



Tourism – a partnership between the private sector and Government

Brief to the Minister of Tourism

November 2017



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Executive Summary

Tourism is New Zealand's biggest industry, biggest employer and biggest export earner. Since 2014, it has also been New Zealand's fastest growing economic contributor.

Tourism Industry Aotearoa (TIA) is the peak industry body, representing all aspects of the tourism industry in New Zealand. TIA is the guardian of the industry-led and Government supported growth framework, [Tourism2025](#).

TIA has forged close working relationships with Government and its agencies. Partnership, collaboration and trust between the public and private sectors is the key to supporting the sustainable development of New Zealand's tourism industry. On the back of record growth, there are many opportunities and challenges for the Government and industry to tackle together.

The Immediate Priorities:

Engagement: An open, capable and well-informed Government system, with strong political leadership and genuine partnership with TIA and the private sector. This requires:

- Adequate funding of tourism policy and research capabilities within Government
- Recognition of tourism issues across all of Government
- Maintaining support of Tourism New Zealand and making greater use of its capabilities to tell the tourism story and influence tourism outcomes in New Zealand.

Sustainability: An industry-led commitment to a sustainable tourism future, with Government endorsement and support. This requires:

- Positive policy and regulatory settings that encourage business innovation
- Increased funding for the Department of Conservation (DOC)
- A commitment to improve our fresh water resources
- Making measurable progress on Predator Free New Zealand.

Infrastructure: New Zealand has a highly desirable tourism product that the world wants, but we have to reinvest back into our product to ensure it continues to deliver outstanding visitor experiences. Commitment is needed from both the public and private sector. This requires:

- Identification of the most pressing local and mixed use infrastructure priorities
- Council access to funding assistance through a structure that is free from political influence
- Removing barriers to private sector investment in infrastructure.

People & Skills: Attracting and retaining staff with the right skills and attitude is a top industry priority. With the rapid growth in tourism, acute labour shortages are appearing. The industry and Government must work together to deliver the expanding workforce that is needed. This requires:

- Government and industry in partnership attracting more Kiwis to work in tourism
- Ensuring immigration settings allow employers to secure quality staff when no suitable New Zealanders are available.

Funding: All visitors pay taxes and are more than paying their way. Additional taxes are not favoured and could be counter-productive by discouraging potential visitors to travel to New Zealand. Any new tax needs to be fair, workable, efficient, applied nationally and ring-fenced for tourism investments. This requires:

- Reinvesting more of the existing tourism tax dividend being received by Government
- Before proceeding with any new tax proposal, working closely with the tourism industry on its design.

Detailed Recommendations

The following recommendations for Government action emerge from the issues discussed in detail in Section 4 of this paper. It is a lengthy but very achievable list of outcomes that if implemented would ensure a vibrant and successful tourism industry making an increasing contribution to New Zealand.

1. Ring-fence a proportion of the GST paid by international visitors to invest back into regional tourism infrastructure.
2. Before introducing any new border tax or any other imposition on the visitor industry, consult with TIA and the wider industry to ensure a fair and efficient collection system as well as distribution to where the need is greatest.
3. Discourage Local Government from imposing ad hoc taxes.
4. Work with the tourism industry to establish a sustainable funding model to address medium and longer term local and mixed-use infrastructure priorities.
5. Make a commitment to removing barriers to infrastructure investment.
6. Continue Government involvement through New Zealand Trade & Enterprise in attracting foreign investment into the New Zealand tourism industry.
7. Commit to working in partnership with TIA, tourism operators, ServiceIQ and training providers to attract New Zealanders to work in tourism.
8. Ensure immigration settings allow tourism employers to secure quality staff when no suitable New Zealanders are available.
9. Provide a sustainable funding model to ensure DOC remains a significant contributor and enabler of the visitor experience without compromising its core role of growing conservation.
10. Reduce barriers to private sector investment in new attractions and activities on the public conservation estate, and promote opportunities for concessionaires.
11. Encourage the prompt delivery of Project Groundswell to deliver efficient, transparent and predictable concession systems.
12. Encourage the prompt completion of DOC's Visitor Strategy.
13. Recognise the DOC/TIA agreement to partner by fully understanding that working together in partnerships with tourism operators will lead to genuine gains in conservation and act on it accordingly.
14. Demonstrate a serious commitment to protecting the environment, recognising its importance to tourism.
15. Make decisions that appropriately balance protecting the environment with maximising tourism's commercial, recreational and cultural opportunities.
16. Commit to enhancing our fresh water resources and make measurable progress on Predator Free New Zealand.
17. Undertake work to better support understanding of the economic value of fresh water to tourism, both at a national and regional level, and how to integrate this understanding into fresh water management processes.
18. Encourage and incentivise tourism through regional development plans, and support destination management and development.
19. Support initiatives through the Regional Development Fund that create tourism demand in the regions.
20. Endorse the TIA Tourism Insight Framework and work with TIA and industry to support its implementation.
21. Recognise tourism within Government research and innovation programmes.
22. Configure the \$1.5 billion Science and Innovation Fund to enable it to fund quality research to support sustainable tourism development.
23. Proceed with the proposed Māori Battalion Museum.
24. Decrease the Border Clearance Levy per passenger charge, ensuring that the over-collection to date is used and aim to avoid over-collection in future.

1. Introduction

Since 2014, when the industry launched its new [Tourism 2025](#) Growth Framework, New Zealand has enjoyed a sustained period of tourism growth. Total annual tourism revenue has grown from \$28 billion to \$35 billion; international arrivals have increased from 2.8m to 3.6m visitors a year; domestic tourism spend has grown faster than overall household spend.

The big issues the tourism industry currently faces are the challenges of growth. There is rising industry and public concern that tourism may be growing faster than our ability to cope. Without a coordinated response, we risk being unable to fully capture the potential of tourism and protect the long-term sustainability of the industry.

The current strategic priorities for the industry, guided by the Tourism 2025 Framework and highlighted in [Tourism 2025-two years on](#) include the interrelated topics of infrastructure investment, sustainability, seasonality and regional dispersal.

We welcome the appointment of Labour Party Deputy Leader Kelvin Davis to the tourism portfolio. This is an important signal of the importance that the Government places on supporting New Zealand's largest industry and driver of economic activity.

