



Tourism Sector Skills Summary

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Hinonga Kōkiri Head Start Project

The Hinonga Kōkiri / Head Start Project is an initiative from ServicelQ that brings together service sector stakeholders from industry, employers, schools, tertiary education providers, and iwi throughout Aotearoa New Zealand to reflect on the impacts of COVID-19.

The purpose of the project is to hear stakeholder perspectives on:

- ▶ how COVID-19 has reshaped vocational pathways and business, and
- ▶ what people and skills, training, and learning pathways are needed to get a head start to COVID-19 recovery.

The stakeholder consultation began in October 2020 and concluded in January 2021. In total, 321 sector representatives attended 41 focus group sessions in 10 regions throughout New Zealand. Their perspectives shaped the creation of online surveys, resulting in 488 responses that provided further views on how COVID-19 impacted the service sectors, and what support is needed for recovery.

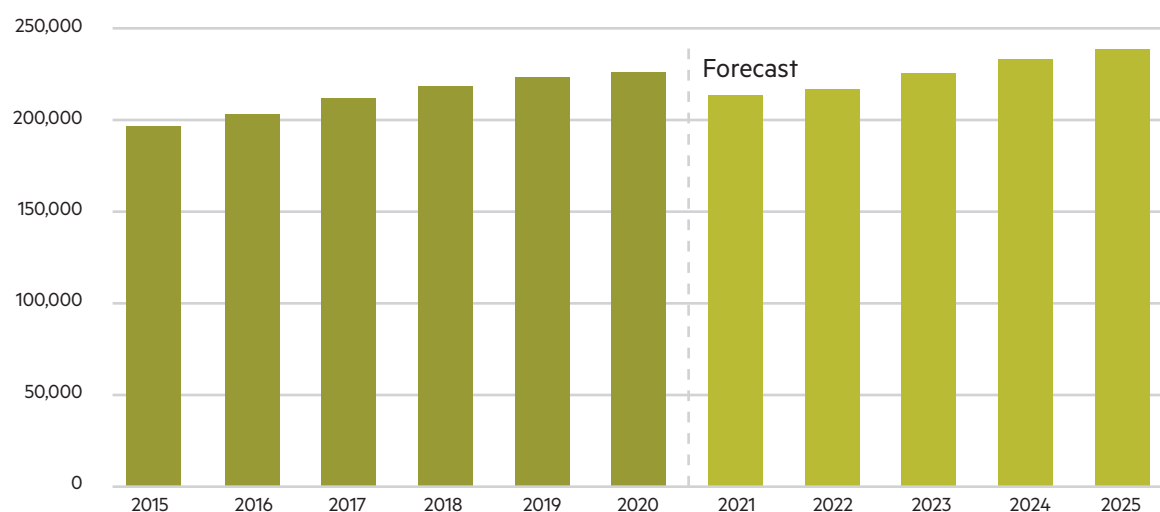
The consultation results have been combined with industry insights, data and forecasting to produce nine sector skills summaries, one for each sector represented by ServicelQ in our capacity as a Transitional Industry Training Organisation for the Services Workforce Development Council. This skills summary is for the tourism sector. There are eight other summaries for the accommodation; aviation; cafés, bars and restaurants; catering; clubs; quick service restaurants; retail and retail supply chain; and travel sectors.

From this research ServicelQ will produce a workforce strategy for the Services Workforce Development Council Interim Establishment Board. The strategy will include industry, employer, schools, provider, and iwi voices. In this way the project gives service sector stakeholders an opportunity to shape vocational education in Aotearoa New Zealand.

The report is structured into five main areas to show what impacts COVID-19 has had on the sector; the sector response to COVID-19; key drivers of future success; skills needed to support sector recovery; and skills initiatives and strategies.

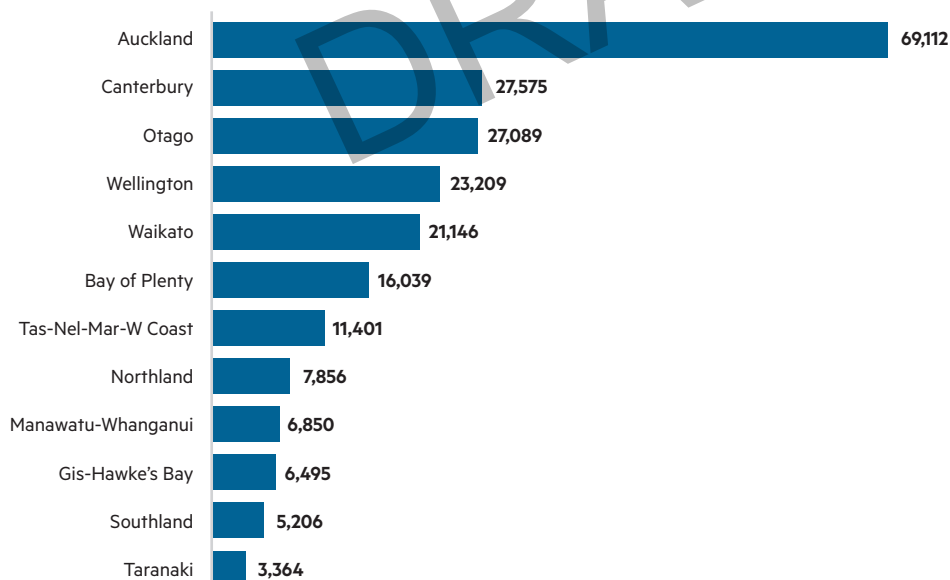
Tourism Sector Snapshot¹

Tourism sector jobs



- ▶ Prior to COVID-19 there were 225,385 tourism sector jobs and the sector was forecast to grow 11.3% between 2020 and 2025. Infometrics now forecasts job losses of 12,803 or 5.7% of the tourism sector workforce in the year to March 2021, and then 1.7% jobs growth (3,666 jobs) in the year to March 2022 and 3.9% growth (8,423 jobs) the following year. The tourism sector is forecast to reach pre-COVID-19 job numbers in 2023 and grow to 237,810 jobs by 2025.

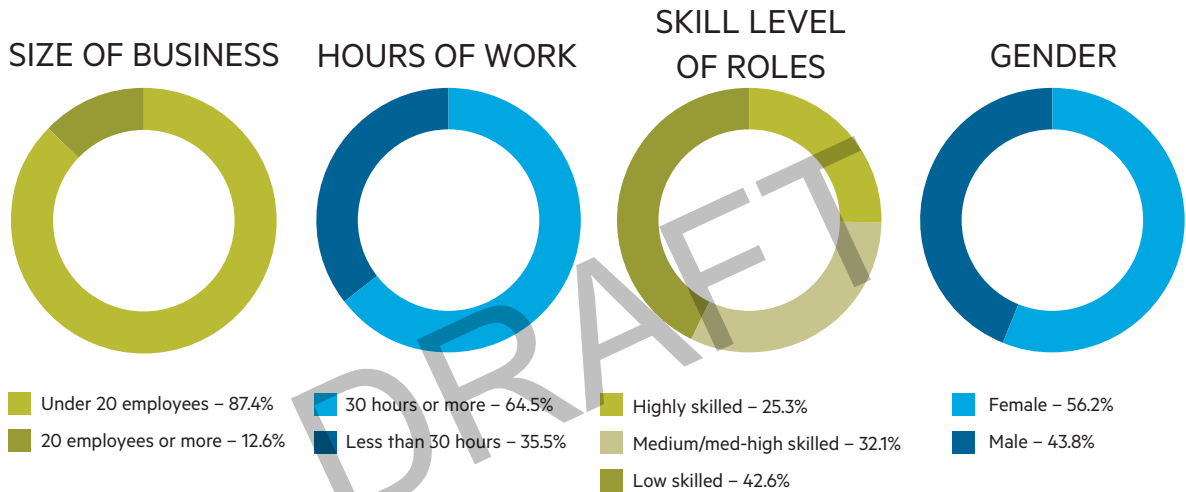
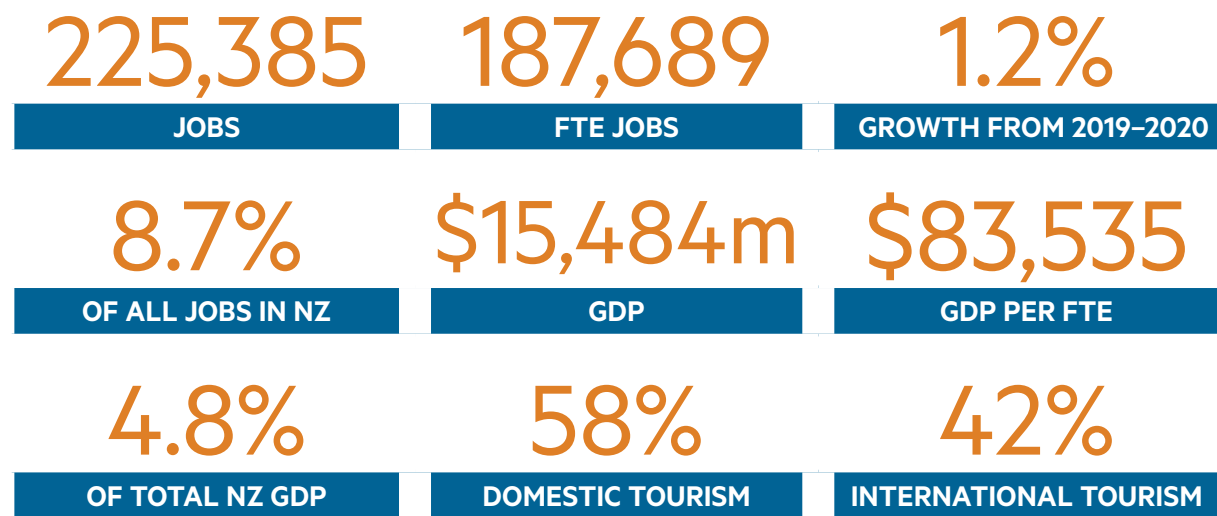
2020 Regional employment



