destination management and the freedom camping reforms.
- Regulatory reform to how commercial activity on conservation land is managed to drive better outcomes for the economy and environment.

73. As Minister for Tourism and Hospitality, you will need to work with colleagues to achieve this, however we consider that there are actions that you can take now that will set the sector on a far more prosperous and sustainable course.

### **There is wide stakeholder consensus on the challenges – but no consensus around who pays**

74. The issues discussed in this BIM have been the subject of many sector strategies and documents for the last decade. Notable recent contributions include the Future of Local Government Review (independent panel), Tourism 2050 (Tourism Industry Aotearoa), Project Tōnui (Regional Tourism New Zealand) and the Tourism Adaptation Roadmap (Aotearoa Circle).
75. However, it has been difficult to achieve consensus between local government and the sector as to who should pay, which has often defaulted back to a reliance on Crown funding (e.g., the Tourism Infrastructure Fund).
76. From MBEs perspective it is crucial that these issues are recognised as an economic problem rather than a fiscal problem. That is, the role of government is not to fund this, it is to ensure that those who benefit contribute to this. This will require legislative change.

### **Ensuring that visitors contribute to the amenities that they use and costs they create is key**

77. Both the tourism sector and regions are interested in exploring options to fund infrastructure and better manage destinations. This could be achieved through the introduction of tools which move costs closer to those who benefit from visitor infrastructure, or those who create impact which needs to be managed (i.e. the visitors). This is not a new issue, and New Zealand lags many other nations in implementing charging tools<sup>7</sup>.
78. Examples of existing charging tools include the IVL, the Stewart Island Visitor Levy, targeted rates, concessions, and differentiated charging combined with volume limits for the Great Walks. However, there are limitations with each.
79. A suite of tools is required that ensures those who benefit from New Zealand's services and infrastructure make a fair contribution to the costs. Funding generated through new charging tools can be reinvested at different levels of the tourism system to provide additional benefit to visitors and/or residents, such as through installing e-Bike charging on Great Rides, providing local event funding or through infrastructure development and restoration. There are decisions for you on how funding is generated and who is responsible for allocating funding.
80. We consider that providing local authorities and Department of Conservation, in particular, with additional tools to both charge and manage demand would have significant benefits for local communities and enhance the visitor experience without impacting overall visitor volumes.
81. Some local authorities have indicated they are looking at local solutions. We note that the tools that local authorities currently have are not well targeted at the challenges raised by tourism, and there is

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<sup>7</sup> International examples include Venice's recently enacted visitor charge, Charging for access to national parks in the United States (<https://www.nps.gov/planyourvisit/passes.htm>) and the use of 'visitor' or 'bed' taxes in multiple cities and nations worldwide.

a risk that a proliferation of local workarounds increases compliance costs for businesses and leads to less efficiency overall.

82. It is important that whatever tools are used ensure that the price is passed through to the user, and that any compliance costs for business are minimised.
83. The sector is also interested in identifying revenue streams to support club/industry-specific goods (mirroring the commodities levy in place for some parts of the primary sector). This could include marketing, data and diffusion of best practice.

**The sector will need to both adapt to and contribute to the mitigation of climate change**

84. Tourism was identified as a risk in New Zealand’s first climate risk assessment<sup>8</sup>. This is because of the dependence on natural and physical infrastructure that is vulnerable to disruption, and the risks of changes in consumer preference.
85. The tourism sector in New Zealand is already feeling the impact of global climate change in the form of extreme weather events and will likely see higher costs as fuel and carbon prices rise worldwide. However, locally felt impacts of climate change are also impacting the sector’s ability to operate – for example, in reduced snow days on New Zealand ski fields. Impacts of this kind are likely to increase in frequency and New Zealand’s tourism economy will need to adapt and secure itself against these issues.
86. One approach is to address the carbon produced in travelling to New Zealand. Most travel to New Zealand is either via aviation or cruise, with a significant portion coming from long-haul destinations. As such, international aviation emissions are a strategic challenge that leaves New Zealand exposed to any changes in consumer preference (and increases in energy costs).
87. Solutions to reduce the carbon intensity of air travel are in development worldwide as well as in New Zealand and there is high demand worldwide for sustainable aviation fuel (SAF). However, large-scale implementation is unlikely to eventuate in the medium-term and is likely to be costly. Mitigation action may be possible in the short-term and will require close work with the Ministry of Transport and others.
88. There is significant stakeholder interest the adaptation and mitigation of climate change. Air New Zealand and Qantas are both supportive of a SAF supply mandate, which would require fuel suppliers to sell or produce a minimum percentage of SAF per year. We will brief you separately on tourism and climate change.

