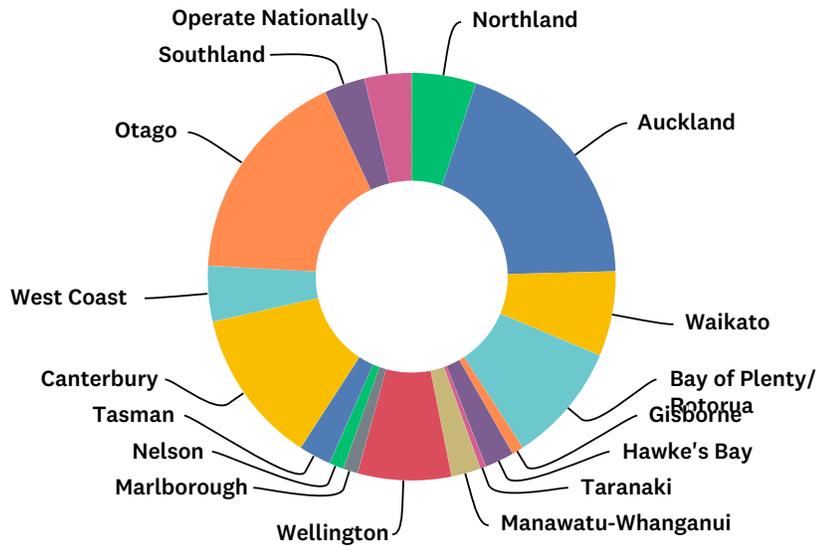


## Q1 Where is your primary location?

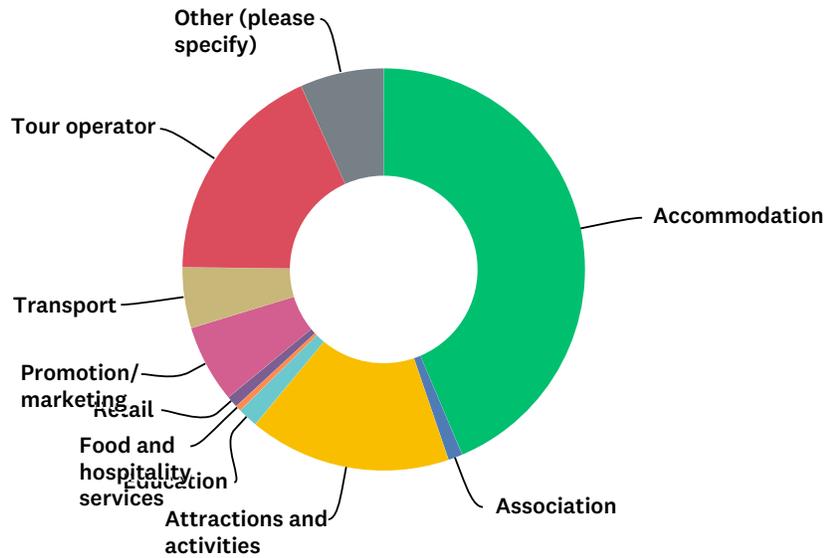
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ANSWER CHOICES	RESPONSES	
Northland	5.10%	22
Auckland	19.49%	84
Waikato	6.73%	29
Bay of Plenty/ Rotorua	9.51%	41
Gisborne	0.93%	4
Hawke's Bay	2.32%	10
Taranaki	0.46%	2
Manawatu-Whanganui	2.32%	10
Wellington	7.42%	32
Marlborough	1.16%	5
Nelson	1.16%	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
<b>TOTAL</b>		<b>431</b>