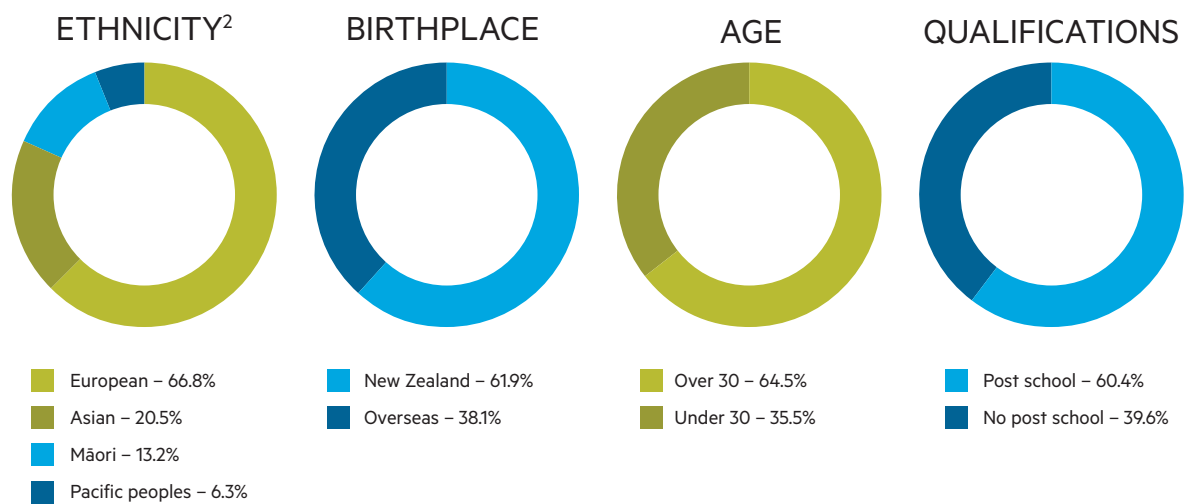
- ▶ Almost one third of tourism jobs (31.6%) are in the South Island which is considerably higher than the overall New Zealand workforce where a quarter (24.1%) of jobs are in the South Island.
- ▶ In 2020, there were 34,876 business units in the sector with 17,374 employing one or more people, an average of 6.4 people per business.
- ▶ The self-employment rate in the tourism sector is 12.4%

¹ Sector data and forecasts supplied by Infometrics February 2021. N.B. 2020 sector data is as at end of March 2020

2020 Sector data



Sector demographic data from 2018 Census



▶ 25.5% of the tourism sector workforce hold a Bachelor Degree or higher.

² Employees may identify with more than one ethnicity.

Sector Consultation Insights



1. The impacts of COVID-19 on the tourism sector

Customers

The tourism sector was the first to feel the effects of COVID-19 due to the introduction of international border restrictions. With the borders closed to international tourists since March 2020 tourism continues to be one of the hardest hit sectors. While there is still some demand from international travellers who have remained in New Zealand, there is minimal international visitor spend. This has resulted in a huge decline in revenue, especially for tourism businesses in tourism hotspots e.g. Queenstown and Rotorua, who rely on international visitor spend.

Prior to COVID-19, tourism was New Zealand's biggest export earner contributing 20.6% of foreign exchange earnings with international tourism expenditure of over \$44 million per day. International tourism made up 42% New Zealand's visitor economy. In 2019 \$40.9 billion was spent on tourism; \$17.2 billion of this was international visitor spend and \$23.7 billion domestic.

There is a reliance on domestic visitors and they often have a lower budget than international visitors, so while domestic tourism has increased it does not fill the gap. Even with increased domestic visitation there is still expected to be a gap of \$12.9 billion over the 12 months since COVID-19. Domestic visitors spend \$155 on average per day compared to international visitors' average spend of \$232 per day.

Domestic tourists are more spontaneous than international tourists who had more predictable and prebooked itineraries. Ideally tourists dream, plan, do. Kiwis mostly just do (with a bit of planning), which makes it harder for businesses to plan and roster. Demand is lumpy, with busy weekends and school holidays, and quieter weekdays.

There are huge variations but those who have met the domestic market well are doing better than expected. There is resentment over what some see as the unfair distribution of the Strategic Assets Protection Programme (STAPP) fund. Domestic customers pressure operators for discounts, as they think all tourism businesses have had a "handout". In some regions, competition between tourism operators to get enough business to support staff has turned into a price war to attract the customer.

Customers seem to be less tolerant since COVID-19, with higher expectations and this has been hard for staff, especially those who are younger or less experienced at handling challenging situations. Processing cancellations, changes and refunds has been time consuming.

There are no international conventions, previously a good tourism revenue source and the events and hospitality sector continues to be affected, with some business closures. COVID-19 is expected to change the way business events occur in the foreseeable future.

At higher alert levels i-SITE visitor information centres played a role in keeping international visitors informed. Foot traffic is lower, with more enquiries via email or phone. Information centres have become more like travel agencies organising multiday itineraries for New Zealanders.

The cruise ship market ceased due to COVID-19 with the \$570 million cruise ship industry plummeting to zero. This has impacted regions who rely on revenue from cruise ship passenger spending. e.g. Tauranga, Napier, and some businesses have gone into hibernation.

Where accommodation is being used for Managed Isolation and Quarantine (MIQ) and MSD contracts, this is affecting accommodation availability for domestic visitors, event participants and attendees e.g. Balloons over Waikato.

Staff

As a result of COVID-19, roles were disestablished as businesses were reshaped, resized and right sized, with a focus on core business. As one of the earliest and hardest hit industries, restructures and redundancies have led to a loss of capable trained staff. This is impacting the knowledge and capability of the sector. Casual staff went first, followed by permanent staff. Where there was a mix of permanent and seasonal workers there was some natural attrition and wherever possible core staff were retained.

The wage subsidy and other government support for tourism has helped keep businesses afloat and retain experienced and skilled staff. Some roles have been hibernated. There have been pay cuts (voluntary, temporary), merged roles, reduced hours/days of work. While there is cautious optimism, scheduling and recruiting has been challenging with demand spikes and large fluctuations in visitor numbers e.g. busy weekends and school holidays, quiet weekdays. Some staff have been redeployed e.g. to the DOC Jobs for Nature programme.

Tourism organisations have needed flexibility with multiskilled staff to cover combined or mixed roles. Some people have been redeployed to a completely new workstream where there is a need. There is more multiskilling and combined roles, less specialisation. Redeployment and cross training have been ways to retain staff who can performing a wider breadth of work tasks.

Reduction of specialist staff and lower staff numbers means greater reliance on multiskilled staff doing more and working longer hours, covering multiple roles. Managers have needed to be more on the frontline, with everyone 'mucking in'. One example given included the CEO delivering coffee, marketing manager answering the phone, HR manager waitressing.

Despite this, some iconic tourism businesses have closed or hibernated, with SMEs and vulnerable workforces particularly affected. Women, young people, Māori, and Pacific peoples have been disproportionately impacted by tourism job losses. With no international visitor arrivals in sight there is a risk of further business closures and job losses. Many of those that have lost jobs have shown resilience by retraining/reskilling or volunteering.

While there has been some immigration flexibility and visa extensions, there is still a lot of uncertainty for those on migrant visas and many of the migrant workforce have left New Zealand. E.g. Queenstown has lost a lot of its international workforce, because businesses need to be able to offer at least 30 hours work and are unable to do so.

There have been some secondments to other businesses that can utilise skills e.g. customer service, but still maintaining the connection so they can return when tourism businesses scale back up. The sector is now competing with other sectors to retain skilled staff and there is competition for skilled staff within the sector.

Training has been deprioritised, with less time and capacity for learning and development. For international organisations, some support roles were absorbed e.g. into Australia.

This has been a challenging time, especially for SMEs, some of whom have limited management skills and experience. It has also been a challenging time for HR and management. Staff roles and responsibilities have been redefined. Staff reductions and other changes have been accepted better when the reasons are understood.

Wellbeing

COVID-19 has had an emotional impact on staff with emerging issues around wellbeing and mental health. There is some survivor guilt from those who retained their roles and both staff and management are fatigued. The effects of uncertainty and job insecurity are taking their toll. Emotional resilience has been needed, with a wellbeing focus. This is the first global downturn experience for young people in the workforce.

Recruiting

Prior to COVID-19 the tourism sector did rely on international travellers on working holiday visas, whereas recruitment now attracts domestic applicants, many who do not have the work readiness skills needed for the sector. Some businesses are doing better than expected with strong domestic tourism and need more staff. There are more casual and fixed term roles.

COVID-19 has affected the reputation of tourism as a career path, resulting in a lack of job applicants and people leaving the industry. There is concern around keeping skilled people in fully paid work, e.g. rafting guides who take three years to fully train. Newly qualified students are not getting the opportunities to gain experience and continue to upskill on the job and with no international raft guides coming in there will be a skills shortage. There are other roles that require specialist overseas skilled staff/contractors, due to no local capability.

Communication / Technology

Keeping staff informed through clear communication has helped to provide support and remain connected, with Zoom and social media group pages used. During alert level restrictions staff worked from home where possible. A lot of planning and decisions happened online e.g. through Zoom meetings.

Some businesses have done team building and training activity online. i-SITE took the opportunity during lockdown for staff to upskill through online learning. The opportunity was taken by tourism businesses to do research, develop new programmes, virtual tours, specialty tours and project work.

