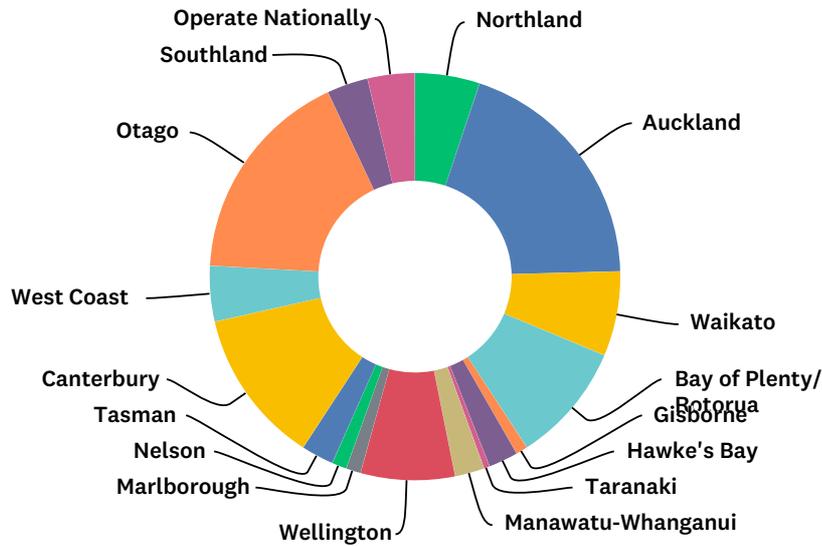


Q1 Where is your primary location?

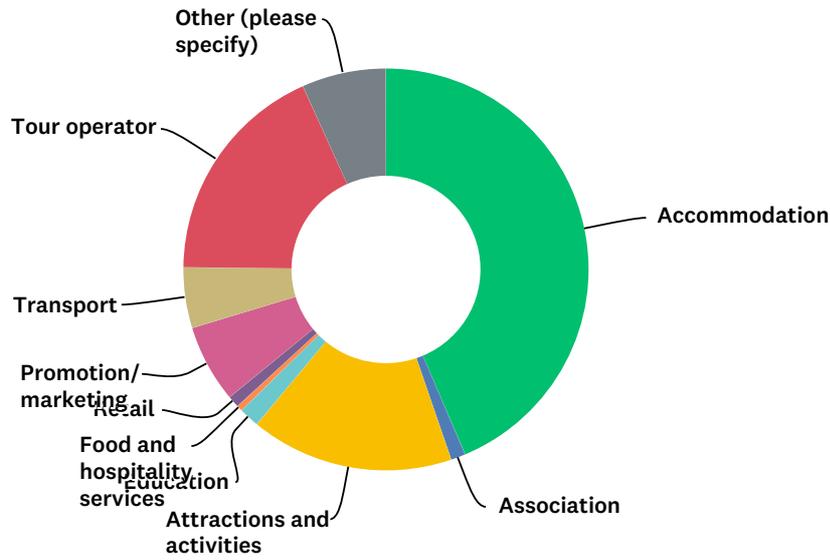
Answered: 431 Skipped: 0



ANSWER CHOICES	RESPONSES	
Northland	5.10%	22
Auckland	19.49%	84
Waikato	6.73%	29
Bay of Plenty/ Rotorua	9.51%	41
Gisborne	0.93%	4
Hawke's Bay	2.32%	10
Taranaki	0.46%	2
Manawatu-Whanganui	2.32%	10
Wellington	7.42%	32
Marlborough	1.16%	5
Nelson	1.16%	5
Tasman	2.55%	11
Canterbury	12.30%	53
West Coast	4.41%	19
Otago	17.17%	74
Southland	3.25%	14
Operate Nationally	3.71%	16
TOTAL		431

Q2 In which sector of the tourism industry do you operate?

Answered: 431 Skipped: 0



ANSWER CHOICES	RESPONSES	
Accommodation	43.62%	188
Association	1.16%	5
Attractions and activities	16.24%	70
Education	1.62%	7
Food and hospitality services	0.46%	2
Retail	0.93%	4
Promotion/ marketing	6.26%	27
Transport	4.87%	21
Tour operator	18.10%	78
Other (please specify)	6.73%	29
TOTAL		431

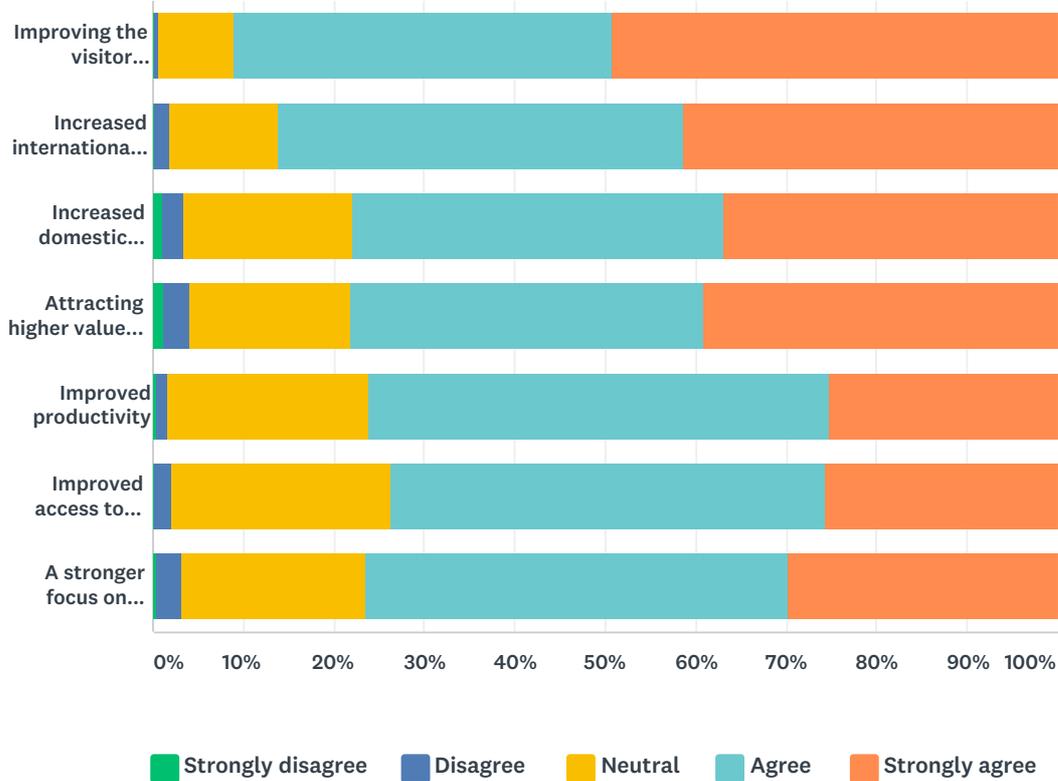
#	OTHER (PLEASE SPECIFY)	DATE
1	Council - i-SITE	8/6/2018 2:38 PM
2	education and research	8/6/2018 2:36 PM
3	RTO/EDA	8/1/2018 10:11 AM
4	Tourism region Chair	7/30/2018 3:48 PM
5	Tourism services	7/30/2018 3:08 PM
6	Campervan Rental (accomodation?)	7/26/2018 8:04 AM
7	market intervention	7/25/2018 9:35 AM
8	i-SITE	7/25/2018 8:01 AM
9	WeChat Pay & AliPay	7/24/2018 6:31 PM
10	Maori cultural	7/24/2018 5:28 PM
11	Luxury Hunting Lodge	7/24/2018 4:33 PM

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12	RTO	7/20/2018 3:58 PM
13	Destination Management Company	7/20/2018 12:36 PM
14	Scenic Flight Operator	7/19/2018 9:22 AM
15	hunting guide	7/18/2018 5:19 PM
16	Hunting and fishing guide	7/18/2018 10:07 AM
17	RTO	7/18/2018 9:26 AM
18	RTO	7/16/2018 5:05 PM
19	Hotels and hospitality consultancy	7/11/2018 9:26 AM
20	Tour guide local and nationwide	7/9/2018 9:33 PM
21	Airport	7/7/2018 11:06 PM
22	Tourism consultant	7/6/2018 5:55 PM
23	recently retired from Tourism Education	7/6/2018 4:37 PM
24	Wedding Industry, specializing in elopements and significant life events. We also have an accommodation soon to be opened at split Apple Rock.	7/6/2018 12:34 PM
25	Tourist Railway. Pottery and Conservation Park	7/6/2018 9:03 AM
26	Technology (mobile app)	7/6/2018 8:33 AM
27	transport tours	7/5/2018 5:46 PM
28	Expereince provider : Luxury fishing lodge	7/5/2018 4:48 PM
29	Translation services	7/5/2018 3:34 PM

Q3 The Tourism 2025 Growth Framework has 5 core elements – Connectivity, Target for Value, Visitor Experience, Productivity, Insight. To what extent you believe the following have the ability to advance your business?

Answered: 431 Skipped: 0



	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
Improving the visitor experience	0.23% 1	0.46% 2	8.35% 36	41.76% 180	49.19% 212	431	4.39
Increased international connectivity	0.23% 1	1.62% 7	12.06% 52	44.78% 193	41.30% 178	431	4.25
Increased domestic connectivity	0.93% 4	2.55% 11	18.56% 80	41.07% 177	36.89% 159	431	4.10
Attracting higher value visitors	1.16% 5	2.78% 12	17.87% 77	38.98% 168	39.21% 169	431	4.12
Improved productivity	0.46% 2	1.16% 5	22.27% 96	50.81% 219	25.29% 109	431	3.99
Improved access to insight	0.23% 1	1.86% 8	24.13% 104	48.03% 207	25.75% 111	431	3.97
A stronger focus on sustainability	0.46% 2	2.78% 12	20.19% 87	46.87% 202	29.70% 128	431	4.03

#	ANY ADDITIONAL COMMENTS ON AREAS THAT HAVE THE ABILITY TO ADVANCE YOUR BUSINESS	DATE
1	Need greater socialization of what might constitute a "high value" visitor	8/6/2018 2:36 PM
2	How is "sustainability" defined? Environmental, economic etc?	7/30/2018 3:49 PM
3	Local Councils need training and improved awareness of visitor needs - and funding!	7/30/2018 3:23 PM

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4	improved infrastructure	7/30/2018 9:42 AM
5	The feedback we are receiving while visiting overseas is that NZ is too crowded and busy and won't go back	7/30/2018 9:42 AM
6	no freedom camping within 5km radius of any holiday park already providing accommodation	7/30/2018 9:40 AM
7	Increased input from local councils regarding restrictions and requirements on AIR BNB	7/30/2018 9:38 AM
8	Improving business volume through shoulder and low seasons will have a significant impact on the overall health of our business	7/30/2018 9:37 AM
9	When you say higher value visitors are you referring to high net worth individuals ... if that is the case it is such a tiny part of the part and exclusive to a few super lodges.	7/29/2018 10:39 PM
10	We currently focus on the High end of the NZ Tourism Industry abd have done so for the last 18 years. We need extra man or woman power for want of a better expression with the appropriate skills, knowledge and experience to assist in putting special ltineraries together that we can market and tailored itineraries for our guests. Thus providing us with more time on sourcing new business. and looking after our guests.	7/26/2018 12:55 PM
11	We are constantly looking for ways to market our brand and product to international markets so assistance here would be great. We do everything we can to ensure our product and service is of the highest standard. Better maintenance of infrastructure in the regions would help to improve the total visitor experience in NZ. We are also doing everything we can to set our selves up to be financially and environmentally sustainable. More support in this area in terms of knowledge and funding would be beneficial.	7/26/2018 8:09 AM
12	Encouragement of domestics to see NZ first...	7/25/2018 2:16 PM
13	Direct long haul links to and from Christchurch International Airport	7/25/2018 8:42 AM
14	Greatly improved understanding and support for tourism by local council	7/24/2018 11:26 PM
15	Maintaining the interest and satisfaction of Australian and European visitors in the climate of very large Asian visitor numbers.	7/24/2018 4:03 PM
16	The above are the reasons to train in tourism but also provide the content of what we teach as these are the core elements of tourism in New Zealand currently. Another requirement for us, as an education provider, is visa and immigration regulations that allow international students to study in New Zealand. just recently the government changed the requirements so our lower level courses are no longer attractive to our international students.	7/19/2018 9:40 AM
17	More and better rail connections more and better bus connections	7/19/2018 9:24 AM
18	!!!One has to change the system about NOT KNOWING the unswear to a question that is asked, and if the person dose not know the respond to a question and go to the next page. You next page is out of my knowledge,,,"How do i know if NZ is well connected to the international market!!!. So the unswear to the question on the next page is ""I do not know"" You casn not leave a page and not unswearing to a question that the unswear is not clear to a person.	7/18/2018 10:16 AM
19	Invitation and support to attend overseas networking / sales trips - (increased international connectivity/attract higher value visitors/Improved productivity/Improving the visitor experience - 'knowledge')	7/18/2018 8:53 AM
20	Tourism gaining more respect as a viable career path	7/18/2018 8:36 AM
21	The improvement of the regulatory framework to better recognise the needs and issues in our sector	7/18/2018 7:57 AM
22	Advancing my business as a holiday park on a busy tourist route....will depend heavily on the customers continuing to be be amazed by our landscape and the friendliness of our people and the big one is keeping the country Clean....as in rubbish free streets road sides etc. I am currently in Europe...and it is the biggest problem along with congestion on roads in the cities. In my neighbour hood we have a Doc camp site which has no tap water and campers use the river water for everything and one stinking toilet....the visitors are shocked at what's on offer...the council knows about and is powerless to act...doc is smiling as they get money for providing nothing and it is a complete embarrassment to our local people....this is on state highway 6 this is the sort of thing that will give New Zealand a bad name.....I deal with 80 percent international customers.....talking with them is where you get your answers to how to grow and keep nz reputation as an amazing place to visit... I feel I am probably wasting my time putting pen to paper as most of the information you choose to take on board comes from people that haven't directly spoken to that many customers in their business for quite a while....there staff do that.....so that is one of the biggest problems with your information gathering.....regards karen steadman murchison motorhome park	7/17/2018 7:17 PM

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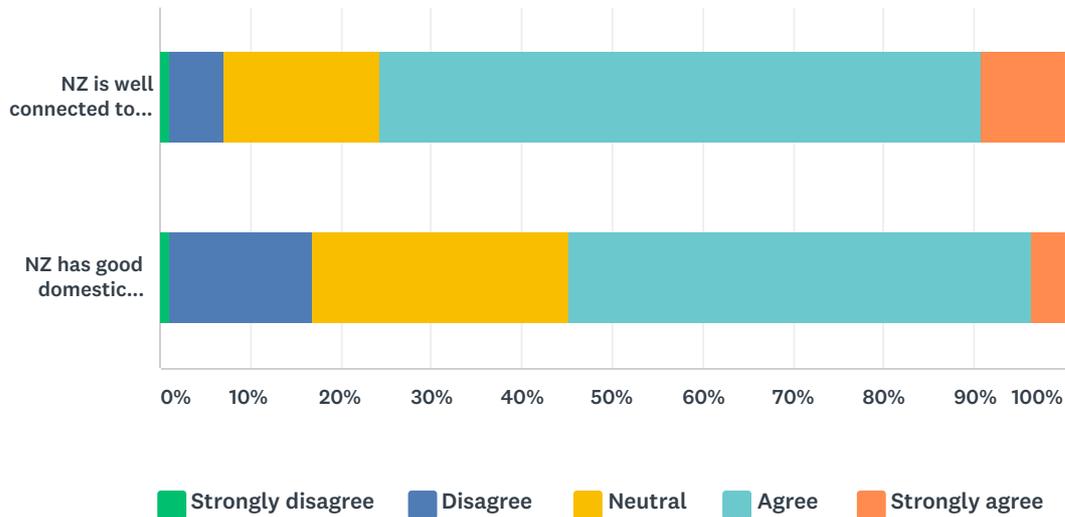
23	We need to place a far stronger emphasis on the quality of service delivery together with focusing on sustainability.	7/17/2018 3:42 PM
24	law keeping in certain location, crimes against tourists eg in Paihia, Auckland, Rotorua In Auckland, tourist vehicles entered into with loss of property. In Paihia, crime against persons and property both from vehicles and in hotels. Tuesday is a favourite night for break in as the only police person has his off day.	7/17/2018 3:16 PM
25	Unfair competition from Air B&B and freedom camping,	7/17/2018 3:06 PM
26	Infrastructure needs to meet visitor expectations	7/13/2018 5:26 PM
27	Immigration. We are hobbled currently.	7/10/2018 2:55 PM
28	It would help us if some of this was concentrated in the outer regions to spread the tourists out a bit, this would also take the pressure off the infrastructure. Restricting freedom camping to protect camping grounds would also help us as we find we have less numbers than the freedom camping sites, this doesn't help us as it is very hard to compete with free - and should we have to ??	7/9/2018 9:17 AM
29	Queen Charlotte Track is designated a Great Walk. Spreading the Great Walks around the regions will advance many small accommodation providers.	7/9/2018 9:15 AM
30	I personally feel New Zealand Tourism is missing a key issue in helping international visitors to our Country to know, learn and understand about Qualmark and what this means in terms of a Quality Experience for them in New Zealand. Running both an Inbound Tour Operator www.nzencounters.com and an Award Winning Boutique Bed & Breakfast www.bayview91.com we have polled our visiting clients from around the World and its shocking that in excess of 85% do not know what Qualmark is. Also on our recent Business trip, visiting Agents across Europe these past two months again over 78% did not know what or who Qualmark was and this is just totally shameful. Now that finally, Tourism New Zealand owns Qualmark there should be a total change and association cooperation to advise on the Website that Qualmark is wholly owned by Tourism New Zealand and for the very poor Qualmark Website to be TOTALLY redone and linked to www.newzealand.com . It is true that all Qualmark Endorsed suppliers can be showcased on www.newzealand.com , however I feel there is a missing point here, we need to get Tourism New Zealand to have a dedicated Qualmark Suppliers section on their Website, this will not only show these as Quality Experience, it will entice more suppliers to sign up to Qualmark. We need to get Airlines to show an arrival into NZ Video showcasing Qualmark and educating what this stands for that where they see this sign it will ensure a Quality Visitor Experience. How can we make this happen? visit https://www.qualmark.co.nz/ here on the main page we suggest the following: Welcome to Qualmark wholly owned by New Zealand Tourism, Why this is and will be a major endorsement to the Worldwide Visitor to New Zealand. Qualmark website showcases its suppliers via an XL Spreadsheet - I mean really in today's World is this acceptable - NO. furthermore, Member area should be via log in not available for the public to see. We suggest that a box comes up on the home page that says as stated Qualmark is wholly owned by Tourism New Zealand and you are now being transported to the Qualmark dedicated area on www.newzealand.com to help you to find a Quality Experience in New Zealand	7/7/2018 1:00 PM
31	Product development is key for us	7/6/2018 4:40 PM
32	Insights are crucial to all advancing and understanding all aspects of the visitor sector yet there is a huge gap in data in NZ. Nationally, we're not capturing visitor nights in hosted accommodation - bookabach, bed and breakfast, farmstays, lodges and more which make up a significant portion of our accommodation sector, and in some regions accounts for the majority of their accommodation sector. This issue needs to be addressed and led at a national level.	7/6/2018 4:30 PM
33	Some areas can't be influenced, i.e. the weather. However improved breadth of experiences enable choices to be made when weather conditions disrupt plans.	7/6/2018 3:51 PM
34	Improved training and tools to market direct to the FIT traveler whether they are overseas in their home or already traveling through New Zealand.	7/6/2018 2:20 PM
35	Promotion of direct booking.	7/6/2018 2:19 PM
36	As a small business it is hard to have my voice heard but I strongly feel in my region that we are missing the mark in the people we are encouraging. We have all the infrastructure to encourage engaged couples entering into marriage. We already encourage honeymoon stays why not add on the ceremony. It encourages a higher spend and longer stays and often brings friends and family with them, especially with the expat sector. I work hard to engage with other like minded business able to offer part of the experience but i do not have the budget to push it further on my own. We need to get one board collectively as a region and a country.	7/6/2018 12:38 PM
37	We will create our own energy on the property (Water, Wind and Solar), Battery electric RailCars, increase our conservation foot print,	7/6/2018 9:26 AM

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38	Due to the boom in tourism last three years' NZ is at the tipping point where the visitor experience will be seriously compromised. New Zealand's secret gems and the advertised "off the beaten track" areas are at times overwhelmed by visitor numbers. I am hearing this from my guests. Ever increasing cruise ships calling into NZ result in FIT's find it difficult to enjoy local attractions such as The Albatross colony, Larnach Castle, Tiaeri Railway because it is fully booked by the cruise line passengers. Milford Sound walks booked out. Queenstown overloaded with visitors. The solution is to put in controls reducing visitor numbers at the border before it is too late.	7/5/2018 10:37 PM
39	More "quality visitors" and less "quantity visitors"	7/5/2018 10:19 PM
40	Domestic connectivity in Auckland = reducing congestion, airport connections...also relates to international visitors...if they can't get the city easily Auckland stands no chance of engaging more people with visitor activities and attractions	7/5/2018 5:48 PM
41	Ban freedom camping for all non New Zealand citizens / permanent residents	7/5/2018 4:50 PM
42	I believe that the way the 5 core elements are viewed and implemented has more relevance the the questions above	7/5/2018 4:13 PM
43	Not necessarily attracting higher value visitors - the mid-range and domestic is also very important and should have a high marketing	7/5/2018 4:00 PM
44	Banning or tightly controlling freedom camping.	7/5/2018 3:58 PM

Q4 Improving connectivity is a key aspect of the Tourism 2025 framework. Please indicate below to what extent you agree or disagree with the following statements

Answered: 431 Skipped: 0



	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
NZ is well connected to international markets	0.93% 4	6.03% 26	17.40% 75	66.36% 286	9.28% 40	431	3.77
NZ has good domestic connections for visitors	0.93% 4	16.01% 69	28.31% 122	51.04% 220	3.71% 16	431	3.41

#	ANY COMMENTS ON THE TOPIC OF CONNECTIVITY	DATE
1	We do have good domestic connections for visitors as in frequency, however price can at times be prohibitive especially to regional areas	8/6/2018 2:38 PM
2	I do not feel that we are well connected to international markets at a deep level - traditional channels of agents and wholesalers are changing and we need best customer journey insights to understand buying decisions before leaving and how to best target when in country.	8/1/2018 10:13 AM
3	Double edged sword in that Air NZ and the airports want as many people as they can to use their services where as I believe we need to take less and charge more - make the experience of higher value. Fontera should be a warning to us all! also Air NZ's predatory pricing is very dangerous for our industry - the sooner Luxon goes "home" to Fontera the better.	7/30/2018 3:37 PM
4	Rail connections should be revived as they offer different approaches for tour operators and their clients	7/30/2018 3:24 PM
5	Hopefully TIA's efforts are being listened to - by NZ policy makers.	7/30/2018 3:23 PM
6	Rotarura would be good addition	7/30/2018 3:21 PM

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7	Our national connectivity is now in a situation where we have a monopoly on ground transport for links between our major destinations/regions. This means that the individual franchise holders within the Intercity Group have the power to block the communities that they do not serve/have limited services to - with the result of blocking connectivity and regional dispersal. This is a critical issue for us in Coromandel Town which puts businesses involved in tourism at risk in what is otherwise a vibrant town with unique character that provides an authentic visitor experience. Last April we initiated a direct service connecting Rotorua - Matamata - Coromandel to enhance connectivity/regional dispersal, this was underpinned by the high visitor numbers in the peak season enabling additional service that would benefit locals - essential social/community sustainability. This was successful in the first season due to being linked into the Mana.Bus/Naked.Bus network and passenger volumes. With the unfortunate closure of this network this service has had to be suspended as it relied heavily on passengers with extended journeys from outside our service. We would be very interested in discussing this situation with a representative from TIA as it is the anthesis of the goals of Tourism 2025.	7/30/2018 9:41 AM
8	no	7/30/2018 9:40 AM
9	Smoothing the seasonality of both International and Domestic markets makes a significant difference to our business	7/30/2018 9:39 AM
10	Outside of the major cities (and Queenstown) I think there is a lot of scope to improve domestic connections in NZ (including those for NZers) which would help spread more value out to the tourism markets outside the main centres - and potentially help preserve the experience within the main areas	7/30/2018 9:37 AM
11	There is still remove for approved here. Regional connectivity through the major gateways could be improved and be more cost effective across all airlines and it needs to be pushed more offshore ... the ease of reaching regional NZ by air and not just road.	7/29/2018 10:41 PM
12	New Zealand is well connected with some major markets, but not other markets that could produce business.	7/26/2018 12:57 PM
13	It would be great to reintroduce rail connectivity across the regions	7/26/2018 10:32 AM
14	For our size we do a reasonable job attracting the international visitor. I particularly like the new "storytelling" marketing strategy.	7/26/2018 8:10 AM
15	Cost still identified as roadblock to encouraging longer and more dispersed (to the regions) stay.	7/25/2018 2:18 PM
16	Need direct flights from India and/or more connections through Singapore.	7/25/2018 10:39 AM
17	NZ needs to attract more airlines from high growth areas. India would be a good example of this. Growing middle class, that likes to travel and spends well when in market. You only have to have a look at the numbers going to Aussie from India all because of direct flights. Domestic connectivity is poor. It is disappointing that AIRNZ has a monopoly on travelling to regions. Would like to see more of a push to attract other airlines on the Rotorua, Queenstown route.	7/25/2018 9:55 AM
18	International connectivity is still highly concentrated and NZ would benefit from increased competition on key routes like US and India. Domestic connectivity suffers from low population density outside the main urban areas and a lack of air and rail infrastructure.	7/25/2018 9:37 AM
19	Auckland Airport is a negative experience for visitors trying to connect between domestic and international flights	7/25/2018 8:43 AM
20	used to have good domestic connections until last couple of years when AirNZ stopped many of them ie Westport to Wellington	7/25/2018 8:00 AM
21	We, in Otago need improved connectivity with Australia	7/24/2018 11:27 PM
22	air NZ to dominant domestically. Need more competition. We need air services from India direct	7/24/2018 6:17 PM
23	In Rotorua we need domestic connectivity via air to the south island and vice versa	7/24/2018 5:42 PM
24	Jet routes are fine, but the regional connectivity can be a roadblock. Of course key increased connectivity is freight and increased competition on regional routes	7/24/2018 4:45 PM
25	Always room for improvement in this area.	7/24/2018 3:46 PM
26	I have assumed you're talking about transport connections - it's not clear.	7/24/2018 3:17 PM
27	The number of direct air routes continues to rise and domestic air capacity has also increased significantly.	7/23/2018 9:55 AM
28	SOMEHOW HOTELS IN QUEENSTOWN NEED TO BE CONTROLLED - THEY ARE KILLING BUSSINES	7/23/2018 8:55 AM
29	Availability of domestic connectivity isn't too bad but affordability of those options could still be improved.	7/21/2018 12:14 PM

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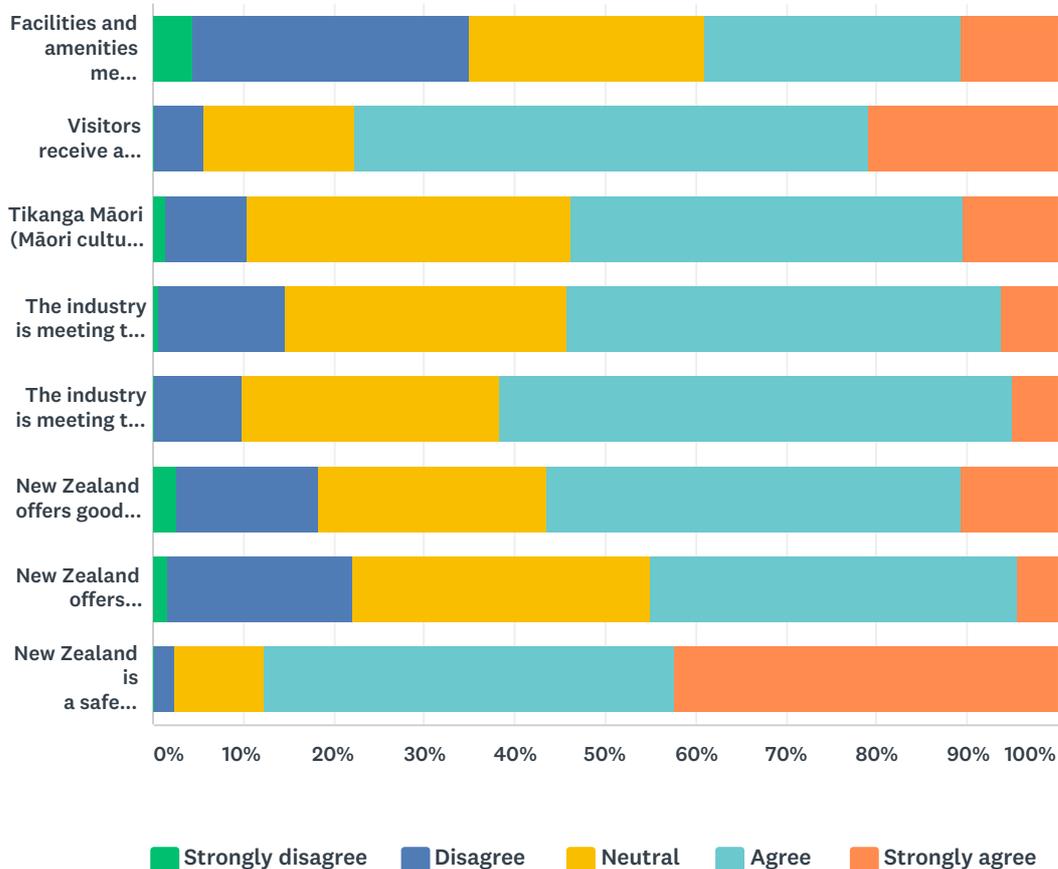
30	I think we can improve on our domestic connectivity by getting more airlines into the regions to bring prices down. Often flights into major hubs require an extra night's stay before you can fly to the regions adding extra cost to the holiday.	7/19/2018 9:44 AM
31	The Central North Island is poorly serviced by air, bus and rail transport. The Main Trunk line between Auckland and Wellington has the capability to hugely increase tourist access to CNI. The AIR NZ schedule into Taupo could be better especially a full service to Wellington	7/19/2018 9:27 AM
32	Sufficient rail and road public transport is missing	7/19/2018 9:25 AM
33	Re Domestic connections, the greater use of rail as a means to move tourist around the country using existing infrastructure as well as upgrading these and the overall connectivity of the towns would make for a more dispersed tourist foot print. As well completion of the national cycle path connecting the country North to South and across would be a good investment.	7/18/2018 2:37 PM
34	for domestic no low competition impacting pricing	7/18/2018 12:56 PM
35	Better flights which are reasonable priced especially from rural areas would be better.	7/18/2018 12:41 PM
36	I do not know the answer to this question.	7/18/2018 10:17 AM
37	Domestic flights into the regions are expensive and not as frequent as required although understandable with a small population. Due to cost does make international travel more attractive and real competition.	7/18/2018 9:38 AM
38	Connection is an interesting choice of words. I think there is room for improvement in regards to general understanding for many on what exactly international tourists want, how they think and behave. For example, in NZ we go on and on about distances, however for an Australian driving for 4 hours to do something is actually quite normal.	7/18/2018 9:30 AM
39	Air New Zealand's extension into new US markets in recent years and with Chicago coming a key factor in driving valuable North American business - especially at the high end. Would like to see US flights into Christchurch. Domestic connections would be improved to the regions. Blenheim and Marlborough a nightmare. Direct flights between regions instead of hubbing via WLG and CHC would be advantageous during peak season.	7/18/2018 9:13 AM
40	Connectivity for most Tour Operators is by their own accord - TIA/TNZ support especially for new businesses such as ours 'and growing' South Pacific Helicopters NZ acquired Wings Over Whales 23 May 2018 as a new operator inclusion of overseas networking opportunities would be highly beneficial. Our marketing success is based on 'Uniquely Kaikoura' - Kaikoura as a destination.	7/18/2018 8:55 AM
41	Expensive for some provinces at times to travel internally...eg Nelson to East Coast North Island	7/18/2018 8:37 AM
42	Main routes are well supported (and priced) - however due to economies of airlines, road quality and transport providers provincial centres are a more difficult proposition.	7/18/2018 8:16 AM
43	our small airports like Rotorua suffer cancellations and diversions, there are often multiple stops / flights required and the pricing is high by international standards. Driving is great but not many have the time (or the will) The international connectivity has improved massively over the years, Houston and China and so forth, but Akld, Wtgn, Chch/ Queenstn, dominate, some trans-tasman flights into Bay of Plenty and Marlborough/Nelson would be a great addition	7/17/2018 6:20 PM
44	Don't really know	7/17/2018 5:55 PM
45	Connection is one thing but priced way too high for domestic / regional flights. Need more direct flight to Asia, America	7/17/2018 4:26 PM
46	Our climate and terrain has issues for domestic (and sometimes international) connections. I feel anxious re potential biosecurity hazards from visitors and what they bring with them.	7/17/2018 4:10 PM
47	Could be better connected to international markets	7/17/2018 3:42 PM
48	Our primary market is India. Not only there is no direct flight, but also fares are expensive. This makes it hard for us to compete against European and US destinations.	7/17/2018 3:14 PM
49	air connections between secondary destinations could be improved.	7/15/2018 7:09 PM
50	We should never forget our local people	7/9/2018 9:35 PM
51	International as well as Domestic connections for visitors, can be improved a lot.	7/9/2018 1:29 PM
52	Wanaka Airport will improve things for my business	7/8/2018 3:43 PM
53	From an Airport perspective, the regional connections can only be done through the main hubs of Auckland, Wellington and Christchurch. Region to region connections are very limited.	7/7/2018 11:08 PM
54	As stated previously there is much work to do in this area	7/7/2018 1:01 PM