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

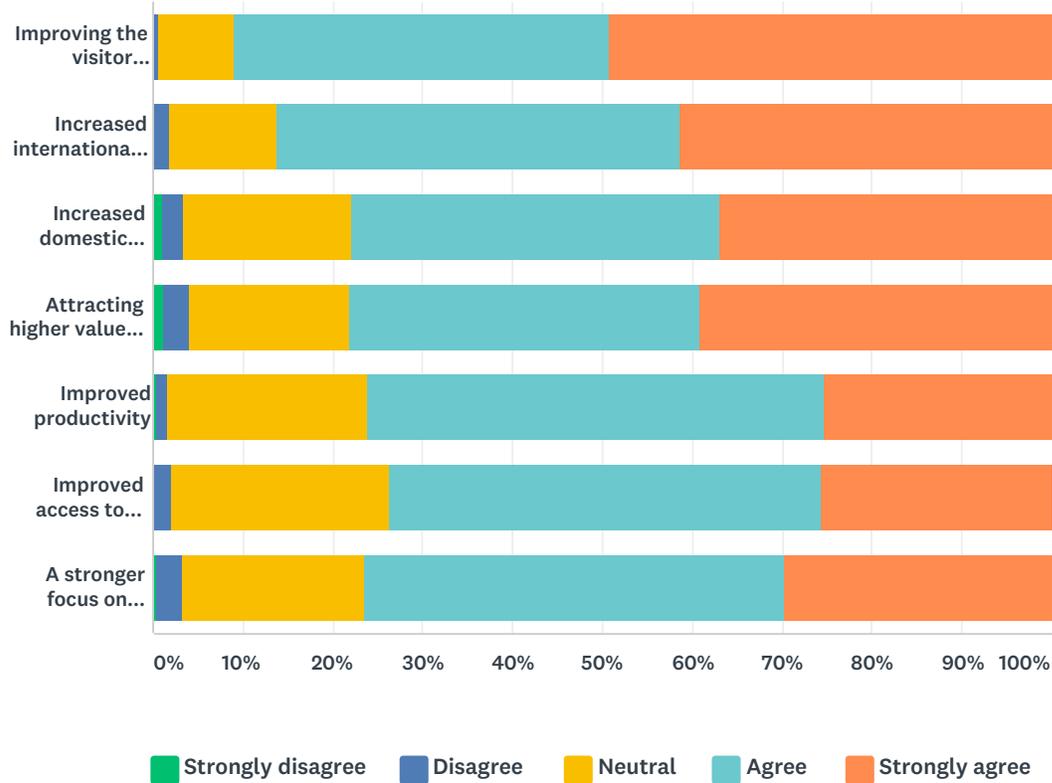
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ANSWER CHOICES	RESPONSES	
Accommodation	43.62%	188
Association	1.16%	5
Attractions and activities	16.24%	70
Education	1.62%	7
Food and hospitality services	0.46%	2
Retail	0.93%	4
Promotion/ marketing	6.26%	27
Transport	4.87%	21
Tour operator	18.10%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

### 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?

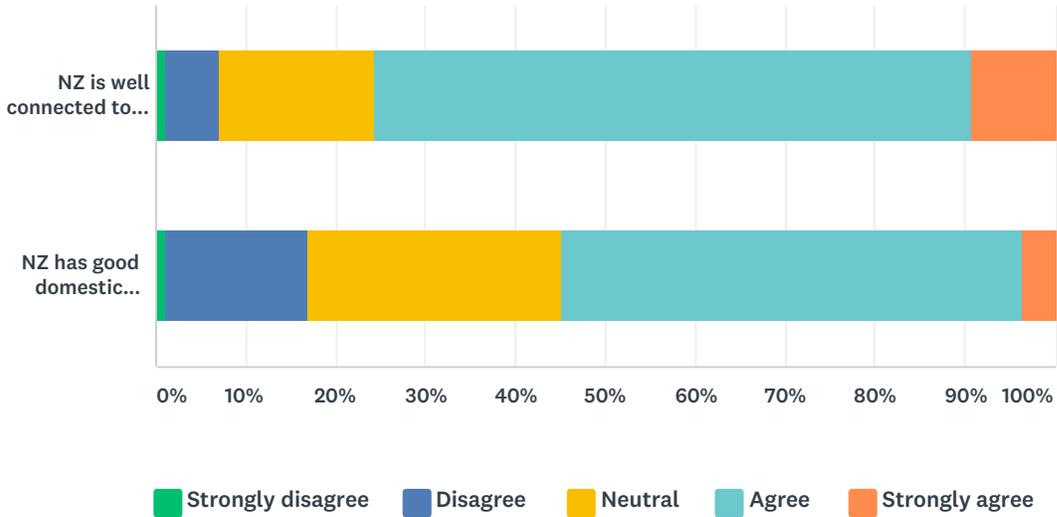
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	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
Improving the visitor experience	0.23% 1	0.46% 2	8.35% 36	41.76% 180	49.19% 212	431	4.39
Increased international connectivity	0.23% 1	1.62% 7	12.06% 52	44.78% 193	41.30% 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

