

Statement of Intent (SOI) 2021 – 2025



**100% PURE
NEW ZEALAND**

June 2021



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to section 149 of the Crown Entities Act 2004

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Foreword from the Board

It is our pleasure to introduce the Statement of Intent (SOI) for Tourism New Zealand (TNZ) on behalf of the Board of Directors.

TNZ's last SOI was written in the context of a tourism sector dealing with the challenges and opportunities of growth.

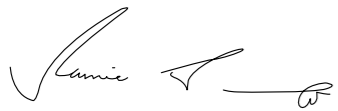
This SOI is written in a wholly different context. New Zealand has operated with domestic tourism only for over a year, often interrupted through Alert Level changes. In April 2021, we welcomed international visitors for the first time in 13 months from our closest market of Australia. As a result of COVID-19, tourism has moved from being New Zealand's largest export sector, to an international export that has to be rebuilt and shaped from zero.

This experience has touched all New Zealanders in some way. This includes the one in ten New Zealanders employed in the sector and those living in tourism-dependent communities who are experiencing the impact of the loss of tourism on their businesses and amenities. It includes a generation of New Zealanders that feel less connected as global citizens, having lost the opportunity to meet and host visitors, and to be visitors themselves. However, the last year has given New Zealanders the opportunity to reconnect with their land as domestic visitors during a unique moment in time, and they have reflected on what they want their manaakitanga to the world to look like in future.

The investment TNZ made four years ago to redefine 'value' through the Enrich 2025 concept recognised that tourism needed to contribute holistically to New Zealand, delivering net benefit outcomes for New Zealanders and communities. In this SOI, we build on that foundation and the Treasury Living Standards Framework to show how TNZ will embrace and drive forward the need for tourism to be different in New Zealand, for New Zealanders.

This work can only be achieved in partnership, and we have drawn on the work of the Tourism Futures Taskforce and our industry engagement in refining the role TNZ will play in tourism's recovery and rebuild.

TNZ's agility and positive culture have equipped it for the challenges and opportunities ahead. It will continue to dedicate itself to work that will deliver long term benefit to New Zealand.



Jamie Tuuta
Chair
Tourism New Zealand



Roger Sharp
Deputy Chair
Tourism New Zealand

PART A Nature And Scope

Purpose: Enrich Aotearoa

TNZ's purpose is to Enrich Aotearoa through the contribution of visitors to the economy, nature, society and culture.

Tourism must enrich New Zealand and the wellbeing of New Zealanders. This means that tourism needs to contribute more to New Zealand than it takes. Tourism must create jobs, restore nature, enhance our heritage, build our national reputation and make us proud. It must inspire and enable us to celebrate who we are, our unique people and place.

Our four capitals have been adapted from the Treasury's Living Standards Framework (LSF). We have applied the Treasury's concepts in a way that is most applicable to TNZ and tourism, emphasising social and cultural capital alongside nature and the economy.

Through a period of strong growth in tourism until early 2020, the impacts or costs of visitation have become clear. Costs vary across regions according to the shape and management of visitation at place, but cover issues such as pressure on infrastructure, carbon emissions and congestion. This understanding contributed to TNZ's Enrich approach four years ago, which is built upon within this SOI.



ECONOMY

The tourism economy thrives and grows adding incremental value to the New Zealand economy and its assets



NATURE

Tourism restores, maintains and nourishes the environment for the intergenerational benefit of New Zealand



CULTURE

The tourism story and experience preserves and enhances our values, culture and heritage: the makeup of our identity



SOCIETY

People in and part of tourism communities thrive through jobs, shared knowledge, and physical and mental wellbeing

Figure 1: Our four capitals have been adapted from the Treasury Living Standards Framework.

TNZ's goal is to maximise the **net benefit** of tourism.

This is defined as a net positive benefit against our four capitals:

- Economy – tourism contributes goods and service tax (GST) revenue, creates jobs and increases productivity through regional and seasonal distribution.
- Nature – tourism is sustainable and regenerative and supports the management of New Zealand's natural assets.
- Society – tourism supports regional amenities and creates productive, high-wage, enriching jobs for New Zealanders.
- Culture – tourism respects and champions te ao Māori, brings New Zealanders together and enables us to celebrate who we are on the world stage.

This document refers to what we call the 'high-quality visitor' or a 'high-quality audience'. These visitors and audiences are not solely defined by economic benefit, but rather, they encompass a range of characteristics and exhibit behaviours that support New Zealanders' views of tourism, and who we should be sharing our unique place with. Throughout this document, when we speak about audiences or target markets, we are generally referring to high-quality visitors unless otherwise stated. We explore the concept of the high-quality visitor under Strategic Intention Three.

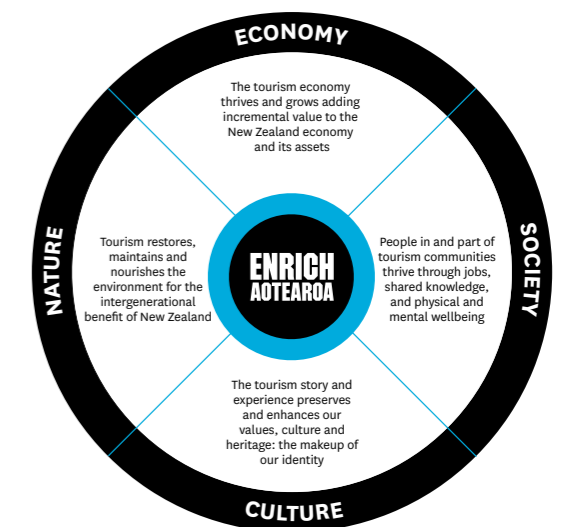


Figure 2: Our purpose is to Enrich Aotearoa by delivering a net positive contribution against the four capitals.

The Tourism System

Tourism is an ecosystem with several key actors, with each having a different role or expectation for the system:

- Government – leads economic and tourism policy settings, including setting expectations for the transformation of the tourism sector.
- New Zealanders – expect a tourism sector that supports their communities and businesses and have views on how international tourism should come back to New Zealand after borders reopen.
- Consumers – both domestic and international – expect high-quality, enriching experiences and once-in-a-lifetime holidays.
- Tourism businesses – are wide ranging in their size, products and services and locations, and seek support and guidance to operate through the COVID-19 environment, to prepare for the future, and to succeed for the benefit of their communities.

The foundation of TNZ’s work remains the New Zealand-Aotearoa Government Tourism Strategy and TNZ’s Enrich 2025 approach.

These are the strategies that capture the key values and purpose of TNZ’s mission.

There are a number of additional pieces of strategic leadership that guide TNZ’s approach. We are committed to working with our partners in the sector who are driving for change.

Recent comments and reports from the following groups have contributed to our thinking, and we have factored their outcomes into the development of our strategy.

1. Ministry of Business, Innovation and Employment (MBIE) - *New Zealand-Aotearoa Government Tourism Strategy* (2019)

2. TNZ Report - *Optimising TNZ’s future role and contribution to New Zealand* (Independent panel, 2019)
3. Ministry of Foreign Affairs and Trade (MFAT) - *Trade Recovery Strategy* (June 2020)
4. NZ Māori Tourism (NZMT) - *Building a Visitor Industry That is ‘Fit for the Future’* (NZMT, October 2020)
5. New Zealand Tourism Futures Taskforce (TFT) - *We Are Aotearoa - Interim Report* (TFT, December 2020)
6. Climate Change Commission (CCC) - *Our Advice and Evidence Reports* (CCC, January 2021)
7. Parliamentary Commissioner for the Environment (PCE) - *Not 100% – but four steps closer to sustainable tourism* (PCE, February 2021)
8. Department of Conservation (DOC) - *Heritage and Visitor Strategy* (DOC, February 2021)



Figure 3: Tourism is an ecosystem with several key actors.