**Supporting regions to manage congestion and infrastructure pressures at place, using tools such as destination management and the freedom camping reforms**

89. Tourism has national benefits (such as to our economy and increased international connectivity), but it occurs ‘at place’; people travel somewhere to consume the goods, services and experiences that make up their holiday.
90. By integrating tourism into local planning, local authorities can begin to ensure that they can capitalise on new attractions and businesses, and that issues such as congestion are managed. Partnership

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<sup>8</sup> [National climate change risk assessment for New Zealand - Main report | Ministry for the Environment](#)

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between regions and their cities can help spread visitation and encourage visitors to enjoy our natural environment as well as the retail, cultural and hospitality offerings of urban centres.

91. Communities (including business, residents and a range of interest groups) have started to describe what type of visitor economy they want, and the actions needed to get there, through destination management plans (DMPs). Integration of tourism into local government planning is variable across the country.
92. The Government invested in supporting the development of destination management plans as part of the COVID-19 response and recovery package. While the balance of responsibility now resides in the regions, MBIE began work to look at options for government to use the IVL to support ongoing co-ordination of these plans. MBIE will brief you separately on this work and the options available to you.

### **Freedom camping management**

93. The Minister of Tourism is regularly contacted about freedom camping. Many of the problems of freedom camping arise from both the over-consumption of a free but finite good (e.g., parking spaces for campervans), and an inability or unwillingness of local communities to pay for initiatives that would alleviate the pressures.
94. Local authorities have been very supportive of acting on freedom camping issues, and the work to date has been focused on addressing their concerns.
95. MBIE is currently heavily focused on the implementation of regulatory reforms to self-contained vehicle standards. You will likely receive stakeholder views on wider planning and enforcement issues. MBIE will brief you separately on freedom camping.

### **Regulatory reform for managing commercial activity on conservation land to drive better outcomes for the economy and environment**

96. Tourism activities on public conservation land and water provide significant benefits to the New Zealand economy, and the Tourism and Conservation portfolios are closely connected. Many international visitors use conservation land just as New Zealanders do – free and independently. Some visitors use the private sector to facilitate access and experiences.
97. It is critical to work closely with the Minister of Conservation to ensure we are making the best and most sustainable use of this resource. A particular issue to work on is how the concession system is managed to ensure land is used and funded in the best way for mana whenua, tax and ratepayers, as well as our visitors.
98. The Milford Opportunities Project was established to preserve Milford Sound Piopioptahi's World Heritage status, cultural and conservation values and improve the overall visitor experience. The Milford Opportunities Project is a major collaborative exercise between the Department of Conservation, Ngāi Tahu, local authorities, MBIE, the Ministry of Transport and Waka Kotahi. The basis for the project has been the exponential growth in visitors, with consequent congestion, degradation (environmental and experience), and safety issues emerging.
99. There is strong stakeholder agreement with the problems identified through the process to date. An independent advisory committee (the Milford Opportunities Project Board) is currently feasibility testing a Masterplan for managing the area. The Masterplan includes transport recommendations to change road, air, and sea access. Feasibility testing of recommendations in the Masterplan is now underway.

100. A Ministerial Group was established to be decision makers for the project and is comprised of the Minister of Conservation (lead), Minister for Tourism and Hospitality and Minister of Transport.
101. From MBIE’s perspective, managing access, the charging regime and the commercial model are the key policy settings that are shaping tourism at Milford, and this is an opportunity to take a different approach one that drives value rather than relying on volume for a return and allow for investment into core infrastructure. This will also make those returns sustainable.
102. The Department of Conservation, MBIE and the Ministry of Transport will brief joint Ministers separately about the Milford Opportunities Project.