The tourism industry has the ability to add value and support achievement of the Labour-led Government programme. We are aligned in a number of areas including environmental regeneration, as a strong and healthy environment is important to the destination value proposition; regional development, as distributing the value of tourism to the regions is an industry goal; and employment, as a direct employer of over 180,000 people there is a shared interest in having New Zealanders available to work in the tourism industry.

We welcome the opportunity to work with the new Government. We are seeking strong engagement with the Tourism Minister, other Ministers and officials to develop a shared understanding of each other's needs and priorities, ultimately leading to a strong and prosperous tourism industry that benefits all New Zealanders.

Purpose of this document

The new Government and the tourism sector need to jointly address a number of challenges facing the tourism industry and New Zealand in general. This document outlines the priority issues facing the New Zealand tourism industry and states TIA's position in relation to the Government's policy statements on tourism sourced from the Coalition Agreement between the New Zealand Labour Party & New Zealand First, the Confidence & Supply Agreement between the New Zealand Labour Party & Green Party of Aotearoa New Zealand and the individual party policies as sourced from their websites. This document also includes brief information on the size and value of the industry.

2. The importance and structure of the tourism industry

Tourism, New Zealand's biggest industry and biggest export earner, is a vital contributor to New Zealand's economic and social wellbeing, generating wealth and supporting jobs in communities around the country. Tourism and its contribution is felt at national, regional and local levels throughout the New Zealand economy.

As well as their significant contribution to GDP, visitors contribute income to the Government through GST, the Border Clearance Levy, petrol tax, the income taxes paid by the 188,000 people directly employed in tourism, and the company taxes paid by the thousands of businesses servicing visitors.

Tourism 2025

[Tourism 2025](#), an industry-led, Government supported economic growth framework, was launched in 2014 and has set an aspirational goal of reaching \$41 billion in annual tourism revenue by 2025. The industry's focus is on growing value faster than volume.



The Tourism 2025 growth framework is based around five key themes:

- **Insight** - this is at the core of the framework recognising that having timely, accessible and relevant insight is what will help tourism businesses with the information they need to support operational and strategic decision-making.
- **Connectivity** - focusing on growing sustainable air connectivity is critical for an island nation that relies on 95% of its visitors arriving on a commercial aircraft.
- **Productivity** - making more money from the investments we already have and finding new solutions to seasonality (the tourism industry's perennial challenge) and regional dispersal.
- **Visitor Experience** - we can derive more value by creating outstanding visitor experiences that meet the needs of a changing visitor mix by recognising the end to end visitor experience, the need to improve visitor facilitation, and by measuring and managing visitor satisfaction.
- **Target for Value** - identifying and attracting targeted market opportunities to deliver the greatest economic benefit.

This growth framework was reviewed in 2016. While the five themes of the framework remain unchanged in [Tourism 2025-two years on](#), the emphasis in some focus areas has shifted. **Sustainability** is one of the themes now being given greater emphasis. There is a desire and expectation that long term, economic, environmental, cultural and social sustainability becomes a core value against which all decisions are tested. Another theme that is being given greater priority is facilitating **infrastructure investment** to support tourism growth.

Structure of the tourism industry

There are many components that make up the New Zealand tourism industry.

The private sector includes:

- TIA, the peak industry body
- Multiple sector associations
- Training providers
- Share market listed companies
- Iwi-owned companies
- International chains
- Small, medium and large privately-owned businesses

More than 85% of tourism businesses are small-to-medium enterprises (SMEs) and many have fewer than five staff.

The public sector includes:

- Tourism New Zealand
- Department of Conservation
- Ministry of Business, Innovation and Employment
- Other Government agencies
- Tertiary Education providers
- Local Councils
- Regional Tourism Organisations/Economic Development Agencies

Tourism by the numbers¹

Total annual tourism expenditure is **\$34.7 billion - \$95 million per day**.

Annual international tourism expenditure is **\$14.5 billion – \$40 million per day**.

Annual domestic tourism expenditure is **\$20.2 billion – \$55 million per day**.

Total annual tourism expenditure has increased by **\$6.7 billion** or **24%** in the past two years.

Tourism is our biggest export industry, contributing **21%** of foreign exchange earnings.

Tourism generates a direct and indirect annual contribution to GDP of **\$22.7 billion**, or **10.0%**.

332,000 people are directly or indirectly employed in tourism in New Zealand – more than **1 in 8 jobs**.

The annual GST paid on purchases by travellers is **\$2.8 billion**, including **\$1.15 billion** collected from international visitors.

¹ Statistics NZ, Tourism Satellite Account: 2016, The contribution made by tourism to the New Zealand economy, October 2016. (Tourism Satellite Account 2017 to be issued 13 December 2017).

Tourism plays a significant role in the New Zealand economy in terms of production of goods and services. It creates employment and directly and indirectly supports 13.2% of the total number of people employed in New Zealand. It generates travel spending by international visitors, resident New Zealanders, and business and government travellers.

Aside from specialised travel and accommodation providers, a number of other sectors gain benefit from tourism expenditure. The sector provides value to industries within New Zealand that add tourism experiences to their product offering, such as farm stays, factory tours and wineries. As touring through New Zealand by car or bus is very popular, fuel stations also benefit from tourism expenditure. Tourism helps drive regional economic growth and supports the revitalisation of towns and communities. This in turn creates employment and helps build regional pride.

The following graphic is useful in understanding how far the tourism dollar reaches in New Zealand.

THE POWER OF TOURISM



3. Current challenges and opportunities for tourism in NZ

This section summarises the big issues for tourism and **how the industry is responding**. We also comment on what the Government can do to assist these industry efforts. This section should be read in conjunction with Section 4, which provides more detail on some of the issues.

