



TOURISM EXPORT
COUNCIL OF
NEW ZEALAND



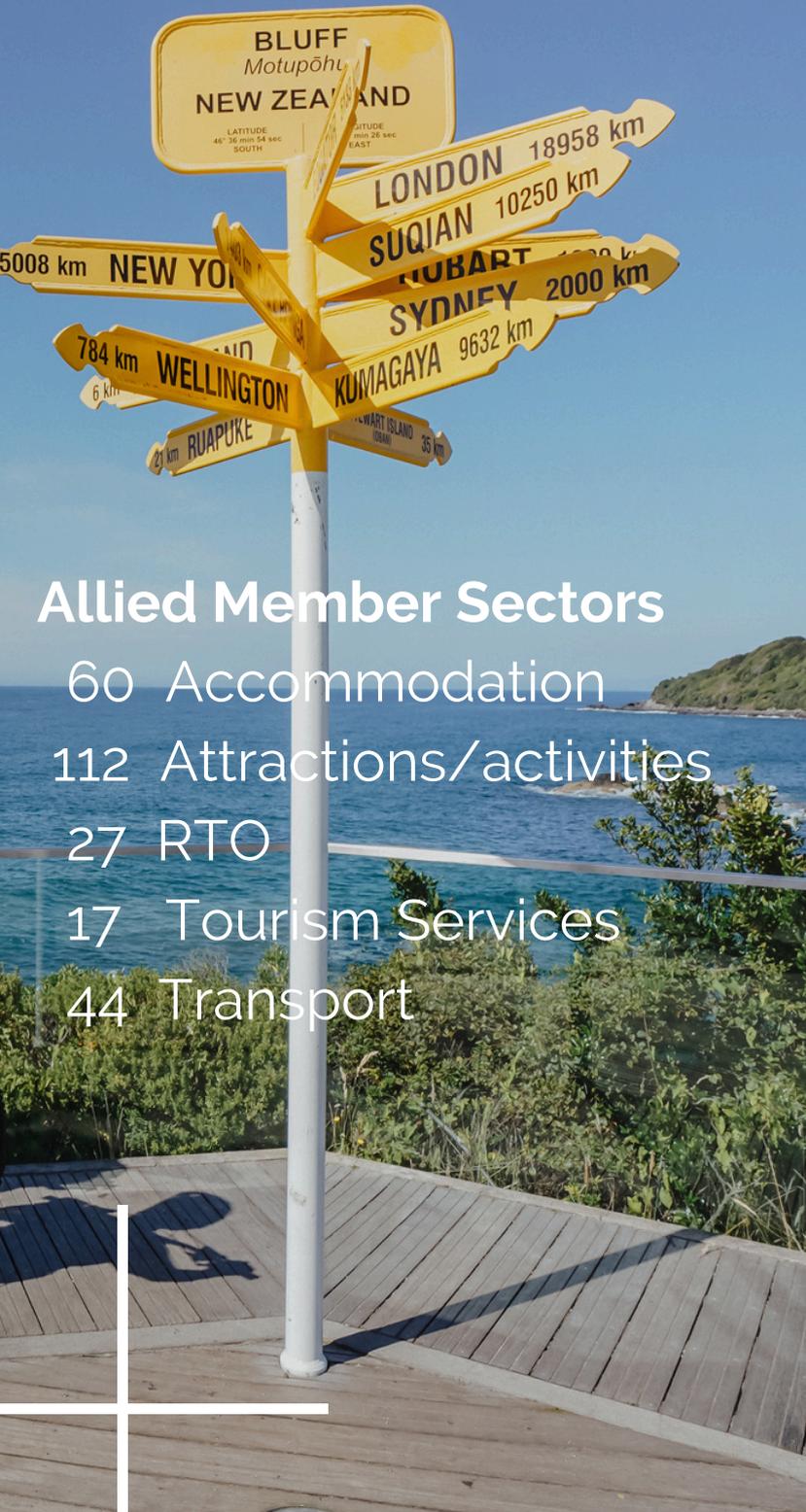
ANNUAL REPORT

2024 - 2025



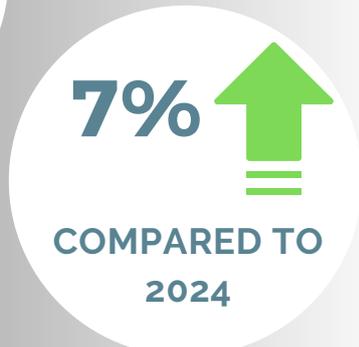
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Allied Member Sectors