## Issues and opportunities in the Hospitality Sector

103. MBIE notes the addition of Hospitality to the Tourism portfolio. At the time of drafting the BIM no further detail was available as to specific functions, but MBIE has assumed it will be in line with the current ‘broad support and promotion of the sector’.
104. As discussed previously, Hospitality consists of several industry sectors – mainly Accommodation and Food Services, and some Gambling. It is reliant on both population growth and visitor growth and is around 2% of GDP.
105. Statistics New Zealand data can be used to indicate how significant tourism demand (either domestic or international) is to each sector. Using pre-COVID data we can see that Accommodation is heavily reliant on tourism demand compared to food and beverage. Gambling is predominantly reliant on local demand.

Tourism Product Ratios by Type of Product (ANZSIC06) (Annual-Mar)			
	Tourism product ratio		
	Accommodation services	Food and beverage serving services	Gambling services
2018	0.95	0.43	0.15
2019	0.95	0.42	0.15
2020	0.95	0.43	0.14

106. MBIE is aware of a range of interests from the Hospitality sector (from election manifestos and other engagements). These can be grouped in the following ways.

### *Economy-wide issues*

107. The Hospitality sector shares concerns that will be common to many sectors. These include the general regulatory burden; workplace relations, access to migrant labour; and concerns about the vocational skills and education system. As discussed in paragraph 67, MBIE recommends that Ministers work across portfolios on immigration issues.

### *Sector-specific concerns*

108. Different parts of the Hospitality sector have raised specific concerns. These include liquor licensing, and specific activity fees for local government regulatory activity (eg food safety).

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109. Government and industry collaborated on a Tourism and Hospitality Better Work Action Plan which covered off a range of issues with workforce recruitment and retention specific to tourism and hospitality. MBIE will brief you separately on this work.

### *The Interface of Tourism and events*

110. There are issues that sit at the intersection of tourism and hospitality. These include local government funding (especially 'bed taxes'); public funding for events and conferences (subvention) and the impact of disruptive technologies on the sector. Examples of this include that hotels and motels are concerned about whether there is a level playing field between short-term rental accommodation and hotels/motels. Holiday Parks have had longstanding concerns about Freedom Camping.

### *MBIE is keen to understand your expectations and priorities for Hospitality*

111. MBIE is keen to discuss with you the balance of effort between hospitality specific issues and those issues which sit at the interface of tourism and hospitality.

## 4. Portfolio responsibilities

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### Overview

112. As Minister for Tourism and Hospitality, you are responsible for setting the direction for the tourism sector and supporting it to achieve its goals. The Tourism portfolio has few direct legislative levers to direct change, and instead will effect change through funding tools, investment decisions and through collaboration with your Ministerial colleagues.
113. A number of issues the Hospitality Sector will raise are regulatory in nature, and the responsibility of other Ministers. We will discuss with you how you would like to progress these ideas.
114. This section sets out your key formal responsibilities and the range of ways you can collaborate to drive change across the tourism sector.

### Tourism New Zealand

115. You are the responsible Minister for Tourism New Zealand. Tourism New Zealand is a Crown entity marketing New Zealand as a visitor destination for the long-term benefit of New Zealand. It aims to shape demand for New Zealand as a destination (encourage off-peak and regional travel) and to influence the type of visitor travelling to New Zealand.
116. You can set the parameters of Tourism New Zealand's work through a Letter of Expectation and feedback on their strategy (e.g. Statement of Intent, Statement of Performance Expectations). You also choose how much to invest in that activity.
117. As part of a rapid savings exercise in mid-2023, Tourism New Zealand's baseline was reduced by \$15m (effective from 2026/27 onwards) to a total of \$96.95m. At that stage, an undertaking was made to investigate alternative funding models. These could include future Budget bids, funding from the IVL, or a new funding model. MBIE would appreciate an early discussion on this to understand your priorities, in the context of the overall fiscal environment.