Challenges	Responses and Opportunities
<p>Infrastructure</p> <p>Recent tourism growth has placed pressure on some infrastructure used by visitors. In order to better understand and size this issue, TIA undertook a National Tourism Infrastructure Assessment in 2016/17. The resulting report identified the main infrastructure deficits in both the private and public sectors.</p> <p>The priority infrastructure types identified were:</p> <ul style="list-style-type: none"> • Visitor accommodation • Telecommunications • Airport facilities • Road transport • Car parking • Public toilets • Water and sewerage systems <p>Much of the infrastructure identified as a priority for investment is local and mixed use (used by both residents and visitors) and has often seen long-term under-investment.</p>	<p>What the Industry is doing</p> <ul style="list-style-type: none"> • Tourism sectors able to scale-up quickly are doing so, e.g. the road transport sector has been able to respond quickly with increased fleet size. • Operators making significant private investment into infrastructure, e.g. Skyline Queenstown \$100m redevelopment. • TIA undertaking work to identify and address the key barriers to infrastructure. • TIA engaging with local councils on regional tourism infrastructure via the review of Council Long Term Plans. <p>What the Government can do</p> <ul style="list-style-type: none"> • Support the Tourism Infrastructure Fund (TIF) to provide \$25m in 2017/18 for local mixed-use infrastructure. • Invest more of the tourism dividend (increased taxes) received by the Government into infrastructure to support the industry’s future growth. • Make a commitment to removing barriers to infrastructure investment. • Support NZTE’s efforts to attract overseas accommodation investors via Project Palace. • Continue to address tourism-related blackspots via the Rural Broadband Initiative.
<p>Social Licence to Operate</p> <p>The fast growth of the tourism industry has caused unease in some host communities, with locals worried about the number of visitors and the impact. This places pressure on the social licence the industry has to operate within these communities.</p>	<p>What the Industry is doing</p> <ul style="list-style-type: none"> • TIA in conjunction with Tourism New Zealand undertakes six-monthly ‘Mood of the Nation’ research to assess New Zealanders’ views of tourism. • TIA in conjunction with Tourism New Zealand is developing a ‘Tourism Narrative’ project. • TIA is a key partner in NZTA’s Visiting Drivers project to reduce the number of accidents by visiting drivers. • TIA leads the Responsible Camping Forum, a group of 40 organisations representing rental operators, industry associations, Local and Central Government working together to manage freedom camping. • A number of infrastructure initiatives will contribute to addressing social licence issues such as over-crowding. <p>What the Government can do</p> <ul style="list-style-type: none"> • Allow and encourage Tourism New Zealand to use its resources and expertise to help tell the Tourism Story or Narrative to the New Zealand public.

Challenges	Responses and Opportunities
<p>Sustainable Tourism With the rapid growth achieved in the past few years, we are well on the way to achieving the Tourism 2025 aspirational goal of \$41 billion in annual visitor expenditure by 2025.</p> <p>Now the tourism industry is facing the challenges of managing and sustaining growth, rather than generating growth. There needs to be purposeful effort to actively manage the industry for its long term sustainable success.</p>	<p>What the Industry is doing</p> <ul style="list-style-type: none"> In 2017, TIA has worked with industry and with Government agencies' support to develop a Tourism Sustainability Commitment (TSC).  <p>ECONOMIC Tourism is delivering prosperity across the New Zealand economy.</p> <p>HOST COMMUNITY New Zealanders strongly support and reap the benefit from tourism operating in their communities.</p> <p>VISITOR New Zealand delivers world leading experiences for both international and domestic visitors.</p> <p>ENVIRONMENT Tourism is recognised for its contribution to protecting, restoring and enhancing New Zealand's natural environment and biodiversity.</p> <ul style="list-style-type: none"> The Commitment establishes a set of aspirational goals at both an industry and business level across the areas of economic, environmental, host communities and visitor sustainability. Tourism operators will be invited to sign up to the TSC and work towards implementing the sustainability commitments within their businesses. <p>What the Government can do</p> <ul style="list-style-type: none"> Support the tourism sustainability goal through positive policy and regulatory settings, and funding. Continue support for the post-earthquake recovery of both Kaikoura and Christchurch as key regions for the industry's economic sustainability.
<p>Seasonality & Regional Dispersal Seasonality and regional dispersal are perennial issues for the industry. Spreading visitors around the country and around the year will improve productivity and reduce pressure at peak times and locations. Currently, 65% of visitor spend occurs in the four gateway destinations – Auckland, Wellington, Christchurch and Queenstown. 35% of international visitors come to New Zealand over summer, reducing to 18-24% over other seasons.</p>	<p>What the Industry is doing</p> <ul style="list-style-type: none"> Operators are developing new products and packages for off-peak and shoulder seasons. TIA convened the Domestic Tourism Working Group to promote the value of domestic tourism in addressing dispersal and seasonality issues. TIA and the Working Group have developed the free online DGIT (Domestic Growth Insight Tool) for operators and regional tourism organisations. <p>What the Government can do</p> <ul style="list-style-type: none"> Use Tourism New Zealand to encourage regional dispersal and seasonality, and support new product development in the regions.

Challenges	Responses and Opportunities
<p>People & Skills 1 in every 8 jobs in New Zealand is directly or indirectly dependent on the tourism industry. Tourism directly employs 188,000 New Zealanders, and indirectly another 144,000. An estimated 53,000 new people need to enter the tourism workforce by 2021. In the 2017 State of the Tourism Industry Survey, 82% of respondents (tourism operators) agreed that staffing is a significant issue for the industry.</p>	<p>What the Industry is doing</p> <ul style="list-style-type: none"> • TIA developed People & Skills 2025, a strategic document with a 24-point action plan aimed at meeting labour and skills needs to deliver high quality visitor experiences. • In 2017, TIA is focussing on initiatives to attract New Zealanders to the tourism industry. This includes brand image research, supporting school programmes and advocating for tourism to be an approved University Entrance subject. • TIA actively responds to any proposed changes to work visas, to ensure that access to migrants remains open when no suitable New Zealanders are available. • The Tourism Sustainability Commitment includes a business-level commitment that businesses pay a fair wage to all staff. <p>What the Government can do</p> <ul style="list-style-type: none"> • Work in partnership with the tourism industry and employers to attract more New Zealanders to work in tourism • Make tourism at school a University Entrance subject. • Ensuring immigration settings allow employers to secure quality staff when no suitable New Zealanders are available.
<p>Insight The provision of knowledge about tourism – what we call the ‘tourism insight system’ - currently operates in an ad hoc and disjointed manner.</p> <p>There are concerns around the quality of data with a lack of trust in some key Government statistics.</p> <p>Accessibility to funding for research is fragmented, unclear and often non-existent.</p>	<p>What the Industry is doing</p> <ul style="list-style-type: none"> • TIA has spearheaded the development of an industry-led Tourism Insight Framework (being launched on 13 November 2017). <p>What the Government can do</p> <ul style="list-style-type: none"> • Provide insight that is useful for industry - align the provisions of Government tourism data with the industry’s Tourism 2025 aspirations, insight strategy and plans.