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55	Good connectivity between main centres, off the beaten track needs assistance with rail and bus transport planning	7/7/2018 6:14 AM
56	There are many countries in the world who visit New Zealand for a specific reason. Being at the coal face, I observe the statistics gathered are not specific enough.	7/7/2018 12:31 AM
57	More regional flights are needed	7/6/2018 6:10 PM
58	The industry at large takes the domestic markets too lightly. We need much better insights and research re domestic market contribution to the economy. We need strong leadership to promote the benefits of domestic tourism to the regions, their value and challenges. 80% of tourism product start with a good idea, shared with friends and family (for the experience) and then trialled with the domestic population. Government needs to wake up, acknowledge and fund regional tourism activities and infrastructure to enable more SME entrepreneurship. By this I mean, stop funding consultants and start funding the key driver of the business with wages and capability building.	7/6/2018 5:59 PM
59	Depends on where you are. Some connections are seasonal, which limits growth of shoulder seasons. Sustainability of connections in our region an issue.	7/6/2018 4:41 PM
60	Expensive and unreliable when outside the main centres. Regional New Zealand has been disadvantaged by Air New Zealand strategy.	7/6/2018 3:52 PM
61	We have a blow average mobile and internet connectivity service compared with our competitor destination around the world. The traditional wholesale/retail/i-SITE distribution channels still have a position in the market place to assist some visitors, but how can an individual SME compete in connectivity platforms? The cost of 10% to 25% commissions to get a visitor to come through your door is unsustainable and as a consequence, remains one of the real direct costs to SME businesses and directly relates to NZ becoming too expensive in comparison to other tourism markets	7/6/2018 2:27 PM
62	Obviously Nelson is growing and improving, I can't comment about the rest of NZ.	7/6/2018 12:39 PM
63	Limited domestic connections with our regional customers.	7/6/2018 12:09 PM
64	Infrastructure needs to be able to cope along side increased visitor numbers for both domestic and international	7/6/2018 9:28 AM
65	There is a real need for a national rail solution and road transport to the smaller towns across the nation. Intercity only travel offer transport options down the main highways	7/6/2018 8:31 AM
66	Connections may exist, but price points are high	7/5/2018 5:52 PM
67	In areas where there is competition for air travel the connectivity has improved in frequency and value but very expensive where there is no competition. Bus is reasonably comprehensive and it would be good to have more rail.	7/5/2018 5:00 PM
68	The AA 101 things to do in NZ was the last time there was any major value put in NZ and what is has to offer for NZer's. Now there are so many people travelling round thinking everything should be free and spreading litter and misinformation that NZ has lost it's way with the clean green image thing we had going for us. There are some very good facebook pages & web sites promoting NZ - but they are not necessarily reaching the target market	7/5/2018 4:18 PM
69	I don't feel that NZ is providing an accurate message to international tourists. They know about the sights, walks, culture, etc but have very little appreciation of the traveling times required. Our most notable experience was the couple who flew into Auckland, were very determined to visit Milford Sound and were flying out of Auckland again - all in 10 days. Too many people are trying to cover horrendous distances in too short a time. The conclusion we have formed is that NZ is doing a great job selling people the idea of visiting our country but at the same time they are very light on details regarding how long is needed to achieve what these customers want to see and do.	7/5/2018 4:06 PM
70	We don't do much domestic business	7/5/2018 2:53 PM

Q5 An improved visitor experience helps to add value to our industry. Please indicate below to what extent you agree or disagree with the following statements

Answered: 431 Skipped: 0



	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
Facilities and amenities meet the needs of visitors	4.41% 19	30.63% 132	25.99% 112	28.31% 122	10.67% 46	431	3.10
Visitors receive a uniquely New Zealand experience	0.23% 1	5.34% 23	16.71% 72	56.84% 245	20.88% 90	431	3.93
Tikanga Māori (Māori culture) is fostered within the tourism industry	1.39% 6	9.05% 39	35.73% 154	43.39% 187	10.44% 45	431	3.52
The industry is meeting the customer service expectations of international visitors	0.70% 3	13.92% 60	31.09% 134	48.03% 207	6.26% 27	431	3.45
The industry is meeting the customer service expectations of domestic visitors	0.23% 1	9.51% 41	28.54% 123	56.61% 244	5.10% 22	431	3.57
New Zealand offers good value for international visitors	2.55% 11	15.78% 68	25.29% 109	45.71% 197	10.67% 46	431	3.46
New Zealand offers good-value for domestic visitors	1.62% 7	20.42% 88	32.95% 142	40.60% 175	4.41% 19	431	3.26
New Zealand is a safe destination	0.23% 1	2.09% 9	9.98% 43	45.24% 195	42.46% 183	431	4.28

#	ANY COMMENTS ON THE TOPIC OF VISITOR EXPERIENCE	DATE
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1	I think perception of value is challenging but I think overall increasingly NZ is perceived as expensive for what you actually receive. For example 30-40 dollars for a main meal - fine if it is a great dining experience but often feedback says it is average, the same can be said of experiences paid activities and attractions. On balance I think we meet domestic visitor needs but have more we can do around meeting the needs of international visitors from a cultural and authentic experience point of view.	8/1/2018 10:16 AM
2	I think service can be improved. Safety for visitors is deteriorating...I don't know what is wrong here but we are not the safe destination we used to be. The Maori experience is multifaceted and visitors need to be educated on contemporary Maori and move on from preconceptions of concert parties and grass skirts!	7/30/2018 3:52 PM
3	Providing for simple everyday needs (e.g. toilets, accessibility of attractions, traffic management) need improvement.	7/30/2018 3:23 PM
4	Immigration is making it difficult for us to uphold service standard due to staff shortages in Queenstown area	7/30/2018 3:21 PM
5	Generally I believe NZ his a safe destination but I get embarrassed when I read about tourists getting ripped off or hurt here.	7/30/2018 3:09 PM
6	Compliance cost enforces on businesses by central and local government is crippling and forcing the cost to rise, but not at the true rate at what it should be. Larger companies can absorb these costs, smaller can't. Auditing costs are out of control and for why??	7/30/2018 9:43 AM
7	we have an amazing country with so much variety in such a small area	7/30/2018 9:40 AM
8	Ithink there is a lot of improvement needed in the overall facilities and amenities within the country, especially looking at the ways in which many tourists are interacting with our market - like freedom camping. A lot of place s do very well with the experience aspect but there are still too many operations dragging the level down and likewise on the cultural aspects. NZ generally services its markets very well where they understand the unique sense of NZ humor but it is often lost on / offensive to many other nationalities	7/30/2018 9:37 AM
9	Safe destination - varies from region to region. A tourist parking their car in a high tourist spot in Rotorua or Queenstown has a higher chance of having it broken into vs parking their car in Martinborough (for example).	7/29/2018 10:42 PM
10	New Zealand has become an expensive destination and we frequently received comments on this including from high net worth visitors. The level of Customer service not up where it should be. Young New Zealanders don't want want to work in the Hospitality or Tourism Industry because their is real career path mapped out for them. Thus the industry especially in the accommodation sector is forced to hire foreigners a good number of whom's English is very poor , and a lot of them do not understand the New Zealand Culture and way of doing things. Their is nothing mre frustrating at time to call up hotel for example and get a Foreign Speaking voice on the other end, and you can't understand what they are saying. Maori Culture is frankly over fostered within the new Zealand Tourism Industry to the point that in some instances it is frankly overwhelming for the visitors. I have seen a number of instance of this. New Zealand should be a safe destination, but it isn't always. Just read about the number of assaults and Robberies on Tourists.	7/26/2018 1:10 PM
11	Our lack of large-scale quality and premium commercial accomodation is major weakness for our international visitor market. Customer service and lack of extended opening hours for the hospitality & retail sectors in the regions can be improved for the better.	7/26/2018 10:34 AM
12	Quality of amenities and cost impacting visitor experience	7/25/2018 2:20 PM
13	There is too much variation in visitor experience, from hotel to hotel, product to product, region to region. Hotels are not good value for visitors, both domestic an international, and service standards are poor for what you pay when compared to other countries.	7/25/2018 10:43 AM
14	Hotel prices far too high and making NZ uncompetitive with other destinations	7/25/2018 10:24 AM
15	I think certain sectors of the industry are letting NZ down. Hotel/Motel service standards are poor and this is common feedback we are receiving from international clients. Public facilities in NZ are also poor with more investment needed. Trying to push people away from freedom camping is silly when they are doing it anyway, so NZ needs to provide additional facilities to meet these needs.	7/25/2018 10:09 AM
16	Visitors numbers are becoming too much for certain regions and the current infrastructure in place there - ie. Queenstown	7/25/2018 8:54 AM
17	Dominance of foreign staff in New Zealand tourism service roles can lessen the authenticity of the experience	7/25/2018 8:44 AM
18	We are a category 1 listed facility therefore cant change some access issues ie stairs.	7/25/2018 8:35 AM

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19	compared to many other places in the world NZ is a safe destination which more could be made of but we should be high quality attracting high quality visitors not just everyone as that then dilutes the unique NZ experience with too many people.	7/25/2018 8:01 AM
20	Some of these questions are a bit vague - can't tell if they are about our organisation (which I can speak to) or about the sector more broadly, in which case I cant possibly respond to the first two statements.	7/24/2018 3:19 PM
21	The number of international visitors is pushing the price up for domestic travellers. Local facilities need to continually developed to meet the growing demand.	7/24/2018 3:14 PM
22	Value rating is in danger of dropping as NZ becomes more and more expensive to visit for both Int and Nat vistors.	7/23/2018 10:49 AM
23	The Visitor Experience Monitor shows that most visitors expectation's are met or exceeded. However, we can always improve. The challenge is doing this in a way that is sustainable and is not detrimental to communities. This may mean looking at different ways of funding facilities and amenities i.e. charging rather than providing everything for free.	7/23/2018 9:55 AM
24	NZ experience is tempered with many service providers being staffed by other nationalities we have clients that comment - where do we meet Kiwis?	7/19/2018 9:52 PM
25	New Zealand is being priced out of the market for domestic tourists. Southlanders can no longer afford to holiday in Queenstown.	7/19/2018 9:46 AM
26	Road safety is a big issue as is the issue of theft and intimidation of international visitors. Safe also infers safety in such things as tramping and this is a major issue.	7/19/2018 9:30 AM
27	not as safe on our roads and in our national parks	7/19/2018 9:27 AM
28	The industry needs to go through a period of adjustment whereby the big businesses have a reduced product margin, whilst they increase wages significantly, to attract the right calibre of workers.	7/19/2018 7:41 AM
29	Too many overseas originated employees in the front desk every single corner tend to reduce real experience of kiwi hospitality and customer services. Question of where are all those young kiwis gone is always my clients one of many questions on tour. They want to experience real New Zealander who can present its real value and story.	7/18/2018 10:22 AM
30	With all due respect,,Beyond my understanding	7/18/2018 10:18 AM
31	I think more could be done to encourage NZ'ers to travel in the offseason, creating Local pricing and deals, and educating New Zealanders to be the best ambassadors.	7/18/2018 9:50 AM
32	NZ is well over-priced. People pack their own lunches instead of buying them at main attractions due to them being overpriced. When it's cheaper to buy a meal in Switzerland than NZ, we need to start a bit of self-reflecting. Additionally when the only place you know you can get a vegetarian meal is the Inter-islander, it's quite obvious we're catering only for the domestic market in so many regards (half of India is vegetarian and most of Australia is gluten intolerant).	7/18/2018 9:36 AM
33	Not in a position to answer domestic tourism questions. We're doing better at projecting Maori culture - but much more can be done. High pricing is of concern for me, No doubt that high pricing already affecting business from some markets - especially UK and Europe. We're nearly at a point where the value proposition is being compromised.	7/18/2018 9:18 AM
34	There is much room for improvement. Maori culture and tikanga is represented strongly by a few tour operators/iwi - slowly growing. International visitors seeking culture and unique experiences will drive demand - change is slowly happening. Facilities and amenities are what let NZ down - local authorities must adhere to simple requirements (public toilets 'conveniently' located) - therefore I support international tourist tax for national tourism infrastructure/public conveniences, etc. Iwi must be consulted and involved - Kaikoura March 18 July is due to disrespect and exclusion of iwi/hapu leaders/members/Ninety Mile Beach where iwi are now taking it into their own hands. Tourism leaders must be actively supporting sustainability of NZ resources with iwi.	7/18/2018 9:09 AM
35	In many ways the answer to each of these questions depends upon where you are. There are without doubt many points of strain in areas of the South Island but areas of the North have much capacity. The standard of service, the consideration of maori values and indeed price/value for money varies greatly across different parts of the country and indeed individual communities, businesses and experiences.	7/18/2018 8:33 AM
36	We are slack at customer service.....noticeable in the hospitality Industry we are miles behind..	7/17/2018 7:21 PM
37	There is much lip service to many experiences and culture and 100% pure, we can do a lot more. NZ is expensive. Mostly safe however we have many thefts and even more sinister happenings for our international visitors, our roads are another killer for them	7/17/2018 6:22 PM

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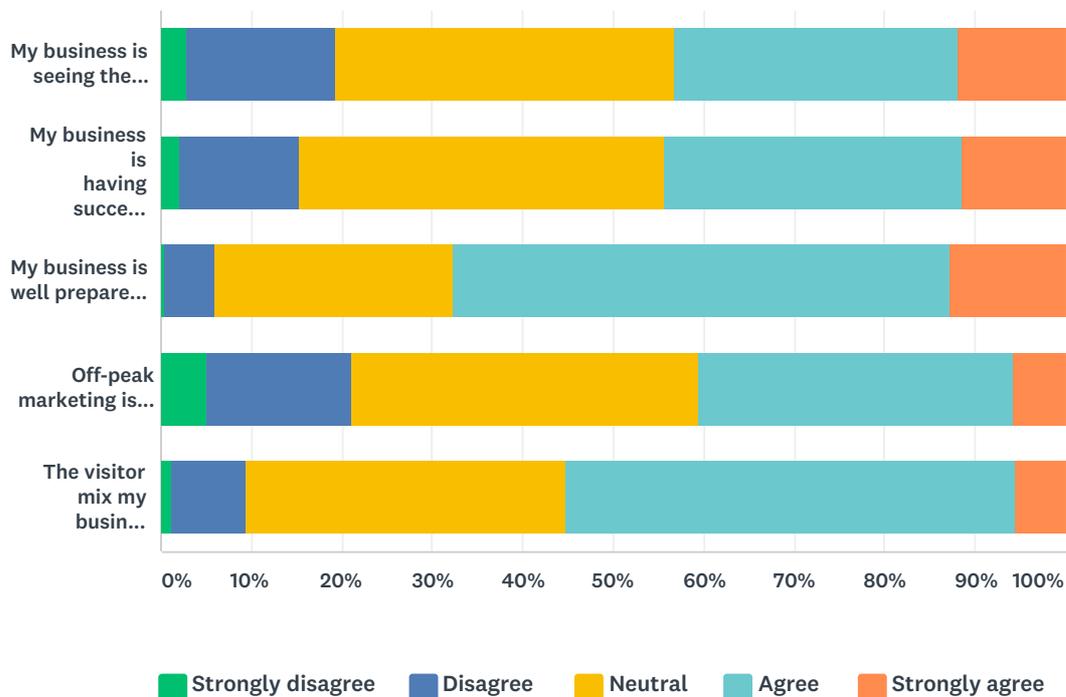
38	Facilities and amenities meets the needs of paying visitors but not the free loaders who want to stay FOC in our parks and reserves. I do not believe these are the visitors we should be allowing.	7/17/2018 5:57 PM
39	Customer service is often too relaxed, need to improve on professionalism and productivity. Would be essential to make regional / domestic destination affordable in term of flight, this will help spreading tourism around the regions. Each regions should attract people with food speciality unique for their region. Food and tourism goes often together, this will help further visitors into the regions	7/17/2018 4:37 PM
40	Improving local water supply safety is needed or visitors should be advised re shortcomings. I think that some rationing over access to the great walks is needed and also more stringent requirements over the equipment needed to access those with potential hazards. I hope that a greater financial contribution by visitors to track and hut maintenance will assist. Plus toilet facilities for visitors. I believe that freedom camping needs greater restrictions as not only in remote locations problems can arise but also in our cities. I would like to see a total ban (with instant fines) for freedom campers in our cities	7/17/2018 4:24 PM
41	The visitor experience in New Zealand needs to be drastically improved. The issue we have is that the average Kiwi does not view service as a career. The students who graduate from hotel schools expect immediate junior management roles as to starting from the bottom and working their way up.	7/17/2018 3:49 PM
42	expectations of visitors change. different expectations from different markets.	7/17/2018 3:18 PM
43	Our primary market is India. NZ is seen as an expensive destination by mainstream tourists.	7/17/2018 3:15 PM
44	Too much emphasis on free, nothing is free there is always a cost	7/17/2018 3:09 PM
45	I believe, a lot of tourism regions are becoming over crowded and show NZ is well behind in looking after the international visitor. we are behind in facilities either a poor standard or lack of facilities in general	7/17/2018 3:03 PM
46	NZ is fast becoming perceived as an expensive destination. All the current talk about new taxes is not helping. Far better to recognise that overseas visitors' spend on GST and their contribution to GDP is the fairest way for the Government to take its share of the revenue, and for Government to return a portion of that tax take in infrastructure improvements and regional assistance. Right now, it is being perceived as just plain greedy.	7/11/2018 9:33 AM
47	Price relativity is important. Both Overseas and domestic visitors will find our pricing a challenge	7/9/2018 9:37 PM
48	All TIA hotels are focused in meeting customer service, not sure about the privately owned business and the level of service which in overall will be a factor overall.	7/9/2018 1:30 PM
49	Our public areas and facilities are overrun by freedom campers doing all their ablutions in facilities designed for day visitors. Our public areas should be kept for what they were meant for. People (locals and visitors) to enjoy our beautiful natural resources for the day. They should then have to stay in a camping ground that meets all the regulations.	7/9/2018 9:21 AM
50	The impact of increased visitor numbers in areas with a small rate pool is massive, and will continue to be detrimental to facilities and amenities. Creating a negative atmosphere and culture to tourists in these areas.	7/9/2018 9:18 AM
51	NZ tourism lives of the scenic and relatively unspoiled beauty of this country. Very important to safeguard views/vistas, natural quiet, clean air, clean water. Often overlooked is the natural quiet - the busier we get the noisier we get, this is dangerous!	7/8/2018 10:38 AM
52	it all comes back to making Qualmark a rated system for excellence and a Quality Experience for the end user, but at the same time educating Agents and the Worldwide visiting public by promoting this in a better way to have this to be simonious across the industry as it is done in other countries. I did look at that Qualmark confirmed star rating partnership with Trip Advisor https://www.tourismnewzealand.com/news/qualmark-confirms-star-ratings-partnership-with-tripadvisor/ I do not see this on Trip Advisor Website look at our Bayview 91 accommodation link on trip advisor you will see it is not there - so WHAT HAPPENED TO THIS? https://www.tripadvisor.co.nz/Hotel_Review-g488373-d2177136-Reviews-Bayview_at_91_Boutique_Bed_Breakfast-Whitianga_Coromandel_Peninsula_Waikato_Region_Nor.html	7/7/2018 1:15 PM
53	Freedom campers expect to live for nothing in while in NZ. With local ratepayers picking up the tab for over free camping. The visitor is definitely getting great value.	7/7/2018 12:34 AM

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54	Tikanga Maori (Maori culture) is fostered within the tourism industry: Tikanga Maori is not promoted adequately, acknowledged or promoted as our unique point of difference. After my 30+gst years in the industry it still has token appreciation by the sector which is why the wider population pay little attention to it. Its only now that the environmental protection of water and biodiversity is coming into play that the sector is talking about cultural sustainability. Maori have been the advocates for sustainability of the land, water and culture for eons. Maori should be applauded and recognised for their kaitakitanga (guardianship) and rangatiratanga (leadership). Thank goodness its a kaupapa (philosophy/principle) that runs through their veins. Its not a political convenience that is now trendy...	7/6/2018 5:59 PM
55	There are excellent examples of great customer service and facilities, but there are also many places which need to lift their game and invest more in their business. It's patchy.	7/6/2018 3:54 PM
56	The industry is currently meeting the needs of about 95% of international visitor expectations, however, there is a growing trend for these visitors to experience a more engaging and personal experience with Kiwis versus the Disneyland cue type experience at some of our more popular visitor attractions. Accommodations is an area that we will need to improve on as far as quality and quantity available in the marketplace.	7/6/2018 2:32 PM
57	Depends what you mean as safe. I feel very strongly that 1080 does not offer a safe environment for any of us. I do believe that generally visitors feel safe in NZ to travel freely, however the issues with freedom camping has changed the feelings of many and i will not be surprised if an incident hasn't already happened or will happen. Personally, I feel this is a visitor that has been encouraged in past years, we now need to make clear boundaries to what is and is not acceptable, These boundaries need to be managed and policed, with big penalties to freedom campers as well as the companies /owners renting/using camping vehicles. I also feel better provisions need to be available. Motueka, allowing them in car parking space is not the right way to co.	7/6/2018 12:44 PM
58	New Zealand is becoming an expensive destination for visitors.	7/6/2018 12:10 PM
59	Tikanga Maori is fostered in some areas - the whole story of travelling through NZ could be more closely aligned with Maori Culture. We do provide value in some areas with the sought after nature experience, but some of our accommodation is highly priced for the value received (Base Backpackers AKL as an example)	7/6/2018 8:38 AM
60	See my first comment regarding control of visitor numbers to NZ.	7/5/2018 10:39 PM
61	We need to accept that NZ culture is more than Maori culture...	7/5/2018 5:54 PM
62	we have had a good number of tours canceled because NZ is getting to expensive mainly around hotels prices	7/5/2018 5:52 PM
63	The value is dependent upon the strength of the \$ for international visitors but so much of the NZ experience is currently free.	7/5/2018 5:03 PM
64	Ban freedom camping for all non New Zealand citizens / permanent residents	7/5/2018 4:51 PM
65	The overseas visitors have to pay to do most activities in their home country - here they get cheap permits or no permits or a donation to visit DOC land which all NZer's are paying for through taxes & rates. I believe the visitors should be paying for all the services they use including medical - ACC fees, rubbish removal, use of our flora & fauna, water, sewage etc as we do when visiting other countries. I don't believe this should be put on accommodation providers in the form of a bed tax as visitors have the privilege of FREEDOM CAMPING - which they read and some campervan rental companies read as FREE CAMPING	7/5/2018 4:27 PM
66	1/ NZ is becoming really expensive, especially for locals. There are many experiences that have priced themselves out of the market for Kiwis already and it will only get worse. The cost of compliance is steadily rising but Kiwi wages are not keeping pace so we often cannot afford to take part ourselves. 2/ The common argument is that there are not enough toilets and rubbish facilities throughout the country and I agree, we do need more. However, if these facilities are put in just to cater for freedom camping then I strongly disagree. NZ should be user pays (especially for tourists), Kiwis should not be expected to subsidize those who want to pay nothing. We have already lost our Parking Areas (designed for drivers taking a break) and many of our public toilets to freeloading tourists coming to NZ for a cheap holiday in a carpark.	7/5/2018 4:15 PM
67	All of the above areas need improvement	7/5/2018 4:01 PM
68	There is high need to improve public facilities and infrastructure, safety for domestic and international.	7/5/2018 3:04 PM
69	Currently don't believe NZ is offering goo value for international visitors because of the high cost of particularly - Accommodation in NZ. It already costs significant amount just to get here from some markets, and then the accommodation is now at New York levels in terms of rates.	7/5/2018 2:55 PM

Q6 Targeting value over volume is a focus of the Tourism 2025 framework. Please indicate below to what extent you agree or disagree with the following statements

Answered: 431 Skipped: 0



	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
My business is seeing the benefits of the work being done to attract high value visitors	2.78% 12	16.47% 71	37.59% 162	31.32% 135	11.83% 51	431	3.33
My business is having success in targeting high value visitors	2.09% 9	13.23% 57	40.37% 174	32.95% 142	11.37% 49	431	3.38
My business is well prepared for opportunities presented by visitors from new markets	0.46% 2	5.57% 24	26.22% 113	54.99% 237	12.76% 55	431	3.74
Off-peak marketing is having a positive impact on my overall business growth	5.10% 22	16.01% 69	38.28% 165	34.80% 150	5.80% 25	431	3.20
The visitor mix my business is attracting is optimising my business success	1.16% 5	8.35% 36	35.27% 152	49.65% 214	5.57% 24	431	3.50

#	ANY COMMENTS ON THE TOPIC OF HIGH VALUE VISITORS	DATE
1	as earlier. we need to have a common understanding of a "high value" visitor. E>G> spend (gross revenue) vs a distribution (regional) focus?? we need this key phrase to be more than 'aspirational' ...	8/6/2018 2:36 PM
2	seasonal focus on low and shoulder by TNZ and other major players has been beneficial	8/1/2018 10:16 AM
3	Our rural location and small size tend to get less exposure.	7/30/2018 3:23 PM
4	Targeted high value visitors is for only north island and Queenstown destinations, no thought for rural south island	7/30/2018 9:43 AM
5	Not a significant part of our market	7/30/2018 9:42 AM

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6	I target budget travelers, and those with pets and families, so I am not targeting the high value visitor, my prices reflect this	7/30/2018 9:40 AM
7	We are a boutique tourist industry and targeting value over volume is vital for us to maintain the unique experience we offer both Domestic and International visitors.	7/30/2018 9:39 AM
8	New markets are still a work in progress for my business but I see huge value in all the statements and seeing these come to fruition	7/30/2018 9:37 AM
9	High Value Visitors need to have a better understanding of regional NZ and not just the main centres which comes from TNZs marketing offshore. Plus high value visitors need to understand there is life beyond Huka Lodge & the super lodges ... we need to be doing more to spread the PR & Marketing efforts throughout 'all' of NZ.	7/29/2018 10:44 PM
10	We are getting a increased number of high end businesses, but a good proportion of that success could be put down to referrals and word of mouth. and repeat business from overseas wholesalers that we deal with. We would agree that we are now seeing more visitors arriving outside the main season. ie arriving in August/ September onwards instead of November onward...	7/26/2018 1:15 PM
11	We still have a long way as a country to deliver opportunities for new markets. There are still some parts of NZ that cannot leverage the benefits and needs of the Chinese visitor - whether it from group dining or quality accommodation options. This is the same for the high-value customers with a real lack of 5-star quality accommodation and premium luxury lodges in most regions.	7/26/2018 10:36 AM
12	We target the top end of the economy range of campervan travelers. When I talk about "High value" I mean those with discretionary spend who are actively engaging in adventure tourism, culture and an incredible NZ experience.	7/26/2018 8:13 AM
13	My company focuses on African travel but is NZ Based my clientele is mainly from NZ with a small average of overseas travellers	7/25/2018 4:13 PM
14	Not seeing any value to NZ nor regions from high value customers, wrong target in our view.	7/25/2018 2:21 PM
15	As an attraction outside of the main tourism centres e.g. Auckland, Rotorua, Queenstown, we are not seeing the same benefits as other areas in high-value visitors and shoulder seasons. It is still extremely difficult to persuade International visitors to visit our region when they have short itineraries.	7/25/2018 8:59 AM
16	Haven't seen a change.	7/25/2018 8:55 AM
17	Airbnb is starting to have a significant effect the the Christchurch area that is having a massive impact on accommodation operators.	7/25/2018 8:54 AM
18	We absolutely see this as the future of tourism in Canterbury, however it is undermined by a lack of infrastructure and lack of action on mitigating the effects of high-volume, low-value visitors on our landscape.	7/25/2018 8:46 AM
19	Attracting high value visitors is a bonus but counter-productive when you have capacity. Mid week marketing provides very low ROI especially with domestic tourism market where quality of experience (i.e. no queue is the main driver to visit mid-week)	7/25/2018 8:14 AM
20	high value is way more valuable to NZ tourism - we offer quality product so get quality tourist not just box tickers. Stay longer spend more - win win for sustainability and environment also - offset carbon emissions getting here by staying longer and spending more.	7/25/2018 8:03 AM
21	There has been obvious growth during shoulder seasons. There is still an obvious hole during off peak seasons.	7/24/2018 5:33 PM
22	off peak marketing is work to and extent and the shoulder is moving, but high end visitors are harder to sway to shoulder or winter travel as they have the \$\$ to travel when they want to and to afford the prices at high season. more traction is attracting mid value visitors to shoulder and winter travel	7/24/2018 4:49 PM
23	This is a critical element given the size of our country and the strain on resources. High value however demands high quality guest experience and go hand in hand.	7/23/2018 11:50 AM
24	We are in the higher end of the budget traveller market and this market already showing signs of slowing and even reducing in numbers over the last 12 months. This is a very valuable market who generally stay longer, often help with seasonal workplace shortages such as fruit picking and often return to NZ when older or influence family members to visit.	7/23/2018 10:53 AM
25	It would be useful to understand how you are defining high value visitors - this may mean something different to every business	7/23/2018 9:55 AM
26	off peak should be May till September October November and March and April are not off peak anymore	7/19/2018 9:29 AM

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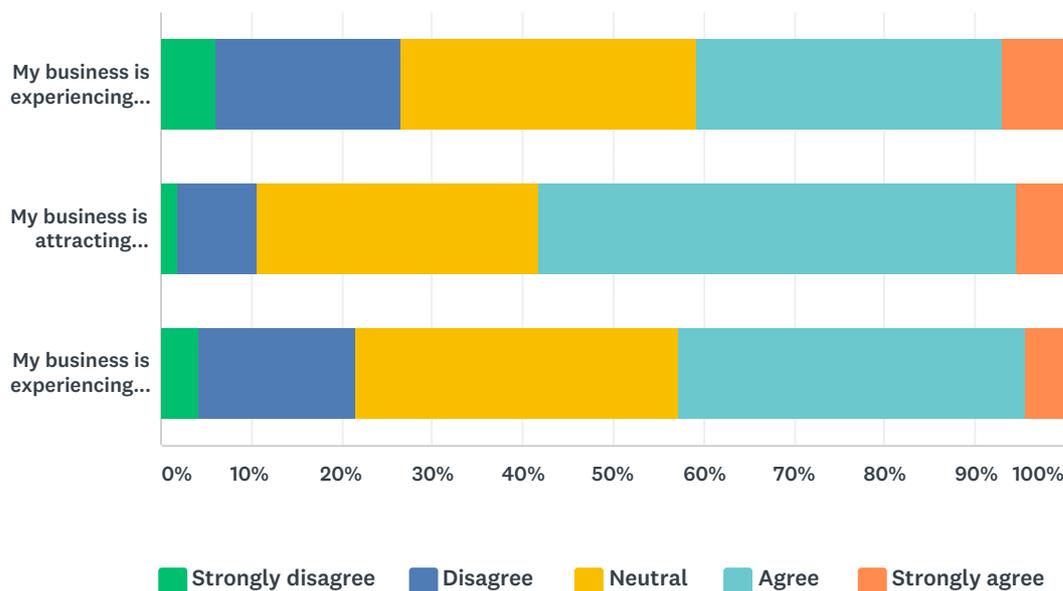
27	The high value non active visitors thta just sit and look do not add value to active adventures	7/18/2018 8:59 PM
28	Do not know	7/18/2018 10:19 AM
29	Strong and consistent International marketing investment is essential. There are many small owner operators that without support from TNZ and RTO's have no real opportunity to market themselves overseas. It is essential that we support these operations as without them we lose the personal touch that International visitors come here for.	7/18/2018 9:53 AM
30	Much achieved in attracting our visitors including high end value customers is through our own sales & marketing initiatives/efforts and direct partnerships. Each operator must leverage from networks, consistently pursue industry/trade support and as a new operator we have had to heavily invest financially to connect with industry/overseas business. TRENZ was extremely valuable for networking. Our marketing success has been strategic - Uniquely Kaikoura - working with other credible local tour operators to build Kaikoura as a destination 'packaging tours/combo's'. For most part we will still need to drive our business, we hope support from Trade will grow and believe Tourism 2025 framework shows great potential.	7/18/2018 9:22 AM
31	Our seasons are still very defined. Core markets such as USA, UK and Europe difficult to influence to travel off peak. We need concentrate on markets that traditionally travel Apr - Sep to grow winter business. We can make minimal impact on influencing USA,UK,Europe to travel in NZ winter.	7/18/2018 9:21 AM
32	As an EDA its hard to answer these questions. What I do know is that regional dispersal and seasonal dispersal is challenged by the lack of funding available to local government to invest in improved visitor core infrastructure, new tourism products and experiences and events. Finding a solution for Local Government that REALLY addresses this is the only real way of moving visitors beyond the main centres who have the reputation and resources to just keep building.	7/18/2018 8:36 AM
33	I have a new tourism business and hope to have a start this October. I agree completely with value above volume. I agree that service and attention to the customer experience is paramount.	7/17/2018 9:13 PM
34	Freedom camping is the biggest threat to the success of my business....and in the long term it will continue to drag nz down as far as high value customers are concerned as while we are seen as a cheap option for people to visit...and disrespect our country.....but how can we call it disrespect when it is allowed.....no doubt a continuing situation until our visitor numbers become affected	7/17/2018 7:27 PM
35	I do not see the benefits of a high value visitor. We are struggling to compete with Air bnb with cheap accommodation and non compliant. Even high value visitors will stay at bnb facilities. My business has room for growth at anytime, however there is no incentive form the current government to expand.	7/17/2018 6:02 PM
36	We are very much seasonal so our winter is very slow - but will hopefully see some growth soon.	7/17/2018 4:00 PM
37	what's is your definition of high value visitors? Do you include the total spend as well as the length of stay? Examine the accommodation inventory of NZ, eg motels for high value visitors? Motels are the most common accommodation with many SME's which are contributors to the economy and provide employment/social stability in smaller towns and rural areas.	7/17/2018 3:24 PM
38	We're a start-up in the industry so have yet to see any of these benefits in real time.	7/17/2018 9:51 AM
39	My market is German and European - this is not an off peak marekt	7/9/2018 9:39 PM
40	We very much target high value visitors in line with Tourism NZ. The equation is simple really: Attract high value visitors that benefit the economy a lot more than masses of low value visitors that visit NZ on a shoestring and crowd out locals	7/9/2018 6:14 PM
41	The cycle trail has been the best thing for attracting higher value visitors.	7/9/2018 9:22 AM
42	We offer luxury villas and experiences in Wanaka. Targeting high value, long stay visitors iduring off peak times is vital to my business	7/8/2018 3:49 PM
43	Our business is prepared to tackle new markets, but the Department of Conservation and their management of the National Parks currently restricts developing or increasing activity within the National Park (Fiordland)	7/7/2018 2:02 PM
44	We have seen a year on year increase in our Business and High End spend up as well, it takes hard work and dedication in doing all we can in the design of our clients vacation to showcase the very best of New Zealand within the budget	7/7/2018 1:25 PM
45	THL, Alr NZ and the Airports are focused on quantity and not value. As it is quantity that makes these businesses money and not high value.	7/7/2018 12:38 AM