Tourism New Zealand’s Role

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

Independent report into Tourism New Zealand, 2019

TNZ is New Zealand’s **national destination marketing organisation**.

Our objective under the New Zealand Tourism Board Act 1991 is to:

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

Our focus over the coming years is to build back the New Zealand tourism sector in a way that supports the New Zealand-Aotearoa Government Tourism Strategy. This will be a multi-horizon focus:

- growing domestic tourism value to support the sector while the border is closed;
- restarting a sustainable level of international tourism as the border opens (partially or fully) to international visitors; and
- shaping demand and to enrich New Zealand through the contribution of visitors.

TNZ’s role focuses on demand.

As a marketing organization, TNZ’s role is to generate and shape tourism demand.

Through our work, we seek to influence the quality of international and domestic tourism for the long-term benefit of New Zealand.

The greater the proportion of visitors in New Zealand who have been influenced by TNZ’s marketing to dream, plan and book their holidays, the better the economic, social, cultural and environmental outcomes to New Zealand, and New Zealanders.

TNZ does not lead tourism policy, tourism supply interventions, destination management or product development. Tourism policy is led by MBIE. Tourism supply and destination management is the responsibility of other parts of the tourism system.

However, supply and demand must be well connected to achieve good outcomes. In order to shape demand effectively and in line with Government and sector objectives, TNZ partners with industry, MBIE, DOC, Regional Tourism Organisations (RTOs) and other agencies to understand and advise on supply side opportunities, challenges and aspirations.

The 2019 Panel Report reviewing TNZ’s performance and role in the tourism system found that TNZ is highly effective in its core role of marketing New Zealand as a visitor destination. TNZ’s marketing generates a net benefit to New Zealand.

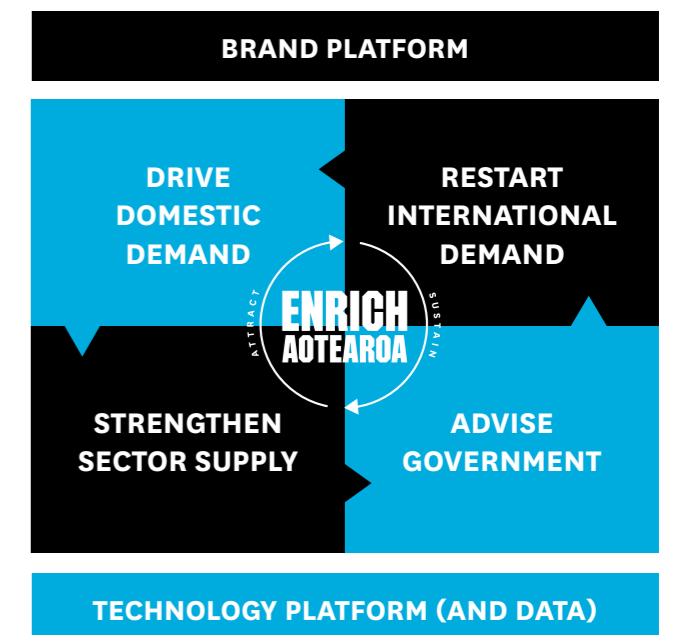


Figure 4: TNZ’s role encompasses four key areas.

Highlights from the last four years

“ The challenge for TNZ is to maintain its performance-based reputation for being innovative, expert and efficient in its core destination-marketing activity...TNZ already makes every dollar work hard. The challenge in the future will be to continue to grow the productivity of every single dollar. ”

Independent report into Tourism New Zealand, 2019

Pre-COVID-19, the tourism sector in New Zealand was going from strength to strength

Prior to COVID-19, the tourism sector had reached new levels of value, employment and GDP contribution. For the year ended March 2020:

- Total tourism expenditure was \$41.9 billion, an increase of 2.4 percent (\$1.0 billion) from the prior year.
- International tourism expenditure increased 2.2 percent (\$371 million) to \$17.5 billion and contributed 20.1 percent to New Zealand’s total exports of goods and services.
- Domestic tourism expenditure increased 2.7 percent (\$629 million) to \$24.4 billion.
- Tourism generated a direct contribution to gross domestic product (GDP) of \$16.4 billion, or 5.5 percent of GDP.
- The indirect value added of industries supporting tourism generated an additional \$11.3 billion, or 3.8 percent of GDP.
- 225,384 people were directly employed in tourism (8.0 percent of the total number of people employed in New Zealand), an increase of 2.5 percent from the previous year.
- Tourists generated \$3.9 billion in GST revenue, with \$1.8 billion coming from international tourists.

Following our last SOI, we have focused on ‘value’

Since our previous SOI (FY2018-FY2021) we have redefined what ‘value’ means. Our use of the term ‘value’ describes a more holistic view of the contribution of visitors to New Zealand which underpins TNZ’s Enrich 2025 approach (‘Enrich’).

Enrich is a part of our wider approach, and part of our balanced portfolio

Enrich is now reflected in and connected to TNZ’s ongoing strategies, and to the New Zealand-Aotearoa Government Tourism Strategy and vision developed by the Tourism Futures Taskforce. It supported TNZ’s work to create a balanced portfolio of established and emerging markets that contributed in different ways to the tourism sector, as well as our work with partners across the sector that enhanced the experience of visitors and New Zealanders.

TNZ has worked closely with the sector, including RTOs and tourism businesses across the distribution chain, to grow value and regional and seasonal dispersal over the past five years. We have managed and evolved our portfolio approach to leverage the scale and value of our core markets (Australia, China and the United States); increased the contribution of established markets (United Kingdom, Japan, and Germany); and built the foundation of future growth in emerging markets (including South America, India, Indonesia and the Philippines).

Despite the challenges of COVID-19, we have worked to maintain our tourism standing internationally, and stimulated domestic demand

We maintained our reputation as a premier international marketing organisation, with the evolution of the 100% Pure New Zealand campaign and Good Morning World, which was our most effective campaign yet in media reach, consumer engagement and conversion lift.

The past year has been a significant challenge for the New Zealand tourism industry due to the shutdown in global travel. When our borders closed to international visitors in March 2020, no one could have anticipated the ongoing impact this would have on our tourism industry.

Despite this, the industry has risen admirably to the challenge under unprecedented circumstances, and TNZ shifted its operational model as quickly as possible to support this. We developed a new domestic marketing capability that has supported a lift, on average, of domestic value across the country by 15 percent.

Since our previous Statement of Performance Expectations (SPE FY21) we have stimulated domestic demand to support tourism businesses and kept New Zealand’s brand alive in the hearts and minds of international consumers, ready for international recovery. Our focus for the next 12 months is to continue rebuilding the sector in a sustainable way and be prepared when international borders reopen.



Figure 5: The visitor economy as a cycle.