- 60 Accommodation
- 112 Attractions/activities
- 27 RTO
- 17 Tourism Services
- 44 Transport



FIGURES AS AT 31 MARCH 2025

ANNUAL REPORT 2024-2025

Scott Mehrtens, Chair

Lynda Keene, Chief Executive

Kia ora koutou, the Board and team are pleased to present the Annual Report for the 2024-2025 financial year.

The industry has just completed its third season of international visitor recovery ending 31 March 2025. We recognize many in the industry had a great 24-25 season depending on location and which markets businesses focused in, whilst there was still difficulty for several regions with seeing the same number of visitors or no growth over the previous year.

Our international tourism recovery only saw 4% growth in visitor arrivals in the 2024-2025 year over the previous season which finished at 82% of pre-Covid arrivals.

At year-end 31 March 2025 New Zealand achieved 86% recovery of arrivals. Markets that performed well included the US (104%), Canada (91%), Australia (94%), Singapore (93%) and India (120%). These being the only countries achieving greater than ninety per cent of pre-Covid arrival numbers. There is still a lot of work to do to see the return of Chinese visitors from NZ's second largest market, and to attract more visitors from our traditional UK, Germany and European markets back to New Zealand.

Why is New Zealand's recovery slower than most northern hemisphere countries? We believe it is a combination of a number of factors.

- New Zealand was one of the last countries in the world to reopen borders for visitors (Oct 2022) and it takes time for markets and prospective visitors to regain trust in a destination it is safe to travel to.
- On 1 October 2024 with only a three-month lead in time, the government increased visitor visa fees by 60% and increased the International Visitor Conservation & Tourism Levy (IVL) 185% from \$35.00 to \$100.00 per person for most visitor markets. That was not a very 'welcome to NZ' message for visitors or offshore agents to share with their clients.
- New Zealand has become unaffordable in some markets and is not delivering as much value for prospective visitors' holiday investment as it had before March 2020.
- There is a lot of geo-political upheaval around the world at the moment, and visitors from long haul markets are choosing to travel more intra-regionally (closer to home borders) than take two flights from UK, Germany and Europe to get to New Zealand.
- It's a globally competitive market for the visitor dollar. New Zealand must be cognizant of this and ensure its messaging is that we welcome visitors. We note this changed quickly late January 2025 when the government announced that driving the return of international visitors would be part of its economic growth agenda.



One of the highlights of the year was our Annual Conference in Invercargill. It is always great to feel the energy and catch up with colleagues as we brief, debrief, cringe, laugh and share how work is going and what's worked well and areas to improve for next season.

The following section provides a summary of our key activities:

Financial Performance 2024-2025

The past year has seen the organisation improve its financial position and produced a good surplus of \$59,889 and improve our equity position to \$476,126. We're very pleased with the result. The good financial result has provided a solid platform for us to look at initiatives to provide more value and benefit for members in the future.

- Total income \$ 861,586 (previous year \$789,933)
- Membership revenue \$372,690 (previous year \$358,202)
- Total expenses \$801,697 (previous year \$672,938)
- Net surplus of \$59,889 (previous year \$116,995)
- Total equity \$476,126 (previous year \$416,237)



Above: 2024 TECNZ Trade Day / Conference in Invercargill.

Below: 2024 Good Sort of the Year - Cecil Potatau, Ngā Tahu Tourism.



Strategic Pillar Reporting 2024 - 2025

The organisation's strategic plan, operational plans and governance reporting covers four pillars. Highlights of activity and achievements noted below.



Strategic Pillar 1: Governance, Advocacy and Influence

Advocacy remains a core pillar of the organisation, and it is critical we continue to educate and keep government agencies and Ministers updated with the role of Inbound Tour Operators (ITOs) and trends / impacts of policies on the return of international visitors and the business operating environment for tourism suppliers.