## 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

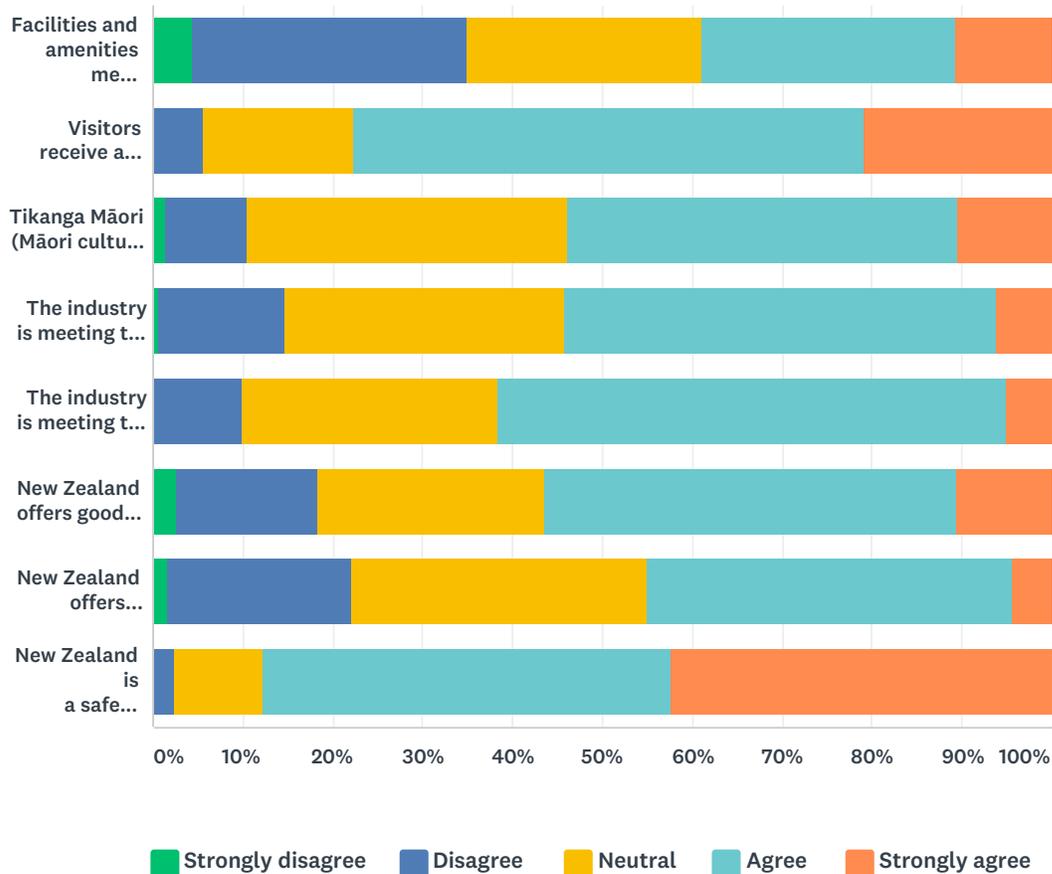
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	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
NZ is well connected to international markets	0.93% 4	6.03% 26	17.40% 75	66.36% 286	9.28% 40	431	3.77
NZ has good domestic connections for visitors	0.93% 4	16.01% 69	28.31%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