### Tourism funding through the International Visitor Conservation and Tourism Levy

118. The IVL is a \$35 charge paid by most international visitors when they travel to New Zealand<sup>9</sup>. It is paid alongside a visitor's short-term visa or New Zealand Electronic Travel Advisory (NZeTA).
119. Assuming 2019 arrival figures, the IVL is expected to raise approximately \$80m per annum which is currently split evenly between Tourism and Conservation portfolios. The fund is administered by you as Minister for Tourism and Hospitality, the Minister of Conservation and the Minister of Finance (Joint IVL Ministers).
120. In July 2023, the Government published the IVL Investment Plan 2023 to ensure future investments align with the current priorities and direction for tourism<sup>10</sup>. This plan was designed through collaboration between MBIE, Department of Conservation and members of the tourism sector. You will be periodically presented with options for investment into the tourism sector where those investments align with this plan.

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<sup>9</sup> Australians, most Pacific Islanders and diplomats are exempt.

<sup>10</sup> <https://www.mbie.govt.nz/dmsdocument/27170-ivl-investment-plan-2023>.

121. The IVL investment plan is a major lever in the portfolio. You may wish to make amendments to the objectives, goals or methods outlined in the investment plan. We will brief you separately on this work.

### **Freedom camping**

122. Freedom camping issues are the responsibility of multiple portfolios: Conservation, Local Government and Tourism. In practice, most public and local authority complaints tend to come to the Tourism Minister.

123. In 2023, the Government implemented changes to the *Freedom Camping Act 2011* which altered how freedom camping worked in New Zealand, by placing limits on the type of vehicles which could take advantage of freedom camping locations across the country. It is expected that these changes will reduce the environmental and physical impact freedom camping has around New Zealand.

124. You hold overall responsibility for the maintenance and operation of this legislation. We will brief you separately on this.

### **Ngā Haerenga New Zealand Cycle Trails' Great Rides of New Zealand**

125. The Government has invested around \$115m to establish the 23 Great Rides across New Zealand, which has been supported by an additional estimated \$60m of community co-funding. Since their introduction they have grown into a world-class network of cycle trails.

126. The Great Rides are a key tourism asset for New Zealand, offering a low-carbon way for visitors to explore the country. They are also used by locals and residents in their day-to-day lives for commuting and leisure.

127. Estimates suggest that the Great Rides generate around \$1bn for local economies by attracting visitors to regions with trails. There is potential to grow this use further by attracting greater numbers of overseas and domestic visitors.

128. As part of the rapid savings exercise in mid-2023, the annual funding for the Great Rides was amended so that only \$3m per annum of operational funding was provided by the Crown, with a further \$5m provided via the IVL. The total funding of \$8m is unlikely to be sufficient to enhance the Great Ride network but may be enough to continue ongoing necessary maintenance.

129. You have choices for how best to manage the role of the Great Rides as part of New Zealand's tourism infrastructure, including how they are funded and how this funding is best used. We will provide you with further advice on this, including on options to raise revenue.

### **Tourism data**

130. Tourism data is important for sector needs and regional planning. MBIE has a small appropriation to provide key data on behalf of the sector and regions.

131. The Tourism Data Leadership Group (TDLG) was established in 2022 with \$5m of tourism funding from the IVL. The TDLG aims to, in a collaborative manner, fill critical data gaps, improve data quality and to increase sector capability. The TDLG is chaired by Steve Armitage (Chief Executive, Hospitality New Zealand). The remaining members work throughout the sector (e.g., central government, regional tourism, private operators). The TDLG is in the process of finalising a strategic business plan which will address the sector's priority data needs over coming years. There are likely to be ongoing calls for government to do more in this space as agencies make prioritisation decisions about data.



### **Sector collaboration**

132. Over the last few years industry, unions and government collaborated on two Action Plans to tackle key workforce and environmental challenges within the sector.
133. Through the Better Work Action Plan, the Tourism and Hospitality sector agreed that action is needed across key areas to address productivity challenges, including supporting fit-for-purpose education and training, lifting technology uptake, and improving employment standards and practices.
134. The draft Environment Action Plan identified that bold action is needed to improve environmental outcomes, particularly in terms of emissions reduction and biodiversity. Key areas of action were proposed for:
- Decarbonising tourism journeys.
  - Visitor mix and management.
  - Business capability.
  - Biodiversity restoration and protection.
135. We will brief you separately on both these processes and options for next steps.