There has been a lot more engagement with, and enquiries coming from, online services such as Facebook and Instagram. Some businesses have found it harder to get social media engagement, with large volumes of social media traffic to compete with.

Operational / Process

Alert level changes have meant continual reassessment of plans and there was confusion initially over the rules at different alert levels. Planning has been difficult with uncertainty around borders reopening. Logistics have been challenging, especially around supporting international staff.

Businesses with much lower visitor numbers are having difficulty paying government fees e.g. for AAO (Adventure Activity Operators) audits.

In some cases, investments in overseas product development now appear wasted e.g. multilanguage briefings for overseas visitors.

Financial management is a key focus. Revenue is generally down but some costs have also gone down e.g. staffing, goods and services. COVID-19 has presented the opportunity to review all parts of the operation and become a better business.

Training has been needed on new systems and processes, different product offerings, and new booking and membership platforms.

Training Providers and Schools

Tourism training providers were impacted by the decline in international students, particularly diploma and degree students. Those offshore could not return and there were no new arrivals. International students in New Zealand are looking for pathways. Some providers did not run Level 3 programmes in semester two in 2020 due to low numbers and they did not feel they could pathway into employment. They did experience an increase in domestic enrolments, including displaced employees and school students not wanting to return to school.

Secondary school tourism teachers feel that COVID-19 has affected tourism more than any other school subject. This is most noted in Auckland South, Waikato and Hawke’s Bay. Students perceive that careers and pathways have dried up with no short-term prospects or real future in tourism, and more competition for fewer roles. This has been amplified by negative perceptions from other teachers and parents and is exacerbated in regions that have minimal direct access to the tourism industry. It is expected to take time until the COVID-19 recovery improves confidence in tourism education. There is a decline in 2021 student enrolments in tourism as a school subject which is traditionally the beginning of a pathway into the tourism sector.

During lockdown online resources were used and more students than usual did not complete their units. Not all students had access to internet and resources at home and some left school to work to support their family or to take up apprenticeships in other industries. Some students struggled to reengage in classwork post-lockdown.

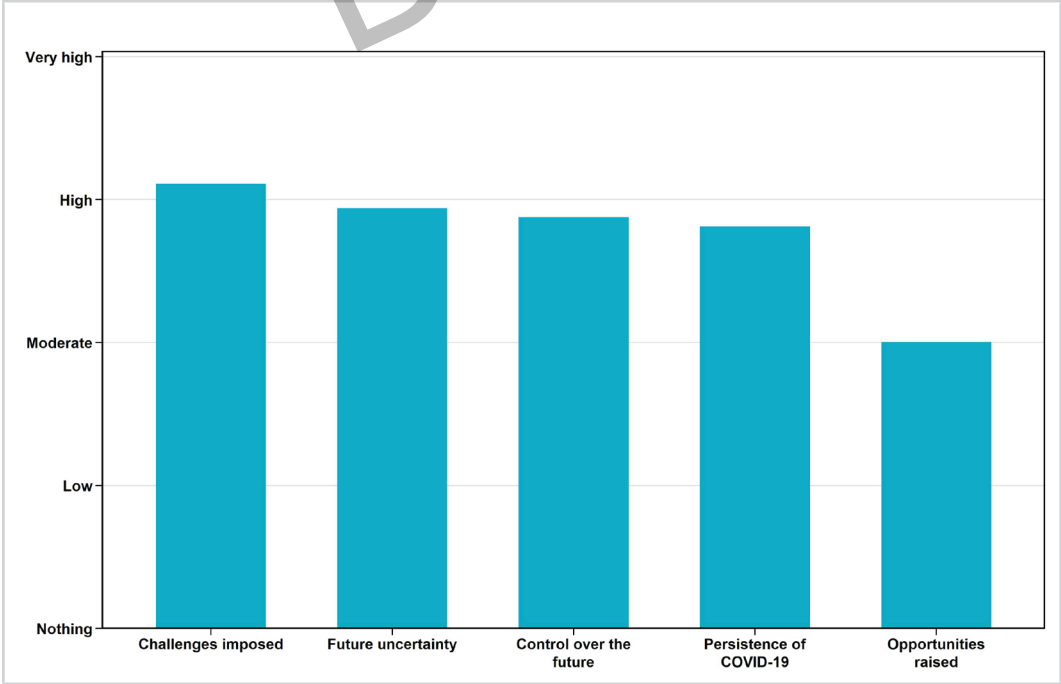


Figure 1.1. The extent to which COVID-19 impacted the tourism sector.*

* Hinonga Kōkiri / Head Start Project COVID-19 Industry Response Survey – Tourism sector respondents

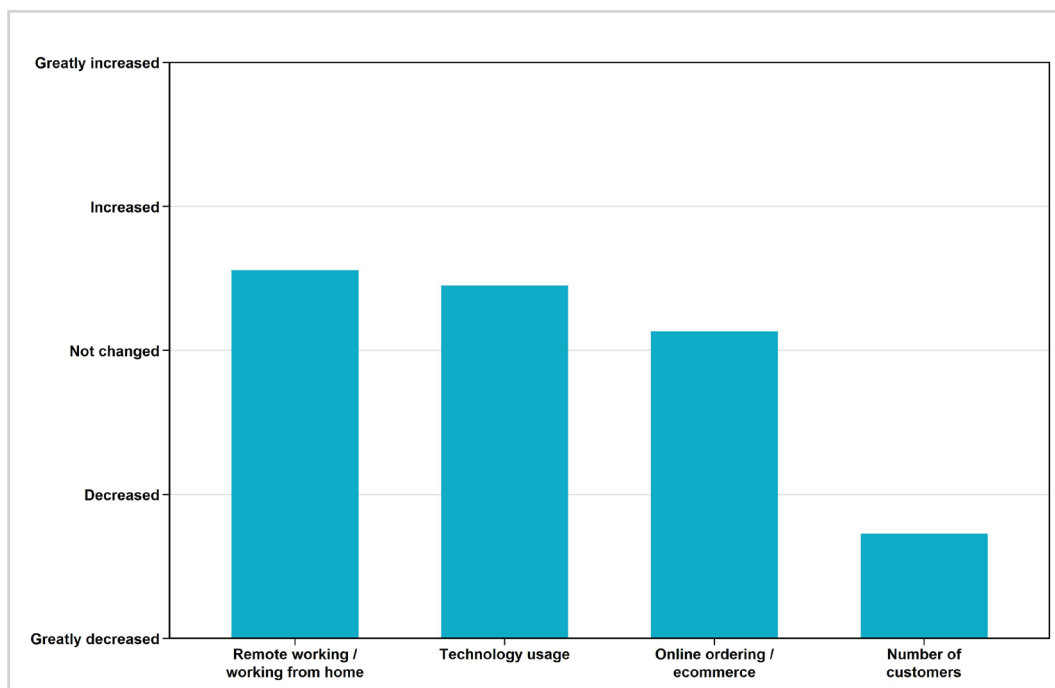


Figure 1.2. The extent to which COVID-19 influenced behaviour in the tourism sector.*

2. The response to date as a result of COVID-19

Customer / Products / Services

There have been opportunities to innovate and grow despite the challenging operating environment. Many tourism businesses have pivoted to attract domestic visitors with a smaller domestic operating model, adapting to the needs of the domestic market. This has included new product offerings and collaboration with other businesses to create domestic packages and hybrid events.

To respond and recover businesses report they have operated like start-ups, being nimble and agile. SMEs have been able to be entrepreneurial with high growth strategies, focusing on domestic, setting family focused pricing strategies, using word of mouth and social media, and incentivising staff to promote new offers.

As part of its COVID-19 Respond, Kickstart, Reimagine strategy, the Do Something New, New Zealand campaign was launched by Tourism New Zealand to promote domestic tourism. The aim is to deepen and enrich the experiences on offer to appeal to New Zealanders and this has been embraced. New Zealanders have fallen in love with nature, with good use of National Parks, but they tend to visit closer parks, do shorter walks and are less likely to hire guides.

Regional Tourism Organisations (RTOs) have been busy supporting operators and promoting their regions, with government STAPP funding enabling them to work on regional projects and events. This has supported regional events to attract visitors from adjacent regions e.g. Aucklanders visiting Northland. These initiatives have increased the numbers of domestic tourists visiting regions and has meant some businesses who were looking at closing have been able to stay open. Regions who already had strong domestic visitation have done well. Businesses and regions who relied most on international tourists are most affected.

* Hinonga Kōkiri / Head Start Project COVID-19 Industry Response Survey – Tourism sector respondents

Tourism operators have offered good deals to attract people into the regions e.g. campervan rentals. Domestic travellers embraced this but did tend to rent for shorter periods. More older people are independently travelling and they tend to travel for longer; so can visit tourist attractions on weekdays. There is also a focus on education groups (school and tertiary) to fill the quieter weekdays.

Targets have been revised and pricing reviewed. There is some discounting, but the focus is more on providing value. Pricing is more dynamic e.g. weekday pricing. There are more direct sales, especially as currently visitors are mostly domestic. It is important to make it easy to do business.

Marketing consultants have been engaged to help businesses adapt to a new target audience. New domestic markets have been targeted e.g. corporate team building, Christmas parties and celebrations.

With the loss of international travellers from cruise ships, regional tourism operators have had to adapt to the domestic market who generally spend less, want lower prices for services and are a less steady supply of visitors. In Tauranga, tourism operators that catered to the cruise ship market have altered their business, downsized, run part-time or changed business hours to be sustainable. Cruise ship visits helped spread customer numbers throughout the week. Businesses that previously relied on pre-bookings and rigorous planning have had to adapt to a more fluid structure.

Adventure tourism operators are finding the easiest customer to attract and to work with is younger backpackers, who are fit and able to do the trip and prepared with the correct camping gear.

