

Future of Hospitality Roadmap

A roadmap to support the revival and replenishment of the hospitality sector in Aotearoa

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Our Vision:

a hospitality
sector fit for
the future

What is the purpose of the roadmap?

Launched in 2021, the Future of Hospitality Roadmap is an industry-led document to support the revival and replenishment of the hospitality sector in Aotearoa following the devastating impact of COVID-19.

The 4 goals of the roadmap are:

1. Create workable solutions for legacy issues faced by the industry.
2. Encourage better partnership between industry and Government.
3. Support the development of fit for purpose, adequately funded education and training options that produce ready-to-work, productive, career focused workers.
4. Build business capability, to develop sustainable and financially fit businesses prepared for the future.

Our Vision:

a hospitality
sector fit for
the future

We're a vibrant industry full of interesting, talented and entrepreneurial people. This roadmap sets out how the sector proposes to not only attract more Kiwis to a career in hospitality, but pave the way for the sector to be seen as national leader: providing better skilled workforces, sustainable and safer workplaces, more adequate resources and investment, ensuring a well-rounded, productive sector that is a vital ingredient in nationwide tourism and continues to provide a growth story for the wider New Zealand economy.

We cannot do this alone: we need the support of the Government if we want to build a hospitality sector that is truly fit for the future.

Industry/Pakihi	Workers/Kaimahi	Government/Kāwanatanga
(Employers)	(Employees)	(Ministers and Officials)

What impact does the hospitality industry have?

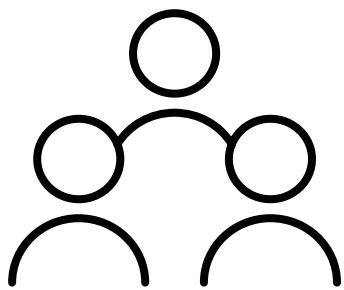
Up until 2020, the hospitality sector was a growing industry: generating annual sales in excess of \$12 billion and employing more than 136,000 people, across more than 17,000 businesses (1).

At the heart of hospitality success is tourism: New Zealand received close to 4 million overseas visitors in the 2019 year (2) and every one of these visitors experienced New Zealand hospitality during their visit. However, COVID-19 stopped the industry in its tracks, causing unprecedented devastation: by the end of August 2020, New Zealand welcomed less than 800,000 overseas visitors (2). This is having a flow-on effect to every corner of the New Zealand Food Story - whether that be locally grown produce, wine, cafe culture, restaurants or bars.

The sector has come together to use this disruption as an opportunity to rebuild our sector for the better, to replenish the way we operate and grow, and to promote more sustainable activity.

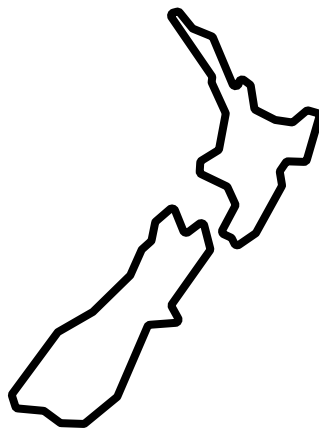
We present to you the Future of Hospitality Roadmap, a document spearheaded by industry to support the revival and replenishment of the hospitality sector in Aotearoa New Zealand.

Our industry's footprint in Aotearoa



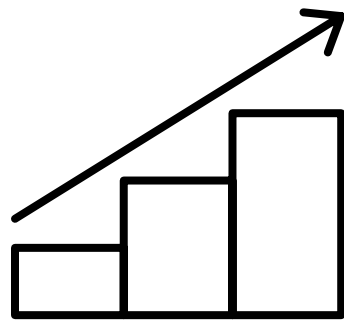
People

136,000+ people employed in the industry in Aotearoa within restaurants & cafes, takeaway/ food to go, caterers bars, clubs.



Impact

4.8% of the New Zealand workforce are hospitality workers and we estimate **75%** of Kiwis interact with the industry in some way, shape or form every week!