Central Government Recognition and Engagement

In recognition of the importance of New Zealand’s biggest industry, we need an accessible and responsive public sector that is willing to listen and work cooperatively on solutions. It is important to ensure tourism functions across Government are adequately resourced to support the development of the valuable tourism industry.

Ensuring the tourism industry’s interests are considered in the development of Government policy will be important in building on recent growth and delivering further value to New Zealand’s economy.

TIA engages regularly with Government agencies across a range of issues and values the access we have to officials. The quality of engagement varies across the different ministries and departments. Some departments engage in a full and open way, providing well-researched information, good access to officials and allowing adequate time to consider proposals. There are also examples where this is unfortunately not the case.

We call on the Government to:

- Give more resourcing to tourism policy functions within Government.
- Recognise the continually evolving nature of tourism and provide policy settings that create a level playing field for all industry participants.
- Recognise tourism's importance to the overall trade and export growth agenda.
- Continue to support the Public Service CEOs' Tourism Group and encourage it to engage openly with the industry.
- Examine the regulatory environment applied to businesses serving visitors and assess where the compliance burden can be reduced to support increased productivity. Any regulatory change should lead to improved business outcomes and better Government services.
- Support and work with the industry as it keeps updating its Growth Framework in order to address the most pressing industry issues.

4. TIA's View of Coalition Priorities and Party Policies

This section assesses the impacts of policy proposals sourced from the Coalition Agreement between the New Zealand Labour Party & New Zealand First, the Confidence & Supply Agreement between the New Zealand Labour Party & Green Party of Aotearoa New Zealand and the individual party policies as sourced from their websites.

Tourism Funding

Labour Party:

- Establish a \$75m a year Tourism and Conservation Infrastructure Fund to pay for projects that will improve the experience of visitors to New Zealand and enhance our natural environment
- Provide this \$75m a year of investment through a \$25 per visit levy on international visitors who are not citizens or residents of New Zealand.

Green Party:

- Introduce a \$20 tourism levy on top of existing border charges for international visitors only.

New Zealand First:

- Establish regional funds to receive revenue from the return of GST from foreign tourism and Royalties for Regions.

TIA's View

International visitors provide a significant net benefit to New Zealand – collectively they form our biggest export industry, worth \$14.5b (YE March 2016). All visitors pay taxes while in New Zealand and they are more than paying their way. TIA believes these taxes, including the Border Clearance Levy and \$1.2 billion p.a. in GST, need to be taken into account when any additional charges on visitors are contemplated.

Where destination management requires Central Government support, redistribution of the GST collected from visitors is the preferred option. The Government is enjoying a tax bonus from the tourism boom; it should reinvest part of this tourism dividend in infrastructure to support continued delivery of a quality tourism product.

Greater user pays should also be explored, such as fees for facilities on the public conservation estate. TIA does not oppose differential pricing, e.g. higher hut fees for overseas visitors and discounts for New Zealanders.

Additional taxes are not favoured, but any new funding models contemplated need to be fair, workable, efficient, applied nationally and ring-fenced for tourism-related investments. The tourism industry must be closely consulted in designing any new tax.

We do not support ad hoc regional taxes. The recent introduction of a targeted rate by Auckland Council on accommodation operators to pay for tourism promotion was poorly designed and unfair. Accommodation operators in Auckland receive only 9% of the visitor spend.

A range of regional taxes would be confusing to visitors and a badly designed tax system would harm New Zealand's brand and attractiveness as a destination.

Recommendations

- Ring-fence a proportion of the GST paid by international visitors to invest back into regional tourism infrastructure.
- Before introducing any new border tax or any other imposition on the visitor industry, consult with TIA and the wider industry to ensure a fair and efficient collection system as well as distribution to where the need is greatest.
- Discourage Local Government from imposing ad hoc taxes.

Infrastructure

Labour Party:

- Establish a \$75m a year Tourism and Conservation Infrastructure Fund to pay for projects that will improve the experience of visitors to New Zealand and enhance our natural environment.
- Make more funding available for transport projects of regional importance by doubling the funding range of \$70m-\$140m to \$140m-\$280m.

TIA's View

TIA recognises that significant public and private investment in infrastructure is required to support growth and the long term sustainability of the industry. A failure to invest in time in critical infrastructure would damage the visitor economy and the visitor experience. The industry does and must continue to play its part by reinvesting back in its asset base. TIA supports major infrastructure developments (e.g. airports, cruise terminals and convention centres) where the investment decisions are made with due diligence and clear evidence of tangible benefits to the visitor economy.

In 2016, TIA commissioned Deloitte to undertake the National Tourism Infrastructure Assessment that identified infrastructure deficits – the first time such a report has been completed. The Assessment found that much of the infrastructure identified as a priority for investment is local and mixed use (used by both residents and visitors), such as car parking, toilets, and water and sewerage systems, which has often seen long-term under investment. To optimise the benefits of tourism for host communities, coordination between Central and Local Government agencies and industry partners is needed for these projects to proceed.

Other infrastructure requirements include more visitor accommodation, improved telecommunications at popular visitor destinations around the country, better roads and road signage, improved regional airport facilities, cruise ship facilities and road transport to meet visitor expectations and enable growth of the sector.

The Assessment showed that there is a need for a substantial infrastructure fund. The previous Government announced a new Tourism Infrastructure Fund (TIF) in May 2017. At \$25 million a year the TIF replaced two existing tourism funds: the Tourism Growth Partnership (\$8m a year) and the Mid-sized Regional Tourism Facilities Fund (\$3m a year). The TIF provides support to local councils and community organisations for projects like new carparks, toilets and freedom camping facilities. The fund is a step in the right direction, but only addresses some of the infrastructure deficits.

Recommendations

- Work with the tourism industry to establish a sustainable funding model to address medium and longer term local and mixed-use infrastructure priorities.
- Make a commitment to removing barriers to infrastructure investment.
- Continue Government involvement through New Zealand Trade & Enterprise in attracting foreign investment into the New Zealand tourism industry.

Immigration

Labour Party and New Zealand First's shared priorities are to:

- Ensure work visas issued reflect genuine skills shortages and cut down on low quality international education courses.
- Take serious action on migrant exploitation, particularly of international students.

TIA's View

The tourism industry directly employs more than 188,000 people (8% of the workforce)². Government support for tourism creates employment opportunities for New Zealanders in every region, often where few other opportunities exist. Attracting more New Zealanders to work in tourism will bring economic benefits.