Māori cultural experience tourism was almost solely targeted to international visitors prior to COVID-19 and some Māori tourism businesses have gone into hibernation. There is development happening in the domestic cultural tourism space, including an unguided trail tour through Auckland, Coromandel, Bay of Plenty and Gisborne. The stories in these regions exist, the experiences exist, but need to be targeted towards domestic tourists. One Māori tourism organisation completely retrained their guides, who are now telling in-depth stories about their hapū which has been very well received by the domestic market.

Staff

Understanding key skills needed and ensuring the right people are in the right jobs have been a focus for tourism businesses. People with a good attitude (as you can teach aptitude), flexibility, the ability to prioritise work and reliability are needed. There has been training to cross-skill and upskill employees as multitasking across roles is now needed in many tourism businesses. Flexi-roles have been created covering multiple roles and redeployment where skills allowed.

Internal development and providing variety in roles have helped retention. There has been more cross over between operations and sales and this has helped staff understand the whole business better. Understanding everyone needs to be a salesperson, with all staff promoting their business/brand. Staff are being upskilled to sell add-ons with staff incentives to encourage this. Experienced frontline staff are being given the opportunity to be more autonomous and make decisions.

Strong leadership has been needed. There has been a focus on retaining and motivating staff, keeping them engaged and providing reassurance about career pathways, which has helped to galvanise staff. Managers are checking in on team members to see how they are doing, what is working and what is not, and working on solutions as a group rather than as individuals. External support such as EAP is being offered to support staff wellbeing.

The tourism sector is finding a lack of quality applicants who are New Zealand citizens. This means a lot of time being spent at recruitment and interview stage with applicants who are not really interested. Weekend and holiday work is not popular with New Zealanders and some are applying due to pressure from MSD to apply for jobs. It can be hard to be able to offer enough hours or days for people to come off jobseeker benefits e.g. they may only be required Friday, Saturday, Sunday. Accommodation options for staff are being explored where needed.

Strong domestic tourism meant some businesses needed additional staff over winter when they are usually quiet. If this trend continues it could mean more staff with permanent rather than seasonal work. However, due to ongoing uncertainty, some tourism businesses are using contractors rather than employing permanent staff. There are examples of people working in multiple jobs across different tourism businesses to have 40 hours of work.

Visa uncertainty may be pushing migrant workers out of the tourism sector, either leaving New Zealand or moving into sectors seen as more stable e.g. the agricultural sector. This may adversely affect the sector's ability to bounce back post COVID-19.

Tourism operators are finding channels to source new staff e.g. partnering with education providers. Some tourism businesses have worked with schools to provide learning and experiences against unit standards, including familiarisation visits and learning products. This is a good model to support school students into industry.

Communication / Technology

Regular communication and keeping the lines of communication open has been essential. Clearly communicating changes has been key, with businesses and staff needing to be adaptable, flexible and resilient. Where possible, staff are involved in decisions around change and goal setting.

More communication and collaboration between businesses has taken place since COVID-19, working together as a collective, although this has dropped off somewhat over time. There has also been good collaboration between tourism operators and tourism education providers.

During lockdown, the tourism sector workforce had to adapt quickly to remote working and online technology, including online learning. There were online meetings, both internal and external, using Zoom and Teams. There is now more remote working, with work from home policies allowing greater flexibility of hours and location. Greater use of remote meeting technology has continued; this helps with connecting more widely geographically, but it still considered important to maintain some face to face.

Digital technology is being used more to reach customers, with a greater web presence, including more digital marketing through social media. Businesses who are savvy with online tools and have a good online presence, have been more resilient. Businesses with no knowledge on how to set up e-commerce platforms or collaborate with online vendors have needed support, especially those based in smaller towns and regions. Utilisation of digital technology for the tourism sector includes digital hybrid events, online experiences, virtual site visits, campervan tours, podcasts, online modules e.g. for agents. More collaboration with tech savvy tourism businesses is taking place.

TourismNZ has launched trade training and education for offshore travel sales with new content, new channels via LinkedIn and Facebook. A digital marketing hub was launched in North America in October 2020, a B2C asset management tool making New Zealand the easiest destination to sell.

Suppliers

Some operators have cancelled subscriptions and marketing costs, e.g. Mail Chimp, Google display advertising, social media, paid marketing and agencies that they previously outsourced to.

There are examples of councils waiving commission charges for tourism businesses advertising through i-SITE, instead focusing on celebrating the district e.g. through digital marketing.

Operational / Process

Reviews of systems and processes/procedures have taken place, identifying efficiencies and what is really needed. This has enabled strategic planning, with faster, more agile decision making. Good financial acumen is key, especially a focus on saving money through controlled spending. Marketing, advertising, sponsorship and partnerships are all being scrutinised. There is currently less need for agents and contracting as these are used more for international tourism.

Change documents have been created and COVID-19 health and safety plans developed for operating at different alert levels. There is a strong focus on hygiene protocols and physical distancing requirements. Operational changes have been implemented to meet the increased demand for contactless experiences. There are now expectations of robust risk management plans for operating at different alert levels e.g. for school groups. People want to know more about health and safety practises, even before visiting and Qualmark is looking at developing health, safety and wellness criteria for accreditation.

There is a greater focus on sustainability, giving back and social responsibility being incorporated into organisational strategies.

Support

Tourism businesses have supported each other, and networks have been important. They have also supported their communities and mentoring has been useful.

Tourism Industry Aotearoa (TIA) and Tourism Export Council New Zealand (TECNZ) have provided advocacy, coordination and webinars to support their members in pivoting to the domestic market, operating at different alert levels, finance and cashflow, employment matters and mental health support. E-newsletters and events are used to keep members informed.

Regional Tourism Organisations (RTOS) held many meetings and workshops, and are doing crisis work, advocacy and funding work. The Regional Business Partners programme supported tourism with vouchers for support. Regional strategies for recovery have been developed e.g. the Ōtautahi Christchurch Recovery Plan to Respond, Recover and Reposition.

NZ Māori Tourism has been supporting and advocating for Māori tourism businesses and especially helping SMEs to be agile and flexible.

The Tourism Futures Taskforce has been established to reimagine the tourism sector long term, the Tourism Advisory Support Service was set up to support tourism businesses and a fund made available to increase digital capability.

When COVID-19 hit, Go with Tourism moved from building the tourism workforce to supporting redundant employees and redeployment support (mostly into other industries). Go with Tourism initiatives include Job Connector, Pledge a Placement, launching Broaden your Horizons campaign, 'Itinerary': an online panel discussion, career pathways on the website and free online courses. Schools Ambassadors promote tourism careers in schools, working to change perceptions of tourism.

Training Providers and Schools

During lockdown, training providers moved to online learning, which required training for tutors. Apps and social media were used to keep in touch with students. E.g. WhatsApp, Facebook. Online orientation was needed for students, who now need increased knowledge and proficiency in digital media and online software. A mix of delivery styles, including online, allows students to be adaptable to learning in different ways, and able to access wider opportunities. E.g. international collaboration no matter the socio-economic background.

Training was used to upskill and retain staff during lockdowns. Queenstown Resort College (QRC) in Northland created an initiative where staff on wage subsidies studied Level 4 qualifications in tourism. This has led to continued collaboration with tourism operators who normally do not engage with them, after employees returned from training with learnings that added value to their workplace.

At secondary schools, teaching moved online with many using Google Classroom. Not all students were interested, and class time was lost because of this. Some students enjoyed delivering presentations on Zoom. There was a move away from assessments to engagements and the emphasis shifted from international to domestic tourism, which students enjoyed. COVID-19's impact on the tourism industry was a good topic for classroom discussion.

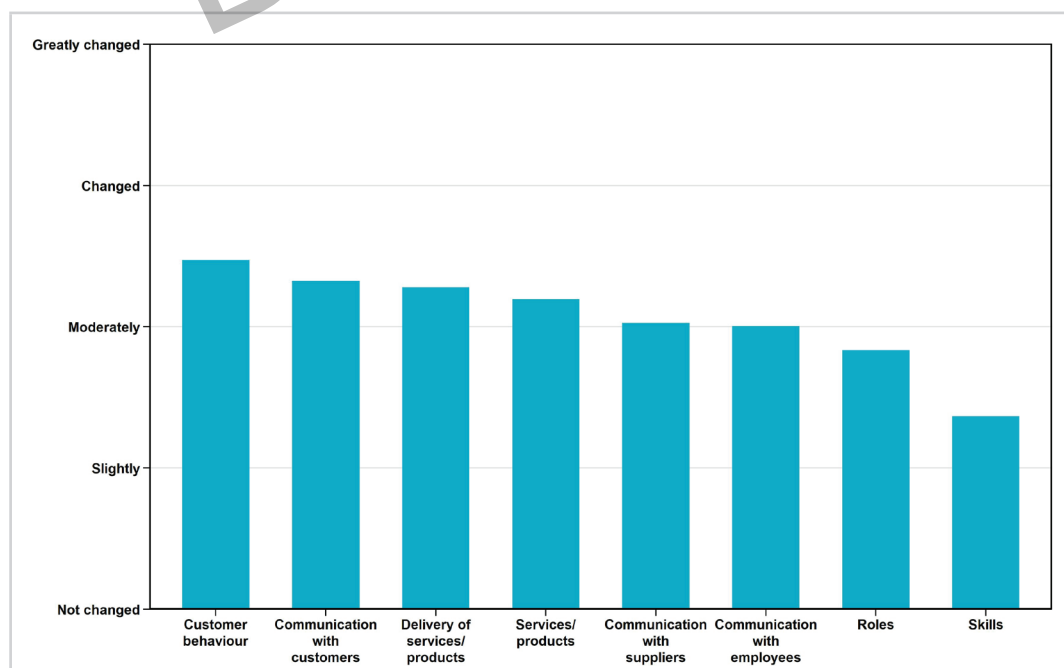


Figure 2. The extent of change the tourism sector has felt since the arrival of COVID-19.*

* Hinonga Kōkiri / Head Start Project COVID-19 Industry Response Survey – Tourism sector respondents

3. Key drivers of future success for the tourism sector

Government

The one thing that the tourism sector needs most from government is to open the borders when it is safe to do so. When this happens there must be certainty of services e.g. passenger flights, so tourism business can plan accordingly. TourismNZ insights research indicates 89% of New Zealanders agree that restarting tourism when it is safe to do so, is good for the wellbeing of New Zealanders. Visiting friends and relatives (VFR) market is likely to be a lead travel trigger and a motivator for inbound travel when it can resume.