### **Māori tourism interests**

136. There are a range of different Māori interests in tourism. Many iwi have tourism as one of their core commercial planks, and some are major tourism operators (eg Ngāi Tahu Tourism). Tourism also provides a source of jobs and business opportunities in regions, including regions with high Māori populations. Māori-owned tourism businesses are also supported by New Zealand Māori Tourism which receives support through the Māori Development portfolio.
137. There are significant tourism – and iwi – implications from decisions about how conservation land is managed. In the case of the Milford Opportunities Project, MBIE has been working with Ngāi Tahu (and other stakeholders). MBIE also works with Tūhoe on tourism issues as part of Crown commitments to Tūhoe stemming from the Deed of Settlement.

### **Stakeholder interests**

138. The tourism and hospitality sector contains a range of well informed and engaged stakeholders who will look to engage with you on a range of issues.
139. Some local authorities and Hospitality New Zealand are concerned about the impacts of short-term rental accommodation. Providers such as Airbnb are worried about a myriad of different local rules being established. This issue intersects other portfolios and needs you to work with the Minister of Housing and the Minister of Local Government.
140. Major events are the responsibility of the Minister of Economic Development, but you will likely hear from stakeholders in the business events, hospitality and regional tourism areas seeking more government support for events.
141. As we approach the peak summer period, stakeholders will wish to speak to you about summer readiness and New Zealand's ability to service the volume of visitors that will travel here. We will provide a separate briefing on these issues.
142. A list of key stakeholders is attached in Annex 1.

## 5. How MBIE assists you

### Our primary ways of engaging with you

143. MBIE assists you in fulfilling your portfolio responsibilities by:
- Providing policy advice, analysis, research and data to support you to achieve your goals for the sector.
  - Providing advice to you on appointments and governance for the Tourism New Zealand Board.
  - Administering Crown funding to promote and invest in the tourism sector.
  - Monitoring and providing advice on the performance of Tourism New Zealand.
  - Managing the operation of the Great Rides, and providing advice on the appointment of the Chair of Ngā Haerenga The New Zealand Incorporated (the independent body responsible for the long-term governance and management of the New Zealand Cycle Trail).
144. Responsibility for providing advice and support in relation to the Tourism portfolio sits mainly within the Labour, Science and Enterprise Group.

### Key MBIE officials

145. The table below sets out the key MBIE officials who will support you in this portfolio.

Table 1: Key MBIE officials

Contact	Role	Priority Area	Contact details
<p><b>Carolyn Tremain</b></p> 	<p>Secretary, Ministry of Business, Innovation and Employment</p>	<p>All</p>	<p>Privacy of natural persons</p>
<p><b>Nic Blakeley</b></p> 	<p>Deputy Chief Executive, Labour, Science and Enterprise</p>	<p>Working with people, businesses, regions, and the science, innovation and education systems to help the country and New Zealanders to be successful.</p>	<p>Privacy of natural persons</p>

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<p><b>Heather Kirkham</b></p> 	<p>General Manager, Tourism Branch, Labour, Science and Enterprise</p>	<p>Providing support to the development of New Zealand's tourism sector.</p>	<p>Privacy of natural persons</p>
<p><b>Michael Bird</b></p> 	<p>General Manager, Entity Performance and Investment, Labour, Science and Enterprise</p>	<p>Oversight of Crown entities for MBIE. Tourism New Zealand is the Crown entity in the Tourism portfolio.</p>	<p>Privacy of natural persons</p>