However, tourism operators need the confidence that workers from overseas will continue to be part of the employment mix, filling jobs when suitable New Zealanders cannot be found. TIA supports work visa settings that make it easy for employers to take on overseas staff based on regional needs, specialist skills and language requirements, when the local market is unable to meet those needs.

TIA is supportive of the principle of maintaining high quality international education. However, we believe this can be achieved through Government working with NZQA and training providers to lift the quality of provision rather than reducing the number of courses available. International students studying for less than 12 months spent \$2.7 billion (YE March 2016) - 18.9% of total international visitor expenditure over that period. International students are recognised as a high quality visitor sector, as they contribute to both regional dispersal goals with many regions offering international education, and addressing seasonality issues as courses commence/continue throughout the year. Family and friends often visit students during their study and travel the country during their time here.

The industry would be very concerned if any proposed changes to temporary work visa settings were to negatively impact on the supply of available staff at a time when the industry is growing both in terms of visitor numbers and spend. The previous Government recently proposed changes to the Essential Skills visa policy. TIA provided a significant amount of feedback from operators, resulting in sensible amendments to the proposals.

Immigration is a hot-ticket item for the industry and operators are very concerned whenever policy changes are suggested that could affect their ability to find suitable staff.

Recommendations

- Commit to working in partnership with TIA, tourism operators, ServiceIQ and training providers to attract New Zealanders to work in tourism.
- Ensure immigration settings allow tourism employers to secure quality staff when no suitable New Zealanders are available.

² Statistics NZ, Tourism Satellite Account: 2016, The contribution made by tourism to the New Zealand economy, October 2016

Department of Conservation

The New Zealand Labour Party and New Zealand First Coalition Agreement includes the goal to:

- Significantly increase funding for the Department of Conservation.

The New Zealand Labour Party and Green Party of Aotearoa New Zealand Confidence & Supply agreement includes the goal:

- Budget provision will be made for significantly increasing the Department of Conservation's funding.

TIA's View

As the manager of a third of New Zealand's total land area, DOC plays a crucial role in protecting our natural heritage and is also a highly valued participant in the tourism industry. Hundreds of tourism operators rely on the concession process managed by DOC to operate their businesses on public conservation land. DOC also provides tourism experiences like the Great Walks and infrastructure used by visitors such as huts and tracks.

The tourism boom is putting pressure on a few of our most celebrated outdoor attractions. TIA believes that a new mix of funding options and mechanisms needs to be available to DOC, so that it facilitates the public interest while always protecting landscapes and species. There are opportunities in regional New Zealand to improve or create new attractions and activities on public conservation land. This will not always require investment by DOC; tourism operators are willing to work with DOC and invest in these opportunities. Tourism concessionaires provide income to DOC as well as enhancing visitors' enjoyment of the public conservation estate.

DOC has been working on a Visitor Strategy for conservation land and TIA has been actively engaged in that process. This is an important document that reaffirms and gives direction to the importance of the visitor industry within DOC's mandate.

There needs to be adequate central Government funding of the agencies that play a key role in the visitor economy, including DOC. Consistent with TIA's general view of tourism funding, we encourage funding for DOC's visitor strategies to be drawn from the GST paid by international visitors. In addition, a new mix of funding options and mechanisms is needed. Funding opportunities exist through a fees model for some walks and tracks, through increased concession compliance to ensure those who are bringing visitors on to conservation land are paying their fair share, and through commercial investment opportunities on public conservation land.

In 2015 TIA and DOC signed an agreement to partner. The partnership aims to achieve outcomes that provide a win-win for tourism and conservation. Central to this partnership is a set of principles based on recognising the value of commercially delivered recreation as delivering high quality, safe experiences for a wide range of people in our natural places. Although progress has been made, there remains much work to be done within DOC to embed this principle into the way they plan for and work with the tourism industry. The partnership also refers to [Project Groundswell](#), an important piece of work developed by DOC and TIA to improve concession systems and management. DOC has yet to operationalise this project.

There are genuine gains for tourism and for conservation if we are looking after our endangered species and managing natural landscapes. Successful outcomes from this are very important to tourism sustainability. Tourism operators are strong conservation advocates. We would like to see a strong focus on working together in partnerships with tourism operators.

Recommendations

- Provide a sustainable funding model to ensure DOC remains a significant contributor and enabler of the visitor experience without compromising its core role of growing conservation.
- Reduce barriers to private sector investment in new attractions and activities on the public conservation estate, and promote opportunities for concessionaires.
- Encourage the prompt delivery of Project Groundswell to deliver efficient, transparent and predictable concession systems.
- Encourage the prompt completion of DOC's Visitor Strategy.
- Recognise the DOC/TIA agreement to partner by fully understanding that working together in partnerships with tourism operators will lead to genuine gains in conservation and act on it accordingly.

Sustainability

The New Zealand Labour Party and Green Party of Aotearoa New Zealand Confidence & Supply agreement includes the goals of:

- A comprehensive set of environmental, social and economic sustainability indicators will be developed.
- Improve water quality and prioritise achieving healthy rivers, lakes and aquifers with stronger regulatory instruments, funding for fresh water enhancement and winding down Government support for irrigation.
- Safeguard the healthy functioning of marine ecosystems and promote abundant fisheries.
- Safeguard our indigenous biodiversity by reducing the extinction risk for 3000 threatened plant and wildlife species, significantly increasing conservation funding, increasing predator control and protecting their habitats.
- Adopt and make progress towards the goal of a Net Zero Emissions Economy by 2050.
- Stimulate up to \$1 billion of new investment in low carbon industries by 2020, kick-started by a Government-backed Green Investment Fund of \$100 million.

TIA's View

Our natural scenery/spectacular landscapes are an important factor for international visitors in their decision to visit New Zealand, as is our environmentally friendly image.³ TIA believes sustainability requires balancing economic, social, cultural and environmental objectives and should be a genuine ethical underpinning of the New Zealand tourism industry. TIA is launching the Tourism Sustainability Commitment at TIA's 2017 Tourism Summit Aotearoa in Wellington on 14 November. The Commitment establishes high-level industry aspirational goals relating to economic, environmental, visitor and host community sustainability, and actions that tourism businesses can take to support the goals. For example, we will measure the number of businesses involved in ecological restoration initiatives, such as Predator Free 2050.