TECNZ continues to lobby Government for financial support for ITOs (inbound tourism operators) and an operational grant for accommodation, transport, and other non-STAPP recipients. When the date is given for the opening of the border, it is hoped Government will invest in inbound tour operators and businesses to stimulate safe international visitation as much as they have with stimulating domestic visitation.

Tourism Industry Aotearoa (TIA) is advocating the following to Government:

- ▶ Reconnect with the world.
- ▶ Support viable tourism businesses.
- ▶ Encourage innovation.
- ▶ Get the knowledge we need.
- ▶ Fill the quiet times e.g. Travel card idea, give New Zealanders \$ to spend on tourism (off peak, outside school holidays and weekends).

While border restrictions are in place government should continue to provide funding to support regional activity and events promoting tourism. New Zealanders supporting local, getting behind the tourism sector and acting as ambassadors will help keep tourism businesses viable.

Fluid and flexible immigration rules are needed, so that skilled and valuable migrant staff can be retained and to allow skilled workers to enter New Zealand when there are skills shortages.

Government funding is needed to train in specialist roles and apprenticeships. There is concern around the drop in funding for tertiary tourism courses. The development of a post-COVID-19 skills strategy is essential for the sector's recovery.

Stuart Nash, Tourism Minister says that the key to success for tourism is strong customer service – delivering on the brand promise, delivering high standards that meet high expectations and pricing accordingly. He advocates the need to attract high value, high spending tourists who buy into sustainability goals. The tourism sector should work in partnership with government.

TourismNZ's international strategy while the border is closed to international tourists is to keep New Zealand's brand alive in the hearts and minds of consumers around the world and to drive appeal, consideration, and preference for New Zealand as a holiday destination through topical relevant storytelling that delivers to the core of who we are and what we stand for.

The Tourism Futures Taskforce is tasked with providing advice on the broad options to enrich New Zealand and the lives of New Zealanders, by reimagining tourism to develop a long-term vision, with the goal of a sustainable thriving tourism system, that is regenerative. They have considered the 4 capitals - social, cultural, economic and environmental and will make bold recommendations to address economic and social issues and long-standing systems issues. Themes from a survey of New Zealanders were: Workforce, jobs, job security, social capital, cooperation, collaboration, communication, iwi, environmental, people and culture. Recommendations and an action plan are due April 2021.

Change themes include:

- ▶ Aotearoa whakapapa – Authenticity, expressing Aotearoa’s identity and purpose.
- ▶ Stewarding Aotearoa – Demonstrating care for Te Taiao and each other.
- ▶ Delivering conditions that ensure individuals, organisations and communities can thrive as a result of the visitor economy.
- ▶ Develop capability to manage tourism locally and nationally. Involve community and council in destination management plans.
- ▶ Enable an agile, resilient and thriving visitor economy through data, technology, research and innovation.

It is hoped that visitors will become ambassadors for tourism in New Zealand.

There is a need to balance the economic advantages of tourism with the pressure it puts on infrastructure in some regions with councils managing permits for tourism activities.

Social licensing, regional dispersal and addressing seasonality to drive year-round visitation will all support the recovery.

Industry

- ▶ Be New Zealand’s world leading tourism sector. Arrive as a visitor, leave as whānau.
- ▶ Ensure the customer is at the centre of all decisions around the customer/visitor experience.
- ▶ Ongoing marketing and advertising campaigns supported by TourismNZ and RTOs.
- ▶ Business agility, the ability to change and adapt as needed.
- ▶ Tourism operators analyse their core business and create sustainable business models to survive and thrive. This includes identifying financially viable roles that are sustainable long term, employing the right staff and ensuring these are meaningful roles with enough remuneration to remain optimistic.
- ▶ A staff wellbeing focus, looking after your people, resilience at all ages.
- ▶ Employ people with self-awareness and confidence, who are willing to do typically migrant roles. The sector needs highly adaptable staff willing to do anything, prepared to come in at ground level and work their way up.
- ▶ Good PR and marketing to promote tourism as a viable and rewarding career option. Getting youth onboard and highlight career paths for all areas including activities, accommodation, transport and RTOs, including wage brackets. Separating tourism and hospitality may help each with their own brand and identity.
- ▶ Workforce integration e.g. winter and summer roles to make up a full year of employment.

- ▶ Businesses and employees are connected to their community. Social license to operate, with community sustainability through engagement, being an employer of choice, retaining/ maintaining talent, sustainable supply chains and collaboration through advisory groups.
- ▶ Sustainable tourism, eco-tourism, regenerative tourism, identifying the value of tourism in the community. New Zealand has a unique opportunity to become a world leader in tourism sustainability. Sustainable tourism operators and Department of Conservation need to work closely as they do rely on each other.
- ▶ Cycle trails are great examples of sustainable tourism, social license and community involvement.
- ▶ New business development: create products for the target market and advertise effectively. Develop untapped tourism opportunities while domestic tourists are looking for new unique experiences. Higher value authentic tourism, offering deeper experiences.
- ▶ There is potential for developing new tourism operations based on local knowledge, especially drawing on local Māori culture through cultural experience tourism.
- ▶ Develop food tourism activities, trails and tours.
- ▶ Maintain relationships with government stakeholders, strong industry leadership voice.
- ▶ Industry collaboration and relationships. Partnerships and advisory groups for skill building, retention, accessing resource and network building.
- ▶ Redevelop the cruise ship industry to leverage New Zealand's good reputation as a cruise destination but avoid over-congestion of tourists when borders reopen.
- ▶ Prepare for borders reopening. International visitors are likely to be VFR first, then those with time and money, and resilient travellers e.g. backpackers. The tourism sector will need to understand post-COVID-19 booking behaviour, offer digital mobile booking technology, focus on yield per customer, add value, and offer innovative products.

On-job training

The tourism sector needs skilled staff with great customer service skills. On-job training grows workforce capability and provides pathways. Staff can be upskilled and trained to meet the needs of the business and this helps with retention and staff engagement. Staff develop skills, capability and flexibility and gain recognition. Broader skillsets are more valuable. While many tourism businesses are operating with fewer staff, internal development can grow overall business capability and adaptability.

On- job training can help the workforce value tourism experiences as high value and deliver great customer service to all clients, both international and domestic. While borders are closed it is essential for staff to understand domestic tourists and adapt to meet the wants and needs of this market.

Employees embrace the earn while you learn philosophy, as many people need an income while gaining a qualification and the business benefits too. Many skills learned on the job are transferable skills. While business is quieter there is an opportunity to develop new skills e.g. guides learning entrepreneurial skills, digital marketing skills during downtime.

Many operators are upskilling and stepping up as managers and leaders and need support to do this. It is felt that Level 5 Team Leadership courses need to be more tourism business focused, they are currently more accommodation focused. Tourism and tourism management apprenticeships would both support tourism sector workforce capability.

Some on-job training is longer than the length of migrant visas which makes them inaccessible. Shorter duration of training would resolve this.

Tourism sector organisations would like to further develop cultural capability and be more sustainable, and these goals can be supported through on-job training programmes.

Training providers

The tourism sector needs tourism graduates to be work ready. Communication and collaboration between training providers and the tourism industry is a critical success factor that will enable educators to develop students to meet the needs of industry. Educators would like more professional development and connection with the tourism sector. Networking events between the students and industry, industry visits, internships, and work experience opportunities will help work readiness.

Tutors and lecturers need the passion and skill sets to teach sustainability and cultural capability. This could be developed by upskilling existing staff, or, bringing in specialist teaching staff and/or programmes to meet this gap. Sustainability needs to be woven into training.

It's important for training providers to facilitate approaches that work such as; a systems thinking approach, solution focused, project-based learning, behaviour change reflection and analysis and cultural inclusivity. Online learning opens more potential for international collaboration that is financially accessible.

Tourism courses must foster people skills and empathy. Workers who happily engage with others are key to help meet the goal of creating "better" tourism. Qualifications are only the beginning, making students employable, it takes experience to become an expert.

Schools

Tourism offers a diverse range of career opportunities and the sector would like schools, through career advisors and tourism teachers, to promote tourism as a career, providing a bigger picture on the career pathways of tourism beyond summer jobs or short-term work. Schools vary in their approach to encouraging students into tertiary tourism study or into tourism sector jobs.

Parents strongly influence student decisions; schools can help parents become more informed about pathways. Many teachers feel the perception of this sector as low paid and long hours puts students off and prevents their parents from recommending it as a career choice. There is a general lack of visibility and understanding of tourism pathways, transferable skills, and opportunities. To combat this, it has been suggested that school students should be offered visits to a range of local operators, including Māori tourism businesses.

Schools need to produce students who have real experience as well as qualifications, which can happen if students have access to industry for job experience. A link or contact point from school to industry to help school leavers gain work experience and employment would support the recovery of tourism.

