

TRENZ 2025 – Tourism Briefing

Speech by Rebecca Ingram – Chief Executive, Tourism Industry Aotearoa

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Speech theme: Leveraging our superpower – moving nimbly through a changing world

Kia ora koutou. Ko Rebecca Ingram toku ingoa.

Nau mai hareae mai – welcome to Rotorua and to the 31st edition of TRENZ.

Firstly, a very warm welcome to our distinguished guests:

- Prime Minister, Rt Hon Christopher Luxon
- Hon Louise Upston – Minister of Tourism and Hospitality
- Mayor for Rotorua Tania Tapsell,
- Mayor for Tāupo David Trewavas
- Mayor for Tauranga Mahé Drysdale,
- and Mayor for Western Bay of Plenty James Denyer

Welcome to our partners, members, officials from various government departments and our sponsors. And, to our speakers - with deep knowledge and understanding of our industry I know this morning will be thought provoking and insightful.

Prime Minister and Minister – thank you for your attendance today which reinforces the value, and importance of our industry and the potential we represent for New Zealand.

The Governments going for growth programme is bringing momentum to the tourism industry, thank you for your work this year to move quickly to invest in key programmes to boost tourism. We are an industry of growth potential, and we are ready to do our part for New Zealand's wellbeing and prosperity.

And what an amazing industry we are a part of.

Tourism is an interconnected system. A galaxy of supply chains, experiences, people movement and cultures.

In this room I can see the breadth and depth of the skills and experience at our fingertips – and the connections that exist between each one of us.

With ever growing uncertainty and geopolitical changes around the world, there are many questions about what tourism will look like in the future and the impact on travel behaviour.

With this in mind, today I will focus on:

- Where the New Zealand tourism industry is at
- And what we are thinking about as we prepare for tomorrow.

Where the New Zealand tourism industry is at today

Tourism is an economic heavy hitter. When tourism thrives – so does New Zealand. Tourism is our second-largest export earner — but it's also one of our most inclusive. TRENZ helps future-proof our economy by spreading opportunity across cities, towns and rural areas. Tourism showcases our cultural richness and builds people to people connections.

And the data backs this up. In the year to March 2024, visitor spending generated \$44 billion to our economy. For context – that equates to \$121m per day.

What stands out for me though, is the more than 303k people who are directly or indirectly employed by the visitor economy. That is 1 in 10 jobs in New Zealand.

I think of that often – one in ten jobs.

Most tourism operators are small businesses with less than 20 employees. They are the powerhouse behind this contribution.

Our arrivals and the value of TRENZ

Looking at visitor arrivals we have plateaued at around 86% of our previous levels.

Our diversified markets are our strength. USA is a star performer, China has been growing more quickly over the last year and visitors from Australia remain the bedrock of our visitor economy. India is also notable for the strength of its recovery. After a strong summer season for many, our members tell us that their #1 focus for 2025 is business growth.

To compete globally, we must invest, evolve and be seen. The energy at TRENZ proves the industry is innovating, with 40 new products and 20 new operators showcased this week.

New Zealand consistently punches above its weight in global tourism rankings, recognised for authentic, high-quality experiences. TRENZ keeps us top-of-mind for global buyers, turning reputation into real bookings and benefits for Kiwi communities.

Few countries host trade events dedicated solely to one destination. TRENZ is a strategic asset for New Zealand, connecting businesses with global decision makers.

Travel buyers from 26 countries are here and together the 1200 delegates next door will hold 16,000 business meetings this week – almost 2,300 (exact 2280) took place yesterday afternoon alone!

Benchmarking off last year, we estimate that 14% of attending businesses will generate more than \$1m in turnover from TRENZ. And then there's the impact of the event being here in Rotorua, with over \$3million of economic impact expected because we're all eating, drinking, sleeping and experiencing.

Our visitors

Tourism operates at place – we are in communities and while we deliver significant economic benefits, we are very conscious of the privilege and responsibility we have.

Importantly, Kiwis have our backs. 94% of NZ'ers think tourism is good for New Zealand, and 82% personally benefited from tourism activity in their local area.

We recognise there are differences across regions and having strong destination management plans in action is a key element of addressing community concerns and maintaining this high level of support.

As an industry we are focused on visitor experience – and we have much to be proud of with the vast majority of Kiwi and international holiday visitors saying we either met or exceeded their expectations.

Along with our reputation for high quality, the opportunity to experience our unique Māori culture is a deciding factor for almost 13% of visitors. We are committed to substantially increasing participation in Māori culture experiences because we know it is the memories from these experiences that are only available in New Zealand. We are thrilled to have 31 Māori businesses here at TRENZ.