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46	Targeting value over volume: Don't forget that the majority of our international visitors fill 3/4's of the planes and cruise ships that arrive in NZ. Value over volume is important to our success in the long term future but we have to totally up our game as a country and service if we want all our visitors to be valued over volume clients.	7/6/2018 5:59 PM
47	Our region struggles to attract - lack of product	7/6/2018 4:43 PM
48	does not apply now	7/6/2018 4:41 PM
49	Still work to be done	7/6/2018 3:55 PM
50	Many of us in the industry have been focused on off-peak marketing for many years. To try to claim the results as solely or largely due to the decisions TNZ made 2 years ago to do this is disingenuous.	7/6/2018 3:11 PM
51	We would like to see more high value visitors , we are ready for them but need to encourage them to think New Zealand is ready for them as an overall visitor destination. Infrastructure still lagging behind.	7/6/2018 12:12 PM
52	We are introducing for visitors two high value tours. They will be guided, low numbers (10 to 12 pax maximum) high quality 'behind the scenes' tours taking visitors to areas not available or seen on our EyeFull Tower Rail Tour. They are a ZipLine Conservation Tour (2.5hrs) and Barry's Journey Tour (3.5hrs).	7/6/2018 10:05 AM
53	We are too early stage to have much input on high-value visitors	7/6/2018 8:39 AM
54	The bulk of our guests continue to arrive February and March. However April and May, August - October very few guests.. High profile areas eg, Queenstown, Dunedin, Southland do not have enough accommodation two months of the year. Feb - March, More marketing targeting our shoulder season will help spread visitor numbers.	7/5/2018 10:43 PM
55	Way more important than volume...	7/5/2018 5:56 PM
56	The very large increase in freedom campers is seriously impacting on our business. These people are both a health risk and safety risk and many cause lots of environmental problems. I have seen them tip greasy washing up water out in our front yard in front of everyone, with no consideration at all, so in places where no one is monitoring them I can only expect worse behavior.	7/5/2018 5:54 PM
57	Quality B&Bs are well placed for these visitors	7/5/2018 5:04 PM
58	Ban freedom camping for all non New Zealand citizens / permanent residents	7/5/2018 4:51 PM
59	I believe we will see more of benefits with time	7/5/2018 4:38 PM
60	We are a domestic summer market. Most of the town closes over the winter - this has a major impact on our business when most activities relay on the out doors. The town does not promote coming in the winter. High value visitors want to do and see activities and vistas and have money to spend doing that - when everything is closed they loose interest quickly	7/5/2018 4:33 PM
61	We don't get a lot of high value tourists in Holiday Parks (unless we are big enough to have motels as well), however we do get quality tourists (nice, tidy vans owned or rented by people who are prepared to pay to stay in a Holiday Park.) Some of the other Parks are really suffering because of freedom camping. These Parks have lost the quality camper van market as these tourists are paying so much for their rental vans that they cannot afford to stay in a Park - plus there is a freedom camping area in a more scenic spot nearby. We are getting slightly more vans in the off season but they are mainly domestic tourists. I'm not sure how much, if any, influence your off peak marketing is having at the moment.	7/5/2018 4:26 PM
62	Our business is predominantly as an accommodation provider of Corporate business which is generally midrange business both domestic and international	7/5/2018 4:03 PM

Q7 Improving productivity is a focus of the Tourism 2025 framework. Please indicate below to what extent you agree or disagree with the following statements

Answered: 431 Skipped: 0



	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
My business is experiencing more visitors in the off-peak season(s)	6.03% 26	20.42% 88	32.71% 141	33.87% 146	6.96% 30	431	3.15
My business is attracting visitors from a broader range of markets	1.86% 8	8.82% 38	31.09% 134	52.90% 228	5.34% 23	431	3.51
My business is experiencing greater year round utilisation of its assets and services (e.g. average occupancy, average daily customers)	4.18% 18	17.40% 75	35.73% 154	38.28% 165	4.41% 19	431	3.21

#	ANY COMMENTS ON THE TOPIC OF PRODUCTIVITY	DATE
1	until local councils enforce their own rules, we are in unfair competition with peer to peer platforms. air bnb being the principal threat to my business growing, or left unchecked, failing .	7/30/2018 3:28 PM
2	We are only open October through May, being rural.	7/30/2018 3:13 PM
3	no	7/30/2018 9:40 AM
4	Off peak marketing is assisting this	7/30/2018 9:39 AM
5	Being in a region I see the biggest road block to off peak development are those businesses that remain focused on a single season instead of workign towards a year round strategy - In Nelson we are seeing positive business trends now through out the year but still many operators seem to doubt the increase and won't invest into year round hurting the whole regions market	7/30/2018 9:37 AM
6	Off-peak business is still a challenge if you don't have a four seasons offering or icons which offer a quick and affordable NZ holiday (talking domestic markets more for winter/shoulder). It is improving but will still take time and the online space has definitely helped a lot.	7/29/2018 10:46 PM
7	We are only 11 months old so am unable to comment. Our visitor split looks roughly like the below: UK - 25% Europe - 25% USA / Canada - 30% Auz - 10% Other - 10%	7/26/2018 8:15 AM
8	We are seeing seasonal stretch from peak to shoulder, need real focus by all in order to foster new markets and encourage existing to travel in shoulder seasons	7/25/2018 2:23 PM

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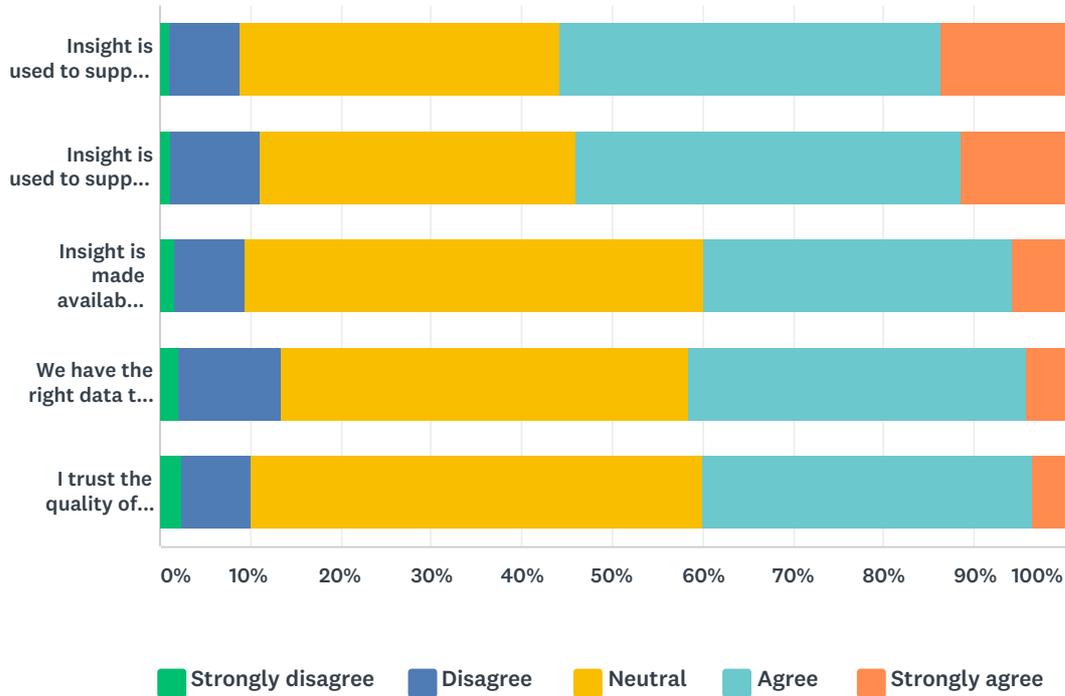
9	We focus on traditional UK/European markets and irrespective of price or own winter offering, it is difficult to convince UK/European travellers to leave a European summer for an NZ winter (unless it is part of a longer 2-3 year working holiday)	7/25/2018 10:23 AM
10	The massive increase in airbnb numbers in Christchurch and the surrounding regions has started a march to the bottom on price. With no overheads these kinds of setups are undercutting traditional accommodation providers in a significant way. This this to be targeted at both a local (what works for the region) and national (basic health and safety, BWOFF light etc) to offer a fair field and a always a safe and quality product for our visitors.	7/25/2018 8:57 AM
11	We actively target seasonal visitors via specific activities; currently the 'high' season is our quietest period.	7/25/2018 8:47 AM
12	we have done our own off season marketing and it has proven successful. After recent visit to Auckland though to visit with inbounders larger inbounders very negative - can't change as say places close over winter but if they don't push the off season to bring visitors in then businesses will stay closed. Many smaller inbounders are more flexible and are seeing positive results of same. Won't happen overnight and won't come in droves - but changes are afoot and can be done.	7/25/2018 8:05 AM
13	My client base is about 90% inbound USA	7/24/2018 4:41 PM
14	we do all of our own marketing to a small select marketplace	7/24/2018 4:39 PM
15	We get more visitors in the shoulder seasons, but we have no growth over the winter months which is such a shame.	7/24/2018 4:15 PM
16	We need a shoulder month events focus.	7/24/2018 3:52 PM
17	Our business could benefit for more work over the winter season.	7/24/2018 3:14 PM
18	An improvement of business levels during off peak times, through innovative events and activity is what will ultimately define our future success.	7/23/2018 11:52 AM
19	All 3 ratings above have reduced in the last 12 months from the growth of the previous 2 years	7/23/2018 10:54 AM
20	Would be helpful to see more robust measures of productivity in the tourism sector.	7/23/2018 9:55 AM
21	The Chinese new year visitor numbers are making it near impossible for our traditional active adventure visitirs to fund an afdirdable bed or a bed at all. And the Chinese do not do my adventures.	7/18/2018 9:02 PM
22	Do not know	7/18/2018 10:19 AM
23	There is so much more to be achieved to ensure dispersal and a more balanced year round level of visitation. Markets such as Indonesia/Japan who travel when we are traditionally quiet need to be educated and supported with education, airlines and offers	7/18/2018 9:55 AM
24	We are a weather dependent activity and I have answered the questions based on us not having cancelled a lot of bookings.	7/18/2018 9:44 AM
25	We have done a domestic off peak promotion to attract people that might not get the chance to experience our trips.	7/18/2018 9:38 AM
26	Kaikoura based - 2016 earthquake we are still pending the return of visitor numbers pre-2016 earthquake but all is looking towards a positive summer season!	7/18/2018 9:23 AM
27	I wish I could respond YES to these questions - bit not really. I am not dealing in markets that travel off season such as India and parts of Asia, or UAE.	7/18/2018 9:22 AM
28	As above the question is not directly relevant to an EDA. Our destination is fortunate to being largely year round and not suffering from abject seasonality in the way other places do. As I've noted in my previous comment I am not seeing that the marketing efforts of TNZ is really making this change and it will struggle to do so until investment is made in different localities to give people reason to go to other places at other times.	7/18/2018 8:38 AM
29	My tourism business is new and I hope to attract first clients this October. I would like to see more night stays spread across the seasons and throughout the provinces. We are focussing on shoulder seasons and Pacific coast and thermal Explorer hi ways. 2000kn over 15 days.	7/17/2018 9:17 PM
30	Yes, up on 5-10 years ago but still extremely seasonal with difficulty in off and shoulder seasons, market mix is widening, mostly Asia/India	7/17/2018 6:24 PM
31	My business is experiencing an increase of occupancy during the winter due to contractors/Trades staying. Not domestic or international tourists.	7/17/2018 6:04 PM
32	last two months (May, June) and month to date July in Auckland are worse than last year. What is ATEED doing after imposing targeted rates on accommodation providers?	7/17/2018 3:26 PM

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33	June to September sees a very low revenue for our inbound business.	7/17/2018 3:17 PM
34	Numbers are down this year due to rugby world cup, and incredible impact of freedom camping and huge growth in AIR B&B in Taupo	7/17/2018 3:13 PM
35	Winter is vulnerable. We are based in Queenstown and there is an assumption that Winter needs light marketing only. This is not correct and we believe we are facing a far quieter winter season because of it.	7/10/2018 2:57 PM
36	In the German market yu don't get this	7/9/2018 9:40 PM
37	We are keen to further optimise off-peak bookings but that will probably always be something we all need to work on	7/9/2018 6:15 PM
38	Both our Inbound Tour Business and our Award Winning Boutique Bed & Breakfast are seeing rises in off-peak travel and advance bookings are outstanding so early in the year for high season ahead.	7/7/2018 1:27 PM
39	Q7. Improving productivity Improving productivity are words on a page to most small business operators. There are few examples of how purchasing software or building SME capability improve productivity. TIA needs to do much more in the 'show me how to, stable of resources and templates' space. Their current suite of advice documents, is just advice. To improve productivity and link it to profitability is what most SMEs need.	7/6/2018 6:04 PM
40	Very seasonal still, with some small gains.	7/6/2018 4:44 PM
41	n/a	7/6/2018 4:41 PM
42	We don't offer tourism experiences in winter, but we have developed strategies to use the asset over winter so it is an all year round organisation.	7/6/2018 3:56 PM
43	7 years or hard work in the off-peak periods is delivering a return. Very little of this is linked to TNZ off season marketing decisions	7/6/2018 3:11 PM
44	The current year is difficult to compare with last year which had the Lion Tour during May and June 2017 and the Golden Oldies World Champs. Over a six year comparison, our international visitor numbers have struggled to stay up with reported stats figure growth for Rotorua. This same period has seen a dramatic drop in domestic visitors out of Auckland. This may be due to lack of promotion in AKL, perceived pricing which had been adjusted 6 years ago to reflect an international visitor price-point, or simply that we haven't undertaken any significant investment in to our product.	7/6/2018 2:42 PM
45	This year has been the poorest in the past few years. As a Doc concessionaire, I have struggled to cover costs, let alone make a profit due to the lack of patrol and education with Doc in my service. The grey area is huge and I can not compete with the mainstream businesses marketing and providing services in the Doc domain and under cutting me. This is a 4+ year unresolved discussion. For this concession I also have to be assessed and have to invest in Qualmark, another big cost to a one women band. I have not seen any benefit of my memberships and investments to date.	7/6/2018 12:50 PM
46	We operate 6 tours per day in off peak season. We will operate even if there is only one person wanting to go on our EyeFull Tower Rail Tour.	7/6/2018 10:08 AM
47	We are not a physical business, however our user activity is naturally much higher during Summer months	7/6/2018 8:39 AM
48	see comments previous page	7/5/2018 10:44 PM
49	The majority of our visitors are International visitors and are therefore more likely to travel in the warmer months.	7/5/2018 5:07 PM
50	Hard to say New Business	7/5/2018 4:39 PM
51	We were really affected by road closures and misinformation by put out by NZTA so we lost our normal market. Despite this our business has grown by approx 10% every year which was mainly due to the enormous amount of tourist that headed for Abel Tasman and Golden Bay and we were on their migration path. This year there has been more domestic tourists in the shoulder season as they have waited to avoid the crush of the huge amount of tourists coming in peak season. I suspect that winter will be the norm unfortunately - dead, or close to it.	7/5/2018 4:34 PM
52	Have not seen any increase at all in off-peak travel in the group and series touring market. It may be true for FIT from some markets.	7/5/2018 3:03 PM

Q8 Insight informs decision making within the Tourism 2025 framework. Please indicate below to what extent you agree or disagree with the following statements

Answered: 431 Skipped: 0



	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
Insight is used to support strategic decision making in my business	0.93% 4	7.89% 34	35.27% 152	42.23% 182	13.69% 59	431	3.60
Insight is used to support operational decision making in my business	1.16% 5	9.98% 43	34.80% 150	42.69% 184	11.37% 49	431	3.53
Insight is made available in a way that is user friendly	1.62% 7	7.89% 34	50.58% 218	34.11% 147	5.80% 25	431	3.35
We have the right data to make informed business decisions	2.09% 9	11.37% 49	45.01% 194	37.35% 161	4.18% 18	431	3.30
I trust the quality of insight that is available	2.32% 10	7.66% 33	50.12% 216	36.19% 156	3.71% 16	431	3.31

#	ANY COMMENTS ON THE TOPIC OF INSIGHT	DATE
1	A great deal more work required in this domain	8/6/2018 2:37 PM
2	IVS is a good example of where insights can be improved. Still feel like we do not have enough insight for investment decisions especially outcomes linked to attribution.	8/1/2018 10:27 AM
3	no idea what you are talking about	7/30/2018 3:28 PM
4	no	7/30/2018 9:40 AM
5	There needs to be more investment made on domestic insights. A small number of research companies are making a lot of money out of providing insights to the major RTOs and the smaller guys are struggling or miss out. The DiGT stats are 2 years old now and it seems crazy everyone is having to spend a fortune on information that should be available to all RTOs so we can all make an informed discussion on domestic insights. International insights are pretty good from TNZ but the domestic space needs improving.	7/29/2018 10:48 PM

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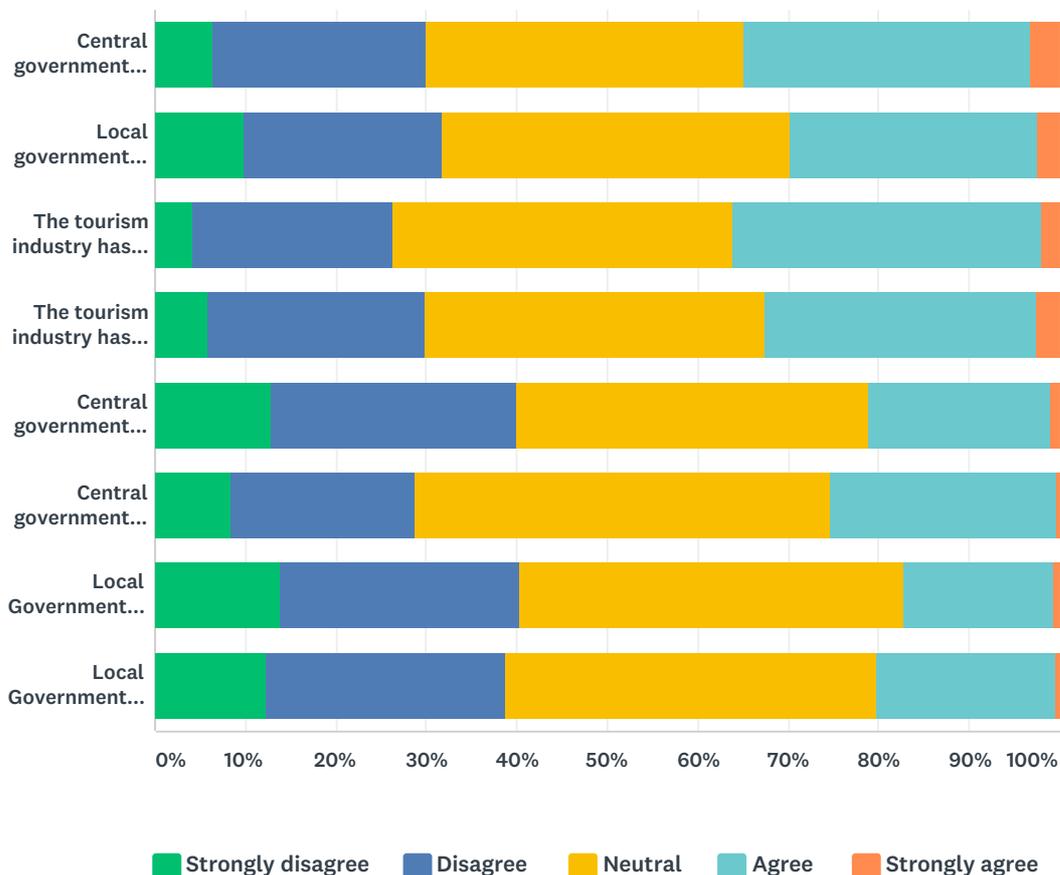
6	Not sure what you mean by insight, we rely on our own data to make marketing decisions, like when to load up our OTA"s	7/27/2018 7:12 AM
7	Again, a lot of the insight captured at the national level is 'lag' data which is great, but doesn't provide the insight for 'lead' indicators. Live journey tracking of the domestic & international visitor would also be of benefit, not just for the tourism sector, but also for retail, hospitality, transport providers, NZTA and emergency services.	7/26/2018 10:39 AM
8	I dont believe I get regular insight from TIA... I could be wrong?	7/26/2018 8:17 AM
9	We need to have better data and we need it faster than is currently provided by MBIE.	7/25/2018 10:46 AM
10	I don't like the term 'insight'. Pffft... marketing jargon. We did OK without 'insights' ten years ago. There's a lot of history and experience in this sector. Many long term operators have seen these trends and cycles before. Their knowledge could be better harnessed	7/25/2018 10:27 AM
11	There are definitely some issues with relevant, targeted data. As industry data is often only available at RTO or TA level, it is difficult to zero in on certain trends, particularly town and area-specific trends.	7/25/2018 9:01 AM
12	There still seems to be a lack of information on the high value non-Chinese market	7/25/2018 8:49 AM
13	we find that TNZ inparticular changes its perameters too easily - one minute it is saying we want quality visitors and then next it is pushing short-term high volume. Insight can be confusing as inconsistent. Mentions high quality visitor in long term plan yet still pushing flights and high visitors numbers rather than length of stay.	7/25/2018 8:07 AM
14	I don't trust that the insights MRTES etc will not change at the end of the year, but I trust that everyone else will work off the same figures	7/24/2018 4:50 PM
15	The right data needs to be from one source which is reliable and available to the entire industry. Consistency of data is imperative to show trends, in-turn trends result into valuable insights. ie, CAM data is a prime example of ineffective measuring in today's tourism industry, it no longer means or truly reflects what it used to when it was first established.	7/24/2018 3:53 PM
16	Questions aren't clear on whether they are referring to our own company insights or other third-party insights? I have answered on assumption it is referring to our own business insights.	7/23/2018 9:55 AM
17	Our business aims to rely on quality data but I question the accuracy of what we're using, especially MBIE figures. Would be good to have easy and clear access to reliable and timely data, or if that's all currently available, more intel on where & how to access that data.	7/21/2018 12:19 PM
18	More insight data required for international visitors	7/20/2018 4:52 PM
19	Too many sources Inconsistent Analysis in a lot of cases is not included.	7/20/2018 4:26 PM
20	Do not know	7/18/2018 10:20 AM
21	We haven't looked at insight. Our biggest challenge in the last 2 years has been the weather, as we have been affected by weather more in the last 2 years then the past 25 years.	7/18/2018 9:44 AM
22	This is our current number one project in order to make future informed decisions. Next year we'll be ticking strongly agree for all :)	7/18/2018 9:39 AM
23	Each operator will have differing requirements of data. Raw data across all sectors/categories/cultural/value/spend will enable businesses to tell their own story.	7/18/2018 9:26 AM
24	TNZ Concentrate on our key markets, more detailed and market specific insight into new opportunities for new markets that travel off peak would encourage me to invest in those markets - just dont have enough information to invest in UAE for example. Would be great to see TNZ running industry briefings on new markets with detailed info to help us identify opportunities.	7/18/2018 9:25 AM
25	There is good insight available in many, many ways. Beyond the core MBIE/Stats stuff it is harder to access or expensive. this make it difficult and less likely that small businesses will rely on good insight. The data on Stats website is good but is not user friendly to the irregular user who wants to drill down.	7/18/2018 8:40 AM
26	I have not used insight. I would like to know more.	7/17/2018 9:18 PM
27	The prediction of visitor numbers is the big thing for my business operation....As long as the international figures are reliable that's all I need.	7/17/2018 7:30 PM
28	do not feel knowledgeable enough to make any informed opinion here	7/17/2018 6:41 PM
29	Sorry haven't looked at the "insight" information. Don't have time.	7/17/2018 6:06 PM

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30	Insight from ATEED? Hardly, they buy tickets to free shows. Unwise spending and little accountability and spurious ROI analysis. EG why did ATEED pay Adelle to perform in Auckland, she will come to Auckland in any case, that's where the large audience is, where people around Auckland can drive to in a few hours and lots of flights. Plus where there is enough accommodation. Insight? Naïve.	7/17/2018 3:32 PM
31	Information is helpful guide to assist with decision making	7/17/2018 3:14 PM
32	New to role here in NZ so have no access to this info	7/9/2018 1:54 PM
33	We have spent to upgrade our systems and processes to ensure it works for our business	7/7/2018 1:36 PM
34	What is insight?	7/7/2018 12:38 AM
35	Q8. Insights It is true that in recent years more insights have been developed in a more user friendly way and if you are in the know, then great. The new insight collateral has been especially useful to RTOs but I'm not confident the flow down intelligence is getting shared. However, demonstrating how the insights can be used to improve productivity and profitability is what the challenge is for general, smaller tourism operators.	7/6/2018 6:16 PM
36	Lack of robust data.	7/6/2018 4:44 PM
37	Insights are crucial to all advancing and understanding all aspects of the visitor sector yet there is a huge gap in data in NZ. Nationally, we're not capturing visitor nights in hosted accommodation - bookabach, bed and breakfast, farmstays, lodges and more which make up a significant portion of our accommodation sector, and in some regions accounts for the majority of their accommodation sector. This issue needs to be addressed and led at a national level.	7/6/2018 4:31 PM
38	To some extent we are dependent on regional success, as visitors need to come to the region first.	7/6/2018 3:57 PM
39	The data insights used to driver our business forward are not those provided by MBIE but rather internal data gathering and insights from that process	7/6/2018 3:13 PM
40	We need more insight on non commercial accomodation and visitor flows,	7/6/2018 8:37 AM
41	Haven't a clue what you are talking about. Please clarify	7/5/2018 10:45 PM
42	Slow to get B&B data	7/5/2018 5:07 PM
43	What is insight ?	7/5/2018 4:52 PM
44	I suspect that there are lots of pencil pushers juggling stats to present the story that they want to tell. How trustworthy is that story? All I can say is that for the three years that we've owned this business we've tried to give the appropriate party our stats. Unfortunately after 4-6 approaches we have given up. Our story remains untold, our 25,000 visitors remain uncounted and we therefore know that the story being told about Marlborough is not accurate (and we wonder how many other businesses are out there experiencing the same.)	7/5/2018 4:39 PM
45	We need to get more of the domestic visitors to our area- once NZer's are talking about what there is to do and see in our area then the word will spread and overseas people will hear about the area through friends and relations - this combined with activities and events in our area we could easily become another tourist mecca.	7/5/2018 4:38 PM
46	What is insight?	7/5/2018 4:27 PM

Q9 Central and local government policy have a strong impact on the tourism industry and can influence business confidence. Please indicate below to what extent you agree or disagree with the following statements

Answered: 431 Skipped: 0



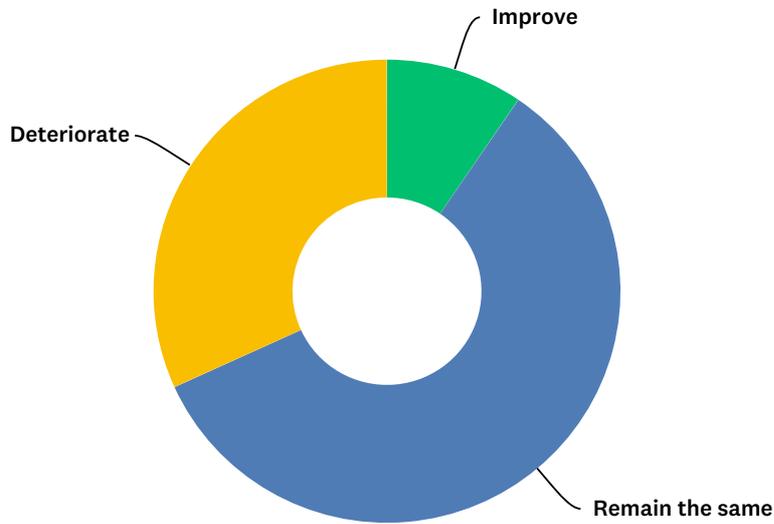
	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
Central government policy settings support the tourism industry	6.50% 28	23.43% 101	35.03% 151	31.79% 137	3.25% 14	431	3.02
Local government policy settings support the tourism industry	9.74% 42	22.04% 95	38.52% 166	27.38% 118	2.32% 10	431	2.90
The tourism industry has a strong voice across central government agencies	4.18% 18	22.04% 95	37.59% 162	34.11% 147	2.09% 9	431	3.08
The tourism industry has a strong voice across local government agencies	5.80% 25	24.13% 104	37.59% 162	29.93% 129	2.55% 11	431	2.99
Central government compliance requirements are generally managed in an efficient and timely manner (ie: concessions, permits, work visas)	12.76% 55	27.15% 117	38.98% 168	20.19% 87	0.93% 4	431	2.69
Central government costs are generally appropriate (eg: DOC fees, ACC levies, maritime fees)	8.35% 36	20.42% 88	45.94% 198	24.83% 107	0.46% 2	431	2.89

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Local Government compliance requirements are generally managed in an efficient and timely manner (eg: consents, approvals)	13.92% 60	26.45% 114	42.46% 183	16.47% 71	0.70% 3	431	2.64
Local Government costs are generally appropriate (eg: rates and fees)	12.30% 53	26.45% 114	41.07% 177	19.72% 85	0.46% 2	431	2.70

Q10 Did the cost and ease of doing business improve, remain the same or change in the last 12 months?