Education at school level can prepare young people for the tourism industry by developing soft skills e.g. attitude and interacting with people, relationship skills, personal hygiene. These are useful transferable skills in a competitive labour market. Development and use of technology and social media will help to create a tech savvy workforce pipeline.

Tourism teachers would like to collaborate when tourism resources and assessments for secondary students are being developed. They would prefer more localised assessments. There are existing issues with unit standard assessments, with students having to get everything 'correct'. There is support for an overhaul of the school tourism programmes, adding achievement standards to make it an NCEA Achievement Standard subject. The tourism sector recommends the Tiaki promise being part of the tourism curriculum.

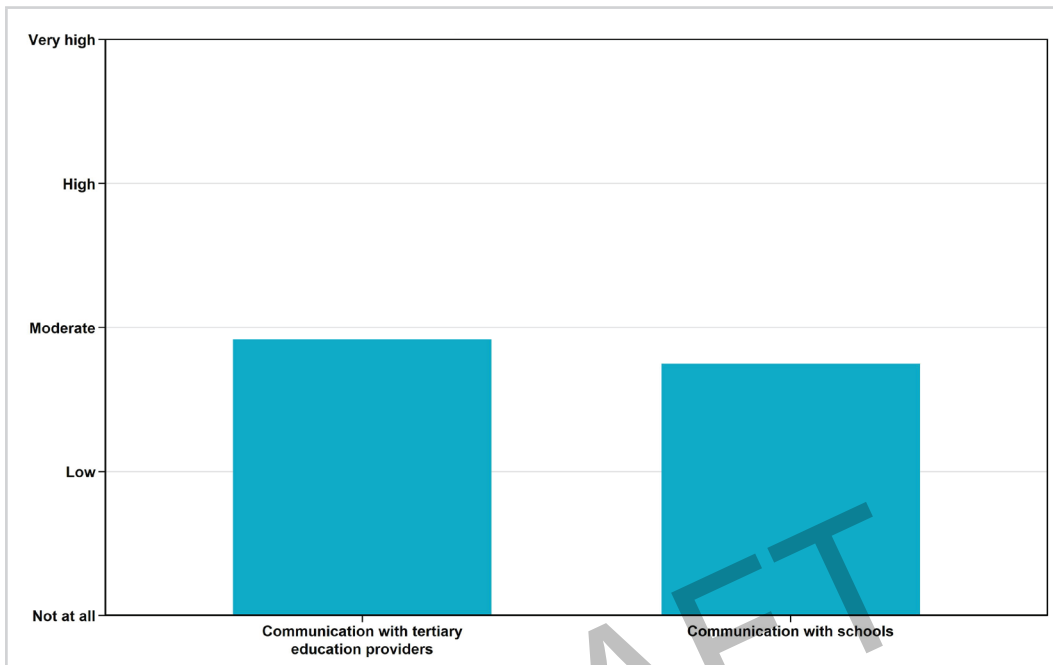


Figure 3. The communication level the tourism sector has with tertiary education providers and schools.*

4. Skills needed to support the tourism sector recovery

Changes in skills and roles

The main changes in roles are cross-skilling and adapting to the domestic market.

Cross-skilling employees has developed a broader skill base, with the ability to multi-task creating flexibility. Identifying and utilising pre-existing skills also creates flexibility. Where possible, tourism businesses are using inhouse skills rather than outsourcing. Developing transferable skills gives people the opportunity to grow, develop, and be more employable across industries.

Employees have been upskilled to meet customer demands. They need to understand and meet the needs of domestic tourists, offering the kinds of tours, activities and attractions they are interested in. Planning is challenging and staff rostering has changed to accommodate the more spontaneous and uneven patterns of domestic tourism. Roles have been redefined and reengineered so that everyone is an ambassador for the business. Those in marketing roles are now targeting the domestic market.

Training providers are looking to train for new expectations i.e. The new New Zealand tourist, how to keep them happy through customer service and value add.

* Hinonga Kōkiri / Head Start Project COVID-19 Industry Response Survey – Tourism sector respondents

Changes in the importance of skills

Skills that have increased in importance include:

- ▶ Soft skills: empathy, resilience, adaptability, problem solving and a growth mindset. The increased importance in resilience and adaptability to change were very strong themes across all tourism focus groups and tourism sector survey responses, with a greater need to work through adversity and accept some trial and error.
- ▶ Wellness skills and awareness, investing in staff, having conversations about mental health.
- ▶ Enhancing the visitor experience, engagement and satisfaction through excellent customer service. A welcoming environment with staff that listen, caring and interacting with customers. To get better quality tourists tourism businesses need to offer high quality, respectful experiences.
- ▶ Conflict resolution, to handle objections, address issues and deescalate hostile positions.
- ▶ The ability to think outside the square, be open minded.
- ▶ Learning quickly and not being afraid to ask questions.
- ▶ Decisiveness.
- ▶ Improved effective communication skills, high quality clear written and oral communication.
- ▶ Networking skills within industry. Collaboration and communication skills between businesses.
- ▶ Coaching and support for leaders and managers. Leadership skills are key, as coaching and mentoring will be needed even more as the sector rebuilds.
- ▶ Helping employees enjoy their workday and set a positive vibe. Communicate the 'story' of the business to employees to help them connect to and find value in the work they do.
- ▶ Confidence and trust in managing a remote team.
- ▶ Knowing the region to provide a richer tourism experience, incorporating local knowledge (the story and culture of the region), being storytellers.
- ▶ Engaging with regional community projects, being visitor hosts, understanding and suggesting other local attractions and hospitality providers.
- ▶ Sustainable tourism and ecotourism. Environmental sustainability through restoring nature, carbon reduction and eliminating waste. Understanding how visitors can contribute to sustainability rather than just focusing on high spending visitors.
- ▶ Understanding the whole market including the distribution chain.
- ▶ Project management, agile project methodology, fast fail.
- ▶ Photography and videography skills as new imagery is needed for domestic campaigns.

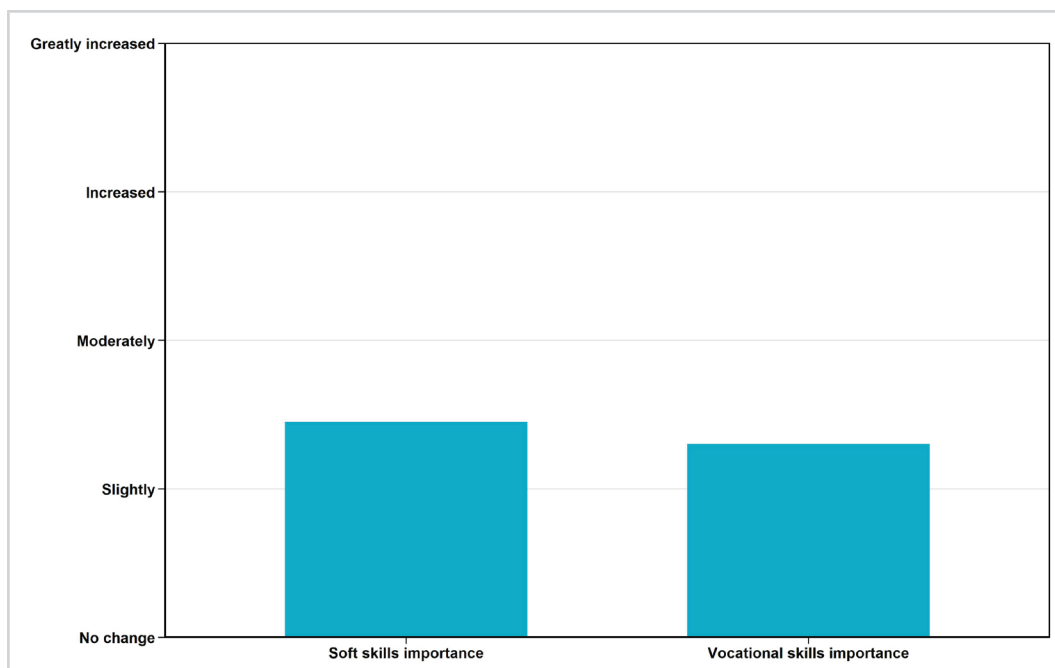


Figure 4. Change of soft and vocational skills importance for the tourism sector since COVID-19.*

New skills needed

- ▶ Digital capability and broad technology skills e.g. Zoom/Teams, knowledge and use of online software and social media platforms.
- ▶ Developing professional websites and e-commerce platforms, keeping them up to date, good online visibility and reporting on online engagement.
- ▶ Capability in building online experiences.
- ▶ Marketing e.g. Facebook, Instagram, including content writing.
- ▶ Being a social media advocate for your business.
- ▶ Tech savvy workplaces with developers, analysts and other data services.
- ▶ Working from home effectively.
- ▶ Online facilitation skills.
- ▶ Developing models of work and structure of roles.
- ▶ Building a better product offering, value add strategies.
- ▶ Sales strategies and skills across the organisation. Authentic sales for a different market.
- ▶ Negotiation skills.
- ▶ Ability to create and articulate professional presentations and proposals.
- ▶ Analytical skills, understanding the business and financial literacy from the bottom up. Economic resilience, investment and innovation. Happy visitors + happy employees = Profit.
- ▶ Policy development, better business continuity plans, political awareness.
- ▶ Scenario planning as it is not possible to forecast trends with certainty.
- ▶ Strategic management and change management including crisis management, environmental management and climate emergency management.
- ▶ Understanding New Zealand health and safety legal requirements and responsibilities, to operate at different alert levels.