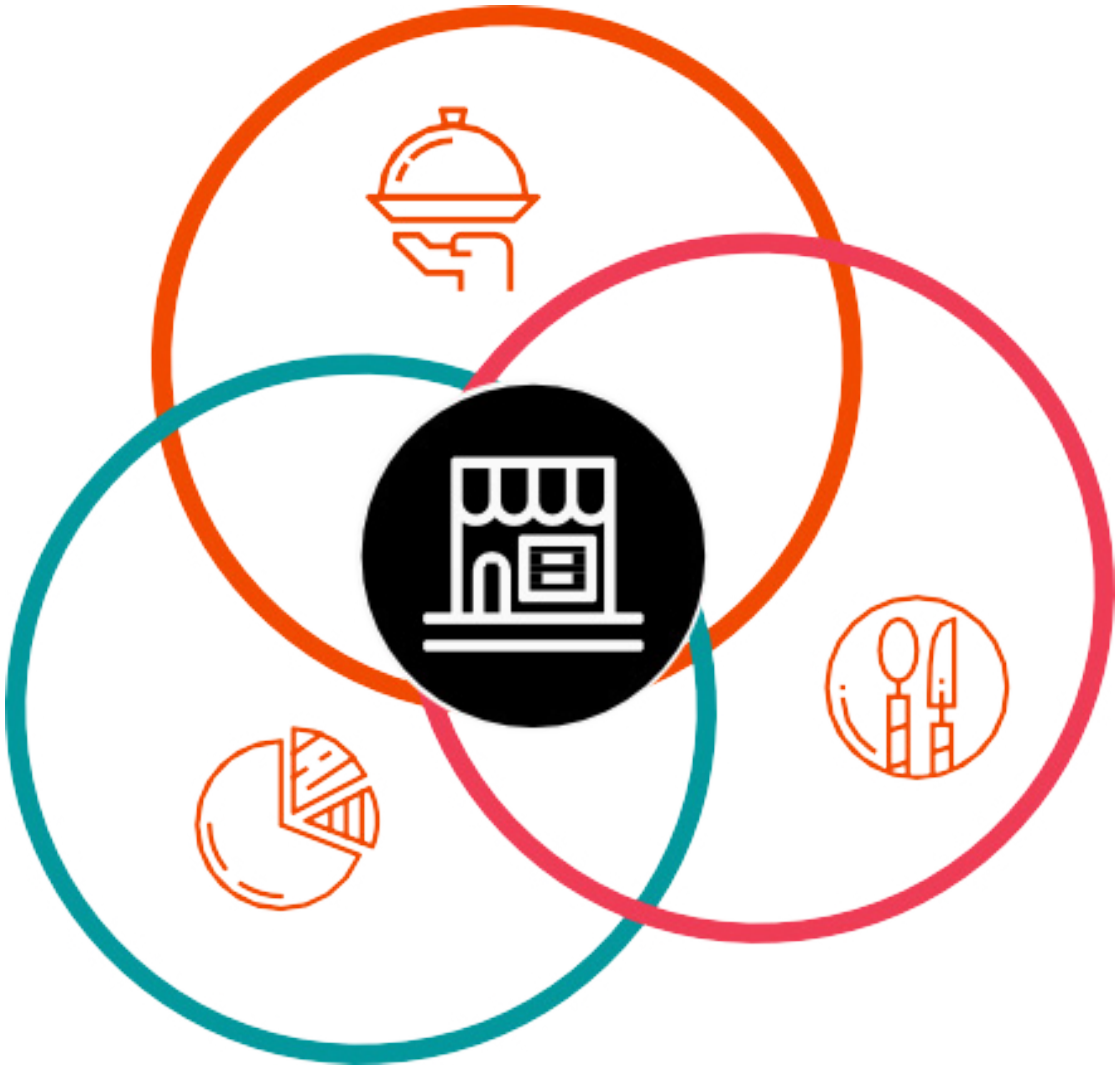


Turnover

\$12 billion+ contribution to the economy of Aotearoa each year.

Who makes up the hospitality sector in Aotearoa?

- | | | | |
|--|--|--|---|
| <ul style="list-style-type: none"> – New Zealand Maori Tourism – Tourism Industry Association – Business NZ – Ringo Hora / ServiceIQ | <ul style="list-style-type: none"> – Cheers! – Institutes of Technology and Polytechnics (ITPs) – Private training establishments | <ul style="list-style-type: none"> – Restaurant Association of New Zealand – New Zealand Chefs – Hospitality New Zealand – Unite Union | <ul style="list-style-type: none"> – Baking Industry Association of New Zealand – New Zealand Specialty Coffee Association – Migrant Workers Union |
|--|--|--|---|



Independent Operators
(those not signed up to an industry organisation)

Our wider stakeholder landscape

Hospitality Industry Ministers

- Minister of Tourism Minister of Immigration
- Minister for Workplace Relations and Safety
- Minister for Food Safety
- Minister of Social Development
- Minister for Economic Development
- Minister for Small Business
- Minister for Commerce and Consumer Affairs
- Minister of Employment
- Minister of Tertiary Education

Government Agencies

- Ministry of Business, Innovation and Employment (includ. Tourism , Employment, Small Business, Eco Dev, CCA)
- Immigration NZ Worksafe
- Ministry for Primary Industries (Food Safety)
- Ministry of Social Development
- Treasury IRD
- Tourism NZ
- Ministry of Education
- Te Hiringa Hauora I Health Promotion Agency

Strategic Partners

- The Mental Health Foundation
- Regional Tourism Organisations

The challenges the industry is facing

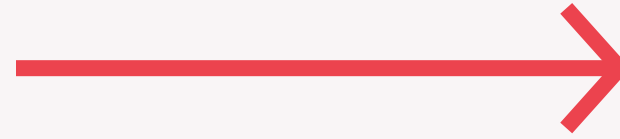
1. Poor skills pipeline and a lack of skilled local workers
2. Complicated regulatory landscape
3. A fragmented hospitality sector
4. A lack of joined-up Government leadership
5. Variable business acumen
6. Poor national narrative



Transformation at a glance



Training and Education



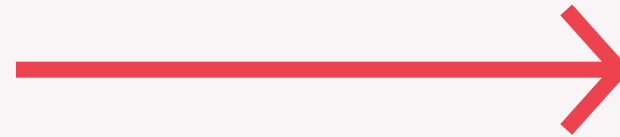
Lead a Hopso Reset: Attract and train New Zealand hospitality workers.

