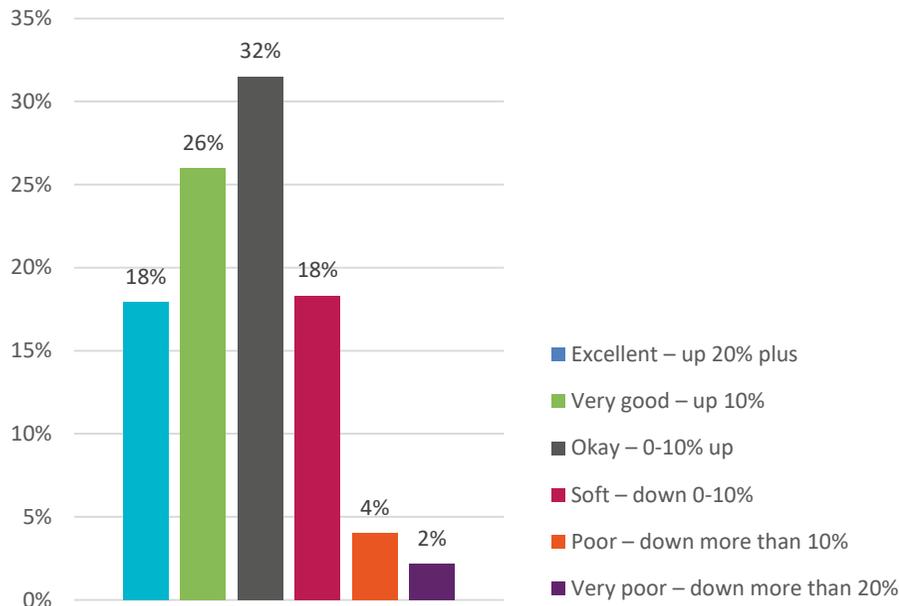


INSIGHT AT A GLANCE – Summer Season 2018/2019: Quick Snapshot

Key results from a survey of TIA members on the 2018 summer season and the outlook for 2019.

TIA conducted a snapshot survey with TIA members over the period of 12-15 March 2019. The purpose of the survey was to understand how members' businesses had been performing over the 2018-2019 summer season compared to the previous summer season, and to assess business expectations for the remainder of 2019. 275 responses were received, with good representation across regions and sector groups (refer Appendix 1).

How was business over the summer 2018/19 compared to last summer?



Business performance was positive over the summer season 2018/19. **76%** of respondents experienced an increase in business activity compared to the previous summer.

While positive overall, **24%** of respondents reported that their businesses were not growing. As we do not have comparative data, we do not know if this was a normal result. However, it is understood that the previous summer was an exceptionally busy one for tourism so the capacity for further growth may well have been limited against those high numbers.

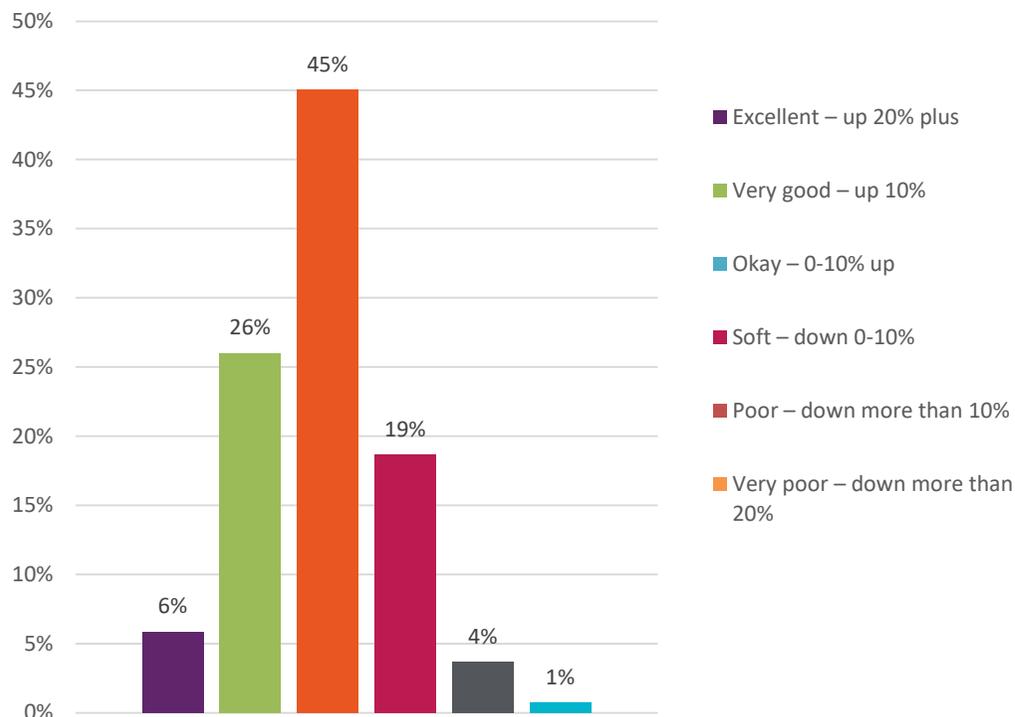
Some respondents reporting a lack of growth were clearly associated with external factors such as the fires around Nelson over the summer season and the reopening of the Picton to Kaikoura highway, which has been taken into consideration.