## 6. Upcoming actions and issues to be aware of

146. The following table sets out the major work programmes that will require early decisions.

**Table 1: Major work programmes with early decisions required**

Programme	Description	Action/next step and timing
<b>Tourism New Zealand Annual Report</b>	MBIE will provide you with advice so Tourism New Zealand's Annual Report can be presented to the House of Representatives. This is a requirement of the Crown Entities Act 2004.	November 2023 (unless MBIE is advised otherwise).
<b>Non-Departmental Appropriation Report - Tourism Portfolio</b>	The Non-Departmental Appropriations Report covers off non-Departmental spending for non-Departmental appropriations you are responsible for within the Business, Science and Innovation Vote which have reportable performance information. You are required to present any end-of-year performance reports to the House of Representatives within four months after the end of the financial year or, if Parliament is not in session, to ensure that the information is presented as soon as possible after the commencement of the next session of Parliament. As Parliament had been dissolved in anticipation of the General Election on 14 October 2023, you are required to table Non-Departmental Appropriations Report – Tourism Portfolio for the year ended 30 June 2023 on the first available sitting day.	As soon as possible after the commencement of the next session of Parliament
<b>Tourism New Zealand quarterly report to 30 September 2023</b>	No decision is required. This is part of Responsible Ministers' and MBIE's usual monitoring arrangements for Crown entities.	November 2023.
<b>IVL review</b>	The IVL rate needs to be reviewed every five years (s399B(c) Immigration Act). In August 2022, the former Minister sought Cabinet approval to raise the IVL rate. Cabinet noted that the tourism industry was focused on recovery following COVID-19, so agreed to delay discussion on sustainable funding until late 2023. There is high industry interest in this work taking a wider look at revenue tools.	We will brief you separately on options before the end of the year.
<b>Better Work Action Plan</b>	The sector has broadly agreed that action is needed across key areas to address productivity challenges, including supporting fit-for-purpose education and training, lifting technology uptake and improving employment standards and practices. Priority actions received funding through Budget 2023.	We will brief you separately on this process and provide options for next steps.





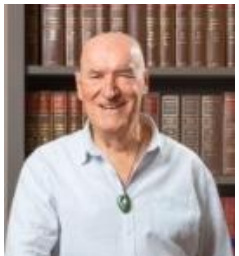


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Programme	Description	Action/next step and timing
<b>Draft Tourism Environment Action Plan</b>	In June 2023, the draft Tourism Environment Action Plan was released for consultation. Stakeholders, including the key industry bodies and businesses, have identified that bold action is needed and proposed some key areas to improve environmental outcomes, particularly emissions reduction and biodiversity.	We will brief you separately on this process and provide options for next steps before the end of the year.
<b>New self-containment regime for freedom camping</b>	MBIE's current focus is implementing recent freedom camping legislative changes, including supporting the Plumbers, Gasfitters and Drainlayers Board to become the new regulator and assisting local government to transition to the new rules.	We will provide you with additional information on the freedom camping work programme in a supplementary briefing in November.
<b>Milford Opportunities Project</b>	An independent advisory committee (the Milford Opportunities Project (MOP) Board) and independent MOP Unit, hosted by the Department of Conservation, are leading the current phase of the MOP. MBIE, Department of Conservation, Ministry of Transport and Waka Kotahi officials support the Unit. You, the Minister of Conservation and the Minister of Transport oversee this work.  The work is only funded through until June 2024.	Joint agencies and the Milford Opportunities Project Board will provide you with an introduction to the work and the proposed timeframes in November/December.
<b>Ngā Haerenga, the New Zealand Cycle Trails Fund</b>	Government provides \$8m a year (comprising \$3m Crown Funding and \$5m from the IVL) for MBIE to allocate to Great Rides for cycle trail priority projects, improvements, and repairs, including extreme event recovery. Funding is also provided to New Zealand Cycle Trail Incorporated for operational costs, quality assurance, marketing and brand promotion activities.  While the Great Rides have been a real success story there are significant funding challenges for ongoing maintenance.	We will brief you separately on issues and opportunities with the Great Rides.
<b>Tourism Investment Portfolio</b>	The Tourism Investment Portfolio translates tourism strategy and the Government's priorities into targeted sector investment funding programmes and monitors the performance of investments delivered by sector partners to ensure value for money. This includes the Tourism Infrastructure Fund, legacy Tourism COVID-19 support packages, Innovation Programme for Tourism Recovery,	We will provide you with a supplementary briefing summarising the current state of the various funding programmes that reside within the Tourism Investment Portfolio.