Operating Environment: Tourism Post-COVID-19

“ There are decades where nothing happens, and there are weeks where decades happen. ”

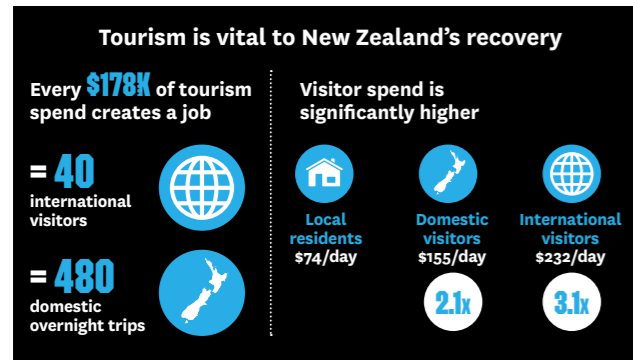


Figure 6: Tourism is vital to our recovery and contributes significantly to our economy.

Tourism is a core part of New Zealand's economy.

Pre-COVID-19, the visitor economy was worth almost \$40 billion to New Zealand:

- International visitors spent three times more than residents, spending an average of \$232NZD per day.
- Tourism directly contributed over \$7 billion in Crown income in 2019.

COVID-19 has shut our borders to international visitors and devastated tourism businesses.

We are in uncharted territory. While New Zealand's economy has mostly sustained the impact of COVID-19, tourism continues to take the biggest hit. Tourism sector businesses and supporting sectors, including hospitality and retail, have been impacted severely by the loss of international visitors. The shape of the sector and New Zealand's tourism proposition will be defined by how many businesses successfully reorient or hibernate their activity, as well as new businesses and opportunities that emerge when borders progressively reopen.

In 2020 and 2021, New Zealanders responded to TNZ's call to 'Do Something New, New Zealand' alongside the efforts of RTOs, and lifted domestic tourism spend by an average of 15 percent. This helped close the estimated \$12.9 billion gap in value from the loss of international visitors. However, key regions of New Zealand are experiencing ongoing volume and value gaps that domestic tourism simply cannot address, with flow on impacts

on employment, businesses, social amenity and local vibrancy.

The sector is confronted with a high level of uncertainty about the timing of our international tourism recovery. Some border restrictions are likely to be in place until early 2022. Domestic tourism is likely to remain the foundation of New Zealand's tourism sector as we bridge into a rebuild phase, as the market with the most certainty and resilience going forward.

Maintaining New Zealand's destination appeal while the border is closed is highly challenging, particularly as competitor destinations open their borders and restart international tourism. As a result, TNZ has had to find new and innovative ways to keep New Zealand in the hearts and minds of international consumers when they cannot experience our manaakitanga in person. TNZ is committed to maintaining New Zealand's edge with key consumer audiences for the benefit of all export sectors while under these highly challenging circumstances. It is important that we keep the brand strong while the border is closed, boosting it so we are ready for a recovery phase.

When borders do re-open it will take time and will be unpredictable.

New Zealand's international aviation links (the availability of connections to international destinations) reached lows of 11 percent of pre-COVID-19 capacity in 2020, and international travel trade distribution channels have also deteriorated. As a long and ultra-long-haul destination, the shape of tourism will first be defined by which air routes return to service New Zealand, and at what frequency.

Decisions and investments in vaccine distribution and travel requirements - such as vaccine passports - will affect New Zealand's market readiness and ability to scale up arrivals. There is a risk that domestic demand could reduce faster than international demand grows, and it will take time to gauge and measure what the 'right' level of arrivals should look like over the next few years. We will need to adapt and prepare for a range of scenarios.

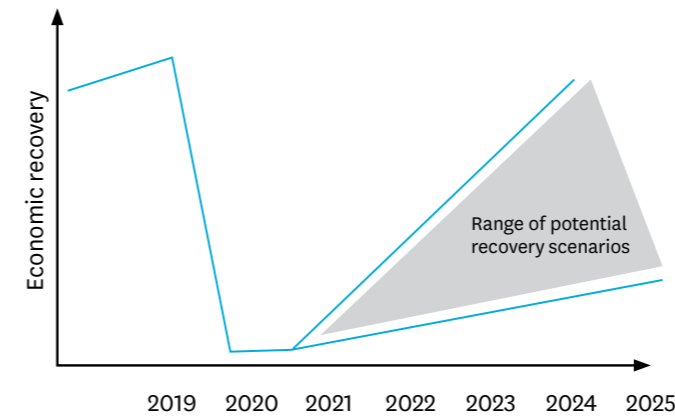


Figure 7: There are a wide range of recovery scenarios for the next four years.

TNZ's scenario modelling currently points to the recovery of 80 percent of pre-COVID-19 international tourism value in 2023. Our planning has been developed on this basis, but we will take an agile approach to new modelling scenarios and data as information continues to emerge.

With this challenge also comes an unprecedented opportunity to reshape the tourism sector

New Zealanders (as hosts and visitors) and international consumers expect tourism to be different in the post COVID-19 environment - more sustainable, productive and inclusive. The Government and tourism industry share this view and have used COVID-19 to explore the 'what' and 'how' of this intent in different ways. TNZ is positioned to lead elements of the sector's vision focused on demand generation and industry support.

In the minds of New Zealanders, our future visitor looks like...

- A visitor who isn't focused on how little they can pay for how long they can stay
- A visitor who is happy to contribute for the footprint they create to get here and be here
- A visitor who is interested in our stories
- A visitor who chooses a mode of travel that allows them to integrate and contribute, rather than congregate and litter
- A visitor who sees the value in our authentic product and stories, representing a shift from a bums on seats model to enriching the lives of New Zealanders



Figure 8: New Zealanders have a view of what an ideal future visitor could look like.

What communities want from tourism varies across the country, and the contribution of visitors can be captured in a wide variety of ways. These range from high spending luxury travellers who contribute strongly in an economic sense, to budget travellers who contribute to New Zealand through regional travel and joining our labour force.

In 2020, the Tourism Futures Taskforce brought together industry leaders in a consultative process with the sector to set a vision for tourism covering five desired future states:

1. Industry Thriving
2. Te Taiao Regenerating
3. Empowering Communities
4. Aotearoa Whakapapa
5. Navigating our Future

We have considered this work as part of TNZ's strategy development.

The opportunity to enrich Aotearoa through the contribution of visitors is greater than before, and even more urgent as part of New Zealand's overall economic recovery.

Transformation is necessary, but by itself is also not enough to enrich New Zealand. We need to restart tourism in a way that accelerates recovery and transition, and sustainably allows us to maximize longer term contributions. It is an opportunity to shape what the world will look like once COVID-19 is behind us or has a lesser impact on our tourism sector.

With increased domestic demand and a gap in the international market, TNZ's role for promoting New Zealand - targeting the right visitors and influencing their behaviour for the best possible benefit to New Zealand - has never been more important.

TNZ's goal, to maximise the contribution of visitors to the four capitals, will involve different actions as the operating context changes, and we bridge through recovery, transition, and the longer-term to an enrichment approach.

There are several scenarios that could eventuate post-COVID-19. TNZ must be responsive to a range of possibilities that may or may not eventuate, and we are planning for a variety of horizons. As an organisation, we will effectively operate by planning a multi-scenario approach to recovery, ensuring that our focus on long term enhancements is not lost through our shorter-term actions. While we may have to take action to provide an immediate response and support tourism growth once borders open, our ultimate objective of increasing the value of tourism overall will shape our response.