Members of the Board met with Minister Doocey in August 2024, and we were pleased the Minister was able to attend the conference in Invercargill. We met with Minister Potaka in September 2024 to share our insights on international visitor trends, itineraries and regional dispersal. We also shared concerns about additional charges the Department of Conservation is considering to add to visitors with carparking and national park access fees.

In February we met with the 5th Minister of Tourism (and Hospitality) in five years, Minister Louise Upston. Minister Upston has outlined government's drive to put initiatives in place to boost the international recovery and look to tourism as a integral part of the government's growth agenda. This was refreshing news for all in the industry.

With the appointment of Minister Upston in the Tourism & Hospitality portfolio and tourism becoming part of government's growth agenda, it was a prompt for us to update TECNZ's Briefing for Incoming Ministers (BIM) document. This afforded an opportunity to update and provide suggestions for ways the government can stimulate growth of international visitors. The BIM was sent to Minister of Finance, Minister of Trade & Investment, Minister of Revenue, Minister of Immigration and Minister of Conservation. We're pleased to see some of TECNZ's suggestions being considered and implemented.

We also kept officials at the Ministry of Business, Innovation and Employment (MBIE), Immigration New Zealand, Department of Conservation and Tourism New Zealand up to date with international arrival forecasts, global tourism trends and inbound booking trends in NZ. Other matters TECNZ provided input with (submissions and plans) to government agencies included:

- MBIE: International Visitor Conservation & Tourism Levy (IVL)
- DOC: Explore introducing access charging for some public consultation land.
- DOC: Streamline concessions and planning processes and enable more flexibility around land exchange and disposals.

For Inbound members we continue to advocate for change/improvement in three important areas that can assist Inbounds with attracting international visitors to our shores. These being:

- TECNZ Inbound new 10-year DOC concession: In final stages of negotiation
- Export Marketing Grants: Look at ways Inbounds can access funding support to attract more export earnings
- Zero-rate GST matter: To assist Inbounds in attracting more international visitors and have some parity with Australian Inbound Tour Operators when promoting NZ in global markets.

The Board is in the process of working with our lawyers to prepare a new Constitution to meet the requirements of the Incorporated Societies Act 2022 to be presented and adopted by members at the upcoming Annual General Meeting on 29 July 2025.



Strategic Pillar 2: Membership

It always means a lot to the Board when members renew their membership. Our thanks to everyone for their continued support of the work we do. We delight in welcoming new members and constantly look at ways to increase membership.

We were very pleased with the high retention rate of membership and in attracting new members in the 24-25 financial year. Our membership continues to grow which we hope reflects the value members are seeing from their investment in TECNZ, our services and events.

Year	ITO	Allied	YoungTEC
2018-2019	61	226	253
2019-2020	65	222	164
2020-2021	54	210	141
2021-2022	61	230	138
2022-2023	69	249	150
2023-2024	71	242	176
2024-2025	74	260	219

Health and Safety

Health and Safety continues to be top of mind for all members. Health and Safety has been a major topic discussed around the Board table on what can we do to help members.

Over the past two years, TECNZ has researched a range of health and safety companies and services that may help businesses with their health and safety focus.

The Board are working with a NZ company called SHE Pre Qual. SHE stands for Safe Healthy Environment (SHE). We have commissioned the company to develop a NZ tourism Health & Safety portal which we believe for suppliers will cover off aspects to meet the requirements of the Health & Safety at Work Act 2015. The intention with the portal is to reduce the number of requests suppliers receive from NZ Inbounds for information on their H&S systems. The portal will house all relevant information and supersedes what we originally started with on the Tourism Trade Checklist. More information will be presented at conference.



Department of Conservation Concession

TECNZ holds a national concession for short walks <1hour for Inbound Tour Operator members and we have been in negotiations with DOC over three years to finalize a new 10-year concession. Inbounds are currently operating off the old concession. Our Board thanks Board members John Gregory and Greg Marett for the hours invested in the process of negotiating the ITO new 10-year concession. Although the concession has not yet been finalized we are hopeful this will happen within the next few months.

For Allied concessionaires, we know there has been some frustration with renewing your own concessions. We welcome any changes and technology that DOC implements to help speed up the process that allows concessionaires to plan ahead with more certainty.