Leadership



Clearly defined **ministerial leadership** for the sector and progress towards a dedicated hospitality unit within the Ministry of Business, Innovation and Employment.

New Zealand's Hospitality Brand



Re-education on what hospitality means, including a focus on the **New Zealand Food Story**.

Regulatory Environment



Examine and refine hospitality's **regulatory environment**.

People Development



Encourage hospitality as an employment pathway for life, **creating memorable work experiences for everyone**.

Immigration



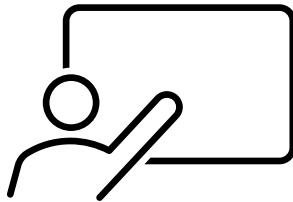
Amend **immigration policy** to support the hospitality industry's recovery and enable access to skilled workers.

Business Capability



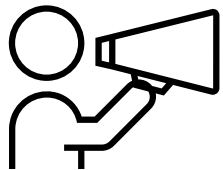
Improve **business competency** to create a more productive, sustainable and profitable sector.

For success we need:



Increased training for New Zealanders to meet the skills shortage needs, both in terms of availability and quality

- Assess current skills shortage measures.
- Existing education framework to be reviewed, gaps identified.
- Training to be centralised or accredited centrally to ensure education is consistent and targeted to address skills shortages.



Investment in hospitality in terms of training, promotion, engagement from government and availability of resources

- Create a centralised business training resource which provides information to hospitality businesses across all aspect of running their business.
- Create a platform for recognition of employers exceeding benchmark standards (HospoCred).



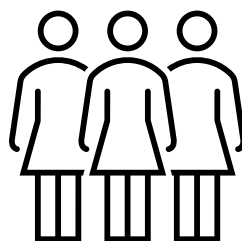
Provide financial support for short course training designed by industry

- Investigate micro-credentialised industry short courses.



Agile immigration policy to meet the employment needs of the sector

- Establish a dedicated hospitality connection within immigration. This will ensure hospitality is considered a high priority when considering policy changes.
- Stronger links with education and training policies through a Government Policy Statement and by requiring WDCs to report on how demand for migrant labour and skills gaps inform their training priorities.



Clear ministerial leadership for the sector

- Sector to agree on ideal Ministerial representation, either a specific ministerial role, or clear guidance on which portfolio hospitality would sit within i.e. Tourism, Economic Development, Small Business Employment
- Once agreed, the sector will then submit a business case to the Government advocating for the change.

For success we need:



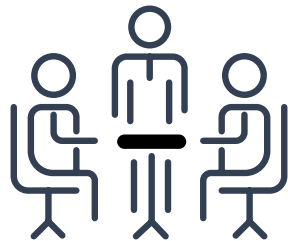
Easily accessible information from the government to the sector

- Once a dedicated MBIE unit is established, this information could all sit within this one platform.



Fund local hospitality employment campaigns as a pathway for Kiwis to learn and earn

- Create a programme of campaigns/programmes to be considered and targeted at local governments.



A dedicated unit within MBIE to represent hospitality



Engaged governance

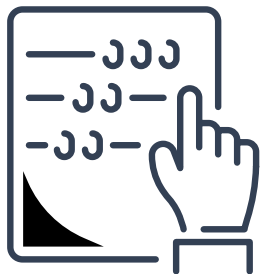
- Once Ministerial representation and a specified unit within MBIE are established, this will allow the industry to collaborate with the Government to continue to develop and grow in terms of the sector's positive impact on the economy, as well as providing training and employment to New Zealanders.



TourismNZ funded advertising campaigns prioritising hospitality and food experiences

- Promoting campaigns specifically focussed on the strong relationship between tourism and hospitality.
- Promote hospitality and tourism job opportunities to the international labour market.

For success we need:



Regulation review across the sector

- Present a list of policies, outlines of the impact these policies have on the sector and suggested changes.



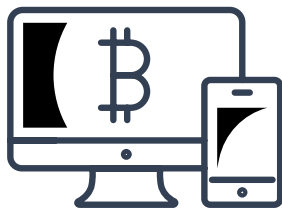
Campaigns to change perceptions and improve the reputation of our sector

- Find your future in hospitality campaign (#hospolife).
- Research to be completed with current and potential workers on their perceptions of the sector following on from the research carried out by Auckland Unlimited and Tourism Industry Aotearoa.



Research business capability

- Research current business capability to inform the development of the tools needed to create more productive, sustainable and profitable business models.



Digital transformation and future technology guidance

- Identify the technology needs of the industry and develop the training and guidance needed to help the future-proof the industry.

Want to keep up to date with the latest Future of Hospitality
Roadmap developments?

www.restaurantnz.co.nz/advocacy/

Thank you