Operating Environment: Tourism Post-COVID-19

We will bridge between different phases from now until 2025

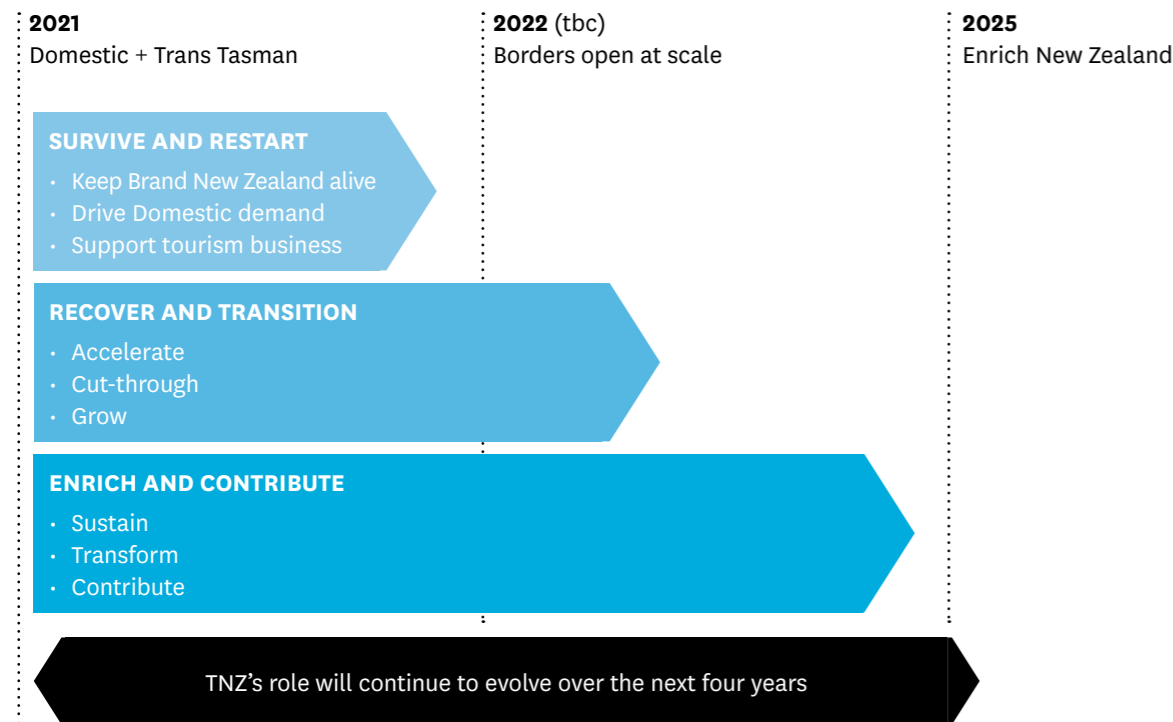


Figure 9: There are three key phases for our operating context to 2025.

PART B Strategic Intentions to 2024/25

The following Strategic Intentions are what we will set out to achieve in the next four years and are closely aligned to the operating context which we expect will change over time. Our three Strategic Intentions outline our desire to build our brand, to recover and transition, and to maximise the contribution of visitors to the four capitals.

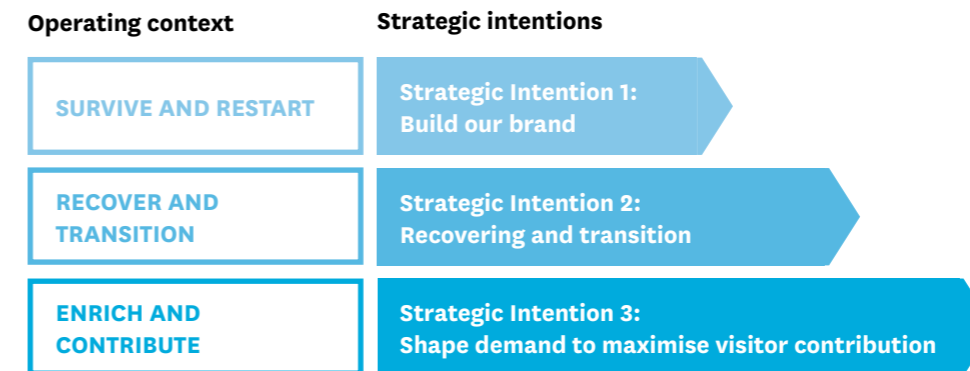


Figure 10: Our Strategic Intentions will phase in step with the operating context.

Strategic intention one: Build our brand

Build extraordinary value in New Zealand's destination brand and reputation

Protecting and growing the profile of New Zealand's brand is paramount in these challenging times.

Creating a high level of awareness and desire for New Zealand and maintaining our position at the top of the list of places that high-quality audiences want to visit, is critical for the success of New Zealand's tourism industry. It also has a wider benefit for our success as a nation. As we build desire for New Zealand and what we offer as a destination (our brand), we grow understanding of New Zealand's story, which can fuel the growth of other export industries.

Whether our borders are open or closed, we need to continue to build appeal (and ultimately, demand) for New Zealand, and make it a destination that is worth the wait. When our target audience is ready to travel, we want them to choose to book New Zealand. This transition from desire to action will be an important part of our economic recovery and future growth.

Building our brand in the minds of high-quality visitors delivers sustainable competitive advantage in a world where there are few other sources. This advantage does

not just enable demand for travel to New Zealand, it also impacts enables a longer term 'premium' destination positioning for New Zealand, setting the foundation for a more profitable industry.

We want New Zealand to be seen as one of the world's most aspirational travel destinations for high-quality visitors. **High-quality visitors are defined by more than the money they spend** – we define this audience by the way they contribute to our natural environment, culture, society and economy. The high-quality visitor is determined by the type of visitor, their scope of activities, travel across seasons and regions, environmental consciousness and engagement with our local culture and communities. We want visitors who contribute more than they take from New Zealand as evidenced by the qualities above.

Getting our audience to progress from dreaming about travelling to New Zealand to booking a holiday can take between three and nine months. Throughout the border closure we have mainly focused on keeping our destination brand alive in the hearts and minds of our audience. The value of this effort will be seen when borders re-open and we will be able to capitalise on the preference for New Zealand as a destination, by quickly supporting prospective visitors into booking a holiday.

Strategic intention one: Build our brand

Our work to build our brand will also focus on the concept of **Manaaki Whenua, Manaaki Tangata, Manawa Ora. We have a responsibility to care for people and place for a mutually enriched life.** This will ensure both customers and New Zealanders experience an enduring benefit, and New Zealand is considered a most desirable destination attracting high quality visitors who will, themselves, become advocates for our nation.

Over the course of FY22 and beyond, we will face a new set of challenges and competitive intensity. We will need to think and act differently to stand out on the world stage as a most desirable destination. To do this, we will adopt a challenger brand mindset approach to our marketing strategy, enabling us to test conventional thinking and make some bold decisions to make the most of our resources.

Our marketing strategy

Audience: high-quality visitors

Pre-COVID-19, New Zealand welcomed approximately four million visitors each year. TNZ traditionally targets and influences a subset of these visitors ('Active Considerers'), mostly holiday visitors, who spend and contribute more to New Zealand when they arrive.

We are shifting the way we approach our consumer audience. This will see us move from a demographic based understanding to a psychographic based understanding, allowing us to group prospective high-quality visitors with shared similar characteristics. This approach has identified seven different international mindsets and five different domestic mindsets; within these we have identified four international priority mindsets and three domestic priority mindsets.



Figure 11: Our marketing strategy will target the audience subset of high-quality-visitors.

Why it's important

Competitive advantage can be gained through understanding why people do what they do. TNZ's mindsets work will allow us to target visitors who are an even greater match to our tourism aspirations and objectives. A greater depth of insight enables us to identify our target mindsets domestically and internationally, and then shape our creative and content, plan and buy our media, engage partners and measure our performance against these mindsets accordingly. This a more effective and efficient way for TNZ to engage the right audience, with the right messaging, on the right channel, at the right time. This approach also allows us to generate demand from visitors who will seek the kind of New Zealand tourism experience that New Zealanders have indicated they will support.