* Hinonga Kōkiri / Head Start Project COVID-19 Industry Response Survey – Tourism sector respondents

Skills shortages

- ▶ Operational crew.
- ▶ Tour guides.
- ▶ Rafting guides.
- ▶ Hospitality staff in tourism businesses e.g. chefs, baristas.
- ▶ Tourism staff in the regions.
- ▶ Destination marketing and destination management skills. The ability to sell the region as a complete destination package. Better tourism, not more.
- ▶ Cultural competency including storytelling, te reo Māori and pronunciation skills. Helping visitors to understand New Zealand's culture and heritage through storytelling and authentic experiences. There is a knowledge gap regarding information about local iwi, it is important to tell the right story/ history, to be able to engage, educate and add a 'heart connection'.
- ▶ Cultural understanding of different markets, people and languages.
- ▶ Tech trained adventure tourism staff e.g. coders who know the industry.
- ▶ Pre employment skills and experience.
- ▶ Full driver license, passenger license and heavy vehicle license.
- ▶ First aid skills.

Reliance on migrants

The lack of migrant workers entering New Zealand is causing a skills shortage of seasonal workers. New Zealanders and tertiary students are not applying for these roles, especially in the regions.

Ideally the tourism sector would like visa extensions for migrant workers in roles that require a period of inhouse training and hours of experience, as it is not possible to replace them in the short term, due to the experience and time needed in the industry before being productive.

5. Skills initiatives and solutions to support the sector over the next two years

How to get the skills

- ▶ Invest in training and development, it is cost effective.
- ▶ Regular, high quality, consistent training across the sector.
- ▶ Training that is flexible in delivery, content and qualifications, with a learning culture right from the start.
- ▶ Training and qualifications need to be relevant, have effective outcomes, linked to credentials, and develop a wide range of skills including communication, passion, attitude and dealing with challenging situations.
- ▶ Continue training so that when border restrictions end there will be skilled people, both within tourism businesses and ready to join the tourism workforce.
- ▶ Structured workplace training plans to ensure staff are regularly trained and have the skills the business needs.
- ▶ Retrain internally so that staff have a broader range of skills, including transferable skills, enabling them to multitask.
- ▶ ServiceIQ could consider running webinars for sector trainees, on key tourism units for learning and encouragement to complete assessments.
- ▶ ServiceIQ courses on te reo Māori pronunciation and Māori tourism units. Domestic visitors expect authentic te reo Māori pronunciation.
- ▶ Interactive workshops.
- ▶ Grow awareness and capability of distance learning and technology.
- ▶ Manageable bite sized training.
- ▶ Partnering/collaboration with other operators.
- ▶ Secondments.
- ▶ Recruit for the industry, realising people are unlikely to stay with one employer forever.
- ▶ Recruit people with soft skills and sector specific skills or develop these on the job.
- ▶ Clearly articulate to schools, training providers and recruiters the skill needs of the tourism sector.
- ▶ Smart hiring of multitalented people.
- ▶ Attract a diverse workforce e.g. older workers with experience and confidence in communicating, more women in aviation tourism.
- ▶ There is good retention of retired or semi-retired casuals and volunteers; recovery strategies should take these groups into account.
- ▶ Have events like Hackathons to encourage innovation e.g. Lightning Lab.
- ▶ Project based initiatives e.g. three months research.
- ▶ Replace OE (overseas experience) with AE (Aotearoa Experience).

- ▶ Embed sustainability and cultural competency in all learning, teaching and industry practice. If industry values these, then students will see value in learning for future employability and understand social and environmental responsibility. Caring for the community and the environment are increasingly important.
- ▶ Regional ambassadors with good local knowledge and passion to help develop the capability of the region for long term sustainability and success. KiwiHost has worked well previously and would be welcomed back to support building regional knowledge.

Training providers

- ▶ Internships, work experience, industry visits, linked learning, career days to encourage and prepare learners for a career in the industry.
- ▶ Understanding domestic tourism influences and having content development to support this learning.
- ▶ Teach business subjects via the tourism lens and have guest speakers to talk about their role, their business. A tourism business manager telling their story of their pathways.

Schools

- ▶ Focus on workplace literacy, numeracy, and soft skills to support work readiness.
- ▶ Increased connection with industry through initiatives such as:
 - ▶ On-job placements and internships.
 - ▶ Gateway programmes.
 - ▶ Site visits.
 - ▶ Low-cost experiences.
- ▶ Customer service skills training.
- ▶ Front-line role training.
- ▶ Providing support to link experience to skills.
- ▶ Attending STAR courses.
- ▶ Days at tertiary training providers.

Support needed

- ▶ Tourism training subsidised by government to keep skilled employees engaged whilst also upskilling further.
- ▶ Subsidies for training new employees.
- ▶ Government support for small businesses.
- ▶ Bring in trainers where training capability is unavailable e.g. SMEs.
- ▶ Cost-effective professional development.
- ▶ More incentives for people to relocate, working with tertiary providers for a pipeline.
- ▶ An ambassador programme that is relevant and targeted. Tourism operators supporting familiarisation visits, helping create regional ambassadors.
- ▶ Collaboration around seasonal operations, with HR/recruitment companies to coordinate.
- ▶ Five-year funding for RTOs to support destination marketing, destination management and events.

- ▶ Sustainable tourism and regional/community-based tourism models to address over-tourism, setting what sustainable tourism numbers are, supporting eco-tourism.
- ▶ Upskill current specialist teaching staff and give industry an opportunity to show how valuable sustainability and cultural competency is i.e. showcasing, case studies, sharing best practice, industry standards and guidelines, awards, promotion and marketing and offering higher wages for skills in these areas.
- ▶ Workforce Development Councils staying connected to the sector, with meaningful authentic dialogue to understand the sector's needs.
- ▶ ServiceIQ/the Workforce Development Council communicate with schools that are working in consultation with industry when developing unit standards.
- ▶ More visits from ServiceIQ training advisors; it is a lot easier having one constant contact person.
- ▶ Development of an app that is a digital way to find capable casual staff in a region.
- ▶ Flexibility around contracting and changeable hours.
- ▶ Advocacy for remuneration linked to recognition of skills and value, working towards a living wage workforce.

Training needs

- ▶ Readily available achievable qualifications.
- ▶ Full day courses, which also helps with networking.
- ▶ Bite sized micro-credentials for specific skill needs.
- ▶ Service sector or tourism apprenticeships.
- ▶ Excellent customer service training is key to success, possibly an internal passport to demonstrate customer service capability.
- ▶ Face to face customer service training. When developing a customer service course, it is important to know what New Zealanders and international tourists want and expect i.e. how much and what kind of customer service.
- ▶ Understanding the customer journey.
- ▶ Improve sales capability through affordable, high quality sales training.
- ▶ Develop good leadership and management skills to support wellbeing such as emotional intelligence and self-awareness, consider the whole person, give recognition e.g. 'Star of the week'.
- ▶ Internal communication and broad communication skills.
- ▶ Financial literacy training.
- ▶ Resilience training and dealing with conflict.
- ▶ Understanding of culture and learning needs.
- ▶ Foreign language skills.
- ▶ Digital/technical skills development inhouse (funded by Tertiary Education Commission), credentialised interactive online digital modules.
- ▶ Social media communication.
- ▶ Digital marketing support to reach the domestic market e.g. through regional support networks.

- ▶ Regular, compulsory health and safety training.
- ▶ Business skills; training should start from school level through to training provider and industry.
- ▶ Training on what food tourism is and how to offer a unique food experience.
- ▶ Sustainable tourism e.g. Tourism Sustainability Commitment – Sustainable development goals that provide a sustainability lens over the whole business, so that it is woven through the business. There could be acknowledgement for this knowledge in qualifications. User based micro credentials (Edubits) are currently being developed (20 credits, hoping to be NZQA approved and TEC funded).
- ▶ Train for scalability when visitor numbers rebound, i.e. People can develop up and then as demand grows, those people progress, and lower skilled casuals can move into entry level roles for a fast recovery response.

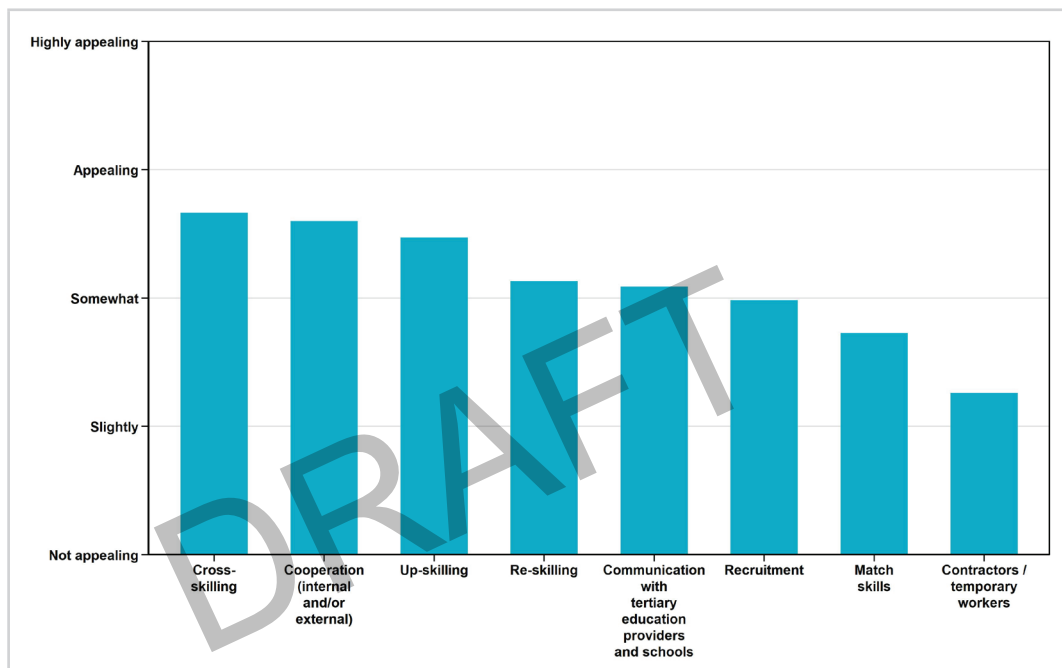


Figure 5.1. COVID-19 recovery strategies that will be considered by the tourism sector.*

* Hinonga Kōkiri / Head Start Project COVID-19 Industry Response Survey – Tourism sector respondents

Learning pathways

Work readiness training is needed for people entering the sector, starting at secondary school level. This includes turning up (on time), doing your part, work ethic, taking direction, understanding boundaries, accepting 'no' is sometimes the answer and good grooming. Attitude and personality are very important in the tourism sector.