Tourism is reliant on fresh water as part of the suite of resources that makes up 'Destination New Zealand'. Other environmental attributes include landscapes, mountains and beaches. As such, the quality of how we manage fresh water is inherently tied to the wellbeing of the tourism industry. TIA has long been a member of the [Land and Water Forum](#). TIA is pleased to see the proposed policy goal of improved water quality, better funding for fresh water enhancement and a review of policies that affect New Zealand's fresh water resource, including those that support further intensification of agricultural land use.

³ Tourism New Zealand, *Visitor experience*, September 2017 – as sourced from <http://www.tourismnewzealand.com/media/3071/visitor-experience-infographic-2017.pdf>

Establishing marine protected areas around New Zealand will have a positive impact on attracting both international and domestic visitors. TIA would like New Zealand's marine management system to take an eco-system based management approach and achieve an appropriate balance between protecting the marine environment and maximising commercial, recreational and cultural opportunities. The Government should not lose sight of the value of marine protected areas to the tourism industry.

TIA is an advocate for New Zealand being the world leader in reducing emissions. Tourism, a low carbon industry, is a non-consumptive conduit between conservation, recreation and economic development. TIA is of the opinion that the wealth-generating capacity of the New Zealand system will be enhanced from being the world leader in reducing emissions. We expect the Green Investment Fund and the rest of the \$1 billion of new investment in low carbon industries to also flow into the tourism industry.

Recommendations

- Demonstrate a serious commitment to protecting the environment, recognising its importance to tourism.
- Make decisions that appropriately balance protecting the environment with maximising tourism's commercial, recreational and cultural opportunities.
- Commit to enhancing our fresh water resources and make measurable progress on Predator Free New Zealand.
- Undertake work to better support understanding of the economic value of fresh water to tourism, both at a national and regional level, and how to integrate this understanding into fresh water management processes.

Regional Economic Development

The New Zealand Labour Party and New Zealand First Coalition Agreement include the goal of:

- A \$1 billion p.a. Regional Development (Provincial Growth) Fund.

TIA's View

TIA welcomes the increased focus on regional development. Regional dispersal is one of the big challenges for the tourism industry, with 65% of current visitor spend occurring in the four gateways of Auckland, Wellington, Christchurch and Queenstown. By improving the spread of tourism around the country, we can ensure that many more regions benefit from tourism activity, while relieving pressure on those places with the highest visitor loads. We are strongly supportive of regional development initiatives that encourage and incentivise tourism.

An effective regional tourism partnership relies heavily on a strong and healthy relationship with Local Government and local communities. The regions where tourism is well managed are characterised by strong local leadership and support, and Regional Tourism Organisations (RTOs) and Economic Development Agencies (EDAs) play an important part in this. TIA engages with Local Government either in partnership with RTOs/EDAs on areas such as regional visitor strategies, or directly on issues such as freedom camping and proposed regional visitor levies.

Recommendations

- Encourage and incentivise tourism through regional development plans, and support destination management and development.
- Support initiatives through the Regional Development Fund that create tourism demand in the regions.

Research & Development

The New Zealand Labour Party and New Zealand First Coalition Agreement include the goal to:

- Work to increase Research & Development spending to 2% of GDP over 10 years.

TIA's View

TIA has identified through the development of the Tourism Insight Framework that investment in innovation and technology research for tourism operators has hardly featured in Government initiatives and research projects. As noted, tourism is the biggest export earner of New Zealand. The lack of access to innovation and tourism research for the industry is a potential barrier to further uptake of innovation and technology.

Recommendations

- Endorse the TIA Tourism Insight Framework and work with TIA and industry to support its implementation.
- Recognise tourism within Government research and innovation programmes.
- Configure the \$1.5 billion Science and Innovation Fund to enable it to fund quality research to support sustainable tourism development.

Culture

The New Zealand Labour Party and New Zealand First Coalition Agreement includes the goal to:

- Build a museum to commemorate the Māori Battalion at Waitangi.

TIA's View

Māori culture is an integral part of a New Zealand experience for many international visitors.⁴ TIA strongly advocates for the fostering of Māori culture and cultural elements across the tourism industry, to provide experiences that are uniquely New Zealand.

We are supportive of the Coalition Goal to build a museum to commemorate the Māori Battalion at Waitangi. This could be a very valuable tourism attraction and add to the experiences visitors (both international and domestic) have in New Zealand.

Recommendation

- Proceed with the proposed Māori Battalion Museum.

Biosecurity

The New Zealand Labour Party and New Zealand First Coalition Agreement includes the goal of:

- An increase to MPI BiosecurityNZ's resourcing and a Select Committee Inquiry into Biosecurity.

⁴ Tourism New Zealand, Visitor experience, September 2017 – as sourced from <http://www.tourismnewzealand.com/media/3071/visitor-experience-infographic-2017.pdf>

TIA's View

In 2015, the Border Clearance Levy was introduced. This \$22 per passenger 'travel tax' was put together in haste immediately before the May 2015 Budget with very limited analysis and no consultation.

The money acquired by the Border Clearance Levy is funding the activities carried out by the Ministry for Primary Industries (MPI) and the New Zealand Customs Service (Customs) relating to the processing of people arriving and departing from New Zealand.

MPI and Customs have advised that the Border Clearance Levy is over-collecting and will have an accumulated surplus of at least \$15m by the end of this first review period (YE June 2018). Under the legislation, this surplus is to be taken into account when resetting the levy for the next period.

Recommendation

- Decrease the Border Clearance Levy per passenger charge, ensuring that the over-collection to date is used and aim to avoid over-collection in future.

Conclusion

TIA looks forward to a close and productive relationship with the new Government. The vibrant and exciting tourism industry is delivering enormous benefits to New Zealand. Through the public and private sectors working together in an open and transparent manner to address issues and grasp opportunities, the future rewards that can be delivered for all New Zealanders are enormous.

Appendix 1 – TIA and its key projects, activities and advocacy work

About TIA

Tourism Industry Aotearoa (TIA) is the peak body for the tourism industry in New Zealand. With over 1500 members, TIA represents a range of tourism-related activities including hospitality, accommodation, adventure and other activities, attractions and retail, airports and airlines, as well as related tourism services. Our members range from SMEs to large, publicly listed corporates. Collectively, they represent around 85% of total tourism industry turnover.