How we'll approach it

We have already completed a comprehensive quantitative research study, enabling the identification of mindsets and priority target audiences within our wider portfolio of markets. We will continue to build our depth of understanding through qualitative research, apply this understanding to our creative development, ensure it informs our global media strategy and roll it into market planning and execution. We will also execute our marketing work and measure performance against key brand and campaign metrics through our Active Considerer monitor – which allows us to monitor those individuals that have shown a strong interest in visiting New Zealand – and campaign tracking tools.

Brand: build boldly

We will grow brand appeal, supporting New Zealand to remain a number one preference for high-quality visitors. This will ensure our priority audience feels compelled to visit now, or that it's worth prioritising New Zealand for their next holiday.

Why it's important

Building long term strength in our brand creates sustainable competitive advantage that ultimately pays off in long term benefits to New Zealand. By creating and reinforcing high desire for our brand, we create demand for New Zealand as a destination that can then be converted to holiday bookings by our marketing partners, such as airlines and travel agents. It can also enable a long term 'premium' destination positioning, setting up our industry for increased profitability.

How we'll approach it

We continue to evolve our creativity by making bold, imaginative and distinctive marketing messaging through advertising, public relations, social media and other channels. We'll ensure it is entertaining, engaging and emotive, grounded in our values as New Zealanders and

te ao Māori. We will work to integrate our brand story into collateral and approaches focusing on both domestic and international audiences. Our marketing will leverage the depth of understanding of our audience, building a consistent narrative globally, while ensuring it is highly relevant to our target audiences around the world.

Channel: inventiveness

We will evolve the way we leverage our channels to market, increasing integration across channels and being more inventive and innovative with the channels we use. This approach will increase the impact of our marketing.

Why it's important

Increasing the engagement of our audience through channels where they are currently engaged, and leveraging the scale and appeal of those channels, is essential to gaining and maintaining their attention. Focusing on the right channels and finding new and interesting ways to use those channels adds reach, relevance and engagement to our storytelling.

How we'll approach it

We will focus on maximising the impact of our marketing work through our paid, owned, earned, trade and social channels. We will look at our existing partnerships and identify new ways to get value from those partnerships to engage our audience more deeply. We'll also look to new partnerships that we haven't previously explored, and where there are major opportunities that can enable exponential benefit, we'll invest more time, effort and resource.

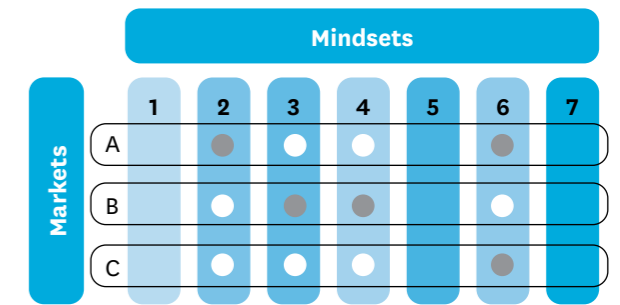


Figure 12: We will use both demographic and psychographic targeting to engage high-quality visitors with shared similar mindsets. In the example above, demographic segmentation is represented by three example markets (A, B and C), while the psychographic segmentation is represented by seven example mindsets (1-7).

AUDIENCE: HIGH QUALITY VISITORS	BRAND: BUILD BOLDLY	CHANNEL: INVENTIVENESS
Deep insights at pace to bring the voice of the most valuable target visitor to the centre	Bold, imaginative, distinctive work that puts New Zealand at the top of the list	Audience led integration, innovation and inventiveness for impact
<ul style="list-style-type: none"> Target selected mindsets as global high-quality audience Actionable insights enabled through consultation and test/learn Rapid response, real time tools for agile approach 	<ul style="list-style-type: none"> Values led, emotive & te ao Māori infused Core brand narrative + mindset based modular content Amplifying conversations eg. social + PR Alignment of Domestic and International 	<ul style="list-style-type: none"> Focus first on getting consumer attention Alignment for impact Global to Market + integration across channels to market Establish new partnerships; leverage major opportunities e.g. Amazon

Strategic intention two: Recover and transition

Accelerate tourism’s recovery and transition to a more sustainable, productive, and inclusive future

There is no new future for tourism without recovery.

International visitor recovery will depend on the opening of New Zealand’s borders, and the reinstatement of air connectivity. It is likely that initially most visitors will be arriving for the key purpose of visiting friends and relatives. The proportion of those who choose to come to New Zealand on holiday during the early recovery phase will depend on TNZ tailoring marketing investments by considering insights into border decisions and likely scenarios. TNZ’s agile portfolio approach is designed to support this process.

As air connectivity recovers, and global international tourism enters a ‘new normal’, we have an opportunity to reset our international visitor market. COVID-19 has presented us with a once-in-a-lifetime opportunity to reimagine the way we approach tourism. We can build a stronger, more resilient and sustainable sector that supports all New Zealand communities, and protects, restores and champions Aotearoa’s natural environment. We have an opportunity now, while most borders are at least partially closed, to re-shape tourism so that as we re-open, visitors, industry, and host communities are working together sustainably.

The industry, Government and New Zealanders have indicated their support for a level of change. We want to leverage this and support Government and industry bridging this transition in a way which will pave a more sustainable future for the tourism sector in New Zealand.

We have a chance to build on the 100% Pure New Zealand brand, and future-proof this for generations to come. We will continue to target those markets that can deliver the most for New Zealand via their contribution – including visitors who respect the unique social and environmental benefits of being a visitor to New Zealand.

How we’ll approach it:

- Accelerating both the recovery and transition that is required for the sector. As borders re-open, we will be in our recovery and rebuild phase. Over the coming years, a bridge will take us towards a broad transition for the system.
- Being agile as New Zealand’s borders re-open, from priming our audience, to igniting travel as borders re-open, and then scaling up sustainably to increase visitors and value as conditions improve.
- Focusing on sustainability to enable us to protect the things that matter to us – natural resources, cultural traditions and social connections. The connection

between people and the land is central to our work and we need to preserve this special relationship.

- Supporting and championing businesses with quality, sustainable products and experiences.

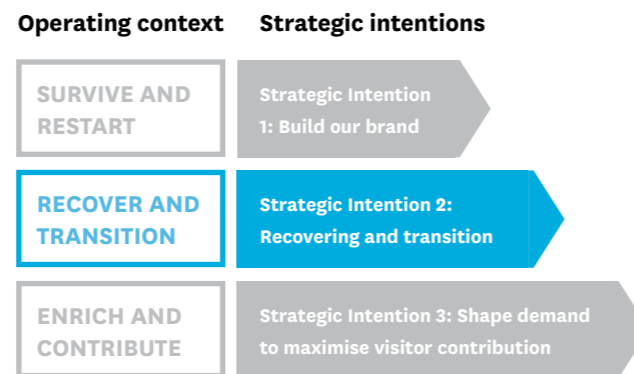


Figure 13: We will need to focus on both recovery and transition as we move forward.

Commercial Strategy: Portfolio Markets

We will adapt our portfolio approach to markets in order to support tourism recovery. We will continue to focus on multiple markets to ensure long-term resilience and value growth for New Zealand, but we will service markets in a more agile way to respond to the opportunities and challenges posed in the recovery from COVID-19.

As we look towards achieving Enrich 2025, we will maintain a **portfolio approach** that includes domestic New Zealand travel as a foundation market.