TECNZ meets with DOC senior officials regularly (with TIA) to discuss broader national DOC matters and concessions that affect our members. We often attend meetings with representatives from TIA to ensure we're presenting specific sector views (inbound) and aligned industry views.

Industry Events

Our Chief Executive Lynda Keene represents TECNZ at many industry events including TRENZ, Meetings, Tourism Summit, RTNZ Inbound-RTO event and speaks at numerous conferences for other sectors of the industry. One of the things that members appreciate being shared are the International Arrival Forecasts 2025-2027 and discussions about future forecasting.

It's been a challenging time for several regional tourism organisations with Local Government funders looking to reduce their investment to RTOs/RDAs for marketing and economic development activities. TECNZ made a number of submissions to Councils to try and support funding applications for RTO members.

Strategic Pillar 3: Events

Our events continue to be a valued benefit for Allied members to connect with Inbound Tour Operator (ITO) members to promote their visitor product or experiences and regions with an outcome to be included on current and future visitor itineraries.

TECNZ's core purpose is to act as the commercial conduit for businesses to connect with offshore trade through the relationships NZ based ITOs have with offshore tour wholesalers and travel agency chains.

A lot of resource, time and planning goes into our events to ensure we retain the things that work well for attendees and areas we can improve or change for stronger engagement and education.

The benefit and work the team does to initiate connections and opportunities cannot be understated.

We ran three events during the 2024-2025 year and introduced three new regional events. We were delighted with feedback from the regional event attendees on having the opportunity to hear direct from four Inbound Board members on their markets and insights, and for the Board to hear of the unique challenges each region faces and of course the value of networking with the Board and team.



Events held:

- 25 June 2024 Regional Event (Christchurch)
- Annual Conference 6-9 August 2024 (Invercargill)
- 17 September 2024 Regional Event (Queenstown)
- 16 October 2024 Regional Event (Rotorua)
- Annual Xmas Symposium 4 December 2024 (Auckland)
- ITO Forum 4 December 2024

We had 301 delegates attend the annual Conference in Invercargill.

The annual Xmas Symposium in Auckland was another successful event attracting 274 delegates.

A new event where the team undertook significant work and resource to prepare for (Sep-Apr) was the TECNZ Trade Event (NZ Buyer and Seller event) that was being launched on 8th and 9th April 2025. The Board is delighted to say post event we attracted 104 Sellers and 74 Buyers to the event with a total of 374 attendees. The event will now become firmly set in the New Zealand annual tourism calendar.

Strategic Pillar 4: YoungTEC

YoungTEC continues to grow from strength to strength and our sincere thanks to all member who have younger team members that you encourage to join up to the YoungTEC development programmes.

For a specific report on YoungTEC's activities over the past twelve months, go to page 14.



Communications 2024-2025

Communication (comms) continues to be a critical aspect to the work TECNZ does to keep members connected and informed of what's happening within the industry and on the political front.

- 4 Member Surveys
- 17 Newsletters
- 7 YTEC Newsletters
- 21 Articles where TECNZ provided comment in media
- Industry events attended that TECNZ was a speaker or panellist on included:
 - Otago Tourism Policy school event (Apr 2024)
 - Speaker at BYATA conference in Taupo (Aug 2024)
 - Speaker at Asure Accommodation conf, Wellington (Sep2024)
 - RTNZ meeting with industry associations (Nov 2024)
 - Tourism Summit and Awards (Nov 2024)
 - American Chamber of Commerce NZ event (Feb 2025)
 - NZ Business Forum luncheon with guest speaker Greg Foran, Air NZ (Mar 2025)
 - Heritage Expeditions 40th anniversary celebration (ship in Wellington Mar 2025)
 - RTO-ITO trade event (Mar 2025)

Board and Team

As with all businesses (small, medium or large) the strength and future of the organisation is with their key asset, their staff / team. TECNZ achieves an extraordinary level of productivity given we have 1 full-time employee, three part-time employees and our accountant, who all do an amazing job.

In the 2025-2025 year we introduced a Business Development role to add more resource into member engagement and support for the new TECNZ Trade Event to be held in April 2025.