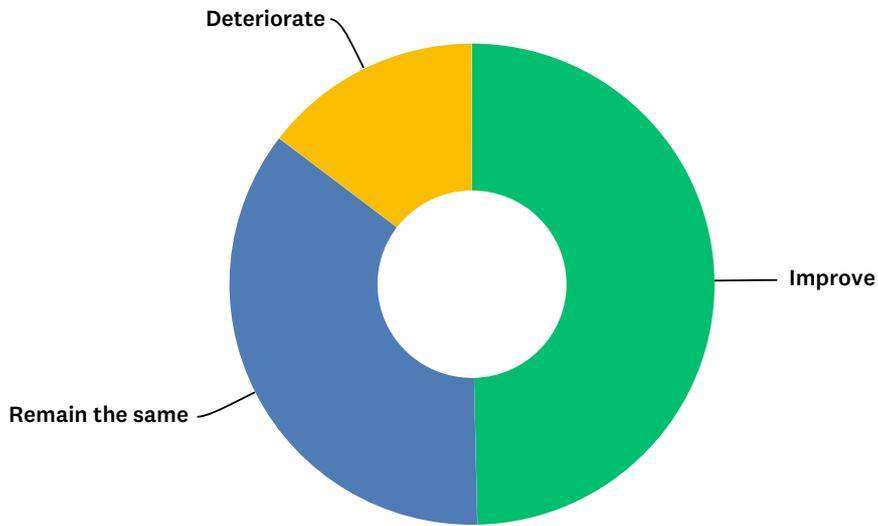
Answered: 431 Skipped: 0



ANSWER CHOICES	RESPONSES	
Improve	9.51%	41
Remain the same	58.70%	253
Deteriorate	31.79%	137
TOTAL		431

Q11 Did your business situation improve, remain the same, or deteriorate over the past 12 months?

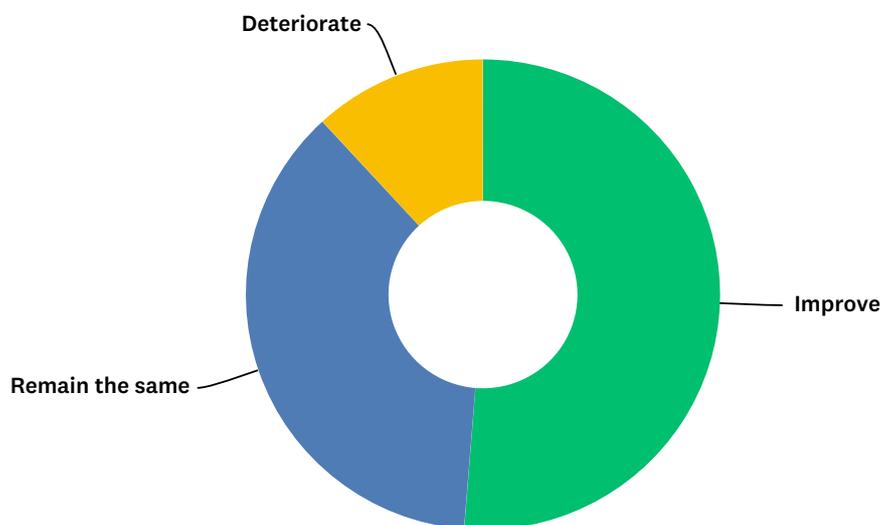
Answered: 431 Skipped: 0



ANSWER CHOICES	RESPONSES	
Improve	49.65%	214
Remain the same	35.73%	154
Deteriorate	14.62%	63
TOTAL		431

Q12 Do you consider that your business situation will improve, remain the same, or deteriorate over the next 12 months?

Answered: 431 Skipped: 0



ANSWER CHOICES	RESPONSES	
Improve	51.28%	221
Remain the same	36.89%	159
Deteriorate	11.83%	51
TOTAL		431

#	ANY ADDITIONAL COMMENTS ON THE TOPIC OF POLICY SETTINGS AND BUSINESS CONFIDENCE	DATE
1	we need 1. a single central government voice for tourism (council?, ministry? ... or is this defaulting to DoC) 2. the above with industry should lead a strong education and support campaign for local government (the key sites for the management of actual tourists) so they are seen as essential partners.	8/6/2018 2:37 PM
2	procrastination on air bnb, and freedom campers are having a detrimental effect on all accommodation	7/30/2018 3:28 PM
3	The Bed & Breakfast industry is negatively affected by Air B&B. The visitor search for cheaper accommodation leads to poorer service and facilities.	7/30/2018 3:23 PM
4	Mainly non powered sites and weather is the major player for us.	7/30/2018 3:14 PM
5	strong growth evident - becoming limited by the access to key components such as accommodation.	7/30/2018 9:42 AM
6	it seems that tourism is very much geared towards the cycle trails, without regards to locals who may have used the trails taken for other activities previously (eg horse riding, walking) If more bicycle trails are planned in the future, how about sharing with these other users and make them multi use? That will then attract even more visitors and also support the locals who would like the trails for their own recreational purposes, ie don't make everything for the tourists, plan for the locals as well	7/30/2018 9:40 AM
7	Central Government needs to address high tourist areas with fresh eyes. Bed tax is not going to fix the impact that tourism is having in NZ. Building more houses and calling them 'affordable' for them to be sold as 'second homes' to be used for AIR BNB or to be sold on straight way for large profits, is outrageous and is not a sustainable option for business like ours, that needs local accommodation permanently for our staff. The whole country needs to understand that airbnb is straining communities, because residential neighbourhoods are operating as commercial businesses.	7/30/2018 9:38 AM

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8	Hopefully my clients business situation will improve over the next 12 months ... if there are no international dramas or another global crisis.	7/29/2018 10:51 PM
9	We are at maximum capacity already, but don't want to build more accommodation due to risk of tourism downturn and the threat of an Alpine Fault earthquake.	7/27/2018 7:15 AM
10	We are only 11 months old so is hard to comment.	7/26/2018 8:18 AM
11	The good news machine has been pumping for a few years now - finally starting to see Govt agencies talk of volatility in the markets ahead. I think many industry members could have written the headline a few months back as the results are being felt this winter.	7/25/2018 10:59 AM
12	UK/European and US markets (our primary markets) are providing 'insights' that NZ is too full...or NZ is catering more to the Asian markets. New Zealand's profile in key brochure publications (and websites) is being reduced because of a lack of inventory - I.e. Limited opportunities for commissionable bookings. Also....in the eyes of many within our target markets (20 -35 years, UK/European/USA)...NZ is simply not as 'cool' as it was 10 years ago.	7/25/2018 10:32 AM
13	Business confidence is deteriorating which will have a flow on affect through to tourism.	7/25/2018 10:20 AM
14	The costs of needed tourism infrastructure are not being met by central or local government and I believe the recent border tax will not make a hug amount of difference. The fact remains that central government is collecting \$2.5 billion in GST from overseas visitors, and is not using that to help the tourism industry with these infrastructure issues.	7/25/2018 9:04 AM
15	This will depend on CCC and central government catching up on what is going on in the accommodation sector.	7/25/2018 9:00 AM
16	Our business is growing, despite crippling bureaucracy and difficulty dealing with incompetent and inefficient local and regional government.	7/25/2018 8:52 AM
17	Greater volume, only good for a bit more growth then it will be an issue.	7/25/2018 8:38 AM
18	Note: for Q10, costs have deteriorated but ease has improved	7/25/2018 8:18 AM
19	there is definitely an increase in visitor numbers but ongoing issues with local government over governance in our area and acceptance of tourism as vital industry. Big issue with appropriate staffing.	7/25/2018 8:10 AM
20	It will improve through our own efforts and Not those of local government/council	7/24/2018 11:35 PM
21	This govt are not wired into the indudtry at all. The Minister lacks grunt and the govt is more concerned with social issues than commerce. I think we are dropping off the radar	7/24/2018 6:21 PM
22	local government rates and levys need to be adjusted to all those that benefit from the visitor economy, not tailored to the 'visible' few. the disrupt economy has created an unfair playing field for those commercial providers paying tourism targeted rates. nominal general tourism rate should be implemented to all ratepayers - as everyone benefits from a vibrant tourism economy. Locals have as much use out of tourism product as visitors do	7/24/2018 4:54 PM
23	Seems to be a slowdown in off-season compared to last three years	7/24/2018 4:43 PM
24	Really feeling the impacts of a lack of business confidence, minimum wage increase, slow visa processing times. Uncertainty in law reforms is also not helping. Lack of events or the like are failing to attract travelers to Wellington in key times like June/July and occupancy is low. Feel that WREDA is not doing much for the city to attract big international artists, events or similar to bring people to the city.	7/24/2018 4:38 PM
25	Dunedin Airport is going to charge 2nd tier rental firms 6% of their turn over. They are very obvious that they only want the global firms at the airport. Sorry not enough room	7/24/2018 4:21 PM
26	We need more infrastructure and funding in the small remote west coast towns, but feel that larger centers and other regions do receive sufficient funding ...	7/24/2018 4:18 PM
27	Policy's need to be an enabler not a disabler, which has tended to be the growing trend at Central and Local Govt level. Any policy which is a disabler in any industry pushes cost's and time expenditure out; which has the immediate effect of slowing down the system or industry progress, we all end up paying the price for this, New Zealanders and visitors alike.	7/24/2018 3:59 PM
28	Lack of focus by central government and utter disdain shown by Auckland local government a serious concern.	7/24/2018 3:55 PM
29	Local government decisions such as the accommodation tax are ridiculous and will impact on the long term success of our Industry, if not changed.	7/23/2018 11:55 AM
30	Lower local government rated lower above due to Auckland councils implementing Targeted Rate. Last 12 months has been a lot tougher to try and achieve same results or growth on previous 2 years. Is location dependant.	7/23/2018 10:58 AM

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31	Increasing fuel prices is the key cost factor that has changed.	7/23/2018 9:55 AM
32	ALL SUBJECT TO THE ACTIONS OF GREEDY HOTELS IN QUEENSTOWN AND TO SOME EXTENT AUCKLAND	7/23/2018 9:01 AM
33	Immigration settings and visa restrictions will impose real & serious consequences on many businesses in the tourism industry in the next few years, if conditions remain unchanged. The reality of the requirements for operators in places like Queenstown and the need for variation to national policy is still not being properly appreciated by government. We are not trying to take the easy road in regards to this, our reliance on being able to retain quality staff from overseas, in the long-term, cannot be overstated.	7/21/2018 12:24 PM
34	As a small business I am almost at the maximum level I can handle and I do not wish to expand. Dealing with Local Councils is an area that needs tidying up. Each Council has and sets its own rules and regulations. This is a benefit in many ways but in others it is costing huge amounts of money in terms of time and energy - particularly around the setting of targetted rates. TIA and the Local Government New Zealand need to come up with some standard policies that can be accepted an implemented around the country and that have taken into account the needs of all accommodation operators.	7/20/2018 4:58 PM
35	Deterioration was largely due to adverse weather and discounting from competitors	7/19/2018 5:07 PM
36	As a Holiday Park owner freedom camping is a big issue, especially as our industry Representative Fergus from Hpnz is not on the working group. Nothing is free and to built more amenities with central and local government funding is not right, as basically through my taxes and rates I have to pay for a competition that is impossible to compete with. How is it possible that a private member organisation is represented on the working group (NZMCA) but not our industry? All stickers for self contained vehicles should not be given out by NZMCA, but should be checked when vehicles get their WOF	7/19/2018 9:43 AM
37	Huge compliance costs, increased wage rates and bank charges have greatly reduced business profitability	7/19/2018 9:36 AM
38	Work with the industry, listen and undertake full and proper consultation. People and business live l the now, not on whimsical beliefs. Do the hard yards and the hard work will bear fruits, be fully transparent.	7/18/2018 2:43 PM
39	I believe there is to much focus on Queenstown and Auckland there is so much more in New Zealand.	7/18/2018 1:41 PM
40	Immigration, visa issuing etc are issues facing the hospitality industry across all businesses. As with all developed countries there are jobs which will not be done by Kiwi workers regardless of salary and the visas an immigration policies put unnecessary strain and cost to businesses which in the end impact customer experience by shortage of staff or high turnover resulting in untrained staff	7/18/2018 1:03 PM
41	Do not know	7/18/2018 10:21 AM
42	I'm concerned that the change in government and the resulting decrease in investment and knowledge (and it would appear passion and engagement) there is the potential for losing ground.	7/18/2018 9:59 AM
43	Local governments seem to be divesting themselves from tourism promotion and information centres. Any consenting process with local authorities is infinitely more complex expensive and time consuming than it was in the past.	7/18/2018 9:46 AM
44	.	7/18/2018 9:44 AM
45	Kaikoura Earthquake provided many challenges for all tour operators.	7/18/2018 9:42 AM
46	Feel that under new Govt that Tourism is seen as a cash cow and revenue stream with little appreciation for the value Tourism brings to the NZ economy. We have a voice yes, but dont beleive we have the ability to really influence central or local govt. Waiting for next round of bed taxes or regional taxes and lets see what influence we have (or don't).	7/18/2018 9:29 AM
47	Questions above n/a (RTO)	7/18/2018 9:16 AM
48	The industry has lost voice since the change of government - and yet it should be in a stronger position; tourism provides jobs to many people in a manner that is spread to every corner of NZ enabling people to live in the place they want and supporting the communities they live in. TIA's approach to local government is a one size fits all approach - the questions above reflect this. Every council is different so the policy settings, fees, timeliness, etc., etc. are different as you cross the boundaries - reflective of the community that has elected its Council! The industry (TIA) will not win success with local government or unpick this situation until such time as it realises this and aligns its advocacy and policy settings with the territorial authorities that are the countries largest investors in tourism.	7/18/2018 8:47 AM

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49	Our council is ill equipped to deal with growth of any sort....Have been negative towards tourism for a long time still stuck in the past something to do with the age of the councillors I suspect....we need younger people involved.	7/17/2018 7:35 PM
50	Have no faith in my local Council to make any decisions in regard to tourism.	7/17/2018 5:39 PM
51	Labour Governments are always bad for business	7/17/2018 4:57 PM
52	I think that, like other B&B operators in our area the competition from Air B&B has affected us. I worry about the potential impact of such events as a fire with fatal results in the relatively unregulated air B&B sector	7/17/2018 4:56 PM
53	The new government has little understanding let alone insight into tourism. Local government eg Auckland is even worse, policies like the Auckland targeted rate was based on incorrect information, bias and uninformed. Politicised to gain votes and popularity not what is right but what it can get away with. Same comment on the central government.	7/17/2018 3:38 PM
54	The improvement in our business situation is attributed to our hardwork and perseverance in penetrating into Indian B2B market, rather than any of the current Government initiatives. In fact, unlike the previous government, the current one seems very shortsighted when it comes to tourism.	7/17/2018 3:22 PM
55	Big question mark on above, Visitor bed nights are down with incredible impact of freedom camping and huge growth in AIR B&B in Taupo	7/17/2018 3:18 PM
56	Insurance and local rates are climbing. We cannot pass on all of the added expense to our budget clientele and are absorbing some of the cost ourselves which is not sustainable	7/13/2018 5:33 PM
57	Auckland Council's cavalier approach to the imposition of a targeted rate on the commercial accommodation sector has sent shock-waves through the industry across the whole of NZ. It has set an appalling precedent, which, most worryingly, certain other councils are now looking at emulating. It is not an approach conducive either to good relations between local authorities and the industry, nor an encouragement to potential investors or developers to boost our national accommodation supply.	7/11/2018 9:39 AM
58	Our business deteriorated because of extreme adverse weather events at peak season. Otherwise it would have improved.	7/11/2018 9:24 AM
59	Create a level playing field in relation to Air BNB and compliance costs.	7/10/2018 3:01 PM
60	The focus seems to be Chinese Chinese Chinese with little regard for original markets that supported this nations industry	7/9/2018 9:43 PM
61	The current government comes across as one which is looking at milking tourism for all it's worth and things like the International Visitor Levy don't help when we are already one of the world's most expensive destinations. We are afraid that this government is going to destroy business confidence in NZ's most important industry and that visitors will turn elsewhere for a great vacation. This comment is actually from someone who is generally positively-minded towards Labour/Greens!	7/9/2018 6:19 PM
62	Central Government needs to either apply greater funding for local infrastructure or remove the restrictions in the Local Government (Rating) Act and allow local authorities to raise funds to build the required infrastructure. The prevalence of multiple players in NZ's infrastructure planning and delivery leads to suboptimal planning and decision making. There are too many conflicting priorities with the various players - central government, NZTA, MBIE, Treasury, local authorities - and a lack of trust to allow those who actually make a difference to do their jobs.	7/9/2018 5:54 PM
63	YOY Decreases from internation visitor to Hostel.	7/9/2018 1:56 PM
64	A lot of old rules/regulations (eg building codes), eg different rules regarding rental accommodation listed on Air B&B/bookabach etc. disadvantages the commercial accommodation provider. A lot of ecision making should be moved from Central Govt. to local Govt.	7/8/2018 10:48 AM
65	The DOC management of snow landings within the Fiordland and Aspiring National Parks is frustrating as the NZ Tourism Industry is promoting such landings but once the tourists arrive looking for snow/glacier landings, there is insufficient landings to cater for the increase in this sort of demand.	7/7/2018 2:08 PM

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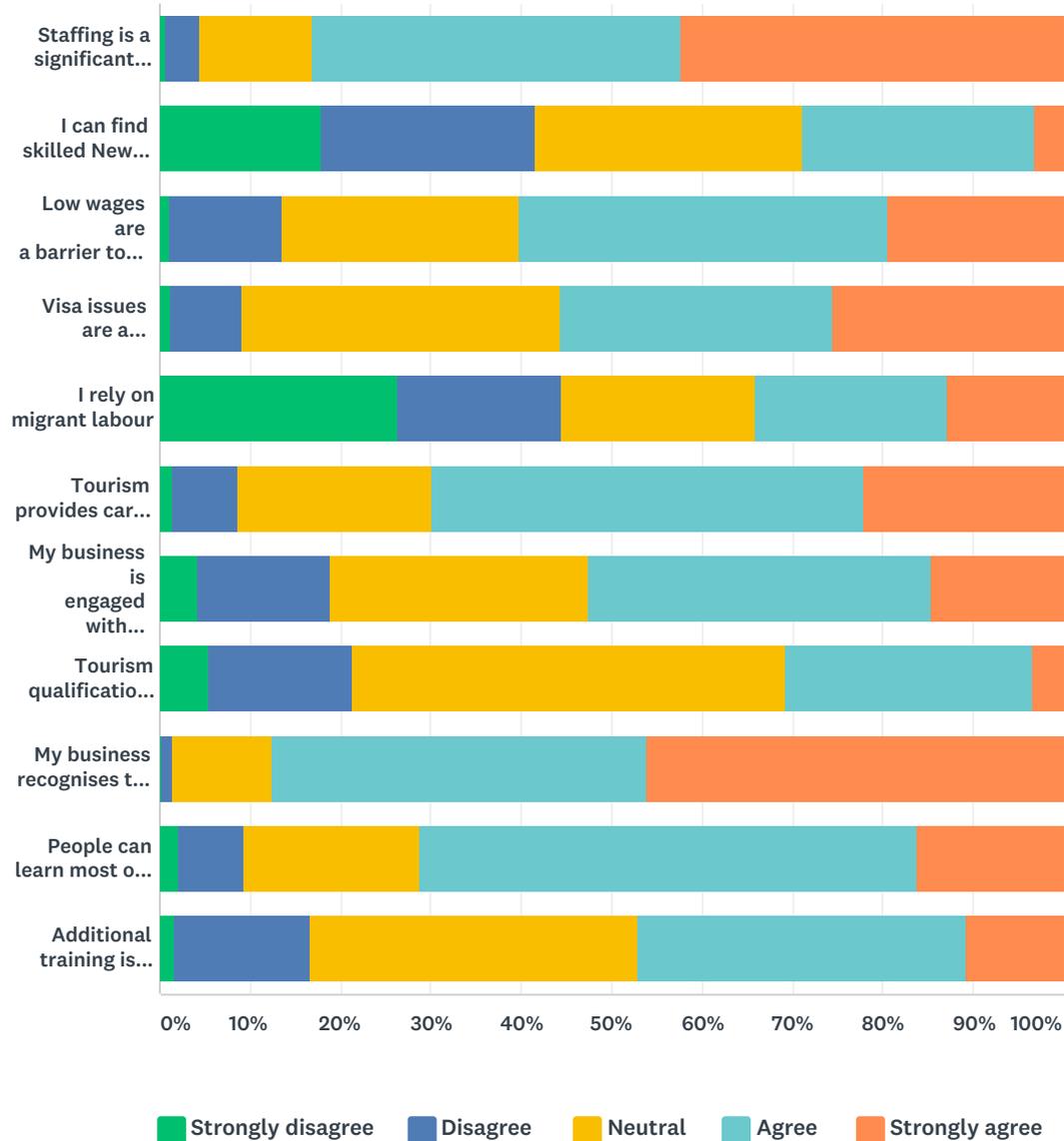
66	Q 9-12 Policy settings and business confidence Compliance costs - especially DOC consent, lease and concession fees are getting out of control. Operators who have been the strongest advocates and protectors of our biodiversity and environment are getting pinged left, right and centre. Basically the sales they are making from recent good seasons is not going towards more employment, new initiatives or 'thank goodness its another good year profit -holidays for the families, but compliances. Compare this to the support government gives Primary industries re subsidies for irrigation, public purse paying for all the new swath of infections, reuse of land initiatives etc. and its clear the current assistance to tourism is still 'pathetic'. We can't even convince Government to give us a better share of GST and GDP contribution that international visitors provide, let alone the value of domestic tourism.	7/6/2018 6:27 PM
67	some did not apply	7/6/2018 4:44 PM
68	DOC should be more commercially astute and charge market prices for use of its facilities, tracks and campgrounds etc. Largest cost areas to our business has been toward health and safety compliance/training, 17% lift in insurance fees, minimum wage increase (which we support, but haven't been able to recover in our pricing to visitors) There is definitely a freeze on domestic spend now due to the pressures that Auckland are facing with cost-of-living and lower confidence through the business sector. Governments are quick to add new taxes without simultaneously telling how they plane to make Government more efficient and value for services provided.	7/6/2018 2:52 PM
69	In the capacity I have i am doing all I can to improve business but its very tough for a small business with few resources available at the level I can invest in.	7/6/2018 12:54 PM
70	Need to keep a lid on rising costs	7/6/2018 12:14 PM
71	Government seems to be in complete denial around the lack of skilled workforce and the vital role played by the migrant workforce	7/6/2018 10:32 AM
72	The tourism funding policy needs to be managed at a central government level as local government have been slammed with roading and other huge costs. As a result tourism is being funded like the poor cousin. Secondly our social licence into operator is getting slim with local rate payers	7/6/2018 8:42 AM
73	No business confidence in local council. After complaining over many years' to District Council about lake of compliance for many accommodation providers they have done absolutely nothing. Many of our competition have no compliance. The local building inspector and I drive pass 10 plus non compliant properties so he can check that I have a current building warrant of fitness on display. and if it is not I am told that there is an instant \$200 fine. We find it difficult to compete having paid out 10's of thousands to meet council regulations when my competitions pays domestic rates, insurance, no fire compliance. The council totally ignores it. My congratulations to Jim Boulton, Mayor of Queenstown who has the guts to do something about it.	7/5/2018 10:55 PM
74	A lot of time is being wasted during the visa application process. Very frustrating	7/5/2018 6:22 PM
75	I hope it will improve but extra cost (wagers ,fuel ,RUC have been a big hit and not been able to put price up to what they should be is painful . In bouders wanting to keep transport price down because hotels have put there's up. Transport industry not working together and letting agents get there way. My prices are the same as they where 6 years ago and i think others will say the same . Eg cruise Tauranga the big operators still using Buses / coaches from the 80s and early 90s that is not good visitor experience. we need to be able to reinvest .	7/5/2018 6:15 PM
76	If the freedom camp expansion continues many in our industry may not be here in 12 > 24 months and some may be forced into a very poor position	7/5/2018 5:58 PM
77	Holiday Parks - I am confident that we will survive because of our location (at this time) but have a real concern that freedom camping will destroy the Holiday Park industry eventually. HAPNZ did not even get a position in the subcommittee set up to look in to the issue while the biggest pusher of freedom camping (NZMCA) did. Once the Parks are sold to developers they will never come back. The cost of compliance for the Parks continues to rise, while the amount of freedom areas (where no compliance is required at all or if it is then it is not enforced or monitored.) We have a situation where local bodies don't have the experience to set up realistic regulations and if they try then NZMCA takes them to court. Central government seems to have very little interest in fixing the mess by either banning or creating a consistent set of rules for the whole country. Dogs breakfast and the country is suffering for it.	7/5/2018 4:52 PM
78	Freedom camping is not regulated but our services are. Over the Christmas - new year period campers can camp on the side of the lakes and rivers for as long as they like in whatever they like -there is no monitoring of the situation or policing the 3 days stay policy there is in place - for over 200 freedom park camp sites - tents, cars, trucks and campervans -some at places with no toilets and some parked behind 'No freedom Parkin' signs.	7/5/2018 4:44 PM
79	Our internal hard work is attracting customers. Nothing external.	7/5/2018 4:14 PM

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80	Compliance and governance cost to soar	7/5/2018 4:13 PM
81	There needs to be immediate focus on Air BnB and book a bach accommodation having appropriate council rate levies, and requirement to meet safety regulations that commercial accommodation providers must meet, this is to mitigate negative guest experience.	7/5/2018 3:22 PM
82	The market is becoming overpriced - accommodation costs particularly have caused our prices to rise to a level never seen before - thus turning off the tap partially. This is a real problem as it appears NZ is pricing itself out - effectively becoming too expensive a destination.	7/5/2018 3:07 PM
83	Challenges with rising minimum wage offset by being able to achieve higher revenues. However, concern that this will not always be possible so if any downturn it will be even harder than before..	7/5/2018 3:01 PM

Q13 Staff and skills shortages have been identified as a significant issue for the industry. Please indicate below to what extent you agree or disagree with the following statements

Answered: 431 Skipped: 0



	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
Staffing is a significant issue for the New Zealand tourism industry.	0.70% 3	3.71% 16	12.53% 54	40.60% 175	42.46% 183	431	4.20
I can find skilled New Zealanders to work in my business	17.87% 77	23.67% 102	29.47% 127	25.75% 111	3.25% 14	431	2.73
Low wages are a barrier to recruiting good people	0.93% 4	12.53% 54	26.22% 113	40.84% 176	19.49% 84	431	3.65
Visa issues are a significant issue for the New Zealand tourism industry.	1.16% 5	7.89% 34	35.27% 152	30.16% 130	25.52% 110	431	3.71
I rely on migrant labour	26.22% 113	18.10% 78	21.58% 93	21.35% 92	12.76% 55	431	2.76
Tourism provides career paths	1.39% 6	7.19% 31	21.58% 93	47.80% 206	22.04% 95	431	3.82

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My business is engaged with local education providers	4.18% 18	14.62% 63	28.54% 123	38.05% 164	14.62% 63	431	3.44
Tourism qualifications match the skill requirements of industry	5.34% 23	16.01% 69	48.03% 207	27.15% 117	3.48% 15	431	3.07
My business recognises the importance of staff training	0.23% 1	1.16% 5	11.14% 48	41.30% 178	46.17% 199	431	4.32
People can learn most of the required skills on the job	2.09% 9	7.19% 31	19.49% 84	54.99% 237	16.24% 70	431	3.76
Additional training is required by staff before employment	1.62% 7	15.08% 65	36.19% 156	36.19% 156	10.90% 47	431	3.40

#	ANY COMMENTS ON THE TOPIC OF PEOPLE AND SKILLS	DATE
1	We do not employ anyone else in our operation.	7/30/2018 3:23 PM
2	too many visas being given to overseas students from India and China where their courses and qualifications lack substance and quality. too easy esp for Indians to get residency after 1 year. Immigration NZ has been focussing on quantity, not quality. no wonder we are regarded as a low wage economy.	7/30/2018 9:43 AM
3	the only training I can't supply is first aid	7/30/2018 9:40 AM
4	If you value staff and pay them accordingly a lot of the staff shortage issues disappear in our experience	7/30/2018 9:37 AM
5	On the job skills training depends on the role.	7/29/2018 10:52 PM
6	We don;t have any staff	7/27/2018 7:16 AM
7	there is a distinct shortage of suitably qualified and experienced people for both the Tourism and hospitality areas. While training institutions appear to teach the necessary theory and operational skills. What they don't teach is Social Skills, manners etc that are absolutely essential to those working in the industry. Some skills should be mandatory to work in the industry.	7/26/2018 1:28 PM
8	We are a small team of 4 NZ nationals plus 1 immigrant. All are very skilled at their roles.	7/26/2018 8:20 AM
9	More support to reduce cost of industry training (on students) will benefit NZ immensely e.g. QRC	7/25/2018 2:27 PM
10	The new immigration rules are making it difficult to attract high quality staff. This is disappointing	7/25/2018 10:22 AM
11	Currently we are well set up with specialised skilled staff, however this may change as we move into the lodging space	7/25/2018 8:53 AM
12	this was a big issue for us this season - people available but not willing. On job training can be done and needs to be done with hands on and feedback.	7/25/2018 8:12 AM
13	My staff are seasonal and return to us each season	7/24/2018 11:38 PM
14	This issue is dependent on where you are located in New Zealand	7/24/2018 4:01 PM
15	New Zealanders are not willing to do most entry level hotel jobs. Reserving these roles for New Zealanders is utterly ridiculous. The threshold for recruiting migrants should be lowered not increased.	7/24/2018 3:57 PM
16	Our business can provide good training & development within the role, we just aim to hire people that have some level of maturity and competence in the workplace in general - we have found repeatedly that our operation is too complex and our expectations too high for people that are just entering the workforce or who lack much life experience generally.	7/21/2018 12:29 PM
17	I don't employ staff so are not qualified to answer this question.	7/20/2018 4:59 PM
18	I work in the skydiving industry where to get a work visa our instructors are classified as guides - the same as kayakers and horse riders. We strap people to our bodies and risk our lives jumping out of planes, yet can only get a 1 year work visa because its not a skilled job! rubbish!!!! It takes a minimum of three years training to get to this position and we are not treated like skilled workers at all.	7/19/2018 6:02 PM
19	New Zealanders don't see Tourism as a long term career option because of the low pay and seasonality. TIA needs to advocate for tourism as a career choice for school leavers. Employers need to pay the living wage and that way they will retain their staff.	7/19/2018 12:56 PM

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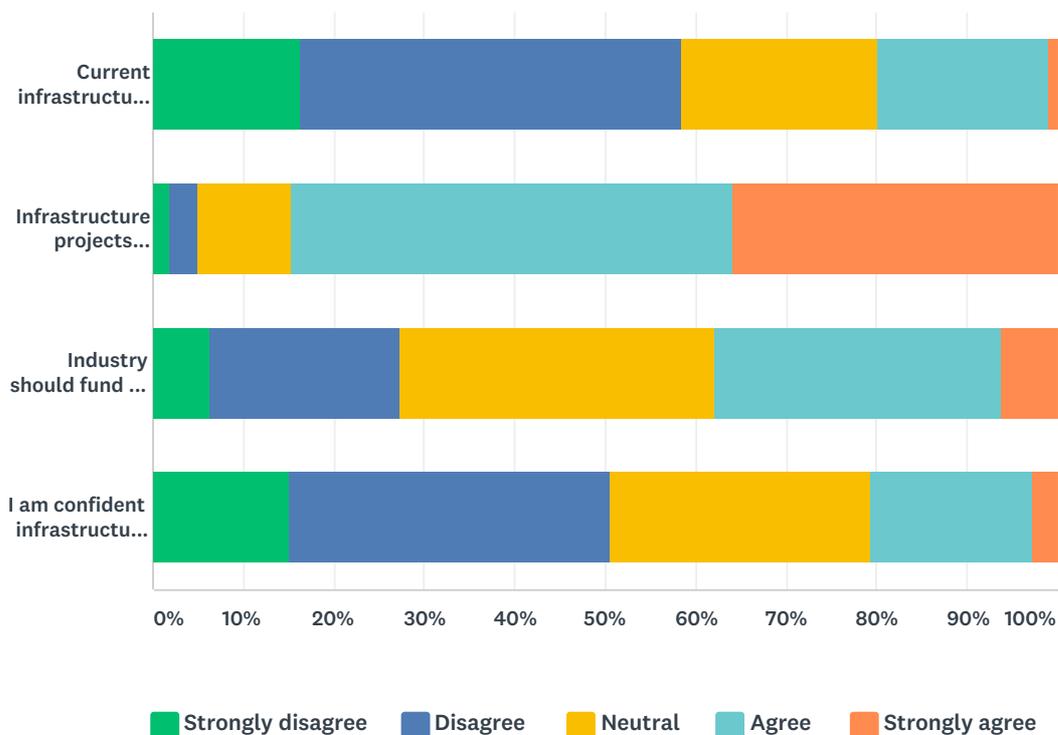
20	The main problem for us is that staff doesn't want to work weekends, holidays and public holidays, but we are a 24/7 industry	7/19/2018 9:45 AM
21	We pay above the living wage and our business has no problem attracting staff because of this. This does not appear to be the case with other employers in our area though who CHOOSE to pay very low wages.	7/19/2018 7:49 AM
22	We run two business, and one needs NZ certification (sailing Charters) and the B&B does not	7/18/2018 7:18 PM
23	A career in hospitality needs to be portrayed as a rewarding and exciting option - in a way that attracts and retains the best people. There needs to be more stories and promotion of people who have progressed and accomplished.	7/18/2018 2:58 PM
24	Serious issue for a while. Where are all those Kiwi young prospects gone? Hardly find at any front desk. No Kiwi hospitality and customer service exist in NZ any longer.	7/18/2018 10:31 AM
25	Not applicable to my work.	7/18/2018 10:21 AM
26	The labour government is a concern and wages and cost to operate are increasing all the time. Even though I am all for fair pay and increasing wages. I don't know if our industry can carry it , with it still being a very seasonal industry and cost going up all the time. Also new generation is much harder to work with , they don't like working weekends , holidays or after hours and that is unfortunately what our industry is all about. It is harder to find young people with a passion for the industry as most of them are just after a job, which will pay their bills, without having to work to hard for it.	7/18/2018 9:45 AM
27	Pilots versus Reservations staff - some roles are more specialised then others. Experience and skills are key to the success of our business.	7/18/2018 9:45 AM
28	I believe companies are choosing to pay low wages in several cases.	7/18/2018 9:43 AM
29	We don't struggle to find staff (have 25) as pay above average salaries and good living wages.	7/18/2018 9:31 AM
30	Majority of NZers aren't interested in the holiday park sector. We love employing people on working visas as they actually come here to work and show up. Our biggest barrier is the job seekers benefit. Not exactly tourism related but a huge curse on employment. We once ran a group interview for housekeeping, 15 people were confirmed to come and 3 people showed up.	7/18/2018 8:19 AM
31	I am certain that staff can improve their professionalism after training. There are simple things they don't know that can be brought to their attention with basic training. Ongoing training is required to give employees skills to grow both themselves and the industry.	7/17/2018 9:25 PM
32	Extremely difficult to find staff in small town.	7/17/2018 5:40 PM
33	I am a very small operator and have no employees so I am not affected by the above although I plan to employ a part-time student during Jan & February next year.	7/17/2018 5:00 PM
34	Its a small pond of motivated suitable applicants	7/17/2018 3:20 PM
35	We are a tour guiding association - you can set up any system you wish but there's only one way the Kiwi way	7/9/2018 9:46 PM
36	Our company pays very well, so can't comment on other companies and the wages they pay being a barrier. Also we can only comment on our business but we do everything we can to ensure we attract exceptional people but these are very difficult to find and that's not even related to pay rate	7/9/2018 6:22 PM
37	cost of living is a challenge in hubs like Auckland, Queenstown or wellington. The government should consider to subsidise public transport for locals, dairy, meat, fruit and vegetables. it doesn't help that petrol prices have been increased too.	7/9/2018 9:36 AM
38	It is important that career opportunities are created - career-path from the bottom up. Tax advantages to be provided to people/businesses committed to teach/retain staff.	7/8/2018 10:52 AM
39	Understanding Tourism is the key, experience and getting out in the field is a key thing for our staff, know the product you sell	7/7/2018 1:39 PM