## 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

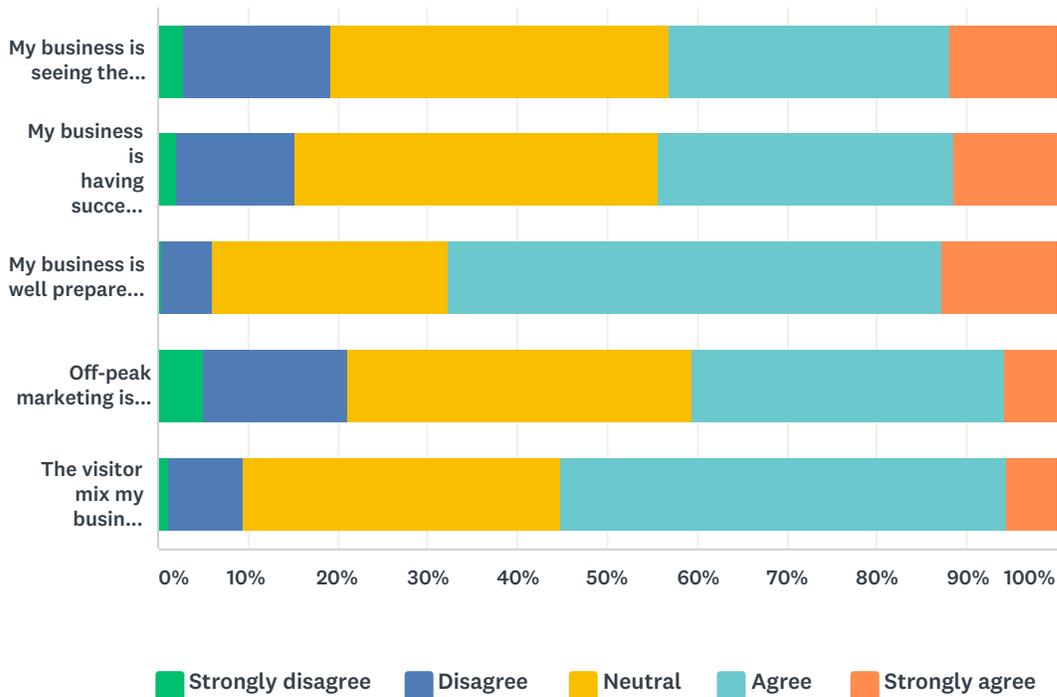
## State of the Tourism Industry 2018

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New Zealand is a safe destination	0.23%	2.09%	9.98%	45.24%	42.46%		
	1	9	43	195	183	431	4.28

**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**

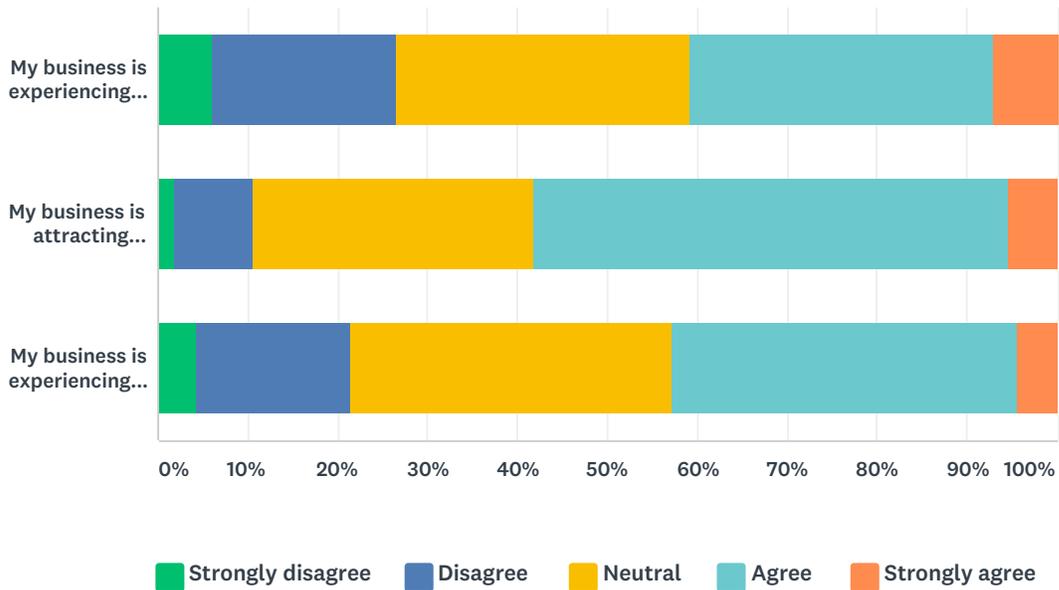
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	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
My business is seeing the benefits of the work being done to attract high value visitors	2.78% 12	16.47% 71	37.59% 162	31.32% 135	11.83% 51	431	3.33
My business is having 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