The team continues to do a great job for the organisation, and we know many members appreciate Lynda's sterling work and voice on behalf of industry. I know the Board joins me in thanking Lynda for her insights, dedication and efforts in leading the inbound sector and keeping TECNZ's voice top of mind as one of New Zealand's leading national tourism organisations.

We'd like to thank our strategic partners for their ongoing support of TECNZ's activities. Your support is much appreciated, and we value the relationships we have. Thank you to NZ Māori Tourism, Tourism New Zealand, Tourism Industry Aotearoa, Interislander and Great Journeys of New Zealand, Christchurch Airport and Auckland Airport.



To the TECNZ Board, my sincere thanks for your ongoing commitment and support. The organisation would not be as effective as it is without strong leadership from Board members and the insights you share on key issues included in TECNZ's submissions to government to try and advocate sensible policy changes that enhances NZ's recovery. We've had some good discussions around the Board table, and I look forward to this continuing over the next twelve months.

In August 2024, we welcomed Debbie Summers (ID Tours NZ), Martin Langford (Ngāi Tahu Tourism) and Trish May (New Zealand Travel Collective) to the Board and farewelled Eve Lawrence in April 2025. Many thanks to Eve for her support and insights over her three-year tenure.

Future of International Tourism

Inbound members, the Board and team keep a close eye on what is happening around the globe and in particular geo-political changes that can impact negatively or positively for New Zealand's international tourism recovery.

Airline capacity will always be the major influencer to drive visitation. At year-end, capacity was at 91% compared to 2019 levels. Whilst seat capacity from USA is up many other markets are still down. Inbound bookings reflect a similar pattern. i.e. good for the US market with China and Asian markets still a bit flat for the upcoming season. More recently it's encouraging to see increased airline capacity into Queenstown, Wellington, Christchurch and Auckland and we hope this bodes well for the next few years.

We hope government's new approach to implementing initiatives to help raise the profile of New Zealand in prospective visitors' minds will start to see positive results this upcoming season 2025-2026. Proactive immigration policies to reduce barriers for visitors to 'tick New Zealand' will be well received in markets who have us (NZ) on their consideration list.

If our assumptions turn out to be accurate, we should see international arrivals recovery rate of 95% by YE March 2026 and we'll be back to 101% of pre-Covid visitor arrivals (3.9million) by YE March 2027. The recovery is taking longer than expected when we compare recovery rates with other countries.

There is price sensitivity in some offshore markets to compete for the disposable dollar. Inbounds continue to hear from clients in the UK and European markets there is a lack of knowledge/confidence in selling New Zealand as a destination. More education / trade activity is required for tour wholesale frontliners, product managers and independent agents to help them build confidence to sell NZ to prospective visitors and make bookings.

The Board is encouraged about the future of international tourism and its role in attracting more visitors and value for the economy and communities.



The window of opportunity to convert the 'thinking about NZ' to being here on the ground is wide open at the moment when one considers some of the geopolitical challenges in some source markets.

New Zealand is a safe, English-speaking destination with an industry proud to host visitors on learning more about our people, culture and landscapes. We need to take advantage of New Zealand's positive profile and keep it top of mind in both traditional and emerging markets to help get back to pre-Covid visitor numbers and put in the right infrastructure and tools to then drive growth for the next five to ten years.

Ngā mihi nui.

Ehara taku toa,
i te toa takitahi,
Engari, he toa,
takitini

Success is not the work of one but the work of many



Scott Mehrtens
TECNZ Board Chair



Lynda Keene
TECNZ Chief Executive



BOARD DIRECTORS



REPRESENTING
TECNZ MEMBERS
2024 - 2025

Back row left to right: Geoff Yee, Mark Ma, Mark Badland, Debbie Summers, John Gregory, Martin Langford
Middle row left to right: Trish May, Amanda Linklater (YoungTEC Chair)
Front row left to right: Brendan Davies, Lynda Keene (CE), Scott Mehrtens (Chair),
Absent – Greg Marett, Eve Lawrence

LIFE MEMBERS

- Chris Ireland
- Dominic Cheng
- Graeme Badland
- Michael Wiedemann
- Peter Black
- Peter Lowry
- Russell White
- Tony McQuilken
- Warren Harford