- **Domestic tourism will be stimulated in the short term** to sustain the sector through the recovery phase, and we will consider ways to transition our domestic marketing for targeted productivity, regional and seasonal interventions.
- **Internationally, our investment will focus on Australia, China and the United States of America**, which made up 60 percent of international tourism value pre-COVID-19 and will continue to play a major role in high value holiday visitation. We will prime, ignite and scale up in the Australian, Chinese and United States of America markets, and target high quality visitors from these locations.
- **We are committed to a diverse portfolio of markets, but our work will remain flexible** as we build insights from border opening and economic recovery, meaning investment will vary from year to year based on TNZ’s analysis of the best return for the sector and economy. We will maintain an agile approach to capitalise on the opportunities that present the highest value. This may mean targeted investment in markets that we have not traditionally focused on if they open faster than our traditional target markets and taking resource from our international hubs to support this approach.

We will achieve this across three key phases:

- **Prime:** Keeping the brand alive and desire for New Zealand high, prior to borders being open. Setting up for conversion.
- **Ignite:** Border openings are announced, and we launch demand conversion, focused largely on the resilient traveller that wants to be ‘first to fly’.
- **Scale-up:** As time goes on, we build value with increased air connectivity and more stakeholders re-engaging.



Figure 14: We will prime, ignite and scale up our response in each market.

Strategic intention three: Maximise the contribution of visitors

Shape demand to maximise the contribution of international and domestic visitors to the four capitals

TNZ will work to better influence who chooses to visit New Zealand and what they choose to do when they get here.

TNZ’s marketing and promotional activities are designed to create visitors who will spend more, visit more regions and travel in the shoulder seasons. Pre-COVID-19, this resulted in:

- 14 percent higher spend per visit;
- 45 percent greater regional diversity in visits; and
- 28 percent increased travel in shoulder seasons.

To achieve greater visitor value across the four capitals, as well as across regions and seasons, we are adopting a portfolio approach to marketing activities. Each market can contribute individually to our outcomes in different ways, for example through visiting outside of New Zealand’s peak season, or by focusing on specific regions or activities of interest to that international cohort.

Our strategic approach is underpinned by the concept of the **high-quality visitor**.

To be successful in future, however, we will need to think differently about how we are targeting high-quality visitors, building on the extensive knowledge we gathered pre COVID-19. We are making a ground-breaking shift to find and define the TNZ consumer with the future of tourism in mind. As noted under Strategic Intention One, we will look beyond borders to target psychographic audiences (based on traits, personalities, values, opinions and attitudes)

What is a high-quality visitor?

High-quality visitors are defined by more than the money they spend – we define this audience by the way they contribute to our natural environment, culture, society and economy.

The high-quality visitor is determined by the type of visitor, their scope of activities, travel across seasons and regions, environmental consciousness and engagement with our local culture and communities.

The high-quality visitor represents the intersection between the global audience that values what New Zealand has to offer, and the type of visitor that is highly valued by New Zealanders.

TNZ’s mindsets approach will better find and target high-quality visitors.

that will contribute more to New Zealand across the four capitals.

As TNZ develops these new audience mindsets, we will be able to understand visitor contribution and experience beyond a market-by-market approach. This will allow us to shape demand in more sophisticated and targeted ways. We will be innovative and responsive in how we segment and focus on markets and audiences.

As well as our traditional focus areas for visitor contribution – such as spend and regional and seasonal dispersal – this approach will enable us to consider how visitors are orientated towards climate consciousness, sustainable travel, environmentally regenerative tourism and a desire for culturally and socially enriching activities in New Zealand.

We will develop and set measures over the period of this SOI that align with economy, nature, society and culture. This will ensure our marketing activity is guided by holistic results and make sense at different stages of the sector’s recovery and transition.

While TNZ does not lead tourism policy, in order to shape demand effectively and in line with Government and sector objectives, TNZ partners closely with industry, MBIE, DOC, RTOs and other agencies to understand and advise on supply side opportunities, challenges and aspirations.

We will work with industry to ensure businesses can take advantage of our audience targeting and insights which will in turn enable connection of a higher value, culturally enriching and sustainable tourism product with visitors.

We will also continue our focus on influencing visitor behaviour through *Tiaki – Care for New Zealand*. The *Tiaki Promise* has a set of guiding principles for visitors to follow, showing them how to contribute to preserving and protecting our land. The *Tiaki Promise* will help to ensure visitors have a clear and compelling understanding of the expectations of travelling throughout our precious environment.

International Visitor Survey YE June 2017	Total	Holiday	TNZ	Marketing lift
International visitors to New Zealand	3.7m visitors	1.9m visitors	246k visitors	+14%
Average spend per visit	\$3,169 per visit	\$3,759 per visit	\$4,427 per visit	+18%

Figure 15: The visitors we target and convert through TNZ marketing spend more per visit.

PART C Capability And Success Measures

Organisational capability

Sustainability Framework

One of New Zealand’s greatest attractions is our unspoiled environment and unique natural assets. The connection between people and the land is central to our *100% Pure New Zealand* campaign.

Now more than ever before, the sector has an opportunity to become truly regenerative and work together to contribute significantly to Aotearoa’s climate change goals, to becoming the most sustainable and tourism sector on the globe.

On 2 December 2020 the Government announced the Carbon Neutral Government Programme (CNGP). The CNGP aims to reduce Government emissions at an accelerated rate and work towards carbon neutrality by 2025.

TNZ is developing a sustainability framework that aims to transform our organisation as well as shape and influence the tourism sector and drive change.

We believe we can impact:

- **Market mix** – to enable balance between domestic, business events, short-haul, long-haul markets for industry resilience, targeting discerning visitors to enrich New Zealand.
- **Digital leadership** – accelerating the uptake of technology to find new ways to reach visitors and building industry digital capability.
- **Visitor behaviour** – working to engage, inspire and educate to positively influence visitor behaviour and promote sustainable operators.
- **Industry recovery** – through destination marketing as international travel rebuilds and supporting the industry to be prepared for visitor expectations.

- **Natural environment** – through TNZ’s own carbon neutral journey and leading the industry to accelerate the transition to a more sustainable and lower-emissions sector.

As well as finalising our own sustainability strategy, we will work with other relevant industry organisations and Government to ensure that our sustainability approach aligns with wider industry aims.



Figure 16: The *Tiaki Promise* is a set of guiding principles for visitors to follow.

Organisational capability

People and culture

Value	Question	Whakatauki
COURAGE <i>Māia</i>	Is this extraordinary work? <i>Ko te whakamana te whai?</i>	<i>Kia kaha, kia māia, kia manawanui</i> <i>Big hearted, dedicated, courageous.</i>
CARE <i>Manaaki</i>	Will this create a better future? <i>He ao houkura te whai?</i>	<i>Manaaki whenua, manaaki tangata, haere whaka mua</i> <i>Care for land, care for people, go forward.</i>
CONNECTION <i>Hononga</i>	Are you building on the strength of our global whānau? <i>Te whakamānawa i ngā hononga ā-iwi whānui o te ao te whai?</i>	<i>Ehara taku toa i te toa takatahi, engari he toa takitini</i> <i>My strength is not from me alone, but from many.</i>

Figure 17: TNZ's values.

Purpose – Kaupapa

Enrich Aotearoa through the contribution of visitors to economy, nature, society and culture.
Whakamānawatia ko Aotearoa.