## 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

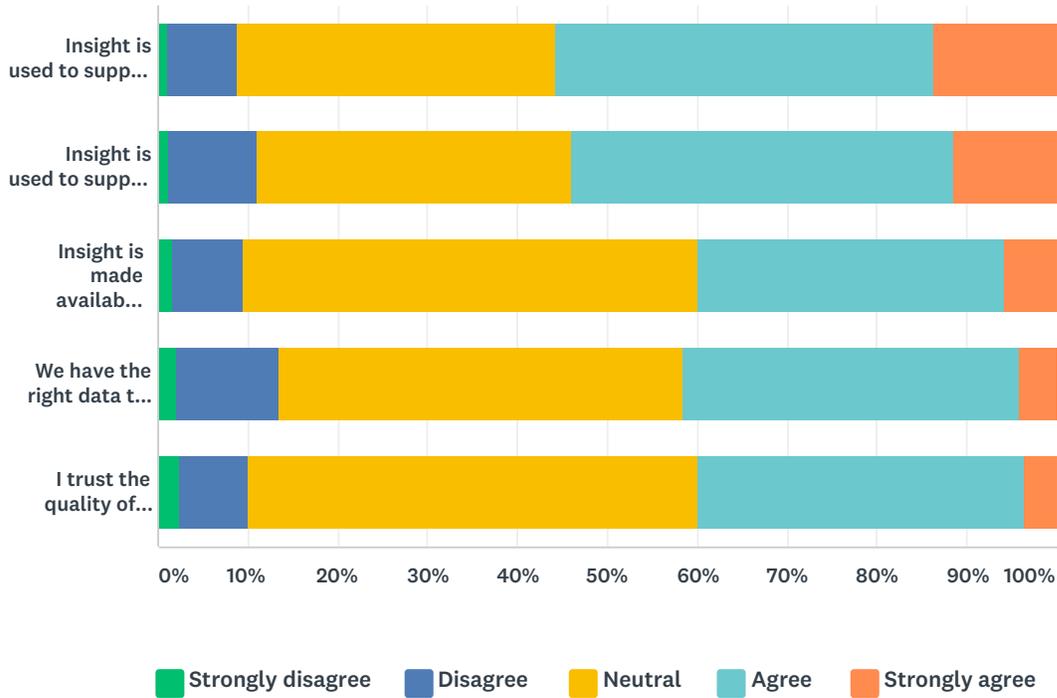
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	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
My business is experiencing more visitors in the off-peak season(s)	6.03% 26	20.42% 88	32.71% 141	33.87% 146	6.96% 30	431	3.15
My business is attracting visitors from a 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

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

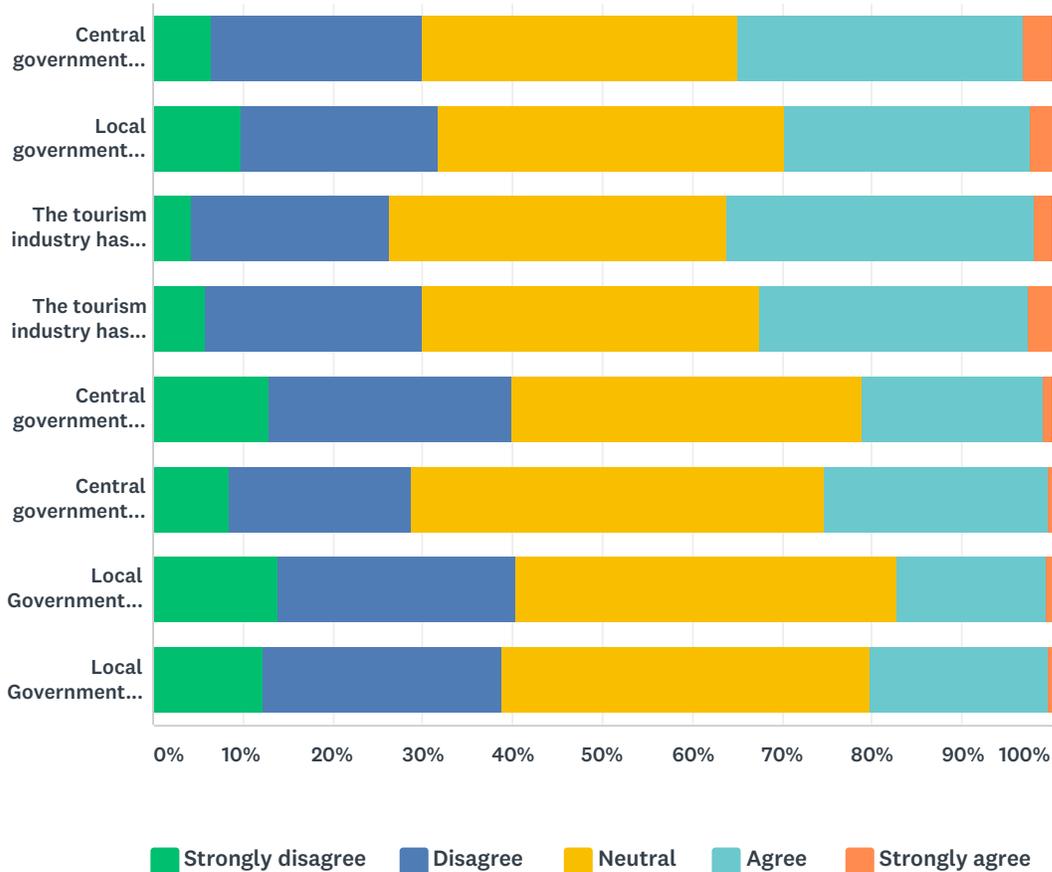
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	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
Insight is used to support strategic decision making in my business	0.93% 4	7.89% 34	35.27% 152	42.23% 182	13.69% 59	431	3.60
Insight is used to support operational decision 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