TIA has a strong and strategic [Board of Directors](#) with representatives from all the main sectors.

We are vocal supporters of our industry, advocating relentlessly to ensure tourism is recognised as a vital contributor to New Zealand’s economic and social wellbeing. Our mission is to achieve tangible benefits for the tourism industry and New Zealand through leadership, influence and action.

Strategic Priorities

TIA looks to **lead, influence and do** across a range of strategic priorities. Ten of the current priorities are summarised below.

1. Sustainability

TIA is establishing a Tourism Industry Sustainability Commitment to complement the Tourism 2025 growth framework.

For the tourism industry to be sustainable – environmentally, socially and economically – we must:

- Ensure tourism businesses are financially successful in the longer term
- Protect and enhance the environment on which tourism businesses depend
- Maintain and enhance support from local communities
- Ensure our customers have outstanding experiences with all their tourism activities.

TIA supports the goal that sustainability will become a genuine ethical underpinning of the tourism industry. Our desire and expectation is that long term, sustainability will become a core value against which all decisions are tested. Financially sustainable businesses are able to invest in environmental and social sustainability, maintaining and enhancing New Zealand for future generations of residents and visitors.

We are launching the Tourism Sustainability Commitment at TIA’s 2017 Tourism Summit Aotearoa in Wellington on 14 November. Over 40 tourism businesses have already agreed to be ‘early adopters’ of the Commitment.

Having a sustainable tourism industry is also invaluable if we are to maintain and grow our [Social Licence to Operate](#).

[More information](#)

2. Infrastructure

Research carried out by Deloitte for TIA showed that more visitor accommodation is the highest priority infrastructure needed to support the future growth of New Zealand's booming tourism industry.

Other priority infrastructure types identified by TIA's National Tourism Infrastructure Assessment are telecommunications, airport facilities, road transport, car parking, toilets, and water and sewerage systems.

The Assessment finds that the tourism industry will need to work closely with Central and Local Government to achieve the required development to close these infrastructure gaps, as market forces alone are unlikely to be sufficient. At a regional level, each region has a different pattern of priorities depending on local circumstances. This shows that there is a strong need for a substantial infrastructure fund.

The Government announced a new [Tourism Infrastructure Fund](#) in May 2017. At \$25 million a year, it replaces two existing tourism funds, the Tourism Growth Partnership (\$8m a year) and the Mid-sized Regional Tourism Facilities Fund (\$3m a year). The Fund will provide \$100 million over the next four years in partnership with local councils and other community organisations, for projects like new carparks, toilets and freedom camping facilities. The fund is a step in the right direction, but is not enough.

[More information](#)

3. Tourism Insight Framework

Insight is at the centre of the Tourism 2025 framework. It shapes and helps drive the other four Tourism 2025 themes (air connectivity, visitor experience, productivity and target for value). TIA has spearheaded the development of an industry-led Tourism Insight Framework.

Several key conclusions can be drawn from the project:

- New Zealand tourism has comprehensive data but this only partly meets the needs of users. While most users consider insight to be of high importance to their business, most also have low satisfaction levels with the current insight system. Many users find data hard to access and despite the efforts of the Ministry of Business, Innovation & Employment and Stats NZ with their dissemination platforms, there is no one place to source the wide body of tourism data.
- There is a lack of analysis and interpretation of the data, meaning that the insights available from the various data sources are not being provided on a consistent or comprehensive basis to the industry.
- Emerging data sources such as mobile phone and credit card data have considerable potential to provide timely and accurate data.
- Tourism, New Zealand's largest export industry, is effectively absent from the Government's \$1.4 billion science and innovation system and industry support for science and innovation research is currently at a low level overall.

TIA is launching the industry-led Tourism Insight Framework and its recommended actions on 13 November 2017.

[More information](#)

4. People & Skills

Ensuring tourism businesses attract and retain staff with the right skills and attitude is a top industry priority. Our industry is already facing acute labour shortages in some popular destinations at peak times of the year, and given the industry's rapid growth, the pressures will only intensify.

In 2015, TIA led the development of the [People & Skills 2025 framework](#). This document gives guidance to the tourism industry on workforce development. The framework is supported by a set of actions that can guide the industry and the Government on both the supply of people for the industry and the skills they need to deliver on the Tourism 2025 aspiration.

Immigration

We advocate strongly to Immigration New Zealand to make it easier for operators to access overseas staff when no suitable New Zealanders are available. When changing policy settings, the Government must demonstrate greater empathy for the specific requirements of the tourism industry. There are already acute staff shortages in certain areas, such as popular tourism hotspots, remote destinations and/or at peak times of the year. New Zealanders are often not available in these areas or may be lacking the required attributes or skills. Although the New Zealand tourism industry prefers hiring New Zealanders, this is often not an option.

[More information on People & Skills](#)

[More information on Immigration](#)

5. Domestic tourism

Domestic tourism is currently worth around \$20.2 billion annually, and the goal is to increase that to at least \$27 billion p.a. by 2025.

TIA is spearheading a Domestic Tourism Working Group to help operators maximise the value they get from domestic travel. Domestic tourism has a big part to play in encouraging regional dispersal and smoothing out seasonality, two of the industry's challenges.

The Domestic Tourism Working Group includes representatives from Regional Tourism Organisations NZ, the Automobile Association, Air New Zealand, the accommodation and transport sectors, i-SITE New Zealand, DOC and the Ministry of Business, Innovation & Employment.

A major initiative undertaken by TIA and the Working Group is [DGiT](#), a free online tool for tourism businesses. DGiT identifies which domestic leisure travellers operators should target, when they want to visit, their motivation for travel, what else they want to do and their preferred type of accommodation. It can also suggest the best way to market to each target audience.

[More information](#)

6. Responsible camping

TIA spearheads the Responsible Camping Forum to manage community, social and environmental issues around freedom camping. The Forum, set up in 2007, has around 40 members from the private and public sectors.

The Forum has succeeded in achieving a unified stance on how best to manage freedom camping in New Zealand. While some degree of enforcement is required, this can be reduced through education and helping campers embrace the principle of kaitiakitanga.

In 2016, Forum members agreed to a three-pronged approach to tackling issues associated with freedom camping, focusing on information, infrastructure and infringements.

The Forum has produced free resources to help rental vehicle operators and the wider tourism industry, visitor centres, councils and other organisations and businesses promote the responsible camping message. We also ran a social media campaign targeting young freedom campers over the 2016/17 summer. This campaign was a huge success and will be extended over the 2017/18 summer.