Our values

At TNZ we refer to our employees as our global whānau. They are the fabric of TNZ. Our global whānau use three core values to underpin how we approach this. For each of our three core values, we have established a question that we ask ourselves to help understand if we are living our values, and a whakatauki that reminds us what the value is about.

People strategy

TNZ's people strategy has three commitments:

- 1. Extraordinary work** – We continually strive to deliver outcomes that are the envy of the world and ultimately lead to enriching Aotearoa. We do this by creating an environment where people perform at their best, having a strong focus on performance and building agility to foster innovation and rapid adaptability.
- 2. Exceptional people** – We focus on attracting a diverse global whānau and developing capability that supports them to do their job well and quickly adapt as new opportunities arise. We have a strong focus on leadership, and we ensure we're continually developing this to deliver on our strategy intentions.

- 3. Enrich wellbeing** – We are committed to keeping our global whānau safe and supporting them to thrive. We actively work to embed safety and wellbeing into our mahi.

Diversity and inclusion

Our global whānau have different backgrounds, experiences and qualities that we respect and embrace. We treat all people equally to create an inclusive work environment. Our Diversity & Inclusion Policy guides how we create a diverse and inclusive workplace. TNZ is committed to Equal Employment Opportunities and each year reports on its efforts against the Human Rights Commission seven elements of being a good employer.

Te Tiriti principles and Pou Ārahi objectives

To support a more inclusive approach that is envisaged by the principles of the Treaty, TNZ will focus on building capability and confidence in te ao Māori across key functions of our organisation.

As a Crown Agency, TNZ is committed to the Governments expectations in giving effect to the principles of Te Tiriti o Waitangi. We believe the Te Tiriti principles of *Partnership*, *Participation* and *Protection* apply to our work, particularly in reference to our ongoing sustainability strategy. TNZ will seek to give effect to these principles in the following way:

- **Partnership** – Engage with and partner in projects and programmes of mutual benefit.
- **Participation** – Create formal and genuine opportunities with Māori to participate in projects and programmes of importance.
- **Protection** – Treat Māori knowledge, interests, values, concepts and principles with integrity throughout the work we do.

To lead this work, TNZ has committed dedicated resource towards the appointment of a Pou Ārahi lead to the Executive Leadership structure. Pou Ārahi refers to the provision of 'ārahi', guidance and direction.

The lead for Pou Ārahi will ensure that TNZ has established clear objectives that align with the responsibilities and principles set out above, while building and guiding a framework for internal operations to align to.

Our Pou Ārahi objectives for FY22 are listed below and will be interwoven across the broader portfolio of TNZ.

- 1.** Our global whānau and organisation are empowered through our overarching Māori strategy.
- 2.** TNZ has built strong and enduring partnerships that enrich NZ and supports our work.

- 3.** TNZ is better informed of the deeper insights into the Māori tourism system.
- 4.** Our brand and content reflect a deeper cultural value set (through story telling).

As part of our te ao Māori strategy we're committed to building the cultural competence and confidence of our global whānau. We have a Māori capability plan in place which is reviewed annually. TNZ supports Maihi Karauna (the Crown's Māori Language Revitalisation Strategy) to revitalise te reo Māori in New Zealand. We signed a Mahi Tahī in 2019 with Te Taura Whiri i Te Reo Māori (the Māori Language Commission), and our Māori capability plan will help realise our commitment and dedications to this.

Workplace, Systems and Environment

Workplace

TNZ's workplace is distinguished by the following:

- Geographic dispersal with 15 offices, in 12 countries, operating across a range of time zones.
- Significant cultural diversity between staff, including a number of staff speaking English as a second language.
- A young and mostly technologically aware and proficient workforce.
- Fluid deployment of staff to international projects.

TNZ works closely with other New Zealand Government agencies (NZ Inc.) in offshore locations, and in support of this, we are co-located with NZ Inc agencies in some countries.

Systems

IT systems are critical for TNZ and its international workforce. Our systems, infrastructure and processes are focused on connecting international offices and staff through tools such as video conferencing facilities and online voice and video systems. Systems and infrastructure are also focused on document and information sharing and transparency, such as through SharePoint document management, a Customer Relationship Management (CRM) system, and our intranet.

Connectivity delivered through IT solutions also realises cost efficiencies through reducing the need for air travel between offices. TNZ's online information system enables 24/7 access to information for our international workforce, which enables accurate and speedy decision making.

An outsourced IT infrastructure model has been implemented to mitigate risks with the organisation's information systems, future proof systems, improve connectivity and deliver cost savings. Investment will continue in IT systems to deliver efficiency and productivity benefits.

Our programme of activity will continue to focus on streamlining and optimising the organisation's existing system.

Safety and wellbeing

TNZ is committed to enriching the wellbeing of our global whānau. Our Safety and Wellbeing Framework ensures we're meeting our legal obligations under relevant safety legislation as well as identifying opportunities to enable our people to thrive in the workplace. We continuously review and improve our safety and wellbeing policies and practices to ensure they are compliant, and work for us as an organisation. By working with the tourism industry in the development of safety and wellness, TNZ also supports the industry in improving its practices and meeting its obligations under safety legislation.

SOI Outcomes Framework

Measuring the net benefit contribution of tourism

We have evolved our previously published Enrich 2025 model to encompass the four capitals, for a holistic view of how we can influence net benefit tourism over the coming four-year period.

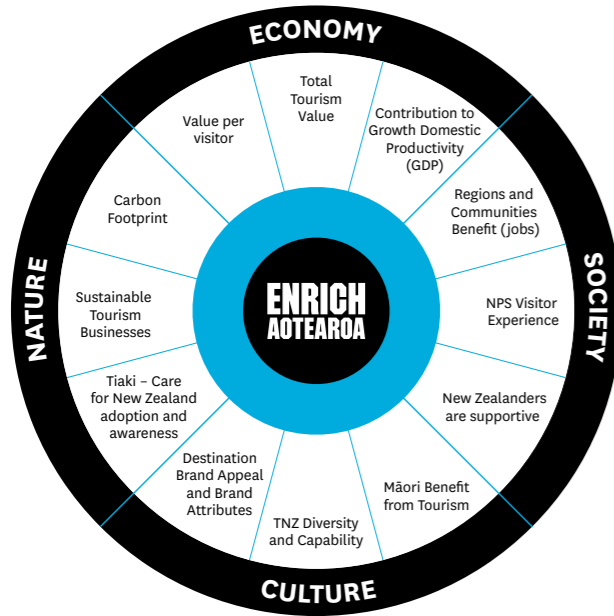


Figure 18: Our Enrich outcomes framework encompasses the four capitals and a range of strategic measures.

Our key activities

TNZ delivers its work through the following activity groupings:

- **Activity one:** Develop and deliver brand and demand driving campaigns to the tourism consumer.
- **Activity two:** Build desire, appeal and awareness via New Zealand stories through third party earned content and partnerships.

- **Activity three:** Inspire, educate and partner with the trade and tourism sector, along with other sector experts, to spread key tourism and business events messages and campaign information through their channels.
- **Activity four:** Develop, deliver and analyse engaging content and messages, supporting our activity through TNZ-owned channels, including newzealand.com
- **Activity five:** Engage, inform and work with the tourism sector, Government and other agencies in New Zealand to support and strengthen the recovery of the sector.