**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



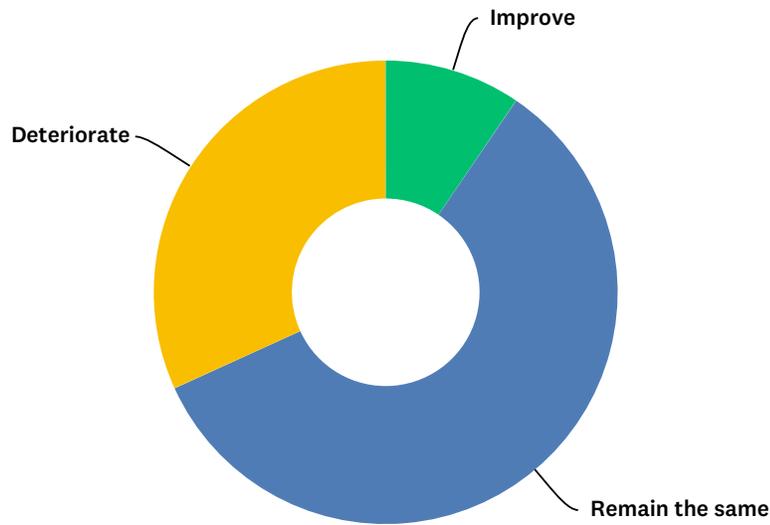
	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
Central government policy settings support the tourism industry	6.50% 28	23.43% 101	35.03% 151	31.79% 137	3.25% 14	431	3.02
Local government policy settings support the tourism industry	9.74% 42	22.04% 95	38.52% 166	27.38% 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

## State of the Tourism Industry 2018

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?

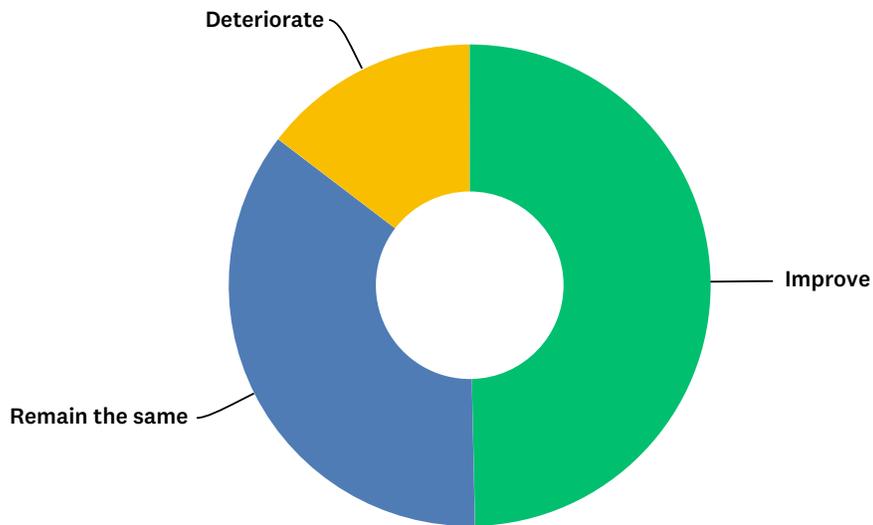
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ANSWER CHOICES	RESPONSES	
Improve	9.51%	41
Remain the same	58.70%	253
Deteriorate	31.79%	137
TOTAL		431