[More information](#)

7. Kaikoura Earthquake – Tourism Action Group (KE-TAG)

Kaikoura is a very important tourism destination within New Zealand and the earthquake of 14 November 2016 had a devastating effect on the destination.

TIA is leading KE-TAG to guide the coordination of the industry and Government tourism response to the earthquake. The group meets regularly to monitor the responses, identify any gaps in the response and take action as required.

[More information](#)

8. Adventure tourism safety

TIA provides leadership and support to help strengthen safety across the important adventure tourism and outdoor sector.

Significant effort goes into encouraging and supporting best practice and a culture of sharing information. This includes TIA developing and managing the [SupportAdventure website](#) and development of [Activity Safety Guidelines](#).

TIA played an important role in shaping the Adventure Activities Regulations, introduced by the Government in 2014 to strengthen safety across the sector. We continue to advocate to WorkSafe New Zealand and audit providers to ensure the audit and regulatory regime adds value to operators and their safety systems. New Zealand now has the best adventure tourism offering in the world, with the strongest safety management systems in place.

[More information](#)

9. Visiting Driver Safety

A lot is being done to educate visiting drivers about New Zealand road rules and driving conditions. We are working with members, the wider industry and other stakeholders on initiatives to improve road safety for everyone. TIA led the development of the www.drivesafe.org.nz website, which provides international visitors with basic information about New Zealand road rules and etiquette, along with links to more details about everything that drivers unfamiliar with our roads need to know.

Working with industry, we spearheaded the rental vehicle [Code of Practice](#). The Code establishes a set of agreed standards and practices for operators to follow when informing visitors about driving in New Zealand and assessing their preparedness. Around 70% of the rental vehicle fleet have signed up to the Code.

[More information](#)

10. Leadership Platforms

TIA delivers a comprehensive and diverse range of industry events.

These include:

- New Zealand's biggest annual business-to-business travel and trade event [TRENZ](#)
- The [New Zealand Hotel Industry Conference and Awards](#)
- The [New Zealand Tourism Awards](#), celebrating and recognising success and industry leadership
- [Discussing Tourism](#) regional events
- The [Tourism Summit Aotearoa](#).

These Leadership Events help strengthen and grow the tourism industry and provide invaluable business and networking opportunities for tourism operators.

[More information](#)

Appendix 2 - TIA Election Manifesto

TIA's 2017 Tourism Election Manifesto *Tourism for Tomorrow*, released in May 2017, highlights the industry's nine priorities for a sustainable future, and what we want from the Government:

A sustainable industry, for NZ's tomorrow

Support the tourism industry's commitment to sustainability

TIA calls on the Government to:

- Support the tourism sustainability goal through positive policy and regulatory settings, and funding.
- Continue support for the post-earthquake recovery of both Kaikoura and Christchurch as key regions for the industry's economic sustainability.

Protect New Zealand's natural environment

TIA calls on the Government to:

- Demonstrate a serious commitment to protecting the environment, recognising its importance to tourism.
- Commit to enhancing our fresh water resources and make measurable progress on Predator Free New Zealand.

Invest in infrastructure for NZ's tomorrow

Prioritise investment in tourism infrastructure

TIA calls on the Government to:

- Work with the tourism industry to establish a sustainable funding model to address medium and longer-term local and mixed-use infrastructure priorities.
- Make a commitment to removing barriers to infrastructure investment.

Enhance and protect the public conservation estate

TIA calls on the Government to:

- Provide for a sustainable funding model to ensure DOC remains a significant contributor and enabler of the visitor experience without compromising its core role of growing conservation.
- Recognise that tourism concessionaires provide income to DOC as well as enhancing visitors' enjoyment of the public conservation estate. Reduce barriers to private sector investment in new attractions and activities on the public conservation estate, and promote opportunities for concessionaires. Concession costs and cost review systems need to be transparent and predictable.

Support tourism, for NZ's tomorrow

Government policies to support tourism

TIA calls on the Government to:

- Create policy and regulatory settings that are supportive of sustainable tourism growth and give tourism greater visibility as a leading and innovative sector.
- Recognise the continually evolving nature of tourism and provide policy settings that create a level playing field for all industry participants.
- Continue to support the Public Service CEOs' Tourism Group.
- Examine the regulatory environment applied to businesses serving visitors and assess where the compliance burden can be reduced to support increased productivity. Any regulatory change should lead to improved business outcomes and better government services.

Political recognition of tourism's importance

TIA calls on the Government to:

- Ensure the tourism portfolio continues to be held by a senior front bench Minister, to reflect the industry's importance to growing New Zealand's economy
- Recognise tourism's importance to the overall trade and export growth agenda.
- Support and work with the industry as it keeps updating its Growth Framework in order to address the most pressing industry issues.
- Encourage and incentivise tourism through regional development plans, and support destination management and development.

Government investment for greater tourism success

TIA calls on the Government to:

- Invest more of the tourism dividend received by the Government into infrastructure to support the industry's future growth.
- Maintain support for Tourism New Zealand's marketing efforts and use Tourism New Zealand to encourage regional dispersal and seasonality, and support new product development.
- Give more resourcing to tourism policy functions within Government.
- Align Government tourism data and insight with the industry's Tourism 2025 aspirations, insight strategy and plans.
- Recognise tourism within Government research and innovation initiatives such as the Science and Innovation programme.

Ensure outstanding visitor experiences

TIA calls on the Government to:

- Continue enabling international air services, especially those which encourage growth from high quality segments and emerging markets.
- Continue liberalising visitor visa processes to support growth from key visitor markets. Advance consideration of initiatives to establish common border facilitation with Australia.
- Support Customs, the Ministry for Primary Industries and Immigration NZ to work in genuine partnership with the tourism industry on continuous improvement to the border experience.
- Continue support for visitor safety initiatives, including the visiting driver project, and adventure and outdoor tourism safety.
- Commit to enabling a roading network that delivers a safe and enjoyable driving experience and promotes regional dispersal.
- Continue support for the industry's freedom camping actions.

Providing jobs for New Zealanders

TIA calls on the Government to:

- Commit to working in partnership with us to attract New Zealanders to work in tourism
- Ensure immigration settings allow tourism employers to secure quality staff when no suitable New Zealanders are available.