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40	Q13. People and Skills This issue has been going around for years and continues to frustrate me. We know what the challenges are i.e. low pay and PR that tourism is a vibrant, diverse and exciting career option, but who is going to accept responsibility for upskilling and educating the thousands of new staff we know we need going forward. In the 6 years I was at the Tourism Export Council and attended numerous industry and government meetings about People & Skills, all we have is a great on paper strategy. Aside from Young TEC being established, there has been no coordination between the Government, MSD, WINZ, Schools and industry about the level of training we know we need. TIA and the industry may need to take a page out of the highly successful Primary industries sector for their commitment to education and training for their industry. https://www.primaryito.ac.nz/ . They face they same set challenges we do but they are proactive and put dollars into their profile of trying to attract more young people to the sector. How many tourism ads do you see on TV and social media 'selling our sizzle'?	7/6/2018 6:42 PM
41	On the job training is the best model, but should be supplemented with outside courses where possible, even another business, nit just an education provider.	7/6/2018 4:47 PM
42	Not relevant	7/6/2018 12:55 PM
43	We have no shortage of skilled New Zealands in our company but realise other sectors may struggle to cover lower paid jobs.	7/6/2018 12:15 PM
44	We pay the Living Wage as a minimum for Part Time and Full time staff. Cost of training staff is significant. We try and retain staff over the low season to minimise the cost of training.	7/6/2018 10:47 AM
45	We need more kiwis in the frontline of our industry. We need to step up and pay our staff a professional wage. To do this we need to fix the funding model.	7/6/2018 8:45 AM
46	Staff are your most valuable asset, We do not employ full time staff and never will. We prefer to manage our workload. Thinking smarter.	7/5/2018 10:57 PM
47	Government agencies and local RTOs have no idea what the real needs of activity operators are	7/5/2018 6:09 PM
48	This section is not really relevant to B&Bs	7/5/2018 5:11 PM
49	We are small and only require cleaners and the occasional relieving manager. The latter are expensive and we struggle to pay their rates although in reality they are poorly paid for the hours that they put in. However we always pay our cleaners the living wage in return for an honest days work. We feel that people paying below the living wage because they can't afford it is a giant cop out.	7/5/2018 4:56 PM
50	If you pay people a reasonable / living wage than good staff are available and will stay	7/5/2018 4:55 PM
51	The seasonality of the job makes it hard to retain good staff	7/5/2018 4:47 PM
52	Prior training is definitely beneficial, but we still find we have to a great deal of on the job training. This is not a complaint as each place of work is totally different and people have to learn how things are "done around here".	7/5/2018 4:31 PM
53	The issue is probably not the actual training provided but the expectations of the students when they graduate	7/5/2018 3:23 PM
54	Depends on the role in question. Some positions need a higher skill level than others.	7/5/2018 3:03 PM

Q14 Infrastructure investment has been identified as a significant issue for the New Zealand tourism industry. Please indicate below to what extent you agree or disagree with the following statements

Answered: 431 Skipped: 0



	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
Current infrastructure can generally meet the needs of visitors	16.24% 70	42.23% 182	21.58% 93	19.03% 82	0.93% 4	431	2.46
Infrastructure projects require additional central Government funding	1.86% 8	3.25% 14	10.21% 44	48.72% 210	35.96% 155	431	4.14
Industry should fund new infrastructure projects	6.26% 27	21.11% 91	34.57% 149	31.79% 137	6.26% 27	431	3.11
I am confident infrastructure investment will keep up with demand from visitor growth	15.08% 65	35.50% 153	28.77% 124	17.87% 77	2.78% 12	431	2.58

#	ANY COMMENTS ON THE TOPIC OF INFRASTRUCTURE	DATE
1	Tourism needs to be seen as a public / private partnership (and include community infrastructure and goodwill). With increased growth volume pressures we need to have much better data and models to assist business cases (which can often take 3+ years to implement)> Infrastructure provision is our greatest area of risk : to value, dispersal, consumer and community satisfaction. it is THE hot button.	8/6/2018 2:37 PM
2	Rural areas can't afford this! Already pay for hospital, schools etc	7/30/2018 9:43 AM
3	NZ is busy in a race to the bottom to get to the 5 million mark for visitors . not good.	7/30/2018 9:43 AM
4	accommodation needs are evident and exist beyond the visible large hotel needs which have visibility / media.	7/30/2018 9:42 AM
5	The GST gained from regions needs to be kept within the region which it was spent to ensure the infrastructure spend is directed where it is needed and not channelled into other regions.	7/30/2018 9:41 AM

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6	Government should not be funding the tourist ventures, there are a large amount of providers and especially within the accommodation sector who can already provide for them, if government wants to support then perhaps giving these operators some kind of tax advantage or supplement to invest in their properties and attract more visitors could be of benefit to both parties rather than continual payment from the tax payer to keep visitors from camping and spoiling many areas	7/30/2018 9:40 AM
7	The return on investment that Central Government achieve through GST and NZ tax structure is far outweighed against the original cost. Government need to step up the funding on infrastructure to assist regions	7/30/2018 9:39 AM
8	We have our own facilities to keep upgraded and maintained and we feel that our contribution in GST is how central government should be distributed this to areas of high demand.	7/30/2018 9:38 AM
9	I think this is one of the key issues for tourism in NZ	7/30/2018 9:37 AM
10	This is a huge concern still. In the major centres and also for the regions ...	7/29/2018 10:53 PM
11	Need more toilets on the West Coast	7/27/2018 7:17 AM
12	Public infrastructure (roads, rail, bridges, water, wastewater, toilets, carparks) are the responsibility of local and central govt. However, tourism infrastructure like commercial accommodation (holiday parks & hotels) are sector/private investment. A major gap is funding of new tourism experiences and development with a lack of private investment available in New Zealand.	7/26/2018 11:07 AM
13	This is a big issue for our industry particularly (campervan travel). I dont believe enough is being done to manage what is a very valuable sector of the industry - particularly as it helps drive the focus on regional growth. There needs to be a national body responsible for self containment standards and also for managing the infrastructure. Currently seems councils are not able to cope with the increased demand which is causing problems for NZ'ers, international visitors and ultimately the industry.	7/26/2018 8:24 AM
14	Focus and funding the infrastructure wrapt around significant attractions should be urgently addressed. Point in case Cathedral Cove with over 250k visitations and 2 long drops avail for use. Equally we should provide infrastructure that would take the load off peaks to ensure visitor experience is enhanced.	7/25/2018 2:30 PM
15	The government have a huge GST take from the tourism industry and we see only a small percentage of this returned to maintain and improve infrastructure that tourists and tourism businesses rely on. I am not in favour of the current suggestion to have a border tax which central Government is then responsible for dishing out to the regions. I don't trust the current or future governments to get the distribution of funds done well and don't trust that all the funds will be made available to the industry in the future. I would rather see regional taxes in place where the local regions have control of the funds to use as required for local regional infrastructure.	7/25/2018 11:03 AM
16	This really depends on the infrastructure we are talking about. If we are talking about providing infrastructure for campers i believe this should be leveled from the camper-van companies and others using these sites. With general funding support, however i am against a bed tax taxing one set of visitors to offset another.	7/25/2018 9:04 AM
17	Rural roads are the lifeblood of many remote destinations and are woefully short of the mark in the Selwyn District	7/25/2018 8:55 AM
18	if keep pushing and supporting freedom camping then no infrastructure does not meet needs of visitors. Needs addresses - infrastructure is there already in forms of camping grounds. We need to be stronger and not be so frightened to say no to certain areas of visitors. They can still come but must use facilities that are available now without building them specific. Subsidise camping grounds to cover usage or something but we are ruining our clean green image for more people but less spend. Diluting the experience for the high quality visitor we are supposedly more interested in.	7/25/2018 8:17 AM
19	Industry should play a part in infrastructure funding but it should be fair. The Auckland Targeted rate is a good example of where the Mayor has designed a policy to raise money but pander to his constituency at the expense of fairness.	7/24/2018 4:00 PM
20	The Central Government should stop sitting on huge financial surpluses (and showing off politically about it), whilst important Industry needs/infrastructure etc are left unattended.	7/23/2018 12:00 PM
21	Ability to keep up with demand subject to investment direction of new border levy. General tourism, infrastructure should be allocated regionally by Government from tourism generated gst for that area as well as border levy. Is already hard enough for businesses to generate profit and environment of increased compliance, wages and costs.	7/23/2018 11:04 AM

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22	We are accomodating 3.7m visitors a year & generally infrastructure is accommodating that but there are constraints in certain locations & certain times of year. It would be helpful if this question was clear on whether it is referring to public or private infrastructure e.g the question as to whether industry should fund new infrastructure projects - are you talking about private infrastructure or are you referring to public infrastrcuture?	7/23/2018 9:55 AM
23	I am in fine with funding models that require joint input, eg. central govt, regional and/or local govt, business investment, but there needs to be boldness and vision in looking at what's required for future growth, not just trying to upgrade to barely keep pace with current demands. Central government needs to get more on-board with this level of change/innovation.	7/21/2018 12:33 PM
24	This industry may be the biggest income earner for the country but its average wages and earning ability is way lower than other industries.	7/20/2018 5:11 PM
25	Infrastructure within NZ must and should be funded by government not the tourism industry.	7/19/2018 8:22 PM
26	Wanaka already can't keep up with visitor numbers and they are trying to turn it into Queenstown which has lost all its soul and vibe and is just a tourist trap that local can't even afford to live or work there! Don't do that to Wanaka	7/19/2018 6:05 PM
27	That question is a joke.	7/18/2018 9:08 PM
28	Think through what drives the demand for infrastructure - is it the growth of the population or is it the increase activity of the economy and poor social decisions and offerings - eg: school holidays sees virtually zero infrastructure congestion, yet business and tourism continue as per usual - does the answer lie with the real cause of the problem. To task and or blame one sector of the economy to fix the issue for all does not portray sound thinking	7/18/2018 3:03 PM
29	Not applicable to my work.	7/18/2018 10:21 AM
30	Kaikoura is a unique region following 2016 earthquakes, great improvements but still some instability with bad weather. Trade support to attract visitors to this region is critical to the survival of tour operators/accommodation providers etc.	7/18/2018 9:47 AM
31	Hotel/motel investment by private sector. Public toilet/ car parking roading by local government "Free camping" at least cost recovery. eg waste dumps at	7/18/2018 9:46 AM
32	Tourism adds massive value to regional and national economy. For this contribution to grow we need to make an investment - councils and govt need recognise the opportunity and step up rather than holding hand up. Far to often local and national govt are looking at easy options for tourism revenue streams (taxes) rather than creating income through encouraging visitors to stay longer and do more.	7/18/2018 9:35 AM
33	See earlier comments regarding the need for local government to be able to source a revenue stream to afford for their investment in visitor friendly destination plans	7/18/2018 8:49 AM
34	Dependent on the ratepayer base, and level of private investment within the area.	7/18/2018 8:20 AM
35	Local and Central Govt should invest with industry in tourism infrastructure. I know they do and I hope to see this continue in an equitable sharing.	7/17/2018 9:28 PM
36	The trouble is all contractors who do work for the government RIP the government off... so the government s money doesn't go far.....	7/17/2018 7:39 PM
37	Depends on the type of infrastructure you are talking about. Assisting existing commercial operators to expand their business would be a great idea and making everyone comply with all compliance costs, health & safety, ACC levys, GST, instead of a selected group. We don't need more infrastructure for the Free loaders. My answer as Neutral is "I don't know".	7/17/2018 6:14 PM
38	Lack of public facilities in towns. We DO NOT need more freedom camping in this country. It needs to be contained immediately.	7/17/2018 5:41 PM
39	Unless something is done about accommodation situation in Queenstown and Auckland, it is going to be detrimental.	7/17/2018 3:24 PM
40	Investment is good, but careful consideration needs to focus on a level Industry playing field	7/17/2018 3:23 PM
41	What is meant by the question: 'Industry should fund new'? The tourism industry pays its taxes, fees, rates etc etc, surely infrastructure projects should come directly from this revenue source? It's the biggest earner in NZ already, so why is a Q being asked if 'industry' should fund projects?	7/17/2018 10:06 AM
42	Too many visitors for overall country and will kill the goose. Host hostility is growing	7/15/2018 11:12 AM
43	Big vision and investment required to match visitor expectations. Public toilets are rarely adequate or up to expectations. I strongly object to councils encouraging freedom camping and feel there's adequate DOC and private campgrounds which can be more fully utilized.	7/13/2018 5:48 PM

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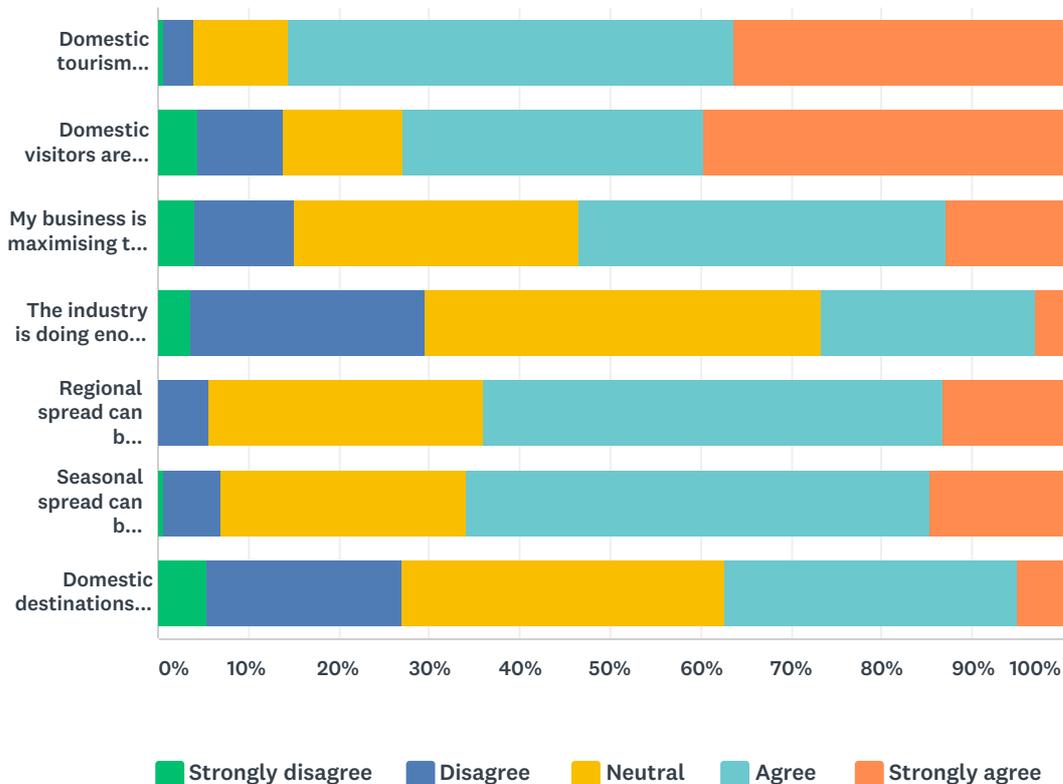
44	If the Government is serious about boosting economic development in the regions, then it should be apportioning the bulk of its regional development funding into infrastructure projects, not vanity or pork-barreling projects.	7/11/2018 9:42 AM
45	If the international visitor levy is applied at the appropriate rate and spent on infrastructure and the environment it will help keep up with demand	7/11/2018 9:27 AM
46	There is an abysmal lack of infrastructure - and when it is built it is INADEQUATE IMPRACTICAL ND NONFUNCTIONAL	7/9/2018 9:47 PM
47	Referring to previous comment, our fear is that this government will try to milk tourism instead of investing in it to grow revenue - as opposed to just visitor numbers - from it. Definitely infrastructure development is government responsibility.	7/9/2018 6:24 PM
48	This is the Government's role in building our tourism product. They are failing miserably and expect the private sector to lead the way. Government should derisk private sector investment by investing in no-brainer infrastructure projects to lead the investment cycle.	7/9/2018 5:56 PM
49	The current infrastructure would meet the demands of visitors if freedom camping was restricted to self contained vehicles only. Industry/rate payers/taxpayers should not be expected to fund facilities for freedom camping. The user should pay. Any funding should go into protecting our natural resources and providing opportunities to see it for all.	7/9/2018 9:28 AM
50	The reality of increased visitor numbers too small rate-pool areas is depressing and will only get worse without significant central govt funding for amenities.	7/9/2018 9:22 AM
51	Central Government should fund infrastructure improvements in regional tourism hotspots and towns....WANAKA	7/8/2018 3:57 PM
52	NZ has to avoid "overcrowding" of certain visitor destinations. Opening up of alternative sights, routes, more walkways etc. If we get overrun, too noisy, messy - NZ loses its attractiveness. NZ strength is it's natural beauty, if it is gone, tourists will go to the next place....! There are plenty of beautiful countries in this world: Chile, Argentina, Kasachstan etc They all can offer beauty, quietness, remoteness. Austria which is half the size of NZ, can handle 30 Mio visitors pa. A bit of planning and self-assessment is required.	7/8/2018 11:03 AM
53	Milford Sound Airport facilities are a disgrace - there is no such facility!!!!!! Toilets and covered waiting area for tourists is totally lacking and in need of urgent attention. The wharf facilities are excellent, but the airport facilities are not in keeping with this visitor site and in need of attention.	7/7/2018 2:19 PM
54	There are key areas of improvement needed for Arrival points in New Zealand especially Auckland Airport with a rail link to Auckland. this should be paid for by Visitor via a departure tax rather than Petrol. But needed it is and will help the visitor to connect faster to the city of sails	7/7/2018 1:41 PM
55	Highway 25 (Thames to Coromandel Town) was damaged in a storm 4th January 2018. The road was closed for 5 days and they still have not finished the repairs on the road 7 months later. This had a significant reduction in visitors to Coromandel over long period which we estimate a \$110000.00 loss of income. We will have a more resilient road (HW25) when the repair work is completed. Significant road storm damage mitigation needs to be assessed throughout NZ. Haast Pass was another road with major problems a few years ago.	7/6/2018 10:58 AM
56	With the right funding model tourism could manage the infrastructure more effectively	7/6/2018 8:46 AM
57	Central government are encouraging visitor numbers. Tourism NZ aim at quantity not quality . No restrictions to visitor numbers in NZ therefore central government can pay all the infrastructure needed to meet visitor demands. Central government place no pressure on local councils to make sure regulations as regards to commercial accommodation compliance are met. Those that do comply are targeted with increasing costs while the non compliant properties are ignored. Local council excuse is 1.. don't know who they are. Haven't they heard of the on line advertising portals such as Air B&B. Booking.com, Book a Batch sites to name a few.or 2. "we are better things to do with our time". actual quote . I pleased after 20 years in the hospitality sector I am almost at the retiring age. I pity those that are new to the industry as they will be soon disillusioned.	7/5/2018 11:09 PM
58	Tourism NZ needs to get real - sending people to the regions is stupid; these are the areas least able to cope with visitors, particular high value visitors...Auckland is the most suited to high value visitors for a myriad of reason, and yet Tourism NZ refuses to help support efforts to keep people here for longer...	7/5/2018 6:12 PM
59	Tourists support the whole economy so it should not fall on just Tourism to invest in infrastructure	7/5/2018 5:13 PM

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60	The Kiwi philosophy has always been "she'll be right" and I am confident that lots of noise will be made but eventually we'll just wait for it to fix itself. Which it will after our tourists go home and say "NZ is beautiful but it's a bit expensive the people are friendly but the foods expensive and so is the fuel and the camper vans and the hotels and the transport and oh did I mention that every car park has a shanty town in it full of squatters and every trail and bush has toilet paper all around it? And then the conversation will going something like "Oh did you hear about Croatia? They tell me that it's really cheap there and there aren't many tourists at the moment"	7/5/2018 5:04 PM
61	I know I am banging on about this topic; Ban freedom camping for all non New Zealand citizens / permanent residents	7/5/2018 4:55 PM
62	What happened to user pays	7/5/2018 4:47 PM
63	It depends on what is meant by infrastructure. Public toilets for instance may require central and/or local government funding. More accommodation at choke points should be the responsibility of industry.	7/5/2018 4:32 PM
64	Infrastructure benefits the locals more than for visitors. Most improvements to infrastructure last longer than the original or ongoing visitor experience therefore it should not be funded by industry	7/5/2018 4:07 PM
65	Public toilets, carparks, more rubbish bins - at major tourism venues.	7/5/2018 3:24 PM
66	the science is lacking in the design of the levy in terms of how it will be distributed and apportioned to the relevant regions. There needs to be a better plan to use the visitor levy to it's best advantage to pay for infrastructure as well as any shortfall for DOC - this would mean doing away with concession payments by operators, which is not properly enforced.	7/5/2018 3:11 PM
67	Depends on infrastructure. Some infrastructure e.g. toilets on West Coast or roading need help, others like hotels or activities do not and should only go ahead if commercially viable business propositions..	7/5/2018 3:06 PM

Q15 60% of the visitor economy is domestic and is of significant value to the New Zealand tourism industry. Please indicate below to what extent you agree or disagree with the following statements

Answered: 431 Skipped: 0



	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
Domestic tourism significantly contributes to regional economies	0.70% 3	3.25% 14	10.44% 45	49.19% 212	36.43% 157	431	4.17
Domestic visitors are important for my business	4.41% 19	9.51% 41	13.23% 57	33.18% 143	39.68% 171	431	3.94
My business is maximising the opportunities from domestic visitors	3.94% 17	11.14% 48	31.55% 136	40.60% 175	12.76% 55	431	3.47
The industry is doing enough to encourage growth in domestic visitors	3.71% 16	25.75% 111	43.85% 189	23.67% 102	3.02% 13	431	2.97
Regional spread can be more easily achieved with domestic visitors	0.00% 0	5.57% 24	30.39% 131	50.81% 219	13.23% 57	431	3.72
Seasonal spread can be more easily achieved with domestic visitors	0.70% 3	6.26% 27	27.15% 117	51.28% 221	14.62% 63	431	3.73
Domestic destinations offer good value when compared to international destinations	5.34% 23	21.58% 93	35.73% 154	32.25% 139	5.10% 22	431	3.10

#	ANY COMMENTS ON THE TOPIC OF DOMESTIC TOURISM	DATE
1	Only 1/3 of our visitors are domestic.	7/30/2018 3:23 PM

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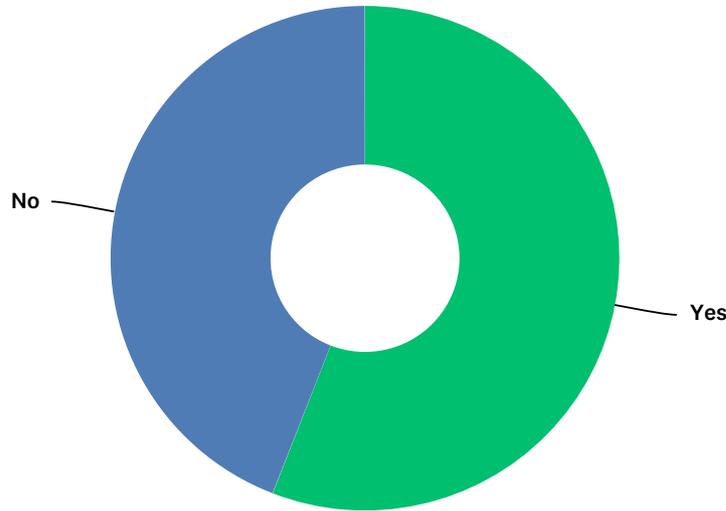
2	domestic flights are often more expensive than overseas flights, this needs addressing to have more people travel to the more rural of areas, eg fly from Dunedin to Auckland you can do this from \$79.00 but from Timaru would be more likely \$400. The smaller areas need the people in but air fares are prohibitive to some	7/30/2018 9:40 AM
3	A vital part of our business - clash of seasons and holidays dilutes the offer	7/30/2018 9:39 AM
4	With the last question - it really depends on the destination and time of the year.	7/29/2018 10:54 PM
5	We go to south east asia for our winter break	7/27/2018 7:19 AM
6	Focus purely on the shoulder seasons, we have capacity and will employ to manage growth, a win win for all NZ	7/25/2018 2:33 PM
7	Events attract domestic visits. No events no increase in visitors generally.	7/25/2018 10:27 AM
8	New Zealand high value market is limited	7/25/2018 8:56 AM
9	Domestic tourism is a hard shift I think. We all have our favourite places to go for our domestic holiday - be it already owning holiday home, friends and family to visit. Hard to change mindset of domestic unless some special deal offered for one off visit. Domestic tourism you just moving one area to another ie will dilute one area to benefit another. Domestic tourism not our own market expect in off season when we do a special package to attract.	7/25/2018 8:19 AM
10	Regional tourism boards focus strongly on Domestic visitors. They are the 'bread and butter' for the industry	7/24/2018 4:58 PM
11	Most of our business is international	7/24/2018 4:21 PM
12	For winter season especially, there are compelling international offers that would encourage potential domestic visitors to compare those opportunities against the cost and value of what they'd need to spend for their overall holiday package in NZ.	7/21/2018 12:37 PM
13	95 % of my business is international. Domestic tourism makes up a very small amount of my business and the amount of domestic tourists to my business depends on the events put on by local organisers rather than the area as a destination.	7/20/2018 5:01 PM
14	It is often cheaper for Southlanders to go to Australia via Queenstown than to go fly to Auckland.	7/19/2018 12:59 PM
15	Some key destinations such as skiing have become hugely expensive and it s now cheaper to take an international flight and ski at Banff than stay and ski at Mt Ruapehu	7/19/2018 9:51 AM
16	The new bulk do nothing Asian market is killing domestic ans traditional golden goose.	7/18/2018 9:15 PM
17	Domestic Visitors are not usually prepared to pay the same as international visitors and often have private alternatives to go to.	7/18/2018 7:20 PM
18	To encourage more domestic tourism, the standard of the accommodation offering needs to be comparable to those on offer throughout the country.	7/18/2018 3:04 PM
19	Simply too expensive these days for NZers to travel domestic destination compared to going to overseas destination.	7/18/2018 10:34 AM
20	Not applicable to my work.	7/18/2018 10:22 AM
21	As the focus of my business is largely International - I am neutral on a few of these points. However it is a no brainer to give credence to the huge importance of Domestic Tourism to our Industry. Just look to Australia for an example!	7/18/2018 10:02 AM
22	Infrastructure and industry support is crucial to Kaikoura domestic and international markets.	7/18/2018 9:50 AM
23	The hotspots for international visitors are becoming unaffordable for domestic travellers.	7/18/2018 9:46 AM
24	Can't really comment on this. Will say... In Queenstown last month my family of 4 did Shotover in morning, skyline and luge afternoon and walter peak for dinner. Not a frenetic day but a good day. Cost for these 3 was \$1416 retail, plus lunch, a wine tasting, drinks with dinner and an apartment for stay. An easy \$2000 day. Not cheap - how many kiwis can afford this?	7/18/2018 9:41 AM
25	Domestic tourism is really important	7/18/2018 8:50 AM
26	We receive very few domestic visitors	7/18/2018 7:27 AM
27	High demand can create pricing issues that impact on domestic market in certain locations. Otherwise I thing domestic travel is good value. Airlines could improve this with cheaper airfares for domestic travel.	7/17/2018 9:32 PM
28	I am an inbound tour operator so questions about how domestic tourism relates to my business should not be counted - we do not work at all in the domestic market.	7/13/2018 1:30 AM

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29	The perception of NZ becoming an expensive destination is not confined to international visitors. Domestic visitors also find it expensive, especially food and beverage in some major destinations like Auckland and Queenstown, where the quality of the product or service does not always match the price.	7/11/2018 9:46 AM
30	I don't do enough international travel to answer the last question	7/11/2018 9:29 AM
31	WE ARE international domestic is of less concern	7/9/2018 9:49 PM
32	The last point is one we'll comment on. It's cheaper to fly to somewhere in Asia - and that includes the cost of airfares - for some holidays than to stay in NZ. We are an expensive destination and always will be, so the solution is to provide fantastic value for money - as opposed to low price. So amazing service and high price can still be excellent value for money if the service quality is great.	7/9/2018 6:27 PM
33	Important to keep residents happy: a good place for residents is a good place to visit. Domestic visitors should get a good experience and value for money. Domestic visitors are easily put-off by over-commercialization of our tourist destinations.	7/8/2018 11:08 AM
34	I see on the Coromandel Peninsula more domestic visitors coming to enjoy the beauty that is here, this is good for the individual business but also good for our Town of Whitianga	7/7/2018 1:43 PM
35	Domestic visitation 80%	7/6/2018 4:48 PM
36	New Zealand is a relatively expensive destination now, many New Zealanders find it can be cheaper for overseas holidays.	7/6/2018 12:16 PM
37	We have a large number of repeat Domestic Visitors bringing Family and Friends to Driving Creek Railway or just return to do the tour again	7/6/2018 11:02 AM
38	New Zealand has become an expensive destination for the domestic market, that is why international departures are growth rapidly.	7/6/2018 8:48 AM
39	I enjoy international travel and fortunate to have visited many countries. My future travel includes, Switzerland for the third time, UK. for second time and closer to home, Tasmania for the second time. Never once have I complained about the cost of travel as it is a once in a life time experience in many cases. The majority of my international guests complain about the cost of travel in NZ which annoys me as compared to what I have paid overseas.. Some domestic travelers seem to think hosts should subsidize their accommodation or provide a shuttle service free of charge or ignore council compliance regulations. Yesterday, a New Zealander asked me to shift another bed into a room therefore three people per room Contrary to health and safety, compliance regs. Needless to say we lost the booking for seven guests..	7/5/2018 11:21 PM
40	The variety in New Zealand is wonderful, and diversity is there for the local market, however the difference to the hip pocket for domestic travelers between Rotarua and Auckland is growing. Can not say value will be there for long if infrastructure is not improved in the key markets	7/5/2018 6:29 PM
41	Average accommodation is massively overpriced and so are flights and now petrol...	7/5/2018 6:13 PM
42	It's often cheaper to fly to another country and experience new sights than it is to travel around NZ (especially if you have to add a return journey on one of the Cook Strait ferries) to the cost of your holiday.	7/5/2018 5:06 PM
43	4 week annual leave and 11 stat days mean the single employed & high end domestic market can have a cheap (freedom camping or lower standard of accommodation) holiday using stat days plus a few days annual leave and go overseas for their main holiday each year.	7/5/2018 4:53 PM
44	It is hard to compete with a third world destination that has third world costs.	7/5/2018 4:33 PM
45	No domestic market here. Less than half of one percent.	7/5/2018 4:18 PM
46	Domestic visitors are important of course, but the sheer volume and high value of international visitors is where we should be focussing on. The TIA should solely be focussed on international.	7/5/2018 3:13 PM
47	RTOs do not seem to prioritise domestic visitors which is frustrating as we get more bang for our marketing bucks with domestic tourism	7/5/2018 3:09 PM

Q16 Sustainability has been identified as a significant issue for the New Zealand tourism industry and TIA is asking businesses to sign up to the New Zealand Tourism Sustainability Commitment Is your business signed up to the tourism sustainability commitment?