Negative public perception of tourism careers is a barrier to entry. Tourism teachers would like students and parents shown that it is still a relevant industry in the domestic market and long term in the international market, that it has not died, just adapting to change and students are welcome to be part of the recovery. Young people can 'earn while they learn' and upskill to progress through roles.

Perceptions can be changed through influencers and heroes, marketing the industry, as fun to work in, skills that can be developed, career pathways and progression.

Collaboration suggested includes:

- ▶ Gather teachers and industry to share knowledge, arrange workplace visits.
- ▶ Discussions with industry on what students need to know.
- ▶ Tourism industry data and information sharing e.g. from MBIE, TourismNZ, TIA.
- ▶ Providing clear guidelines to students about what is expected of them in employment.
- ▶ Work experience, familiarisation visits for families to bring parents onboard.
- ▶ Connections between schools and industry, supported by Go with Tourism, local tourism bodies and TTA-NZ (Tourism Teachers Association - New Zealand).

Industry visits to schools could include:

- ▶ Skills demonstrations.
- ▶ Linking classwork to 'real work'.
- ▶ Highlighting career stories.
- ▶ Career and job seeking advice.
- ▶ Sustainability messages to appeal youth entering the sector.

Having industry attend school to give skills demonstrations would also help show students a broader selection of jobs to consider and support the connection between schools and industry. The industry needs to demonstrate clear pathways and increase visibility in the regions. Training providers are great at getting into schools to promote pathways and help transition students into training provider programmes. An effect of this is that students think they should train through providers and PTEs rather than go straight to a job. Pathways should be possible from schools to training providers then work, or directly from school to work.

Wider education is needed to promote tourism careers through a stronger voice, more evidence and stories. This includes more information for career advisors to help them provide better career advice at school level by understanding the sector opportunities and career paths. Career maps must show the breadth of roles in the tourism industry. There is an opportunity to better highlight the transferable skillsets of tourism and for recruiters to accurately recruit and market roles. Ongoing collaboration between industry and training organisations is needed to understand new roles that might come up and ensure the roles are valued.

The Go with Tourism/ServiceIQ partnership is welcomed. ServiceIQ develops tourism qualifications, standards and resources, with training in schools that mirrors what is learned in the workplace and Gateway programmes for students to gain real world experience. Go with Tourism’s education programme provides accurate and wide-ranging information about careers in tourism, supported by regional coordinators.

Secondary school tourism teachers feel that current modules are detached from the real aspect of working in the New Zealand tourism industry. A move to achievement standards will be more engaging and better reflect industry requirements by reducing bookwork and increasing industry experience. Without achievement standards students select academic pathways, as parents and other influencers perceive tourism as a less than optimal career pathway. This was echoed at most school focus groups and is advocated by TTA-NZ.

Employers can build talent pipeline connections, including both those new to tourism and displaced workers, through Go with Tourism’s Job Connector and Pledge a Placement initiatives, MSD employment initiatives, LSV (Limited Service Volunteers), Youth Employer Pledge, schools, training providers and recruitment companies.

Attracting Māori and Pacific peoples into the tourism sector will help grow capability. Sharing culture through storytelling, personality and connections will provide visitors with authentic tourism experiences. Initiatives are needed to help young people, Māori, and Pacific peoples value their own skills, build confidence in public speaking and story telling and consider tourism as a career. Helping employers recognise and value these skills, especially cultural competency, can help fill the skills shortage of guiding and storytelling.

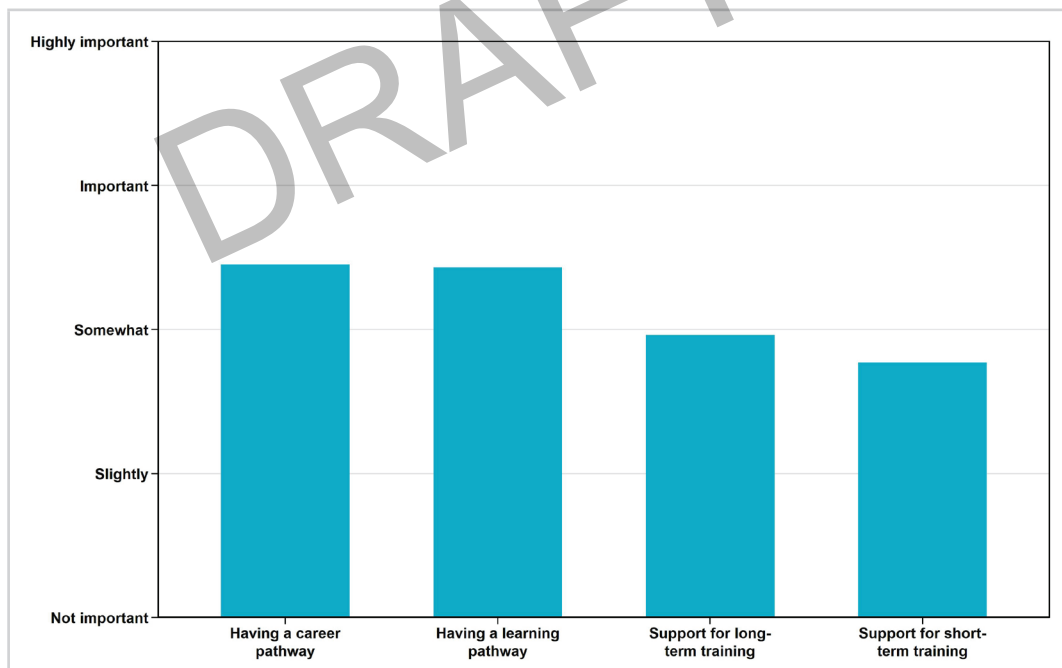


Figure 5.2. The importance of training and pathways.*

* Hinonga Kōkiri / Head Start Project COVID-19 Industry Response Survey – Tourism sector respondents

Post COVID-19

Tourism operators are concerned about recruiting so they can scale back up to full operation when borders reopen. It is going to be a challenge to bring experienced staff back, although where possible they are maintaining connections with existing staff so they can be re-employed at short notice.

Sales and marketing, skillsets and overseas supplier agreements will all need to be reviewed. Businesses that have hibernated are going to find it difficult to re-open due to resources, including staff, and competition that is still operating.

The sector will need to rely more on the domestic workforce, so in preparation there is a need for more upskilling of tourism students. It is hoped that the return of international students and travellers will also support tourism sector workforce needs.

Tourism businesses expect to retain over half of the changes that have been made since COVID-19. Health, safety and hygiene routines are likely to be retained to reassure customers.

It has been suggested that there may be a shift to slower, more sustainable travel and tourism post COVID-19.

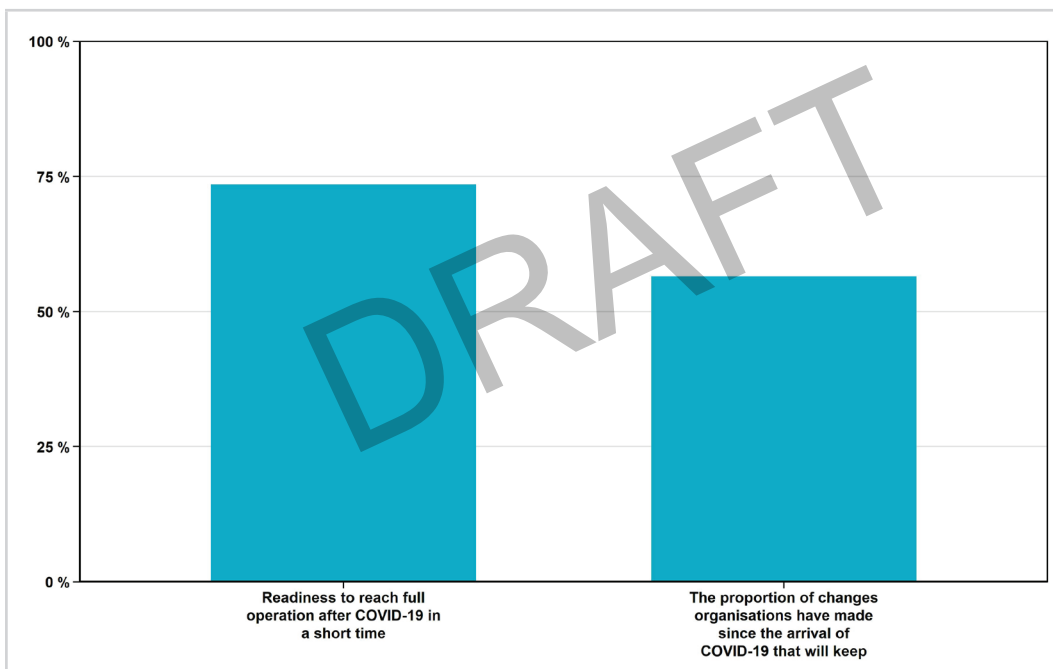


Figure 5.3. Operational stability and agility of the tourism sector when COVID-19 border restrictions end.*

* Hinonga Kōkiri / Head Start Project COVID-19 Industry Response Survey – Tourism sector respondents

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