Focus Areas for FY22

Our Statement of Performance Expectations (SPE) will set out six areas of focus for FY22 as the first year of our four-year strategy:

1. Boldly grow brand desire to make New Zealand irresistible to visitors that will enrich Aotearoa.
2. Drive domestic demand and lay the foundation for long-term value.
3. Accelerate the recovery by scaling up high-value conversion across markets and priority audiences as borders re-open.
4. Embed te ao Māori into TNZ's strategy, work, and ways of working.
5. Support industry to deliver quality visitor experiences that enrich New Zealand for both domestic and international visitors.
6. Actively inform and contribute to all-of-Government programmes for tourism recovery and transition.

PART D Subsidiaries and Associate Companies

TNZ has two subsidiary organisations, Qualmark Limited and VIN Incorporated, trading as i-SITE New Zealand.

Qualmark Limited

Qualmark Limited (Qualmark) is the New Zealand tourism industry's official quality assurance agency. It is owned by TNZ and endorsed by other leading tourism industry organisations.

The role of Qualmark is to help secure a long-term sustainable position for the New Zealand tourism industry by protecting what makes New Zealand unique and desired, by maintaining New Zealand's support for our industry, and by enabling tourism businesses to be ready to embrace change.

Qualmark's key objectives are:

- To enable visitors to select accommodation and activity/attraction/transport options with confidence, knowing that the business they choose has been independently quality assessed.
- To work with operators and the New Zealand tourism industry to deliver a superior customer experience, customer safety, and social and environmental best practice for a long-term sustainable industry.

Qualmark provides a measurement system to assess a broad range of quality criteria including health and safety, economic, environment, social and people attributes. In addition, a star grading system assesses attributes for different categories of accommodation and venues.

This enables visitors and the tourism trade to be better informed about the nature, quality and sustainability of accommodation and services, while also encouraging the industry to lift the bar on the quality and sustainability of products and services. Qualmark has around 2100 licence holders that are assessed annually.

COVID-19 heavily impacted Qualmark members, who are traditionally focused on the international visitor market. Helping to support business survival became

a core and necessary function for Qualmark. TNZ responded to this requirement by providing Qualmark members with a fee holiday and a multi-phase business support programme (*Tourism Transitions Programme*) to assist businesses with their strategic approaches to COVID-19 and build digital capability. This focus continues as the sector transitions into recovery.

Qualmark's key areas of focus for FY22 are to:

1. Support the industry by continuing capability building and added value programmes to support operator survival, with a focus on quality standards as business needs and models change.
2. Help the industry prepare for the return of international visitors with strong communication and support.
3. Tell the industry story to New Zealanders through the 100% Pure NZ Experience Awards and share good news stories to New Zealanders around community and environment (*Tiaki*).
4. Develop Qualmark's value proposition with enhanced tools to enable operators to help themselves, through two streams – assessments and capability development.

i-SITE New Zealand

Once visitors arrive in New Zealand, they need to find out what to do and where to go. TNZ supports the i-SITE network to provide quality information to visitors. To fulfil this role, i-SITE New Zealand has identified a mission and strategic objectives for the network within its strategic plan.

The i-SITE network was heavily impacted by COVID-19 and has been reduced to 64 offices. i-SITE adapted its focus in FY21 to the domestic market and has been undertaking strategic reviews to determine a long-term strategy for the shape of the network. FY22 is expected to be a transition year to a new model.

The i-SITE network's mission is to:

- Match visitors with quality experiences, helping them to safely see and do more, and creating net promoters.
- Drive community and business growth through delivery of trusted information and a competitive sales channel.
- Provide manaakitanga that our host communities take pride in.

The i-SITE network will focus on four themes, each with a strategic objective:

- Brand and awareness – reach more customers with a clearer value proposition.
- Customer experience generate more net promoters.
- Productivity simplifies the business operation to drive down costs.
- Valued network secure investment.

i-SITE New Zealand's priorities across these strategic themes identify areas where it will maintain the

momentum achieved over the past few years, while also focussing firmly on the development of a 'Future Network' and longer-term strategy:

1. Continue our journey towards transitioning to a 'Future Network', ideally under Crown ownership, but with a contingency plan to ensure the network continues.
2. Maintaining the network while key decisions are made regarding our Future Network strategy by maintaining the status quo, but also focussing on:
 - a. Reaching customers with a clearer value proposition by promoting its online presence isite.nz; using a focused digital advertising campaign to target domestic visitors and arriving international visitors once borders reopen; and working with TNZ to leverage their activities in the marketplace.
 - b. Supporting members through training to deliver the best possible visitor experience; encouraging the network to embrace productivity platforms; maintaining stakeholder connectivity to ensure owners and the wider industry appreciate the commercial and public good/social licence benefits that i-SITEs deliver; and encouraging individual i-SITEs to support the Tourism Sustainability Commitment and engage with visitors on initiatives such as the *Tiaki* Promise, freedom camping, safer driving and visitor safety.

Strategy on a page


GOVERNMENT GOAL	STRATEGIC INTENTIONS FY22-25	FOCUS AREAS FOR FY22	SUCCESS LOOKS LIKE...
<p>Tourism growth is</p> <ul style="list-style-type: none"> Productive Sustainable Inclusive <p>And contributes to the intergenerational wellbeing of New Zealanders and their families</p>	<ol style="list-style-type: none"> BUILD OUR BRAND Build extraordinary value in New Zealand's destination brand and reputation. ACCELERATE RECOVERY AND TRANSITION Accelerate tourism's recovery and transition to a more sustainable, productive, and inclusive future 	<ol style="list-style-type: none"> Boldly grow brand desire to make New Zealand irresistible to visitors that will enrich Aotearoa Drive domestic demand and lay the foundation for long-term value Accelerate the recovery by scaling up high-value conversion across markets and priority audiences as borders re-open Embed te ao Māori into TNZ's strategy, work and ways of working Support industry to deliver quality visitor experiences that enrich New Zealand for both domestic and international visitors 	<p>Brand</p> <ul style="list-style-type: none"> Appeal and preference for Brand New Zealand is higher than it's ever been The outtake of our storytelling is consistent with that of our values and truth Implementing and leveraging audience mindsets for higher quality targeting <p>Domestic</p> <ul style="list-style-type: none"> Value remains higher than pre-COVID-19 New Zealand delivers to expectations as a holiday destination for New Zealanders More New Zealanders are aware of <i>Tiaki</i> <p>International recovery</p> <ul style="list-style-type: none"> Recovery of value from Australian market and other markets ready to follow All regions grow in value Increase the percent of direct bookings for industry Aviation partnership planning to re-start key routes with airlines and airports Trade networks are supported, reconnected and inspired to showcase and sell New Zealand
<p>PURPOSE: ENRICH AOTEAROA</p>	<ol style="list-style-type: none"> MAXIMISE CONTRIBUTION Shape demand to maximise the contribution of visitors to the four capitals 		
 <p>The diagram 'ENRICH AOTEAROA' is a circular model with four quadrants representing the 'four capitals':</p> <ul style="list-style-type: none"> ECONOMY: Total Tourism Value, Contribution to Growth Domestic Productivity (GDP), Value per visitor. SOCIETY: Regions and Communities Benefit (jobs), NPS Visitor Experience, New Zealanders are supportive. CULTURE: Māori Benefit from Tourism, TNZ Diversity and Capability. NATURE: Sustainable Tourism Businesses, Carbon Footprint, Tiaki - Care for New Zealand adoption and awareness. <p>Additional elements include 'Destination Brand Appeal and Brand Attributes' and 'Tiaki - Care for New Zealand adoption and awareness'.</p>			

Figure 19: Our Strategy on a Page summarizes our purpose, intentions, focus areas and what success looks like.

Tourism New Zealand
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NEW ZEALAND**



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