Answered: 431 Skipped: 0



ANSWER CHOICES	RESPONSES
Yes	55.92% 241
No	44.08% 190
TOTAL	431

#	IF NO, WHY NOT?	DATE
1	We are unaware of New Zealand Tourism Sustainability Commitment	8/6/2018 2:35 PM
2	process underway intention is to sign up	8/1/2018 10:31 AM
3	We have seriously considered this, however, have not found the time to do so yet.	7/30/2018 5:11 PM
4	Not really heard of it.	7/30/2018 3:29 PM
5	Haven't heard of it	7/30/2018 3:25 PM
6	Don't know.	7/30/2018 3:23 PM
7	Don't know about this?	7/30/2018 3:14 PM
8	project to do this season. Signing up is easy - doing something about it is another harder aspect.	7/30/2018 9:42 AM
9	not sure what it is	7/30/2018 9:41 AM
10	Working through the requirements and will be implementing prior to the end of 2018	7/30/2018 9:39 AM
11	I am pushing for my clients to do so. Plus I am looking into it for my own business.	7/29/2018 10:55 PM
12	We have been doing "sustainability" (one car, recycling efficient heating etc) since we commenced operation, but were only able to achieve silver cert with Qualmark, so have stopped using Qualmark.	7/27/2018 7:22 AM
13	We strongly support Tourism Sustainability	7/26/2018 1:36 PM
14	.	7/26/2018 10:24 AM
15	About to sign up	7/26/2018 10:01 AM
16	Doesn't apply to my business	7/25/2018 4:23 PM

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17	Don't know anything about it	7/25/2018 2:44 PM
18	Because we don't want to	7/25/2018 1:31 PM
19	Not sure where, when or how this was presented. I've simply missed it altogether. Is it part of the Qualmark assessment? (if not, it should be)	7/25/2018 10:36 AM
20	Did not know about it. I am reading now and will join	7/25/2018 10:27 AM
21	Part of a large company, head office has not signed us up	7/25/2018 9:49 AM
22	not sure at present.	7/25/2018 9:12 AM
23	We didn't want to sign up until we actually had some plans in place on how we can start improving our sustainability.	7/25/2018 9:07 AM
24	Because there was no value add when we used to be carbon zero and it wasn't worth the effort and cost sadly...	7/25/2018 9:01 AM
25	Not sure I know much about it, but we are definitely pushing sustainable practice in our industry	7/25/2018 8:57 AM
26	We are too busy coping.	7/25/2018 8:40 AM
27	Part of council	7/25/2018 8:13 AM
28	Not yet, need more info on how to go about this	7/24/2018 11:41 PM
29	Ignorance -- rectifying now	7/24/2018 7:43 PM
30	we will. Just working on other projects right now	7/24/2018 6:25 PM
31	send the forms or link NOW	7/24/2018 5:44 PM
32	can not commit to the living wage any time soon	7/24/2018 4:59 PM
33	Not aware of it	7/24/2018 4:46 PM
34	dont know what it is	7/24/2018 4:45 PM
35	Is a priority over the next 6-12 months.	7/24/2018 4:40 PM
36	Haven't had time	7/24/2018 4:37 PM
37	We are only 12 months old	7/24/2018 4:31 PM
38	Not that I know of	7/24/2018 4:21 PM
39	It seems too cumbersome at this stage but we are sustainability aware.	7/24/2018 4:14 PM
40	I need some more information about it.	7/24/2018 4:01 PM
41	Have not heard of it.	7/24/2018 3:36 PM
42	Will do so in the next week	7/23/2018 2:04 PM
43	Our business is not in an area where the benefit of being aggressively sustainable is very marketable or would add to perceived value.	7/21/2018 12:38 PM
44	feel good joke	7/20/2018 9:59 PM
45	Have not spent any time looking at it til now.	7/20/2018 5:27 PM
46	Just haven't had time yet. Finally, catching up after a very busy peak season!	7/20/2018 5:01 PM
47	None of the real issues around sustainability have even been addressed. Since when did carnivores give a toss about the environment?	7/20/2018 3:33 PM
48	Not done yet	7/19/2018 9:56 PM
49	We are also signed up with what consider to be a more superior commitment Earthcheck.	7/19/2018 4:43 PM
50	Not aware of it. We are Qualmark Silver rated and have a full commitment to sustainability	7/19/2018 9:57 AM
51	signing up has to be based on being honest about your commitment, not greenwashing	7/19/2018 9:36 AM
52	Owner operator. The industry needs to engage with owner operators to understand our reality or we will disappear from the mix of experiences available.	7/19/2018 7:54 AM
53	I do it anyway- no need to sign up.	7/18/2018 9:15 PM
54	not sure	7/18/2018 5:38 PM
55	Will do soon	7/18/2018 2:15 PM
56	No Time as we setting up business and need to get health and safety first	7/18/2018 11:09 AM

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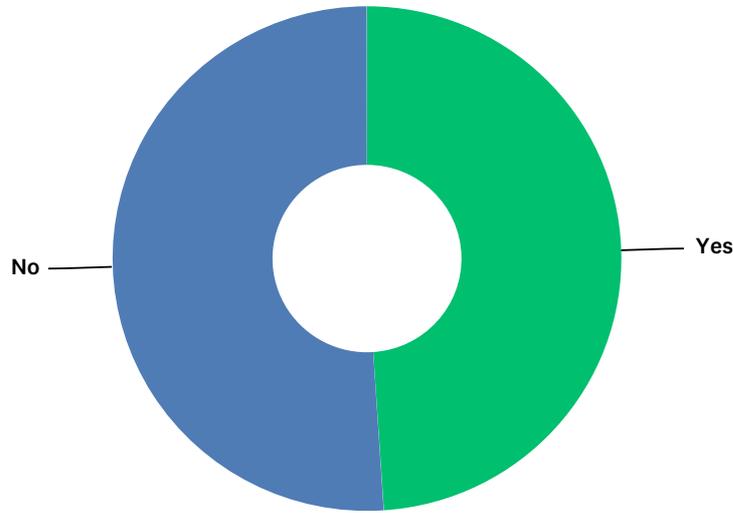
57	No information.	7/18/2018 10:35 AM
58	Not sure	7/18/2018 10:23 AM
59	Will be moving forward	7/18/2018 10:03 AM
60	Not relevant to my particular business, however I am engaged and interested on behalf of my clients whom I've made aware of the initiatives	7/18/2018 10:03 AM
61	No we are contemplating it. We have achieved Qualmark gold and are part of the Rotorua sustainable charter , and this is yet another compliance!! We are a medium , owner operated business and time spend on compliance is increasing by the day , which means less time managing staff and attracting new business and we can see the effects of that.	7/18/2018 9:45 AM
62	Time commitment involved to honour the sustainability commitment	7/18/2018 9:43 AM
63	We have only recently begun looking in to this i.e. the 14 commitments reqd by us and how this aligns with our current business status and what is required of us to ensure we meet these commitments	7/18/2018 9:27 AM
64	Dont know what that is?	7/18/2018 9:20 AM
65	do not have this information	7/18/2018 9:13 AM
66	have own sustainability commitment	7/18/2018 8:59 AM
67	Havent filled in the info yet	7/18/2018 8:20 AM
68	will sign up soon	7/18/2018 8:19 AM
69	I don't even know what it is, or how to sign up.	7/18/2018 8:18 AM
70	not aware of it	7/18/2018 8:04 AM
71	Unsure, Manage for the Owner, possibly yes, he is unavailable for comment at the moment	7/18/2018 7:40 AM
72	Signing up for something isn't going to make a scrap of difference.....the tourism industry isn't going to pick up the rubbish it isn't going to tell Doc to provide water for there guests rather than use the rivers.. to wash in....sometimes it's the little things that will keep us a a great destination....	7/17/2018 8:01 PM
73	We are heavily committed to sustainability and doing it rather than talking about it or showing how smart we are. We just put our energy into doing what is sensible.	7/17/2018 7:19 PM
74	Didn't know to "sign Up"	7/17/2018 6:16 PM
75	Not sure how to sign up.	7/17/2018 5:58 PM
76	Not had enough time as not enough staff to even cope with the summer period.	7/17/2018 5:43 PM
77	Haven't got round to signing up yet	7/17/2018 5:02 PM
78	Looking into doing this in the near future	7/17/2018 4:09 PM
79	Unsure, will have to look into this.	7/17/2018 3:53 PM
80	Unsure	7/17/2018 3:50 PM
81	We should do so.	7/17/2018 3:30 PM
82	Finalist 2017 TIA DOC environmental awards	7/17/2018 3:27 PM
83	Size, nature and target market of our business.	7/17/2018 3:26 PM
84	we are with Qualmark	7/17/2018 3:16 PM
85	What is the tourism sustainability commitment?	7/17/2018 2:57 PM
86	Scheduled to investigate from Aug 2018 with local contact	7/17/2018 2:55 PM
87	No time this winter to concentrate on this project	7/17/2018 9:27 AM
88	Will look into this	7/13/2018 5:50 PM
89	It is not directly relevant to the nature of our business.	7/11/2018 9:48 AM
90	We are likely to soon	7/11/2018 9:30 AM
91	It is under consideration.	7/9/2018 5:32 PM
92	Unsure if we are as new in role	7/9/2018 1:59 PM
93	Just found out about it	7/9/2018 12:03 PM

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94	I don't know enough about it.	7/9/2018 9:29 AM
95	Don't know about it	7/8/2018 3:59 PM
96	We are in the process of doing so.	7/8/2018 11:14 AM
97	Signed up as part of NZ Airports Association	7/7/2018 11:16 PM
98	never heard of it	7/7/2018 8:39 PM
99	yes we look at all ways of being sustainable in our business	7/7/2018 1:44 PM
100	Resource and working through what we can commit to as an organisation of 2	7/7/2018 6:21 AM
101	I will get to it.	7/7/2018 12:45 AM
102	tourism consultant but encourage clients and operators to be sustainable and join the bandwagon	7/6/2018 6:57 PM
103	Very important to our business Been part of Earthcheck and Qualmark Enviro	7/6/2018 6:15 PM
104	We're about to be!	7/6/2018 4:37 PM
105	Will do	7/6/2018 4:18 PM
106	We will sign up. This has been approved by our Board.	7/6/2018 2:50 PM
107	We are an office based online tourism promoter/marketer, and don't think the sustainability commitment is relevant to our business.	7/6/2018 2:37 PM
108	But I have Qualmark bronze, which is about as high as i can go in my business. I work hard to educate on my website http://www.drm-maker.com/about-us/general-information/ and social media pages when possible. 1080 is not a good look	7/6/2018 1:00 PM
109	Having trouble convincing to board to sign up. TIA Bruce Bassett has been excellent in helping us with convincing the board to commit	7/6/2018 11:05 AM
110	Seeking approval from within the business	7/6/2018 10:38 AM
111	Needs discussing with our team	7/6/2018 9:36 AM
112	No reason - will look into it now!	7/6/2018 9:01 AM
113	Still under review	7/6/2018 8:49 AM
114	Unsure	7/6/2018 7:49 AM
115	Not sure, I shall check with my partner on his return.	7/5/2018 11:34 PM
116	Only just began operations, so need to walk before we can run. But it's certainly a goal	7/5/2018 9:55 PM
117	Not relevant to the question of whether or not we're a sustainable operation.	7/5/2018 8:38 PM
118	I do not think I am signed up but I certainly are committed to it	7/5/2018 7:30 PM
119	Just haven't done so yet	7/5/2018 6:38 PM
120	Not had much information regarding this and no idea of the cost to a very small business	7/5/2018 6:02 PM
121	Many aspects like increasing productivity during the off season does not fit with us personally so have not applied but probably will as value the other aspects.	7/5/2018 5:16 PM
122	At the moment I think it is a bit of a joke a bit like Qualmarks' Gold Environ Awards given to some of the biggest polluters out there because they recycle a bit of rubbish and know how to fill out the right forms.	7/5/2018 5:14 PM
123	Not aware of it	7/5/2018 4:56 PM
124	It's a waste of time and costs extra in our area. We did full recycling until the cost got prohibitive We do what we can but costs dictate what we do.	7/5/2018 4:56 PM
125	Unknown	7/5/2018 4:32 PM
126	Tourism is nowhere near unsustainable in this region. It could triple and still be sustainable.	7/5/2018 4:19 PM
127	another feel good do nothing	7/5/2018 3:49 PM
128	Not relevant	7/5/2018 3:40 PM
129	dont know what it is	7/5/2018 3:25 PM
130	I'm not convinced it's anything more than platitudes. While the goals themselves are largely admirable, I remain unconvinced it will result in tangible benefits to either my business or the community.	7/5/2018 3:20 PM

Q17 In your opinion, is the tourism industry doing enough to ensure it will become a sustainable industry?

Answered: 431 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	48.96%	211
No	51.04%	220
TOTAL		431

Q18 Any comments on the topic of sustainability

Answered: 111 Skipped: 320

#	RESPONSES	DATE
1	We don't want to just tick boxes and have meetings real progress must be made.	8/6/2018 3:04 PM
2	Given our brand (100% pure) we need to become much more serious in our sustainability commitment. How would we demonstrate any evidence ... or reduced environmental footprints or community engagement, Much more than words and signatures!!	8/6/2018 2:37 PM
3	guarded yes think more could be done	8/1/2018 10:31 AM
4	Quite happy to do more. Perhaps some ideas etc.	7/30/2018 3:29 PM
5	None	7/30/2018 3:24 PM
6	Increased local awareness is improving attitudes.	7/30/2018 3:23 PM
7	all talk and too much navel gazing. inertia	7/30/2018 9:44 AM
8	no	7/30/2018 9:41 AM
9	-	7/30/2018 9:41 AM
10	A growing awareness and gaining momentum with each year	7/30/2018 9:39 AM
11	Focussing on environmental solutions for businesses ie things we can do to make a difference...and how we translate that to our guests. TIA should have environmental issues as a number one focus, ahead of any financial or 'numbers to nz' targets.	7/30/2018 9:38 AM
12	I don't think the government is taking a long enough view on sustainability and environmental stewardship	7/30/2018 9:37 AM
13	I still think for a lot of the SME the whole sustainability conversation is another area they are struggling to get their heads around, let a lone manage a small business. It almost needs a dedicated national team ...	7/29/2018 10:55 PM
14	What about the huge carbon footprint of air travel to get to NZ	7/27/2018 7:22 AM
15	Their are some serious problems to be addressed.in the Tourism industry. we are in danger of too many tourists who end up destroying the very things they come to see.. new zealand is facing Over Tourism and we do not have the infrastructure to sustain the number.	7/26/2018 1:36 PM
16	Rather than case studies and presentations, there needs to be some mandatory criteria with development workshops to roll-out national initiatives (eg. waste minimisation, energy efficiency, etc)	7/26/2018 11:08 AM
17	This is incredibly important and we need some progressive thinking to ensure we don't damage our beautiful country in the process of chasing growth of the industry	7/26/2018 8:26 AM
18	no	7/25/2018 4:27 PM
19	I think TIA are doing great work and showing strong leadership in this space	7/25/2018 3:03 PM
20	Everyone should have sustainability as part of their focus for 2019/20 then it will become culture in business not just compliancy.	7/25/2018 2:34 PM
21	More activity needs to be undertaken to get wider acceptance	7/25/2018 1:44 PM
22	No, I think more still needs to be done. We are defintely seeing improvements but we still need to do better.	7/25/2018 11:05 AM
23	I don't think the industry yet understands what a truly sustainable industry and perception will have on our ability to attract value.	7/25/2018 11:02 AM
24	The commitment is a good start, but we need to see tangible change across the sector - carbon zero strategies, environmental enhancement, fair wages, etc	7/25/2018 9:44 AM
25	We all need to do more, particularly around social license and walking the talk on environmental issues.	7/25/2018 9:07 AM
26	We need to tighten up on low-value visitor behaviour, ensure they pay their fair share and their impacts are mitigated	7/25/2018 8:57 AM
27	We pander to those with money and don't do enough to control low end volumne	7/25/2018 8:40 AM

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28	continued support of freedom camping is not supporting sustainable industry - we are contradicting ourselves and our own policy.	7/25/2018 8:20 AM
29	we need to embrace it really or we will not align to NZs key global attributes	7/24/2018 6:25 PM
30	no	7/24/2018 5:00 PM
31	Re: 17. I sit on the fence	7/24/2018 4:59 PM
32	no	7/24/2018 4:27 PM
33	Yes no answer not sufficient	7/24/2018 4:19 PM
34	Slow progress like everywhere else...	7/24/2018 4:14 PM
35	More investment needed from Central Govt on this one.	7/24/2018 4:03 PM
36	It seems to be short sighted focused on the next period or year.	7/24/2018 3:36 PM
37	Inadequate attention is being accorded to this hugely important subject.	7/23/2018 12:01 PM
38	There are a lot of communities & businesses doing excellent work already but there is more work needed at both a business and a sector level to ensure long-term sustainability.	7/23/2018 9:59 AM
39	PRICE CONTROLS OF SOME DESCRIPTION ARE NEEDED	7/23/2018 9:10 AM
40	Recycling is becoming a big issue for business's	7/20/2018 12:07 PM
41	Personally I think sustainability is a nice buzz word but for many international and domestic visitors it doesn't influence their decisions as much as industry would like to think	7/20/2018 10:46 AM
42	Sustainability is a very broad matter that seems to find new ways to create a sustainable element for which to generate wide spread appeal and interest among a particular group of industries in this instants the tourism industry.	7/19/2018 8:29 PM
43	All the tourism industry cares about is money, not preserving our amazing scenery or beaches etc	7/19/2018 6:08 PM
44	We need to do more as a country all sectors not just tourism on our own.	7/19/2018 4:44 PM
45	Would be good to have more practical information	7/19/2018 9:47 AM
46	As above - start engaging with all your members. Not just the big players.	7/19/2018 7:54 AM
47	It is a long road, and Local Govt is NOT doing enough in it's own camp thus is not leading by example. Just look at waste bins, availability to dispose of waste correctly, such as green waste, plastics, paper splits at source of supply in the villages, and education of those around.?	7/18/2018 7:23 PM
48	Why change focus from 100% Pure, to emphasizing our people as being the difference. Our people are important, however, people on our front desk are generally not NZ born, as well people by their very nature are a much more difficult factor to get right both in terms of expertise and consistency of delivery. The 100% Pure campaign - is easy to relate to and just because of a few concerns with some aspects , is it not wiser to fix something that is measurable vs emphasise something that is inherently more difficult to give an objective measure.	7/18/2018 3:09 PM
49	Government is not doing enough. They are not providing any level of support to businesses looking to invest in sustainability such as grants, tax breaks etc to motivate businesses to do more	7/18/2018 1:07 PM
50	There is still a long way. The costs in accommodation sector are increasing and use of sustainable supplies are high. to sustain the business the cost has to be transferred to the guests which is proving to be difficult. It is a vicious circle.	7/18/2018 12:47 PM
51	Not applicable to my work.	7/18/2018 10:23 AM
52	Sustainability is a collective requirement, it takes only one organisation for it to fail. But all operators should have the choice to support what it looks like for them as a business 'options/choices' in cost/value/outcomes/regional vs national etc, etc.	7/18/2018 9:53 AM
53	Marketing 101 - your reputation is your brand. We rely on our reputation as clean and green and need to me more vocal about NZ maintaining that reputation. Its the no. thing we need to pushing - hard.	7/18/2018 9:46 AM
54	In my opinion we talk enough about it and it is all very idealistic. But putting in practice is another subject. Just as an example Last TIA update in Rotorua the tables at the Novotel in Rotorua where are covered with individual plastic bottles of water and individual plastic bags with nuts!!! What has happened to the Glass jars with water	7/18/2018 9:45 AM
55	Having seen overtourism in Asia recently its highlighted to me how important sustainability is - the more the industry can do in this space the better	7/18/2018 9:43 AM

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56	Still high numbers of visitors at peak months and should be managed better	7/18/2018 9:35 AM
57	We still lag far behind many countries - in many places in NZ full scale recycling is not an option for the visitor (or resident)	7/18/2018 8:51 AM
58	Sustainability is a relatively new concept and will grow on tourism ventures. I believe this is a very good initiative and hope to see it continue to grow.	7/17/2018 9:34 PM
59	The industry I think is looking at the big picture whis is good but on the ground it will fail....	7/17/2018 8:01 PM
60	To much talk. Just do the obvious as responsible citizens	7/17/2018 7:19 PM
61	Don't actually know the answer to question 17.	7/17/2018 6:16 PM
62	make it compulsory to follow sustainable practices, ban plastic, reduce and recycle more, be efficient, its not hard!	7/17/2018 3:50 PM
63	I believe New Zealand Tourism is fantastic when I compare it to other international tourism providers. I have been told and have seen with my own eyes NZ's services and product is far superior to Australia. My only concern with NZ is it is expensive.	7/17/2018 3:30 PM
64	We are moving in the right direction, just need more businesses on the bus	7/17/2018 3:27 PM
65	will take time	7/17/2018 3:14 PM
66	it is only the start but with more awareness created and more businesses are encouraged to learn from one another it will slowly get better	7/17/2018 3:09 PM
67	There are several issues and examples where the industry seems to decide more in favor of economic growth rather than in favor of nature, space and quietness.	7/17/2018 9:27 AM
68	too little too late. not being pushed enough across whole country not just tourism	7/15/2018 11:14 AM
69	Where tourist numbers greatly outweigh local ratepayers, tourism growth is not sustainable	7/13/2018 5:50 PM
70	We talked sustainability at Trenz - yet at lunch there was so much disposable plastic	7/13/2018 2:17 PM
71	The industry could be doing more to encourage visitors, both domestic and international, to be more considerate of the environment.	7/11/2018 9:48 AM
72	Lead the way in reducing use of plastic & fossil fuels, tell more stories	7/10/2018 3:04 PM
73	the risk lies with centrally funded infrastructure. The industry is investing in the future of their own businesses	7/10/2018 2:00 PM
74	Great initiative from TIA!!!	7/10/2018 10:38 AM
75	It will be tokenism as long as te govt doesn't back it with sincerity	7/9/2018 9:50 PM
76	There can always be more done for sustainability. Our company has won local and even global awards for sustainability, so we go way beyond that proverbial extra mile.	7/9/2018 6:28 PM
77	Freedom camping is not helping	7/9/2018 9:29 AM
78	-	7/9/2018 9:18 AM
79	Avoid the slow destruction of the views/vistas, the natural quietness is often overlooked, clean air/water. Protect the rights, requirements of local residents. (Often progress is pushed - without the protection of the core assets.(Views, quietness, cleanliness, quality of live of residents etc).	7/8/2018 11:14 AM
80	Stricter guidelines and rules. Signing up with the commitment is not good enough.	7/8/2018 10:42 AM
81	Takes education and time, but sustainability is getting high profile and acceptance within the industry. Keep promoting it.	7/7/2018 6:19 PM
82	A lot of unknowns and I don't believe there is currently true buy in across the industry at the necessary level to make a difference	7/7/2018 6:21 AM
83	The price of doing business is expensive. Eg Electricity costs in cold climates	7/7/2018 12:45 AM
84	Q18. Comments re sustainability Is the industry doing enough to ensure it will become a sustainable industry? This is a tricky one as yes it is trying to encourage operators to be more productive and profitable, but in the environmental and cultural space it appears to be a considered spectator. Where is our waterway protection ad cultural stance? TIA need to be bolder and join Maori with their position. Maori in my opinion have the most influence to impact economic development and wellbeing for the environment and country - both politically and economically. Lets be on the right side of the history books when we reflect 10 years from now that we did all we could to make a difference...	7/6/2018 6:57 PM

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85	Not until the entire tourism industry comes together with a single voice will we have a real chance to ensure a sustainable industry. The current piecemeal approach in no way reflects the might of the tourism industry and New Zealand's largest export earner and employer.	7/6/2018 5:17 PM
86	Must be demonstrable and verifiable. Not so easy.	7/6/2018 4:49 PM
87	We need to keep pushing	7/6/2018 4:18 PM
88	More long term thinking required	7/6/2018 4:02 PM
89	TIA offers a sustainability endorsement and Qualmark offers a sustainability assessment as part of its new offering. Do we need both and wouldn't it make sense to work together to develop and deliver a single, robust sustainability structure/assessment/environment	7/6/2018 3:18 PM
90	Identify the top 50 businesses who are leaders in sustainable tourism and share their information with the rest of industry so they can learn and implement sustainable thinking and decision making.	7/6/2018 2:58 PM
91	Sustainability is a very broad term. Means different things to different people.	7/6/2018 2:07 PM
92	I think there needs to be more support and help for small businesses with limited marketing budget. There are many with incredible products not having a voice.	7/6/2018 1:00 PM
93	We are moving in that direction anyway it just requires convincing the board that is the way to go. I will win this battle!!	7/6/2018 11:05 AM
94	It is no longer an achievement - customers now expect that a business is sustainable	7/6/2018 10:36 AM
95	There needs to be increased collaboration with the agriculture industry. Rather than both grabbing for govt. funding or talking about separate issues, I believe that more could be done for tourism to work alongside agriculture to create a sustainable NZ economy (not just sustainable tourism industry). There is room for a model in tourism which drives revenue to farmers that act as hosts for visitors (ie. park in my driveway, bnb etc.). This should be coupled with a reduction in the number of cows we allow to be raised on our land! Protecting waterways on farms, working with farmers to substitute agriculture-based revenue with a tourism based revenue and reducing the overall cattle count in the country will have significant positive effects on the tourism industry because we will be protecting the nature that tourists are coming to see.	7/6/2018 9:01 AM
96	We should be the leaders within the NZ business community, big moves along these lines are making world wide headlines at the moment. If we act now collectively we not only gain the benefits of such changes but also the marketing opportunities that come with it.	7/6/2018 8:09 AM
97	Every 5 years, council and community review visitor targets. eg. Accommodation full, how did they cope over the busy period, the infrastructure coping, ? ie sewerage, power, roads, footpaths. Visitor attractions accessible to all. During peak times are the providers coping. Visitor experience surveys carried out frequently especially during peak periods. I believe communities will be reactive not proactive. as Oscar Wild wrote, Each man kills the thing he loves, Some strangle with the hands of lust, some with the hands of gold.	7/5/2018 11:34 PM
98	It's key to the future viability of the industry, and in attracting high net worth travellers	7/5/2018 9:55 PM
99	The elephant in the room is our polluted waterways	7/5/2018 8:38 PM
100	We should all do more.	7/5/2018 8:19 PM
101	Tourism sector overall is the only industry in this country taking the matter seriously...	7/5/2018 6:16 PM
102	Restricting overseas visitors to those who pay their way so that sustainable practices are funded is critical	7/5/2018 6:02 PM
103	For a Holiday Park it is almost impossible. We have clients who lose all interest in conserving or recycling because they are on holiday. We have dedicated staff (me) who sift through the rubbish, extract recyclable items and sort them into the appropriate bins. Despite this the sheer amount of rubbish that a Holiday Park produces is amazing and there is absolutely no way that I could ever pretend that I run a sustainable industry. I won't even talk about heaters, lights and TV's that are left on by customers that don't think of turning them off when they leave a room or their van.	7/5/2018 5:14 PM
104	I think this will be a big point of difference in the future regarding where tourists will travel to	7/5/2018 5:13 PM
105	I believe none of us go out of our way to make NZ unsustainable	7/5/2018 4:56 PM
106	While we were one of the first to sign up to the sustainability commitment, in my opinion it is an invitation to under achieve. Sustainability will only lead to disaster. We as a society and industry have to focus on how we can be regenerative. It is totally clear from all the data that being "sustainable" will not avert climate change nor rescue our rivers, land, environmental systems or society.	7/5/2018 4:37 PM

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107	Competition is rapidly increasing domestically and internationally , NZ tourism needs to increase its market value and opportunities to continue to increase our sustainability	7/5/2018 4:28 PM
108	Businesses need to do more and engage with Industry	7/5/2018 4:15 PM
109	We have so many issues, NZ needs to be more accountable for the deterioration of our land/water and general environment, if we start now and put better systems in place for everyone - tourism as well as farming, then we might have a chance and keeping NZ strong.	7/5/2018 4:13 PM
110	Too many visitors; killing the goose that laid the golden egg	7/5/2018 3:40 PM
111	Still a relatively low priority for our guests when they make a decision on where to stay so it can be a hard sell to the board when you want to invest in this area as they cannot always see a return on their investment.	7/5/2018 3:11 PM

Q19 What are your overall thoughts on the state of the tourism industry in 2018?