MEMBER BENEFITS



Connecting your products and services within the inbound tourism industry



An association that understands and advocates for inbound tourism



Shared industry communications and intelligence



Business networking and learning opportunities

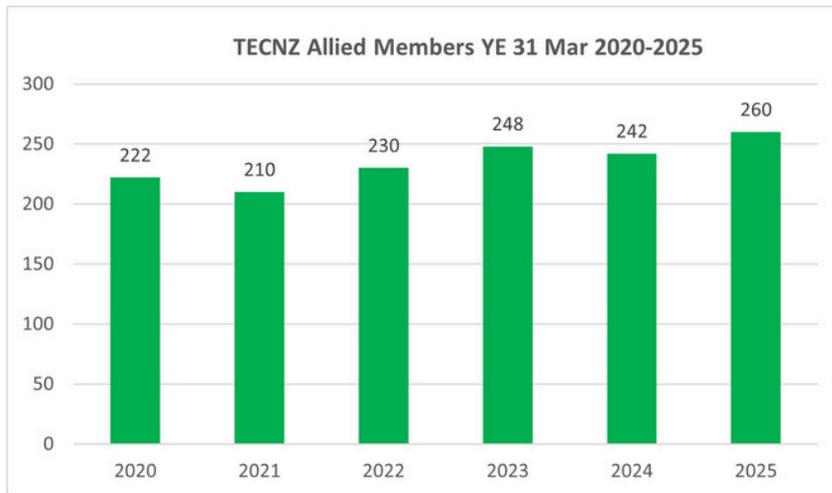
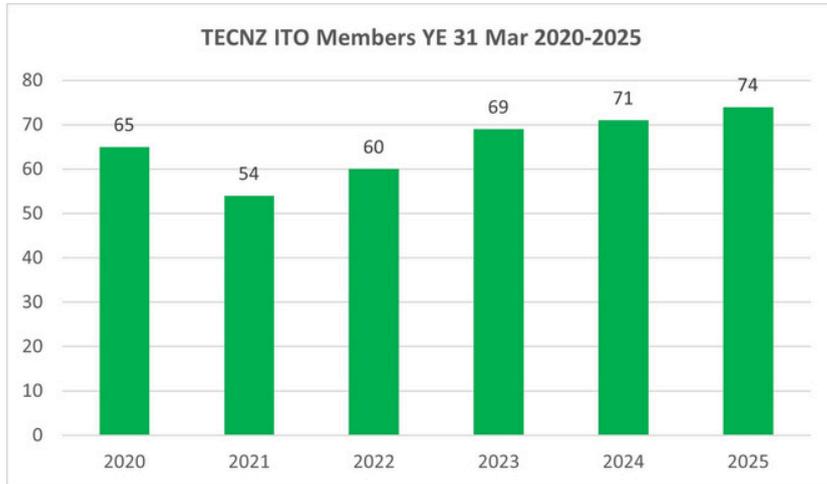


Quality and sustainable world class practices



Membership to YoungTEC

MEMBER TRENDS



YOUNGTEC REPORT

Amanda Linklater (Chair)

.YoungTEC had a standout year in 2024/25, growing its membership base by 25% from 176 in the previous year to 219 members. We had a strong focus on regional growth which contributed to the great growth in member numbers.

The Masterclass Series (professional development programme) held in July 2024 attracted 78 attendees which was fantastic. Our thanks to speakers and industry leaders who generously share their insights that provide value for YoungTEC members.

The Mentorship Programme wrapped up with excellent feedback from mentors and the 61 mentees. The YoungTEC Tourism held on 4 December was well received and the 36 attendees appreciated the TECNZ Board for joining them to share inbound and international tourism trends from their specific markets.

The Icehouse Leadership Day continues to be a real favourite for members and delivers high-value professional development. In the past year we were able to host two Icehouse Leadership days, one in Queenstown (3 May) with 22 attendees and the other in Auckland (3 December) with 18 attendees. Despite tighter funding, these events remain at the heart of what YoungTEC does – they consistently receive positive feedback and play a key role in nurturing our future tourism leaders.

Our sincere thanks to the Hospitality Training Trust (HTT) and Tourism Industry New Zealand Trust (TINTZ) for their ongoing support that allows YoungTEC / TECNZ to run the Leadership programmes.