The qualitative responses point to a wide range of influences on the performance of individual businesses. For instance, some qualitative responses contained concerns about the Chinese visitor market, which were then balanced by comments on the strength of other markets, particularly Europe (excluding the UK), and the US. One respondent reported that younger backpacker numbers were down and older FIT up, whereas other respondents reported FIT and domestic markets were down.

In a general sense, responses reflected the ups and downs of different markets, with the overall picture being relatively strong.

A wide range of operational matters were raised by respondents, including management of freedom camping, lack of events in certain places that would have driven demand and under-management of regional hotspots.

Outlook for the remainder of 2019



Expectations for most businesses are strongly positive for the remainder of 2019, with **77%** of respondents expecting business activity to increase in 2019.

This expectation reflects the same pattern as the 2017/18 summer season performance, although with expectations centred on the 0-10% range and with lower levels of 20% plus high growth.

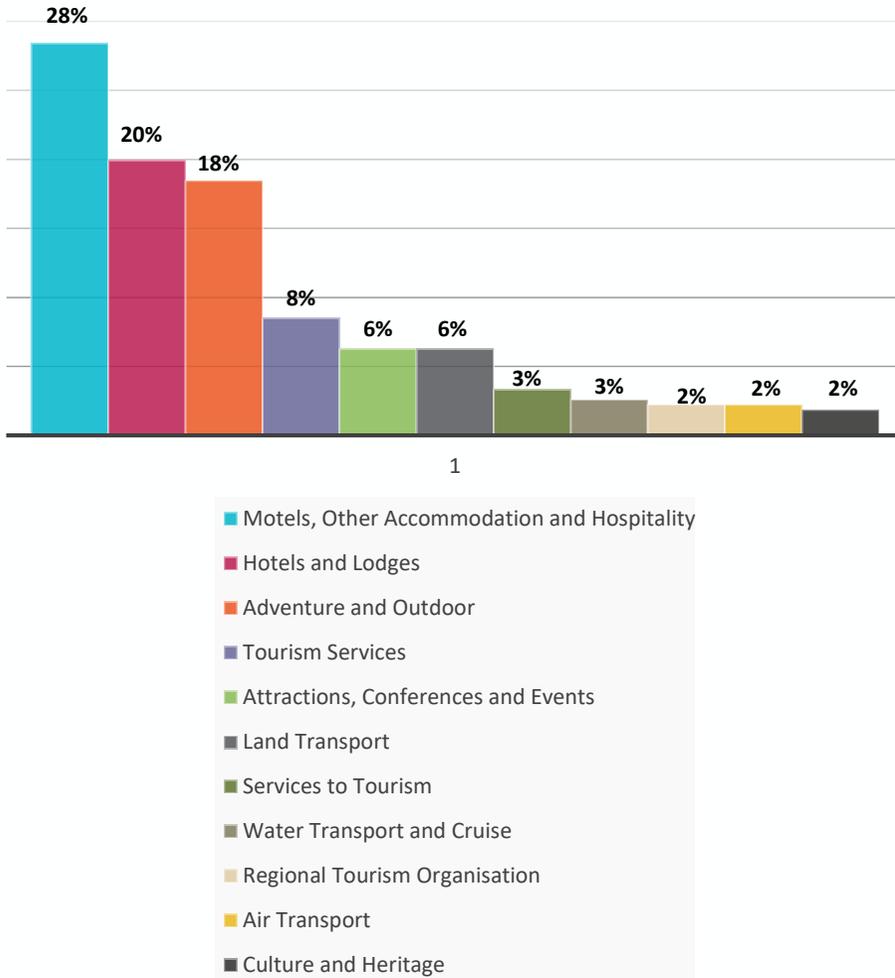
These expectations reflect an industry that is looking to the year ahead with a reasonable level of confidence.

Tiaki – Care for New Zealand was launched in November 2018. The Tiaki Promise initiative calls for travellers to promise to care for New Zealand, travel safely and act as guardians of our land, waterways and oceans during their time here. From the survey, 51% of TIA member businesses have adopted the Tiaki Promise, whilst 24% reported not knowing about this initiative.

In the qualitative responses, the Tiaki Promise was mentioned a number of times, with some respondents using it to strengthen their brand, whereas others thought it still lacked recognition and profile.

Appendix 1: Sector and Regional Response Counts

Respondents by sector group



Number of responses by region