Answered: 246 Skipped: 185

#	RESPONSES	DATE
1	Pretty good but concerns over capacity and ability of locations to cope with visitor numbers now let alone forecasts.	8/6/2018 3:04 PM
2	Going well. Focus in right place via T2025. BUT need all of society (incl govt) focus... and to lead the world on sustainability measures.	8/6/2018 2:37 PM
3	Excellent	8/6/2018 2:35 PM
4	Bring more various kind of accomodation and more experiencing attraction to our visitors, developing Experiential travel	8/1/2018 1:39 PM
5	I have just encountered a problem...it is not legal to include a glass of wine or beer in a safari trip to be drunk after the days expedition or at dinner...this is a perceived sale and illegal!! Can we get up into the 2000s on this matter? How unsophisticated	7/30/2018 3:53 PM
6	Vibrant, but beware of valuing valuing numbers over quality of the experience and economic returns. Fewer high value visitors are better than a mass market approach	7/30/2018 3:50 PM
7	lots of talk (again) but not a lot of "do"	7/30/2018 3:38 PM
8	We need to sell the shoulder seasons. There needs more direction and investment from Government. Local Councils are making ad hoc decisions which are not consistent across the country and this is confusing for visitors	7/30/2018 3:30 PM
9	Like more visitors to less popular places.	7/30/2018 3:29 PM
10	Pivotal and improving.	7/30/2018 3:25 PM
11	Central Government needs to make significant decisions on bi-partisan level	7/30/2018 3:24 PM
12	Quite healthy but not fully coping.	7/30/2018 3:23 PM
13	Strong however NZ is becoming known as expensive destination	7/30/2018 3:21 PM
14	big challenges ahead	7/30/2018 3:19 PM
15	Buoyant ... but very disappointed in the sector support for the visitor levy	7/30/2018 3:18 PM
16	I think generally the industry is growing across the board, but my belief is that is more to do with New Zealand than the marketing of NZ as a brand/destination	7/30/2018 3:16 PM
17	Probably going as well as can be expected. Local government is the problem: resource consent costs, freedom campers.	7/30/2018 3:14 PM
18	Muddling along	7/30/2018 3:10 PM
19	Growth has eased. International visitors are down during the off season but this is largely due to no major events. The NZ economy is slowing and domestic Tourism is similarly affected. The Summer will be strong for International but don't be surprised if Domestic is less so.	7/30/2018 10:03 AM
20	Healthy, under-rated centrally - should be nurtured. More funding for infrastructure.	7/30/2018 9:54 AM
21	not enough being done to spread the visitors around the country. Too busy focussing on numbers rather than fewer higher quality people spending more and having a better experience. places like Milford Sound, Hobbiton etc are an embarassment at peak time and i have spoken to many well heeled visitors where i work who are put off by the focus on high numbers at any cost. also freedom campers are a blight and the rental vehicle companies and border control are not doing enough to monitor their behaviour or penalize them financially for their infringements	7/30/2018 9:44 AM
22	TIA awesome.... Parasite tourism not awesome. Get rid of freedom camping	7/30/2018 9:43 AM
23	continuing growth is under threat due to limitations of accommodation	7/30/2018 9:42 AM
24	My summer business relies heavily on fishermen, but the rivers are warmer till later and the licenses end before the fish arrive, so I suspect that people will no longer want to come in the months they do as there are no fish! The fishing regulations need to change for 2018 and beyond	7/30/2018 9:41 AM

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25	There is a lot of noise around the concepts of regional dispersal & connectivity. The concept of this is great, however the reality is that the industry is falling short in these areas.	7/30/2018 9:41 AM
26	The industry has enjoyed good growth and needs to ensure it consolidates this to a sustainable level while looking at continued investment into infrastructure facilities -	7/30/2018 9:39 AM
27	I think there are a lot of positives but that it can still be a relatively unrefined experience in NZ - sometimes it comes across as authentic - sometimes just as rough. Infrastructure investment is one of the major issues facing the industry.	7/30/2018 9:38 AM
28	It is under pressure and our environment is struggling to keep up with the impact. Our key destinations are becoming over crowded and impacting visitor experience.	7/30/2018 9:38 AM
29	Here are a few ... Regional dispersal is still not happening fast enough at the international end of the market (airlines, TNZ marketing places like Nelson, Northland as new regions ... I have seen a lot of Abel Tasman images over the last 10 years, nothing new?). There is not enough domestic insights for all RTOs to access. Issues with labour shortages & operators struggling to find good staff to full roles. There needs to be another national domestic marketing campaign ... "see your own country first" and push it out during shoulder/winter.	7/29/2018 11:01 PM
30	Booming	7/27/2018 7:23 AM
31	Tourism Industry faces tougher challenges moving forward due to the additional central and regional govt taxes and a clear lack of infrastructure to sustain growth in visitor numbers.	7/26/2018 5:19 PM
32	The industry is facing over tourism. We don't have the infrastructure to support the numbers. There is a serious shortage of skilled people. A lot of young New Zealanders do not want to work in the Tourism or Hospitality so the industry has to offer jobs to visiting foreigners, many of whom only have a temporary working visa for 1 year and cannot get an extension. Many Employers in the industry are reluctant to sponsor young people into getting an extended Visa. Far too much emphasis has been put on certain Destinations by Tourism New Zealand and others ie Auckland, Rotorua and Queenstown. The latter is a major problem because it is now too expensive for workers in the industry to live in Queenstown and have to commute from places like Cromwell etc. There are too many people who view the Tourism industry as a Lifestyle rather than a serious business and get into the Industry for the wrong reasons. A lot of people in this area fail to do their homework and Market research, especially with accommodation. They think for example that building a lodge in a remote location that is off the beaten track they can open the doors today and guests will come flocking tomorrow which is simply not always the case. A good number of these operators don't have the background and experience either. The same situation can apply to transport operators. Since NZTA relaxed the rules. Every man and his dog is getting into being a transport Operator either running a shuttle service or doing tours without the experience, the skills (including social skills), and the necessary knowledge, along with Dress Sense etc. I also think there are too many people making decisions about the NZ Tourism Industry that have never worked at the Coalface of the Industry and really understand it. I am absolutely appalled at some of the things I have seen. I am happy to engage in further discussion on the above and any other points I have made	7/26/2018 1:57 PM
33	Going well, working hard to improve itself for the betterment of NZers	7/26/2018 11:08 AM
34	It hasn't really effected my area at this stage but from what I'm hearing will should notice a change by 2020	7/25/2018 6:43 PM
35	Keep it up.	7/25/2018 5:04 PM
36	Good and up rising in 2018	7/25/2018 4:28 PM
37	Don't know	7/25/2018 4:23 PM
38	Positive, better air connectivity between central North & South needed	7/25/2018 3:04 PM
39	Nervous that the growth enjoyed will stall. Hoping the whole of industry supports shoulder season focus with new and exciting offerings. Need to push for boarder-less (passport free) travel between NZ and OZ as this will have massive up-side benefit for both countries. We must improve the visitor experience and delivery of our most revered attractions, we are at a tipping point for turn-off rather than turn-up. The general feel is the journey has started to Sustainability and we need as an industry to take responsibility to deliver and share what works for our businesses our customers and NZ.	7/25/2018 2:41 PM
40	there is an influx of tourists november to march but not so much in winter. domestic tourism is expensive in this country due to our landscape of the country for travelling, ie car, air, bus etc. going to places like rotorua to do experiences is expensive.	7/25/2018 1:56 PM
41	Positive good forward bookings Lack of 3.5 star accommodation an issue	7/25/2018 1:45 PM
42	Coming under increasing pressure with insufficient resources to meet the needs	7/25/2018 1:07 PM
43	Could be more innovative and place more emphasis on Maori culture.	7/25/2018 11:50 AM

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44	Tourism is still strong and there are still lots of opportunities, however we need to be careful as our global brand is under threat, particularly from environmental threats due to farming, disease (e.g. Kauri Dieback) and general pollution of our land, inland waterways and ocean.	7/25/2018 11:09 AM
45	Headwinds are appearing.	7/25/2018 11:04 AM
46	I think the industry is too sensitive around the idea of boarder levies or a tourist tax. User pays - Simple really. An additional \$30 -\$50 means nothing to most of our tourists - That's one small currency fluctuation. We need the funds, provided those funds are retained for infrastructure investment (primarily DOC, campgrounds, toilet facilities, improved roading) I.e. These funds should be allocated to the Crown - Not government.	7/25/2018 10:40 AM
47	I see a challenging season ahead. Lack of accommodation rising costs within this segment, and perceived poor quality of service is making NZ an expensive destination.	7/25/2018 10:30 AM
48	Ridden a period of global growth in tourism fueled by lower costs and higher disposable incomes. We need to be prepared to fight harder to remain competitive and relevant on the world stage and within the NZ population.	7/25/2018 9:45 AM
49	Many issues are impacting tourism and both local and central government need to start looking at it.	7/25/2018 9:13 AM
50	No enough has been, or is being done to balance international visitor numbers with their NZ experience - there are TOO many people coming down to NZ who are NOT being charged enough to do so, placing HUGE strain on our resources and infrastructure to the point where the visitor experience is being compromised. NZ is not up for sale and never should be - it now needs to be a high-end marketed destination whereby the local and central governments are doing all they can to ensure NZ is fully sustainable, looked after, and available to all Kiwis!!!!	7/25/2018 9:03 AM
51	Generally positive but with some growing pains that need sorting out quickly.	7/25/2018 8:59 AM
52	it is getting too big and we need to control mass people in fragile areas	7/25/2018 8:41 AM
53	Our business is going very well but requires considerable ongoing investment. Big increases in DOC rent (as an example) will make it harder for us to maintain investment.	7/25/2018 8:26 AM
54	Continued conflict on policies and statements from TNZ - high quality and then push for more volume - doesn't equate or support sustainability	7/25/2018 8:22 AM
55	AirBNB is poised to ruin everything.	7/24/2018 7:44 PM
56	Positivr	7/24/2018 7:33 PM
57	optamistic	7/24/2018 7:20 PM
58	Mass tourism is making some key attractions, places and activities of New Zealand very unattractive and unenjoyable.	7/24/2018 6:47 PM
59	holding our own generally	7/24/2018 6:25 PM
60	I have the highest regard for TIA. I think Chris Roberts is doing a great job. More specifically for the Hotel Industry Sally Atfield is also a great leader.	7/24/2018 5:34 PM
61	Going the right way.	7/24/2018 5:17 PM
62	no comment	7/24/2018 5:01 PM
63	Positive but closely watching international affairs, trends, IVL and domestic access routes for an sign of change	7/24/2018 5:00 PM
64	We are a bit complacent and not being creative enough. The need for more major events is critical.	7/24/2018 5:00 PM
65	at the end of a honeymoon after 20 years growth. Time to switch to yield mode	7/24/2018 4:57 PM
66	I believe that economic uncertainty is a factor in downturn in visitors from UK and to a lesser extent, USA. 2018/19 will be a challenging period.	7/24/2018 4:50 PM
67	Need better facilities in the regions. Stop foreign guides illegally operating on public land. Make it easier to employ seasonal qualified international staff	7/24/2018 4:47 PM
68	We need more funding through a visitor visa for DOC and tourism infrastructure. Queenstown also need to look at a bed tax for additional funding for roading, parking, public facilities, and recycling	7/24/2018 4:34 PM
69	Confidence is steady; infrastructure needs to meet demands of tourism	7/24/2018 4:28 PM
70	Vibrant but concern about high number of Asian visitors in some locations and impact on overall visitor experience plus local quality of life..	7/24/2018 4:24 PM

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71	Freedom camping is ruining nz	7/24/2018 4:23 PM
72	Government needs to stop poisoning our country . They have no idea of there impact.	7/24/2018 4:17 PM
73	We're in a gold era. It will last only a few years	7/24/2018 4:15 PM
74	Only keeping it's head above the water! Increased visitor numbers without adequate infrastructure could be the tipping point for many areas pushing them into a negative tourism experience not just for the visitor but for the local communities. Even with the PGF and TGP funding, 50% of the funds still need to be found from somewhere - this is up to 3 billion dollars over the next three years needed from local New Zealand communities and businesses - easy???	7/24/2018 4:12 PM
75	Grossly over regulated and taxed into oblivion, Compliance costs are killing existing small stakeholders and scaring off startups. More needs to be done to assist to alleviate this problem	7/24/2018 4:02 PM
76	Strong but cannot miss the opportunity to invest for the future.	7/24/2018 4:02 PM
77	Healthy but pressure points are appearing which will impact the value proposition.	7/24/2018 3:44 PM
78	I think it needs a long term vision - that is broadly formed, accepted and adopted by all - this is a big stretch target.	7/24/2018 3:37 PM
79	We have been through a period of boom in 2016 and 2017 and it does seem to be levelling off. We need to continue to aggressively market NZ whilst ensuring the value offer we have is also constantly improved. The focus on high value vis a vis Volume is clearly the direction to follow.	7/23/2018 12:05 PM
80	Overall strong but is at a crossroads in many areas incl sustainability, infrastructure, growth and becoming a destination too expensive for some markets who will bypass NZ for Asia, South America and locations cheaper and easier to reach.	7/23/2018 11:10 AM
81	Great opportunities exist for tourism growth and developing a high-value & sustainable future if we successfully adress the challenges which are creating issues for New Zealanders.	7/23/2018 10:03 AM
82	GOOD BUT THERE ARE NEG SIGNS STARTING TO APPEAR AS TO THE COST OF LAND ARRANGEMENTS IN NZ	7/23/2018 9:12 AM
83	Tourism is seen as a tall poppy and a target by government bodies for funding. It is not sustainable to expect one sector to over contribute. Could cost jobs forward	7/23/2018 7:53 AM
84	In a nutshell, my primary concern remains pretty unoriginal - the potential to kill the golden goose by overpricing ourselves and failing to prepare sufficiently for the future, such that tomorrow's visitors won't feel they're getting the NZ experience they hoped for.	7/21/2018 12:41 PM
85	Growing faster than our infrastructure can keep up	7/20/2018 5:30 PM
86	I believe tourism is under valued and the importance of the financial benefit tourism delivers to the whole economy is under estimated and under valued.	7/20/2018 5:02 PM
87	generally too much based on growth & quantity instead of quality	7/20/2018 5:00 PM
88	Things are starting to slow. Growth is slowing. A lot of small operators have recently started businesses on the back of the solid tourism growth, I think there will be some realigning - we should be prepared for this in some areas. I would also like to see a vision for tourism in 20 years - what are the attractions we need/experiences we need to develop, accommodation we need to provide, major events we need to bid for, access to be improved in areas, information provision - will iSITES need to exist in 10-15 years...? I don't see a blueprint for the long term and some of these discussions need to be had.	7/20/2018 4:43 PM
89	A golden opportunity lost thanks to our previous minster for tourism.	7/20/2018 3:37 PM
90	Positive opportunities. Worried about infrastructure ability to cater to growth moving forward	7/20/2018 12:49 PM
91	I am concerned that so much is being spent on the "Freedom Camping" issues. ie putting in more toilets. What is wrong with using the spaces available DOC sites, council site and holiday parks????	7/20/2018 12:08 PM
92	Very Good	7/19/2018 8:30 PM
93	not that good	7/19/2018 7:21 PM
94	Money hungry	7/19/2018 6:09 PM
95	Demand is strong for most businesses but many are being hampered by labour issues. For us a lack of staff, poor weather conditions and discounting by competitors have made for a very tough year.	7/19/2018 5:13 PM

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96	It needs work to improve the numbers of high value clients. While backpackers are the high value customers of the future when they return for their second visit the industry needs to jointly place more value on the attractions it offers and the services it provides. The quality not quantity argument is valid although this needs to be a careful balance as we don't want to cut off the hand which feeds us.	7/19/2018 4:59 PM
97	Poor state at the moment.	7/19/2018 4:45 PM
98	It is very positive in Southland. This statistics show consistent growth over the last 3 years. The trick will be to provide enough infrastructure to keep up with the growth rate.	7/19/2018 1:12 PM
99	Wholesale down, FIT up, seems to be a growing trend. Aus and UK markets softer	7/19/2018 10:45 AM
100	Going well	7/19/2018 10:23 AM
101	There are challenges that we are seen as a to expensive destination and some areas have to many visitors.	7/19/2018 9:49 AM
102	There are many challenges ahead of us to prevent over tourism. We are entering the third season of unsustainable growth and greed that goes with it. The coming two years will send the industry a warning signal and as long as we keep talking openly about how to work with these challenges, tourism will still have a bright future	7/19/2018 9:40 AM
103	Tourism is still going strong, but with different avenues like air b and b are hurting us as we pay for tourism tax, and commerical tax etc while the bandbs are not.. I think we need change. Also National parks should have a levy for international visitors eg tongariro crossing.	7/19/2018 8:48 AM
104	on the right track but slow to implement	7/19/2018 8:12 AM
105	Visitor numbers are growing but are they the right visitors for this country? The industry needs to keep an honest eye on itself and clean up our impacts and stop comparing to other industries (such as dairy). The fact that another industry does things worse is not our business. We need to clean up our back yard and not just tick boxes.	7/19/2018 7:56 AM
106	Tourism industry continues upward trajectory. But we must move forward with great caution to ensure the very reason people come here is not destroyed by over visitation. Tthere are many examples of pressure points in fragile environments,	7/19/2018 7:55 AM
107	Ok. But less of the Asia and more traditional 'active' markets	7/18/2018 9:17 PM
108	It's doing alright, but keeping ahead of costs as the over the top regulations that just eat up income are not productive to being in this business.	7/18/2018 7:26 PM
109	good and can be better	7/18/2018 5:40 PM
110	We are at cross roads, whilst the previous government did a lot of good in streamlining, the organisations, both current local and central governments do not support the industry as well as they could. Being the largest export earner impacting so many people and providing so much opportunity, the industry really needs to be supported vs. being 'milked'. Central government do need to consult and work together with local authorities and to share some of the GST windfall for increased tourist numbers. The Targeted rates needs to be more fairly levied on all those in the tourism industry vs just the Commercial Accommodation providers.	7/18/2018 3:16 PM
111	Can improve in certain areas...	7/18/2018 1:35 PM
112	I've been in Holiday Parks for 30 years and seen the industry through a fair few phases. I sense we are at a bit of a juncture with public opinion. There were great strides made in the 90's with Kiwihost and the establishment of the I site network which placed Tourism on a more professional footing. More importantly it placed Tourism in front of New Zealanders as a serious business that they were all part of. This was reflected in visitor experience and feedback. The increase in volume is shifting us back to a "them and us" attitude from the public. Visitor experience is viewed as something the visitors either pay through the nose for at some attraction or as something they are taking for free to the detriment of our environment and lifestyle. We need to be presenting to New Zealand that Tourism is a sustainable and desirable part of being a New Zealander and that we all have a part to play. Tourism stories need to be mainstreamed so it is not seen as something that happens "over there". We need "Tourism Calendar" on our Tv's every Sunday night presenting interesting stuff about what we all do (definitely not a in reality TV freak show style). I also have a concern that when times are good in the industry operators start talking about guests as "them" as well. As in "stuff them they can pay \$300 for that". There is a tendency to be taking the visitors for granted especially amongst new operators. Nobody was taking them for granted in 2008/9 or in 1996 or indeed 1997/98. We are never going to "fix " tourism issues but we all have a role in managing them.	7/18/2018 1:12 PM
113	Strong interest in NZ. Need to look at issues surrounding the staffing requirements of this industry and recognize that the one shoe fits all approach does not work.	7/18/2018 1:10 PM
114	Could be better especially during low season in Wellington.	7/18/2018 12:47 PM

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115	Its in good health, but vulnerable to international downturn.	7/18/2018 12:44 PM
116	It is average, I believe the Central Government is making the tourism industry worse	7/18/2018 11:30 AM
117	Slack - I believe in Waikato there is very little supporting tourism at all groups like Haka tours miss Hamilton all together! We don't have enough accommodation in Hamilton yet council is negative for what we supply.	7/18/2018 11:12 AM
118	good	7/18/2018 10:56 AM
119	busy, plenty of growth and opportunity. Concerns of lack of mid priced accommodation in squeeze spots such as Mt Cook, Milford, Motueka, Hoki. Tourists being blamed for rise in traffic - when the state has not invested in infrastructure projects for 30 years. Key sites are busy in season - yet out of season are quiet. Even in season they are not busy compared to other countries. Prices are becoming too expensive - dont reperenst value. Food and beverage overpriced. Petrol rip off. This is even outside of key resort towns. NZ will price itself out of the market if it increases year on year. Singel lane bridges need replacing and upgrading.	7/18/2018 10:41 AM
120	With due respect, none of the questions are not applicable to my work. we do all the legwork ourselves, as hunting is a bit of an odd thing.	7/18/2018 10:25 AM
121	Tourism is growing every year which can easily be seen in our yearly figures.	7/18/2018 10:01 AM
122	As a new company to a region that has many challenges our success in marketing Kaikoura as a destination has been well supported. But networking opportunities and joint sales initiatives for our business 'overseas' to better reach our potential is key or our business to move forward. New operator's 'compulsory famil involvement' to reach overseas markets 'OE for New Operators' - would ensure sustainability and keep it fresh and exciting for overseas industry members. Existing businesses should have 'famil updates' - (every 2 - 4 years).	7/18/2018 9:59 AM
123	I am seeing a softening from UK/Europe and some mid range business from the US. We are seeing the same trend in both our NZ and AU businesses. This is normal cycle but price is becoming more a discussion than before. Price has really hurt our China business.	7/18/2018 9:49 AM
124	Positive thoughts overall, great leadership at TIA driving the right areas within the sector	7/18/2018 9:45 AM
125	concerned with the labour government and increase of compliance and the ability to find and hold on to staff	7/18/2018 9:45 AM
126	It currently requires a lot of work	7/18/2018 9:27 AM
127	Behind the curve - need bold leadership and decision making followed by prompt action to position NZ and our environment ahead of the growth seen in global travel (ahead of the curve)	7/18/2018 9:22 AM
128	I believe that we have had a substantial growth in the past couple of years and If we can quickly manage the employment issue then we will continue on the right path for a better future.	7/18/2018 9:07 AM
129	There is a lot of improvements and efforts going to promote 'destinations in Queenstown.	7/18/2018 9:07 AM
130	Having growing pains	7/18/2018 9:06 AM
131	Charging International guests to access national parks is good. Money must be spent on facilities where tourists congregate. Billions must be spent on improved safer roading.	7/18/2018 9:01 AM
132	Tourism is still doing well but we have heard complaints from key partners on the availability of rooms and the ever increasing hike in the cost of room nights through NZ but mainly in the main centres, this makes NZ less desirable as a destination	7/18/2018 8:54 AM
133	In good heart but not making the most of the opportunity this new government presents	7/18/2018 8:52 AM
134	Hot spots of Queenstown and Milford need to be controlled...Government need to redistribute GST earning from Tourists to DOC	7/18/2018 8:48 AM
135	GST collected by RTO's should be redistributed back to the region in order to meet ongoing infrastructure investment requirements.	7/18/2018 8:42 AM
136	some good collaboration across industry and central government. Planning is coming together. Bit of a lolly scramble at the moment - that doesnt necessarily mean equity. Tourism is a NZ wide opportunity - supporting both to urban and rural communities. Would be nice if it wasnt so much of a competition - but some form of equity to share it over the country.	7/18/2018 8:30 AM
137	Mostly the Freedom camping aspect affects us so that needs more attention. A better defination between self containment would help	7/18/2018 8:22 AM
138	Can't talk for the overall industry but we're stifled by our government department.	7/18/2018 8:06 AM
139	good growth, strong Asia performance, need more investment and focus on our 100% pure image which attracts them.	7/18/2018 7:42 AM
140	not bad only	7/18/2018 2:07 AM

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141	I think it is a vibrant industry. The tourism industry can improve the customer experience with better training of all front line staff. Everyone serving the public should consider their place in the greater tourism industry and how they can affect the experiences of those they serve.	7/17/2018 9:38 PM
142	The tourism industry has done a great job getting people to nz but we will drop off the top ten if we don't maintain our standardsalready people are telling me they are avoiding queenstown as it's too congested so then wanaka gets the people then wanaka will be in the same boat so identify new small towns is really the key....and lots more cycle ways.. having just recently been to Amsterdam it is truly amazing the cycle net work and atheism overall attractiveness of the city.	7/17/2018 8:08 PM
143	In a good position - however central government does not listen to industry opinion.	7/17/2018 7:32 PM
144	Optimism	7/17/2018 7:19 PM
145	Don't know	7/17/2018 6:16 PM
146	good	7/17/2018 6:00 PM
147	Very busy but maybe reaching its maximum. We do not want our country overrun especially in the summer period. If it continues along these lines, we will not get support from the domestic populations. We need more seasonal spread in to the shoulder and winter seasons especially for my area.	7/17/2018 5:46 PM
148	Getting stretched by demand on services.	7/17/2018 5:28 PM
149	I expect numbers to increase but hope that freedom campers decrease. I do not enjoy looking out on our great view to find that campers are cleaning their teeth, cooking meals in the back of their vans, filling the council bins with their rubbish so that other visitors have no room for ice cream wrappers etc and the waterfront carpark can look like a rubbish dump. The council bins have signs stating "no household or shop rubbish' but they overflow quickly when we have freedom campers.	7/17/2018 5:14 PM
150	Negative	7/17/2018 4:59 PM
151	Going good for us here in Central Otago - lots of growth happening	7/17/2018 4:11 PM
152	Summer was fair however the Fifa World Cup does impact on visitors to our market and has done so for the previous two tournaments as well.	7/17/2018 3:59 PM
153	We need to see an increased approach to sustainability and a greater focus on customer service and guest experience.	7/17/2018 3:58 PM
154	its ok, not great!	7/17/2018 3:51 PM
155	Tourism certainly a champion of industry TIA to some extent Central,local government- inmates have got the key	7/17/2018 3:43 PM
156	So far I have found looking at forward bookings in comparison to 2017/2018 travellers are booking well in advanced. I bought Hospitality Plus almost 3 years ago so I can only compare to the las 2 seasons.	7/17/2018 3:32 PM
157	Does Govt really understand Tourism?	7/17/2018 3:30 PM
158	We have to focus on quality not quantity. And we have to have quality services available but at a reasonable price. Travelling so far to get here we have to be affordable when they do make it. Visitors are now after genuine, real NZ experiences delivered by real people with passion. Not looking for packaged tourism.	7/17/2018 3:16 PM
159	I believe we have let our standards slip and a lot of areas are need ing help to get the right infrastructure in place for the numbers coming. we also need to spread the visitor flow over the 12 months of the year. we need to work on a better way for freedom campers to use NZ, we cant stop them but what NZ provides now is embarrassing and basically encouraging the freedom campers to do what they want	7/17/2018 3:11 PM
160	Lot of work to be done particularly around infrastructure, central gov funding and visas for the hospitality employees	7/17/2018 3:04 PM
161	Its great however DOC increased fees and tightening of concessions is having a toll on the volume of visitors (we are often full during Summer and cannot expand due to concession restrictions)	7/17/2018 2:59 PM
162	A strong performer with a focus on quality however now needs to invest back into infrastructure to offset negative impacts on communities.	7/17/2018 2:57 PM

State of the Tourism Industry 2018

163	The industry is at a tipping point where negative issues appear and if we want to keep our good reputation the industry needs to commit to balance between growth and the carrying capacity of the individual regions to not harm the natural assets we have and not to lose the support from New Zealanders.	7/17/2018 9:35 AM
164	It is going in the right direction but needs more funds to improve sustainability and international marketing, to achieve results quicker	7/16/2018 1:38 PM
165	Overall good but the lack of accommodation and some skilled staff a hindering growth in peak period	7/16/2018 1:21 PM
166	Need for action now to limit numbers or large parts of what brings tourist here will be ruined. Slow things down a bit, let the country take a breath. Stop mass tourism and stop FREE camping. (not stop Freedom camping but stop FREE camping. Adding toilets does not stop degradation of environment.	7/15/2018 11:16 AM
167	An overall rule needs putting in place regarding Freedom Camping....presently local bylaws are too confusing	7/13/2018 5:52 PM
168	Reactive and not strategic enough - needs more emphasis and strategic thinking at a central government level	7/12/2018 4:45 PM
169	It can be much better. The tourism industry is very significant for NZ. The government should be supporting.	7/11/2018 9:55 AM
170	We continue to send out mixed messages over the value versus volume argument. Value is not the same as expensive, but expensive is what we are becoming known as.	7/11/2018 9:49 AM
171	I'd like more information on what would be involved in becoming a case study please.	7/11/2018 9:32 AM
172	We believe things are softening, there is real disinterest & lack of understanding by the incumbent Government.	7/10/2018 3:05 PM
173	catching its breath.....	7/10/2018 2:01 PM
174	We still struggle with seasonality and dispersal, we still struggle with labor force and with infrastructure plus bar a few exceptions local governments are not business enablers, we still have a way ton go!	7/10/2018 10:41 AM
175	It is overloaded, opportunist by those who can partake.	7/9/2018 9:52 PM
176	Overall very good but thinking further ahead, we need to keep investing in tourism instead of milking what has been built up over the last few decades. We need to be on our guard with regard to maintaining New Zealand's attractiveness as a destination.	7/9/2018 6:30 PM
177	It feel as though it is in decline.	7/9/2018 2:00 PM
178	A lot of potential which needs to be managed and spread throughout the country.	7/9/2018 9:30 AM
179	Depressing for the environment. Regional facilities and amenities are not sufficient for the visitor growth New Zealand has experienced. This leads to a degraded visitor experience and frustrated locals. It is a ticking Time Bomb.	7/9/2018 9:24 AM
180	positive	7/9/2018 9:18 AM
181	Central government needs to take tourism seriously and invest in infrastructure improvements in our tourism towns to maintain the recent improvements	7/8/2018 4:01 PM
182	Quite good but could be better	7/8/2018 2:04 PM
183	Right now, tourism has reached its max. expansion. Reassessment important, infrastructure upgrade necessary.	7/8/2018 11:16 AM
184	Nationally OK but locally in Taranaki work is required to catch up.	7/7/2018 11:17 PM
185	steady slow growth	7/7/2018 8:39 PM
186	Strong, but on a tightrope. Wouldn't take much to derail. Need to keep focus on things we can control - like infrastructure and environment - to make ourselves attractive to visit and then ensure we deliver fantastic memorable experiences. International scene will do whatever it will do!	7/7/2018 6:25 PM
187	Tourism is important to the national infrastructure, but business opportunities with enhancing our National Parks (Fiordland) are restrictive to the likes of our operation	7/7/2018 2:25 PM
188	I am pleased personally with our own business and in general across the country with our supplier their is a wave of confidence at the increase in Business and forward bookings	7/7/2018 1:45 PM
189	Strong growth but should be [and is] concern over sustainability and maintaining the visitor experience as we attract more visitors	7/7/2018 6:22 AM

State of the Tourism Industry 2018

190	very good, but don't give it away. Guests must pay	7/7/2018 12:45 AM
191	We are in a prime position with a new government to influence bold change. Tourism operators by virtue of relying on consumer feedback, already are sustainable and appreciative of their impact on the environment and the economy. What is the worse thing that will happen if TIA as the voice of the industry are visionary about the kind of NZ we want to aspire to, rather than be the lapdogs of government and who over filter the message down from Govt to industry? There is no worse outcome for us as market demand in one way will determine part of our future, but we can enable it to be the most sustainable and profitable we can with strong leadership and proactive policy settings. NZ should be aspiring to being the Bhutan of the Pacific with Gross National Happiness as our measure of wellbeing rather than GDP.	7/6/2018 7:05 PM
192	Growth is expect. Working to spread the highs/lows of the seasonal pattern is working.	7/6/2018 6:16 PM
193	We are riding a wave of international visitor interest currently and the country is coping. However we need to start planning for the long term, not just to 2025. A cathedral approach to 2050 and beyond.	7/6/2018 5:20 PM
194	Still positive. Effect of infrastructure deficits not limited to tourism industry, big issues ahead with social licence in our communities.	7/6/2018 4:51 PM
195	Our's is a large and important industry in terms of GDP, tax income locally and nationally as well as for a wide range of employment, socially and economically.	7/6/2018 4:50 PM
196	Visitor data needs to be addressed as a short term issue, not a long term problem to deal with.	7/6/2018 4:38 PM
197	Good, hopefully the will be no shock event to upset this growth	7/6/2018 4:18 PM
198	I'm not convinced that we are doing enough to disperse our visitors and residents around NZ.	7/6/2018 4:16 PM
199	Pockets of excellence, patches of bad practice. Challenging industry - people think it is easy but it is a long end game which requires patience.	7/6/2018 4:03 PM
200	Progress in being made in many areas but we need to restrict freedom camping and overuse of some areas in DOC managed land to avoid pollution and destruction of pristine environments. DOC needs more government funding to employ staff to monitor visitor behaviour and enforce freedom camping rules. Small regional towns need funding for toilets, carparks, utilising grants and GST raised from tourist spending. More park and ride options like Queenstown - more testing of overseas drivers before they are permitted to hire a car, our roads are now very scary to drive on. More police available to get incompetant drivers off the road. Insist on Coach only or professionally driven vehicles between Te Anau and Milford Sound would make the road safer and the ease the parking congestion at Milford Sound	7/6/2018 4:01 PM
201	Increasing the hour rate in NZ	7/6/2018 3:22 PM
202	Very solid. Need to address tourism infrastructure (which is in progress) and ensure that, in our pursuit of the "high value tourist" we don't end up as an expensive, uncompetitive destination targeting only the wealthy	7/6/2018 3:19 PM
203	It's going well but needs to do more to help locals feel good about it. I.e. We don't want to be killed by an idiot tourist with zero driving skills or knowledge, so test them before giving them car keys.	7/6/2018 2:42 PM
204	Perhaps a step back with a change in government, however good to see some focus on culture and regions.	7/6/2018 2:08 PM
205	I think I have said enough from my perspective. :)	7/6/2018 1:01 PM
206	Need more thought on infrastructure, public facilities, accommodation in peak periods, spreading the load over off season	7/6/2018 12:17 PM
207	I think we are in a good position to move ahead. TIA is doing good job on our behalf.	7/6/2018 11:07 AM
208	Infrastructure, resource issues and a failure of government to recognise the export value earnings of our industry are a concern. The next 2 years will be critical for our industry.	7/6/2018 10:38 AM
209	Showing promise, under resourced, restricted by infrastructure (or lack thereof), expensive for visitors... "plastic" Selling ourselves as 100% pure is nothing short of a lie. We do have some incredible natural beauty that exists in NZ, but we seem to be happy to let economic interests take over and destroy things that bring tourists here in the first place.	7/6/2018 9:03 AM
210	Now is the time to future proof our industry with better funding models so the industry can pay kiwi staff more and offer a better kiwi experience to the end customer.	7/6/2018 8:52 AM
211	Positive, but in need of central and local government regulatory changes.	7/6/2018 8:17 AM

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212	New Zealand is at the tipping point. I have heard many of our international guests complain about the overcrowding ie Milford Sound, Queenstown attractions, It is worrying and nothing seems to be done about it by Central Government or Local Government. 600 million tourists circle the earth each year and increasing. We have been so successful with promotion now it is time to put in strategy to control the numbers visiting our shores.	7/5/2018 11:38 PM
213	Too much emphasis on the quantity markets and not enough emphasis on the quality.	7/5/2018 10:28 PM
214	Good - But there I believe the tourism industry is NZ's 2018 whipping boy	7/5/2018 9:56 PM
215	Heading in the right direction	7/5/2018 8:53 PM
216	Business as usual	7/5/2018 8:38 PM
217	Looking forward to continued improvements.	7/5/2018 8:20 PM
218	Good	7/5/2018 7:31 PM
219	Hopefully another good year ahead but concerned over Visitor/bed tax and its application	7/5/2018 6:39 PM
220	Concerned that we will see the tourism markets start to decline over the coming 3 years. Business confidence seems to be on the decline and the popular destinations are starting to impact smaller cities capture. Workforce visas will continue to be a source of frustration until a smoother process is completed.	7/5/2018 6:34 PM
221	Don t believe it is as good as it made out to be	7/5/2018 6:25 PM
222	Healthy with an exciting future	7/5/2018 6:16 PM
223	Pretty good overall	7/5/2018 5:36 PM
224	Too much focus on mass tourism and big tour groups from Asia. Yield and sustainability must be a focus for NZ in the future. Tourism education continues to be a big issue together with clearly outlining opportunities for our young people to get into the industry. TIA's voice is fragmented and could be stronger if organisations such as ITOC were somehow joined so as not to be so ineffectual (the latter). Tourism NZ's focus on offshore agents and ignoring local trade industry players has always been and continues to be a point of frustration. I have an Australian IBO business and see first hand their industry bodies (like ATEC) are more co-ordinated and we are being left behind..	7/5/2018 5:23 PM
225	Generalluy positive but funding issues are causing concerns	7/5/2018 5:19 PM
226	More and more tourists are coming NZ is not prepared and is not moving fast enough to get ready Eventually the country will be ruined because we are too soft on offenders (people defecating in the wrong places - streets, beaches, in the bushes; people pouring fuel down drains because they put the wrong stuff in and didn't want to pay to get it fixed; people who camp illegally and leave the country without paying just to name a few.) I feel that you need to cap tourist numbers until NZ can cope.	7/5/2018 5:19 PM
227	It needs a major overhaul in some areas. The local government needs to look at what is happening in their area and see what is missing not what they think they (local bodies) want	7/5/2018 4:59 PM
228	Great industry with too many follows and not enough innovators	7/5/2018 4:57 PM
229	I have been involved in the industry for 32 years. We seem to have waves of growth, then a plateau for a while. I think we are about to plateau for a while.	7/5/2018 4:39 PM
230	Very positive, they may be a correction that will be influenced by other factors/ markets. The strength and growth of the industry is sustainable	7/5/2018 4:34 PM
231	Auckland is pricing itself of the market for accom in the peak season and effecting the rest of the country	7/5/2018 4:30 PM
232	A slow increase is a good increase	7/5/2018 4:29 PM
233	Good overseas visitor numbers. I'm not buying into the unsustainable suggestions. Most regions outside of Queenstown could do with receiving many more tourist still.	7/5/2018 4:22 PM
234	Solid but showing signs of leveling off	7/5/2018 4:16 PM
235	Tourism is growing but we do need to help out the regional centres with better infrastructure/facilities and maybe cap numbers where needed.	7/5/2018 4:14 PM
236	Education required to the general public of why investing in tourism is beneficial for the country as a whole. Media needs to be promoting the 'good' side of tourism and international visitors rather than all the negative (eg: freedom campers, certain nationalities, bad drivers etc) What about the thousands who enjoy, spend dollars and respect NZ?	7/5/2018 4:13 PM
237	Moving ahead and getting larger. More opportunities but harder to set up a business due to rising labour and staff costs.	7/5/2018 4:09 PM