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

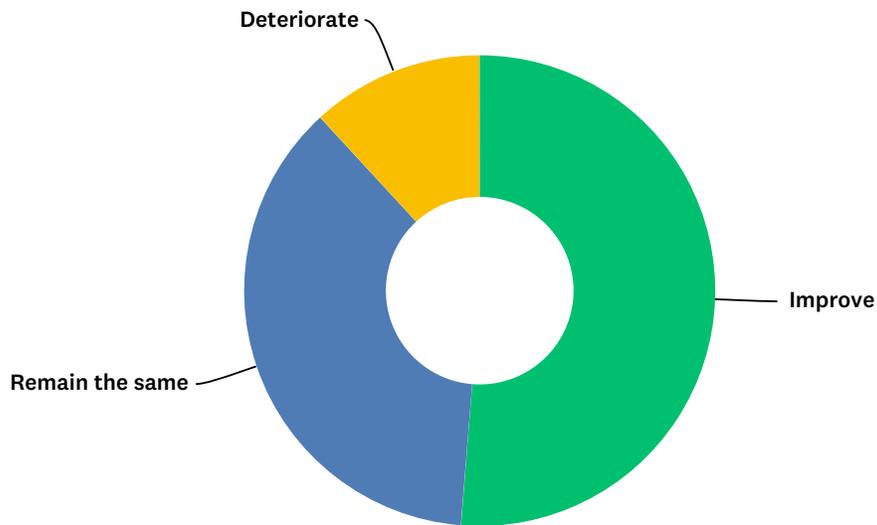
Answered: 431 Skipped: 0



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?