The YoungTEC Board held an in-person Strategy Planning Day in Queenstown 22 November 2024. The planning day played a key role in shaping the roadmap for 2025, refining our strategic direction into three key pillars: Drive Membership, Professional Development, and Career Connections.

We also updated the YoungTEC Award criteria for the 2025 programme and began work to better align our membership cycle with TECNZ, while also identifying new funding opportunities to support long-term sustainability.

It's been an exciting year for each of our branches (Auckland, Central North Island, Wellington and Queenstown Lakes) and my sincere thanks to branch committees for organizing networking events and speakers for our YoungTEC members. Your time and effort is valued and appreciated.

In February 2025, I stepped down as Chair, with Narissa Phipps stepping into the interim Chair role until the next election cycle, which will return to its usual Sept/Dec timing. Thanks Narissa.

A huge thank you to our amazing sponsors, partners, and supporters who brought the YoungTEC vision to life over the past year. And to the TECNZ Board and Tourism Export Council team – your continued support and guidance has been hugely appreciated.

YoungTEC remains committed to creating meaningful opportunities for connection, growth, and leadership development for both current members and those just entering the industry.

Amanda Linklater
YoungTEC Chair

Poipoia te kākano kia puāwai
Ruki ki te mātauranga kia puta ki teoa Mārama

Like a nurtured seed blossoms
Enlightenment comes from nurturing wisdom..



YoungTEC Icehouse Leadership Day 2023



YoungTEC Summit 2024 All Blacks Experience



YoungTEC Summit 2024



YoungTEC Icehouse Leadership Day 2024



FINANCIAL STATEMENTS

As at 31 March 2025

STATEMENT OF FINANCIAL PERFORMANCE	2025	2024	Inc-Dec %
INCOME			
Membership Fees	372,690	358,202	4%
Conference and Symposium	451,972	400,991	13%
Other Revenue	10,000	10,000	0%
Interest	26,924	20,740	30%
Total Income	861,586	789,933	
EXPENDITURE			
AGM/Meetings/Travel	44,865	34,761	29%
Employment Expenses	324,054	264,474	23%
Legal and Accounting	19,668	13,901	41%
PR and Communications	1,672	2,676	-38%
Office Expenses	45,936	46,056	0%
Special Projects/YTEC	29,024	20,978	38%
Licenses and Subscriptions	47,277	10,444	353%
Other Expenses	38,327	27,830	38%
Conference/Symposium Expenses	250,874	251,818	0%
Total Expenses	801,697	672,938	19%
Net (Deficit)/Surplus before Tax	59,889	116,995	-49%
less income tax (refund)/expense	-	-	0%
TOTAL SURPLUS (DEFICIT) FOR THE YEAR	59,889	116,995	-49%
STATEMENT OF MOVEMENT IN EQUITY			
Total recognised INCOME	861,586	789,933	9%
Total recognised EXPENSES	801,697	672,938	19%
(Deficit)/Surplus for the Year	59,889	116,995	-49%
Equity at Beginning of the Year	416,237	299,242	39%
TOTAL EQUITY (END OF YR)	476,126	416,237	14%
STATEMENT OF FINANCIAL POSITION			
AS AT 31 MARCH 2025			
CURRENT ASSETS			
Bank Current and Call Accounts	362,003	231,030	57%
Bank Term Deposits	243,382	259,026	-6%
Accounts Receivable	2,354	9,795	-76%
Accrued Income and Prepayments	280,337	12,508	2141%
GST Receivable	6,238	522	1095%
	894,314	512,882	74%
Non current Assets	691	2,701	-74%
Total Assets	895,005	515,583	74%
CURRENT LIABILITIES			
Accounts Payable	45,605	26,172	74%
Employee costs Payable	28,181	17,777	59%
Income in advance	344,750	53,900	-
Taxation Payable	343	1,495	-77%
Total Liabilities	418,879	99,344	322%
Net Assets	476,126	416,237	14%
ACCUMULATED FUNDS			
Equity at beginning of year	416,237	299,242	39%
Net (deficit)/surplus for the year	59,889	116,995	-49%
Total Accumulated Funds	476,126	416,237	14%