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238	badly aimed marketing at free loader camper	7/5/2018 3:50 PM
239	Over taxed by local Govt, regulate tourism operators not just accommodation providers. Not enough work to fine new markets, depend on airlines or China for growth.	7/5/2018 3:47 PM
240	Time to cap the number of tourists	7/5/2018 3:40 PM
241	The industry is robust and on a growth curve. We must invest in basic infrastructure like carpark sealing and toilets so we are not remembered for the wrong reasons. We will need more chefs and middle management people in the tourism industry to make it sustainable, these people may need to come from overseas, as the attitude of young New Zealanders towards service and reliability is woeful.	7/5/2018 3:27 PM
242	Leaderless We have a minister of tourism but no ministry of tourism surly as a major industry we need a dept such as other industrys have.	7/5/2018 3:27 PM
243	All rather meh to be honest. There are a lot of reports, commitments, platitudes etc but marginal real action. At the end of the day, the tourism industry is one that survives of low wages, and high inputs.	7/5/2018 3:22 PM
244	Still positive but wary of what is around the corner. A very real risk of over supply in accommodation in some parts of nz due to "build it and they will come" mentality.	7/5/2018 3:16 PM
245	Tourist Numbers are down and prices are high in peak season	7/5/2018 3:14 PM
246	We have noticed a decline through Autumn and winter compared to the last 3 years, infrastructure is required	7/5/2018 3:13 PM

Q20 Contact Information(Not compulsory)

Answered: 165 Skipped: 266

ANSWER CHOICES	RESPONSES	
Name	95.15%	157
Company	95.15%	157
Address	0.00%	0
Address 2	0.00%	0
City/Town	92.12%	152
State/Province	0.00%	0
ZIP/Postal Code	0.00%	0
Country	0.00%	0
Email Address	95.76%	158
Phone Number	89.70%	148

#	NAME	DATE
1	Trish Abrahamson	8/6/2018 3:04 PM
2	Raj Natarajan	8/6/2018 2:45 PM
3	Minda	8/1/2018 1:39 PM
4	Michelle	8/1/2018 10:31 AM
5	Kate Baxter	7/30/2018 5:12 PM
6	Sharley Haddon	7/30/2018 3:53 PM
7	Mark Rose	7/30/2018 3:38 PM
8	Nick James	7/30/2018 3:30 PM
9	Wilhelm Lehmborg	7/30/2018 3:24 PM
10	Beverly Fothergill	7/30/2018 3:23 PM
11	Mark Wells	7/30/2018 3:18 PM
12	Steve Martin	7/30/2018 3:17 PM
13	Anthony Moore	7/30/2018 3:13 PM
14	Gary Lucas	7/30/2018 9:54 AM
15	Lisa	7/30/2018 9:43 AM
16	Geoff Gabites	7/30/2018 9:42 AM
17	Karen Legg	7/30/2018 9:41 AM
18	Sarni Hart	7/30/2018 9:41 AM
19	Jonathan Milne	7/30/2018 9:39 AM
20	Richard Ussher	7/30/2018 9:38 AM
21	Angela Scott	7/29/2018 11:01 PM
22	Jonathan Crofton	7/27/2018 7:23 AM
23	Guy King	7/26/2018 1:57 PM
24	Andy Haslett	7/26/2018 8:26 AM
25	andrew pratley	7/25/2018 8:11 PM

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26	Fay Ashforth	7/25/2018 2:45 PM
27	Grant Kilby	7/25/2018 2:41 PM
28	Sue Golding	7/25/2018 2:12 PM
29	chris shotton	7/25/2018 1:56 PM
30	James Little	7/25/2018 1:45 PM
31	Christian Scheule	7/25/2018 1:24 PM
32	Victor James	7/25/2018 11:50 AM
33	Sarah Grant	7/25/2018 11:30 AM
34	Stu Cordelle	7/25/2018 11:09 AM
35	Trevor Weir	7/25/2018 10:30 AM
36	BLAIR CHALMERS	7/25/2018 9:50 AM
37	Simon Guild	7/25/2018 8:59 AM
38	bronwyn simes	7/25/2018 8:41 AM
39	James McKenzie	7/25/2018 8:26 AM
40	Jan and Stephen	7/25/2018 8:22 AM
41	Dan	7/24/2018 7:20 PM
42	Jenny O'Carroll	7/24/2018 5:17 PM
43	Anton Wilke	7/24/2018 4:57 PM
44	Phil Parker	7/24/2018 4:50 PM
45	Richard Lauder	7/24/2018 4:45 PM
46	Mark Ma	7/24/2018 4:41 PM
47	Melissa Carter	7/24/2018 4:38 PM
48	jarrod hanson	7/24/2018 4:23 PM
49	Simon Fowler	7/24/2018 4:17 PM
50	Sebastien	7/24/2018 4:15 PM
51	Margaret Munro	7/24/2018 4:12 PM
52	Franz Mascarenhas	7/23/2018 12:05 PM
53	DAVID HOGAN	7/23/2018 9:12 AM
54	Donal Hanrahan	7/21/2018 12:41 PM
55	Dee Bond	7/20/2018 5:30 PM
56	Andy	7/20/2018 10:47 AM
57	David	7/19/2018 8:30 PM
58	Justin Hutton	7/19/2018 5:13 PM
59	Bhrent Guy	7/19/2018 4:59 PM
60	Glenn Ormsby	7/19/2018 4:45 PM
61	Janette Richardson	7/19/2018 1:12 PM
62	Kordula Daniel	7/19/2018 9:49 AM
63	Erin and Amos	7/19/2018 8:48 AM
64	Greg McIntyre HeliBike NZ	7/18/2018 9:17 PM
65	Stephen Western	7/18/2018 7:26 PM
66	zhen chen	7/18/2018 5:40 PM
67	Winni	7/18/2018 4:02 PM
68	Graham Yan	7/18/2018 3:16 PM
69	Gordon Collister	7/18/2018 1:12 PM

State of the Tourism Industry 2018

70	chris ehmann	7/18/2018 1:10 PM
71	Jun Takemoto	7/18/2018 1:05 PM
72	Vereana Wheatley	7/18/2018 11:12 AM
73	mohammed alam	7/18/2018 10:56 AM
74	Philip Wyndham	7/18/2018 10:41 AM
75	Tony Lolaiy	7/18/2018 10:25 AM
76	Hine King Sales & Marketing Manager	7/18/2018 9:59 AM
77	Martin Horgan	7/18/2018 9:49 AM
78	Sauabh Doshi	7/18/2018 9:18 AM
79	Peter Hamdy	7/18/2018 9:07 AM
80	John Fox	7/18/2018 8:54 AM
81	Katrina marwick	7/18/2018 8:48 AM
82	Philip Brown	7/18/2018 8:42 AM
83	Janna	7/18/2018 8:22 AM
84	Alan Kuriger	7/18/2018 8:19 AM
85	Peter Drew	7/18/2018 8:06 AM
86	Karen	7/17/2018 8:08 PM
87	Ralph Green	7/17/2018 7:19 PM
88	Billie-Ann Gadd	7/17/2018 6:16 PM
89	Adam Joyce	7/17/2018 6:06 PM
90	Richard Mills	7/17/2018 6:00 PM
91	Jan Atkinson	7/17/2018 5:46 PM
92	Bevin Severinsen	7/17/2018 5:45 PM
93	Joy MACE	7/17/2018 5:14 PM
94	Stuart Bean	7/17/2018 4:59 PM
95	Peter Kerr	7/17/2018 3:58 PM
96	SS	7/17/2018 3:51 PM
97	Sharon Pannewitz	7/17/2018 3:32 PM
98	BARRY KIRKLAND	7/17/2018 3:30 PM
99	Nats Subramanian	7/17/2018 3:27 PM
100	Michael S Nolan	7/17/2018 2:59 PM
101	Mira Schwill	7/17/2018 9:35 AM
102	Patrick McElligott	7/16/2018 1:38 PM
103	Brian Davey	7/16/2018 1:21 PM
104	Kerry Weston	7/13/2018 5:52 PM
105	Ahleen Rayner	7/13/2018 2:18 PM
106	Anna Black	7/13/2018 1:31 AM
107	Graeme Stephens	7/12/2018 4:45 PM
108	Philip HAO	7/11/2018 11:00 PM
109	Paddy Gillooly	7/11/2018 9:32 AM
110	Craig Douglas	7/10/2018 2:01 PM
111	Jeroen Jongejans	7/10/2018 10:41 AM
112	Lu Tyree	7/9/2018 9:52 PM
113	Paul Anderson	7/9/2018 5:58 PM

State of the Tourism Industry 2018

114	Sally Sank	7/9/2018 5:33 PM
115	Josh Smith	7/9/2018 2:00 PM
116	Matt Ammunson-Fyall	7/9/2018 12:03 PM
117	Marise may	7/9/2018 9:30 AM
118	Nick Frame	7/8/2018 4:01 PM
119	Sally Shirkie	7/8/2018 2:04 PM
120	Walter & Zita Speck	7/8/2018 11:16 AM
121	David	7/7/2018 6:25 PM
122	Lloyd Matheson	7/7/2018 2:25 PM
123	David L Hall	7/7/2018 1:45 PM
124	Jo Kennedy	7/7/2018 6:22 AM
125	Lesley Immink	7/6/2018 7:05 PM
126	Richard Roberts	7/6/2018 4:16 PM
127	Jane Hindle	7/6/2018 4:03 PM
128	Tania Frisby	7/6/2018 3:22 PM
129	Aidan Rooney	7/6/2018 2:42 PM
130	Terri	7/6/2018 1:01 PM
131	Jason Lu	7/6/2018 11:32 AM
132	Dick Breukink	7/6/2018 11:19 AM
133	John Gurney	7/6/2018 11:07 AM
134	Brendan	7/6/2018 9:03 AM
135	Bruce Moffat	7/6/2018 8:52 AM
136	Jeremy Samuels	7/6/2018 8:45 AM
137	Iris Tait	7/5/2018 11:38 PM
138	Brian Lucas	7/5/2018 10:28 PM
139	Steve McNulty	7/5/2018 8:53 PM
140	Elaine Pram	7/5/2018 7:31 PM
141	Naoto IKESHITA	7/5/2018 7:08 PM
142	Leigh Frame	7/5/2018 6:34 PM
143	George Oliver	7/5/2018 6:25 PM
144	Steven Pleciak	7/5/2018 5:23 PM
145	Rayma Jenkins	7/5/2018 5:19 PM
146	Janice Graham	7/5/2018 4:59 PM
147	Felix Borenstein	7/5/2018 4:57 PM
148	Richard Crouch	7/5/2018 4:56 PM
149	Brian Megaw	7/5/2018 4:39 PM
150	David Lile	7/5/2018 4:34 PM
151	Amy Munn	7/5/2018 4:29 PM
152	James Meldrum	7/5/2018 4:22 PM
153	Paul Mitchell	7/5/2018 4:16 PM
154	Jude McLauchlan	7/5/2018 4:14 PM
155	Jonny Martin	7/5/2018 4:09 PM
156	Kent Breeze	7/5/2018 3:27 PM
157	Dave Moss	7/5/2018 3:27 PM

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#	COMPANY	DATE
1	Naturally NZ Holidays	8/6/2018 3:04 PM
2	New zealand Champion travel service Ltd	8/1/2018 1:39 PM
3	Destination Rotorua	8/1/2018 10:31 AM
4	Heli Glenorchy	7/30/2018 5:12 PM
5	Pakiri Beach Horse Rides Ltd	7/30/2018 3:53 PM
6	The Rees Hotel Queenstown	7/30/2018 3:38 PM
7	Annick House Bed and Breakfast	7/30/2018 3:30 PM
8	ProGuides NZ	7/30/2018 3:24 PM
9	Fothergills on Mimiha	7/30/2018 3:23 PM
10	YHA	7/30/2018 3:18 PM
11	James Cook Hotel	7/30/2018 3:17 PM
12	The Elms Hotel Limited	7/30/2018 3:13 PM
13	Bay of Islands Holiday Apartments & Campervan Park Trading Ltd	7/30/2018 9:54 AM
14	Golden Bay Kayaks	7/30/2018 9:43 AM
15	Cycle Journeys	7/30/2018 9:42 AM
16	Waitaki Waters Holiday Park	7/30/2018 9:41 AM
17	www.coromandeladventures.co.nz	7/30/2018 9:41 AM
18	Simply New Zealand Ltd	7/30/2018 9:39 AM
19	Cable Bay Adventure Park	7/30/2018 9:38 AM
20	Cloud 12	7/29/2018 11:01 PM
21	Ribbonwood Retreat	7/27/2018 7:23 AM
22	Select NZ Ltd	7/26/2018 1:57 PM
23	Mad Campers	7/26/2018 8:26 AM
24	AERODRIVE RENTALS LTD	7/25/2018 8:11 PM
25	Waipatiki Beach Holiday Park	7/25/2018 2:45 PM
26	Hahei Holiday Resort	7/25/2018 2:41 PM
27	Miranda Holiday Park	7/25/2018 2:12 PM
28	CPG Hotels	7/25/2018 1:56 PM
29	Tourism West Coast	7/25/2018 1:45 PM
30	Distinction Hotel Fox Glacier	7/25/2018 1:24 PM
31	Red Carpet Tours	7/25/2018 11:50 AM
32	Appellation Wine Tours	7/25/2018 11:30 AM
33	Ziptrek Ecotours	7/25/2018 11:09 AM
34	Rotorua Duck Tours	7/25/2018 10:30 AM
35	COPTHORNE HOTEL ROTORUA	7/25/2018 9:50 AM
36	High Peak Station	7/25/2018 8:59 AM
37	olveston historic house	7/25/2018 8:41 AM
38	NZSki	7/25/2018 8:26 AM
39	Breakers Boutique Accommodation	7/25/2018 8:22 AM
40	Tauranga Tourist Park	7/24/2018 7:20 PM
41	Alpine HorseSafaris Ltd	7/24/2018 5:17 PM
42	Tekapo Springs	7/24/2018 4:57 PM
43	Fine Wine Tours	7/24/2018 4:50 PM

State of the Tourism Industry 2018

44	Real Journeys	7/24/2018 4:45 PM
45	Master Travel Group	7/24/2018 4:41 PM
46	Hanson Rental Vehicles	7/24/2018 4:23 PM
47	Will places wild game ltd	7/24/2018 4:17 PM
48	Frogs-in-NZ	7/24/2018 4:15 PM
49	Tourism Waitaki	7/24/2018 4:12 PM
50	CORDIS Auckland	7/23/2018 12:05 PM
51	NTB TRAVEL	7/23/2018 9:12 AM
52	AJ Hackett Bungy	7/21/2018 12:41 PM
53	Palms on George Ltd	7/20/2018 5:30 PM
54	Zorb	7/20/2018 10:47 AM
55	Brennan	7/19/2018 8:30 PM
56	River Rats Raft & Kayak	7/19/2018 5:13 PM
57	Mountain Air Ltd	7/19/2018 4:59 PM
58	Destination Kaikoura	7/19/2018 4:45 PM
59	Southern Institute of Technology	7/19/2018 1:12 PM
60	Ohakune TOP 10 Holiday Park	7/19/2018 9:49 AM
61	Anchorage Resort	7/19/2018 8:48 AM
62	Fat Tyre	7/18/2018 9:17 PM
63	Villa Russell B&B / Kingfisher Yacht Charters	7/18/2018 7:26 PM
64	Dreamland Adventure	7/18/2018 5:40 PM
65	MilestoneTours	7/18/2018 4:02 PM
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67	Heritage & CityLife Hotels	7/18/2018 3:16 PM
68	Timaru Top10 Holiday Park	7/18/2018 1:12 PM
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70	Link New Zealand Tours	7/18/2018 1:05 PM
71	Hamilton Holiday Homes	7/18/2018 11:12 AM
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73	Adventure South NZ	7/18/2018 10:41 AM
74	South Pacific Helicopters NZ	7/18/2018 9:59 AM
75	Southern World NZ	7/18/2018 9:49 AM
76	Destination Coromandel	7/18/2018 9:22 AM
77	Mercure Abel Tasman Hotel	7/18/2018 9:18 AM
78	Omarama TOP 10 Holiday Park	7/18/2018 9:13 AM
79	Auckland & Beyond Tours	7/18/2018 9:07 AM
80	Ezi Car Rental	7/18/2018 8:54 AM
81	NMIT	7/18/2018 8:48 AM
82	Novotel New Plymouth Hobson	7/18/2018 8:42 AM
83	Wellington TOP 10 Holiday Park	7/18/2018 8:22 AM
84	Alpine Adventure Holiday Park	7/18/2018 8:19 AM
85	Charterlink Ltd	7/18/2018 8:06 AM
86	Murchison motorhome park	7/17/2018 8:08 PM
87	Greenmantle Estate Lodge	7/17/2018 7:19 PM

State of the Tourism Industry 2018

88	Otorohanga Holiday Park	7/17/2018 6:16 PM
89	Inflite Charters Limited	7/17/2018 6:06 PM
90	Heliworks Queenstown Helicopters 2012 Ltd	7/17/2018 6:00 PM
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93	admirals Landing Waterfront B&B	7/17/2018 5:14 PM
94	Camp Glenorchy	7/17/2018 3:58 PM
95	HHQ	7/17/2018 3:51 PM
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97	TAUPO DEBRETTS SPA RESORT	7/17/2018 3:30 PM
98	Take Me 2 The World	7/17/2018 3:27 PM
99	HeliServices.NZ Fox & Franz, Tekapo, Haast	7/17/2018 2:59 PM
100	Norwest Adventures Ltd	7/17/2018 9:35 AM
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119	The Chalet	7/8/2018 11:16 AM
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129	The Dream Maker NZ	7/6/2018 1:01 PM
130	www.thevillageinn.co.nz	7/6/2018 11:32 AM
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State of the Tourism Industry 2018

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133	Breadcrumbs	7/6/2018 9:03 AM
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136	Sailsashore & Kowhai Lane accommodation & tours.	7/5/2018 11:38 PM
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157	Grumpys Kiwi Holiday Park	7/5/2018 3:27 PM

#	ADDRESS	DATE
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There are no responses.

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7	Nelson	7/30/2018 3:30 PM
8	Rotorua	7/30/2018 3:24 PM
9	Whakatane	7/30/2018 3:23 PM
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11	Papanui	7/30/2018 3:13 PM
12	Paihia	7/30/2018 9:54 AM
13	Christchurch	7/30/2018 9:42 AM

State of the Tourism Industry 2018

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18	Martinborough	7/29/2018 11:01 PM
19	West Coast	7/27/2018 7:23 AM
20	Auckland	7/26/2018 1:57 PM
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22	auckland	7/25/2018 8:11 PM
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25	Thames/Auckland	7/25/2018 2:12 PM
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State of the Tourism Industry 2018

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State of the Tourism Industry 2018

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State of the Tourism Industry 2018

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152	Geraldine	7/5/2018 3:27 PM
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3	minda@mzctour.com	8/1/2018 1:39 PM
4	michelle@rotoruanz.com	8/1/2018 10:31 AM
5	marketing@heliglenorchy.co.nz	7/30/2018 5:12 PM
6	pakirihorse@xtra.co.nz	7/30/2018 3:53 PM
7	mark@therees.co.nz	7/30/2018 3:38 PM
8	nick.james@xtra.co.nz	7/30/2018 3:30 PM
9	wilhelm.l@xtra.co.nz	7/30/2018 3:24 PM
10	beverlyf@xtra.co.nz	7/30/2018 3:23 PM
11	mark.wells@yha.co.nz	7/30/2018 3:18 PM
12	steve.martin@jamescookhotel.co.nz	7/30/2018 3:17 PM
13	anthony.moore@qualityhotelelms.co.nz	7/30/2018 3:13 PM
14	gary@boihacvp.co.nz	7/30/2018 9:54 AM
15	geoff@cyclejourneys.co.nz	7/30/2018 9:42 AM
16	waitakiwaters@gmail.com	7/30/2018 9:41 AM
17	s.hart@coromandeladventures.co.nz	7/30/2018 9:41 AM
18	jmilne@touristgroup.co.nz	7/30/2018 9:39 AM
19	richard@cablebayadventurepark.com	7/30/2018 9:38 AM
20	angela@cloud12.co.nz	7/29/2018 11:01 PM
21	stay@ribbonwood.net.nz	7/27/2018 7:23 AM
22	hello@selectnz.co.nz	7/26/2018 1:57 PM
23	Andy@madcampers.co.nz	7/26/2018 8:26 AM
24	andy.pratley@gmail.com	7/25/2018 8:11 PM
25	camp@waipatikibeach.co.nz	7/25/2018 2:45 PM
26	grant@haheiresort.com	7/25/2018 2:41 PM
27	stay@mirandaholidaypark.co.nz	7/25/2018 2:12 PM
28	chris.shotton@cpghotels.com	7/25/2018 1:56 PM
29	jim@westcoast.co.nz	7/25/2018 1:45 PM
30	christian@distinctionfoxglacier.co.nz	7/25/2018 1:24 PM

State of the Tourism Industry 2018

31	office@redcarpet-tours.com	7/25/2018 11:50 AM
32	sarahg@appellationwinetours.nz	7/25/2018 11:30 AM
33	scordelle@ziptrek.com	7/25/2018 11:09 AM
34	trevor@ducktours.co.nz	7/25/2018 10:30 AM
35	blair.chalmers@millenniumhotels.com	7/25/2018 9:50 AM
36	simon@highpeak.co.nz	7/25/2018 8:59 AM
37	manager@olveston.co.nz	7/25/2018 8:41 AM
38	james@mthutt.co.nz	7/25/2018 8:26 AM
39	stay@breakers.co.nz	7/25/2018 8:22 AM
40	Info@taurangatouristpark.co.nz	7/24/2018 7:20 PM
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42	anton@tekaposprings.co.nz	7/24/2018 4:57 PM
43	phil.parker@xtra.co.nz	7/24/2018 4:50 PM
44	rtauder@realjourneys.co.nz	7/24/2018 4:45 PM
45	info@mtgtourism.com	7/24/2018 4:41 PM
46	melissa.carter@europcar.com	7/24/2018 4:38 PM
47	richard@airsafaris.co.nz	7/24/2018 4:24 PM
48	rentals@hanson.net.nz	7/24/2018 4:23 PM
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50	seb@frogs.email	7/24/2018 4:15 PM
51	margaret@waitakinz.com	7/24/2018 4:12 PM
52	franz.mascarenhas@cordishotels.com	7/23/2018 12:05 PM
53	davidntb@msn.com	7/23/2018 9:12 AM
54	donal@bungy.co.nz	7/21/2018 12:41 PM
55	dee@tuakauhotel.co.nz	7/20/2018 5:30 PM
56	andy_corson@zorb.com	7/20/2018 10:47 AM
57	duro.brennan@gmail.com	7/19/2018 8:30 PM
58	marketing@riverrats.co.nz	7/19/2018 5:13 PM
59	guys@xtra.co.nz	7/19/2018 4:59 PM
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63	info@taupomotel.co.nz	7/19/2018 8:48 AM
64	greg@fat-tyre.co.nz	7/18/2018 9:17 PM
65	info@kingfishercharters.co.nz	7/18/2018 7:26 PM
66	lovemobile2010@hotmail.com	7/18/2018 5:40 PM
67	winni.wen@aoliday.com	7/18/2018 4:02 PM
68	grahamy@heritagehotels.co.nz	7/18/2018 3:16 PM
69	gordon@timaruholidaypark.co.nz	7/18/2018 1:12 PM
70	chris.ehmann@hilton.com	7/18/2018 1:10 PM
71	linkjapan@xtra.co.nz	7/18/2018 1:05 PM
72	hamiltonholidayhomes@gmail.com	7/18/2018 11:12 AM
73	info@mktours.co.nz	7/18/2018 10:56 AM
74	philip@adventuresouth.co.nz	7/18/2018 10:41 AM

State of the Tourism Industry 2018

75	tlolaiy@gmail.com	7/18/2018 10:25 AM
76	marketing@southpacificwhales.co.nz	7/18/2018 9:59 AM
77	mhorgan@southernworld.com	7/18/2018 9:49 AM
78	saurabh@primehotels.co.nz	7/18/2018 9:18 AM
79	stay@omaramatop10.co.nz	7/18/2018 9:13 AM
80	info@aucklandandbeyond.co.nz	7/18/2018 9:07 AM
81	john.fox@ezicarrental.co.nz	7/18/2018 8:54 AM
82	Katrina.Marwick@nmit.ac.nz	7/18/2018 8:48 AM
83	philip.brown.nz@gmail.com	7/18/2018 8:42 AM
84	janna@wellingtontop10.co.nz	7/18/2018 8:22 AM
85	farmerl@xtra.co.nz	7/18/2018 8:19 AM
86	peter@charterlink.co.nz	7/18/2018 8:06 AM
87	stay@murchisonmotorhomepark.co.nz	7/17/2018 8:08 PM
88	ralph@greenmantle.co.nz	7/17/2018 7:19 PM
89	billie@kiwiholidaypark.co.nz	7/17/2018 6:16 PM
90	adam.joyce@inflitecharters.com	7/17/2018 6:06 PM
91	manager@heliworks.co.nz	7/17/2018 6:00 PM
92	janatkinson@xtra.co.nz	7/17/2018 5:46 PM
93	manager@troutcentre.com	7/17/2018 5:45 PM
94	admirals@xtra.co.nz	7/17/2018 5:14 PM
95	stuart@skydive.co.nz	7/17/2018 4:59 PM
96	peter@campglenorchy.co.nz	7/17/2018 3:58 PM
97	sunil.siraboina@scenichotels.co.nz	7/17/2018 3:51 PM
98	bookings@hospitalityplus.co.nz	7/17/2018 3:32 PM
99	barry@taupodebretts.com	7/17/2018 3:30 PM
100	nats@takeme2theworld.com	7/17/2018 3:27 PM
101	gm@ffhl.co.nz	7/17/2018 2:59 PM
102	contact@caverafting.com	7/17/2018 9:35 AM
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104	brian@maugers.com	7/16/2018 1:21 PM
105	info@birdsong.co.nz	7/13/2018 5:52 PM
106	ah-leen.rayner@kiwirail.co.nz	7/13/2018 2:18 PM
107	anna.black@generaltravel.co.nz	7/13/2018 1:31 AM
108	Graeme.Stephens@skycity.co.nz	7/12/2018 4:45 PM
109	philiphao8@gmail.com	7/11/2018 11:00 PM
110	Paddy@farewellspit.co.nz	7/11/2018 9:32 AM
111	craig.douglas@skyline.co.nz	7/10/2018 2:01 PM
112	jeroen@diving.co.nz	7/10/2018 10:41 AM
113	info@proguides.co.nz	7/9/2018 9:52 PM
114	paul@nzski.com	7/9/2018 5:58 PM
115	info@rapaura.com	7/9/2018 5:33 PM
116	Josh@stayatbase.com	7/9/2018 2:00 PM
117	matt@wellingtontours.maori.nz	7/9/2018 12:03 PM
118	stay@millersflat.co.nz	7/9/2018 9:30 AM

State of the Tourism Industry 2018

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122	daritchie@xtra.co.nz	7/7/2018 6:25 PM
123	matheson@slheli.co.nz	7/7/2018 2:25 PM
124	david@nzencounters.com	7/7/2018 1:45 PM
125	jo@visitruapehu.com	7/7/2018 6:22 AM
126	lesley.immink@hotmail.com	7/6/2018 7:05 PM
127	rroberts@dnairport.co.nz	7/6/2018 4:16 PM
128	jane@tucker.co.nz	7/6/2018 4:03 PM
129	info@haastrivermotels.co.nz	7/6/2018 3:22 PM
130	aidan@tourism.net.nz	7/6/2018 2:42 PM
131	events@thedreammaker.co.nz	7/6/2018 1:01 PM
132	jason@thevillageinn.co.nz	7/6/2018 11:32 AM
133	dick.breukink@accor.com	7/6/2018 11:19 AM
134	gm@dcrail.nz	7/6/2018 11:07 AM
135	brendan@breadcrumbs.nz	7/6/2018 9:03 AM
136	bruce@midcanterburynz.com	7/6/2018 8:52 AM
137	jeremy.samuels@sofitelqueenstown.com	7/6/2018 8:45 AM
138	tait@sailsashore.co.nz	7/5/2018 11:38 PM
139	wildsouthnz@gmail.com	7/5/2018 10:28 PM
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141	tranquility@xtra.co.nz	7/5/2018 7:31 PM
142	ikeshita.naoto@his-world.com	7/5/2018 7:08 PM
143	leigh.frame@accor.com	7/5/2018 6:34 PM
144	george@royalecoachlines.co.nz	7/5/2018 6:25 PM
145	steven@beyondtheblue.co.nz	7/5/2018 5:23 PM
146	president@bandbassociation.co.nz; info@cobden.co.nz	7/5/2018 5:19 PM
147	janice@ahp.nz	7/5/2018 4:59 PM
148	felix@owenriverlodge.co.nz	7/5/2018 4:57 PM
149	gm@aspenhotelnz.com	7/5/2018 4:56 PM
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152	amy@eaglesnest.co.nz	7/5/2018 4:29 PM
153	ceo@skydivefranz.co.nz	7/5/2018 4:22 PM
154	paul@helitours.co.nz	7/5/2018 4:16 PM
155	flyfishing@glendeer.co.nz	7/5/2018 4:14 PM
156	info@paihiamountainbikes.co.nz	7/5/2018 4:09 PM
157	kent.breeze@ihg.com	7/5/2018 3:27 PM
158	2grumpys@xtra.co.nz	7/5/2018 3:27 PM
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State of the Tourism Industry 2018

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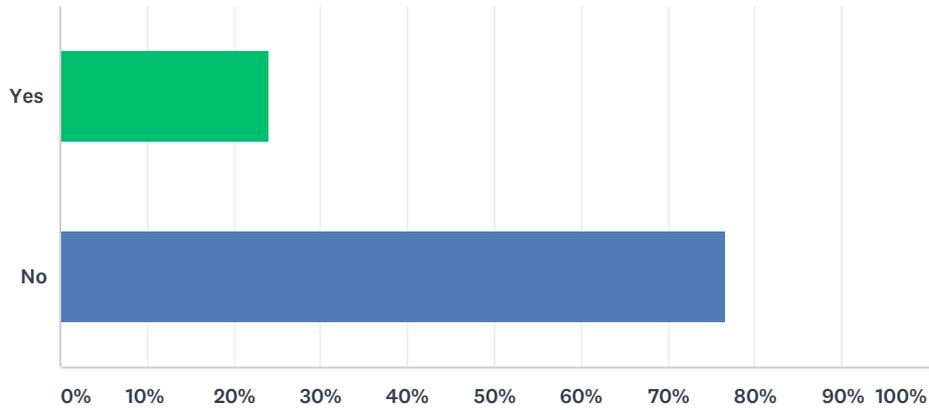
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Q21 Would you like your organisation to be considered as case study in the final report?

Answered: 383 Skipped: 48



ANSWER CHOICES	RESPONSES	
Yes	24.02%	92
No	76.50%	293
Total Respondents: 383		