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Programme	Description	Action/next step and timing
	the IVL, and the Ngā Haerenga New Zealand Cycle Trails Fund.	
<b>Destination management</b>	The previous Government allocated \$5m from the IVL to stand up a national Destination Management team for two years. MBIE is underway with the procurement process to find an external supplier to establish and operate this team. Tourism stakeholders are very interested in and supportive of this initiative.	We will provide you with a separate briefing on this work, outlining the procurement process to date, operational specifics for the proposed team, and options for next steps.
<b>Tourism New Zealand monitoring</b>	MBIE will provide you with background information on your role as Responsible Minister of Tourism New Zealand and MBIE's monitoring role. This briefing will provide you with options for communicating your expectations to the entities - it is usual practice for Responsible Ministers of Crown entities to send a Letter of Expectations to the Board of the entity.	November 2023.

## Annex 1: Key stakeholders

<p><b>Paul Brock</b></p> 	<p>Chair, Tourism New Zealand</p>	<p>Tourism New Zealand is a Crown entity responsible for marketing New Zealand as a tourism destination to overseas markets.</p>
<p><b>René de Monchy</b></p> 	<p>Chief Executive, Tourism New Zealand</p>	
<p><b>Alan Vane</b></p> 	<p>Chair, Ngā Haerenga New Zealand Cycle Trail Incorporated</p>	<p>Ngā Haerenga New Zealand Cycle Trail Incorporated is responsible for the long-term governance and management of the New Zealand Cycle Trails.</p>
<p><b>Rebecca Ingram</b></p> 	<p>Chief Executive, Tourism Industry Aotearoa</p>	<p>Tourism Industry Aotearoa (TIA) represents all aspects of the tourism industry and regularly advocates on their behalf.</p>
<p><b>Pania Tyson-Nathan</b> <b>Rebecca Ingram</b> <i>Rongomaiwahine, Ngāti Kahungunu</i></p> 	<p>Chief Executive, New Zealand Māori Tourism</p>	<p>New Zealand Māori Tourism represents Māori tourism within the tourism sector. This includes supporting Māori tourism providers, encouraging increased representation within the sector and greater cultural awareness from all providers.</p>



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<p><b>Steve Armitage</b></p> 	<p>Chief Executive, Hospitality NZ</p>	<p>Hospitality NZ is a membership organisation that provide expert advice and guidance for hospitality and accommodation operations in Aotearoa New Zealand. Our mission is to empower members of the industry with the tools, resources, partnerships and knowledge to maximize their success and add value to their businesses.</p>
<p><b>James Doolan</b></p> 	<p>Strategic Director, Hotel Council Aotearoa</p>	<p>Hotel Council Aotearoa (HCA) represents 140 of New Zealand's largest hotels, together accounting for approximately 17,500 rooms. HCA member hotels account for investment of \$7.9 billion in New Zealand's visitor economy and employ an estimated 9,485 people in 7,050 full-time equivalent roles. Entire hotel sector employment in New Zealand (<i>excluding</i> motels, lodges and other forms of accommodation) is estimated at 15,000-17,500.</p>
<p><b>Marissa Bidois</b></p> 	<p>Chief Executive, Restaurant Association of NZ</p>	<p>The Restaurant Association's mission is to be the link between good food and good business. greatness. They have members in every part of the country. These are serviced by 12 regional branches and a national office.</p>
<p><b>Other Associations who intersect with the Tourism and Hospitality portfolio</b></p>	<ul style="list-style-type: none"> <li>• Delaney Myers, Bus and Coach Association</li> <li>• Brent Thomas, Travel Agents Association New Zealand</li> <li>• Haydn Marriner, Backpacker Youth and Adventure Tourism Association</li> <li>• David Perks, Regional Tourism Organisation New Zealand</li> <li>• Ann-Marie Johnson, Bed and Breakfast Association New Zealand</li> <li>• Fergus Brown, Holiday Parks New Zealand</li> <li>• Jacqui Lloyd, New Zealand Cruise Association</li> <li>• Billie Moore, New Zealand Airport Association</li> <li>• Lisa Hopkins, Business Events Industry Aotearoa</li> <li>• Lynda Keene, Tourism Export Council</li> <li>• Simon Guild, New Zealand Professional Hunting Guides Association</li> </ul>	