Supporting business to build capability and sustainability

Our incredible and iconic landscapes draw visitors. Commitment from the industry to protect and restore our environment is potent – which makes me very proud. We now have more than 2100 businesses signed up to our Tourism Sustainability Commitment (TSC) – up 200 from last year.

An essential step to making gains on areas like carbon reduction, waste reduction and supply chain improvements, is to assist tourism businesses to get really good at doing these things.

Last year at TRENZ we launched Akiaki – Advancing Tourism. This online learning programme for tourism businesses is free to our members and provides practical actions to help them improve sustainability and business capability. The tools and resources we have developed are resonating with 450 learners from 177 organisations registering to date.

Scaling up the TSC isn't just about making tourism businesses better – but about making Aotearoa New Zealand better.

Navigating for tomorrow's success

Something that is very clear is that the global tourism landscape is evolving. In just five years, how a visitor plans, books and travels through New Zealand will look entirely different.

Gen-Z and Millennials have distinct values and expectations, while technology is making travel more seamless, personalised and efficient. Harvard Business Review's latest research on how people are using AI in 2025 revealed that planning travel was one of the top 25 uses for the first time – it wasn't even on the list a year ago. So, it seems that while we're creating action figures of ourselves for LinkedIn we're also asking "what's good to do in Rotorua?".

Beyond New Zealand the goal posts are shifting and so too are the opportunities. Last month's tariff announcements immediately effected travel patterns with the ripple effects yet to be seen for New Zealand. In this context of 'anything's possible', connections and relationships matter more than ever.

Last year we put our industry strategy – Tourism 2050: A Blueprint for impact – into action and are actively tracking our progress with the majority of our stated outcomes and targets being met or on track.

When we talk about the future of our industry, one word keeps coming up for me — Nimble.

Nimble will mean something different for each of us. As an industry we have a long history of being nimble, leading in innovation and moving quickly. A nimble industry isn't just fast. It's smart. It's focused. And it's ready for what's next. A nimble tourism industry is one that's proactive, not reactive. It's constantly reading the horizon, picking up on trends and signals, and adapting before change is forced upon us.

Nimbleness doesn't mean going it alone. Just as our theme for TRENZ this year states it is about **Tūhonoa te Tāngata - Connecting People**. How through kōrero we engage, connect and strengthen our relationships.

It is about collaborating. We know that we're stronger when we work across regions, sectors, and cultures — especially with mana whenua and local communities. And at its core, a nimble tourism industry is sustainable by design. Climate-ready. Giving more than we take.

At TIA we have many priorities for the year ahead to support our members — from conservation reform to Health and Safety and more. But the three areas we are thinking about to support tourism to be nimble are.

- Great Data – data is a critical enabler, and making real-time visitor insight a basic tool is a game changer. We're committed to supporting and working with MBIE and the Tourism Data Leadership Group to deliver trusted and timely data that allows more informed decision making. Work is underway to enhance the data available, reestablishing the Monthly Regional Tourism Estimates, new projects for data on business events and visitor volume flows, a domestic visitor survey and a comprehensive community sentiment survey. And this year TIA will launch a data insights resource for our members because good information easily accessed is essential for good decisions.
- Secondly: Supporting you to flex – helping business to prepare, with shorter planning cycles, scenario thinking and regular strategy refreshes is on our mind. TIA is working alongside TNZ to ensure our collective international marketing is more impactful and ultimately drives increased sales. At TIA's Tourism Summit Aotearoa this October, we will explore how to be dynamic in a global marketplace.
- Thirdly, growing skills – our tourism industry is all about people. Last month we announced our partnership with Grow Tourism and Powrsuit to provide tailored training to accelerate the careers of women in tourism. I'm also pleased to announce an exciting piece of work with Ringa Hora to develop detailed workforce scenarios for tourism and hospitality so that when we grow, we know what skills and people we need and where we need them. This will be a major step forward for strategic workforce planning and development. And we continue to be a strong advocate for tourism as an NCEA Achievement standard in our schools, so our young people see tourism careers as inspiring.

Our job is to help unlock that nimbleness across the industry — helping each and every one of you in this room.

We do that by shaping policy that gives you the freedom to innovate and grow. By delivering foresight—real insight into trends, visitor behaviour, and what's coming next. We help build capability, with training, shared learning, and tools to help you move faster and smarter.

We connect you — to each other and to the wider economy.

And we champion leadership – not just from the top, but from every tourism business that is thinking differently and acting boldly.

Because in the end, nimbleness isn't just about speed. It's about readiness.

Our superpower is our connectedness. New Zealand's tourism industry might be small in scale, but we consistently make a splash on a world stage because we are a nimble and connected. Together we create a tourism experience for visitors like no other.

Kia ora.