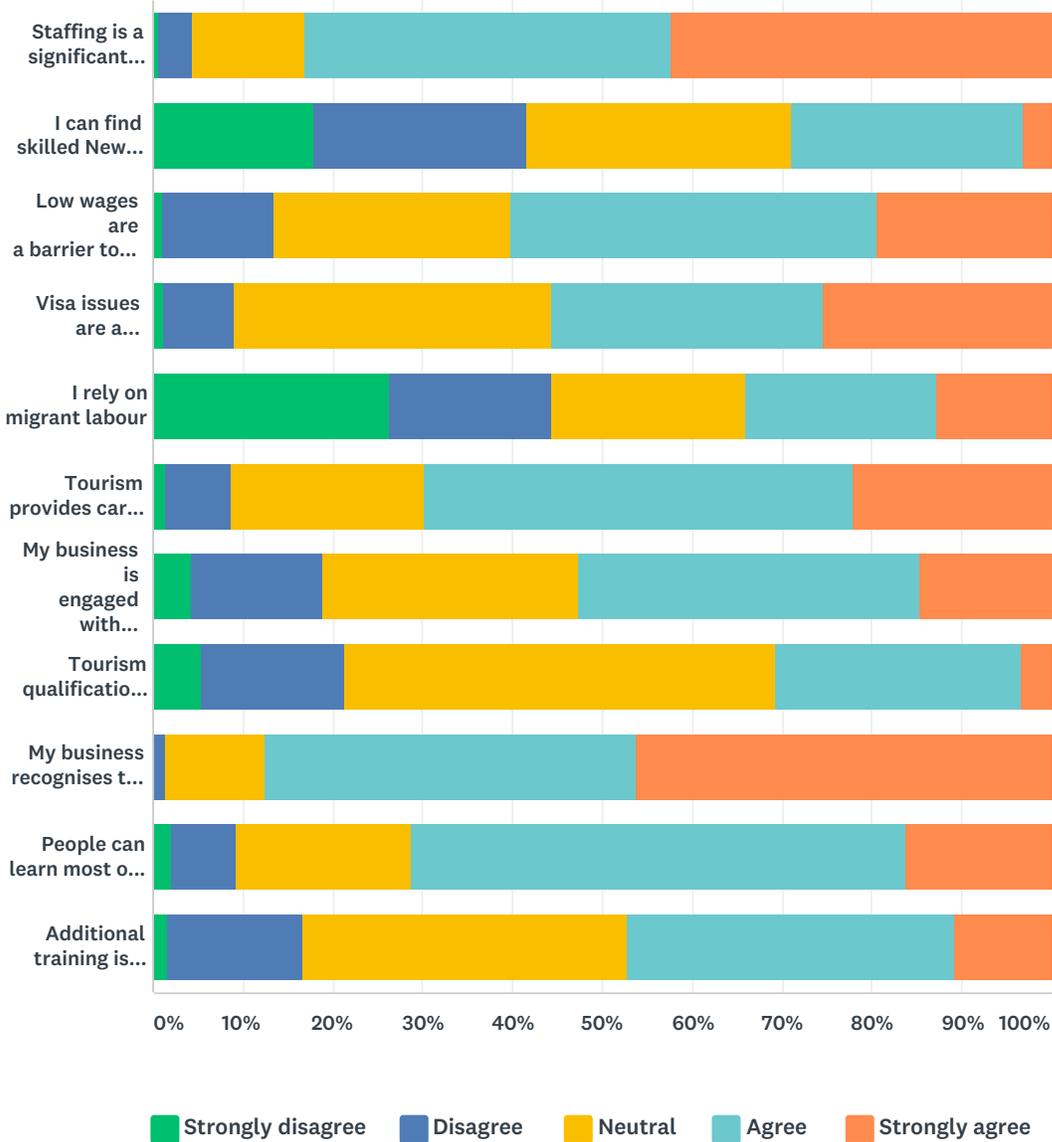
Answered: 431 Skipped: 0



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

### 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



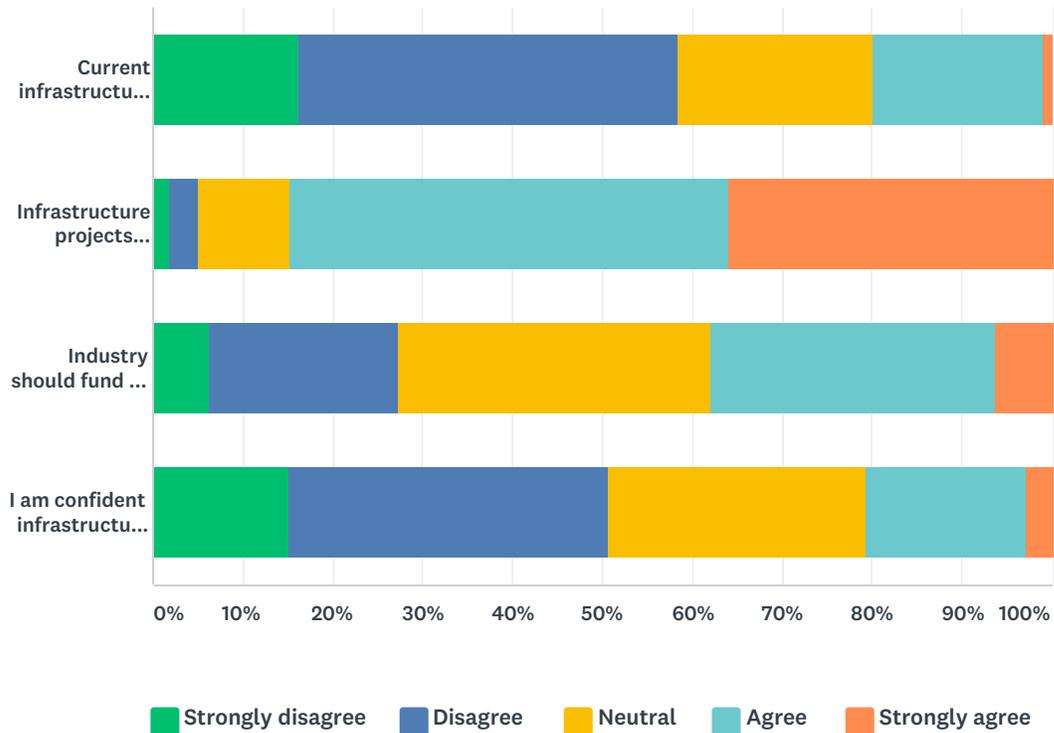
	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
Staffing is a significant issue for the New Zealand tourism industry.	0.70% 3	3.71% 16	12.53% 54	40.60% 175	42.46% 183	431	4.20
I can find skilled New Zealanders to work in my business	17.87% 77	23.67% 102	29.47% 127	25.75% 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

## State of the Tourism Industry 2018

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
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

**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**

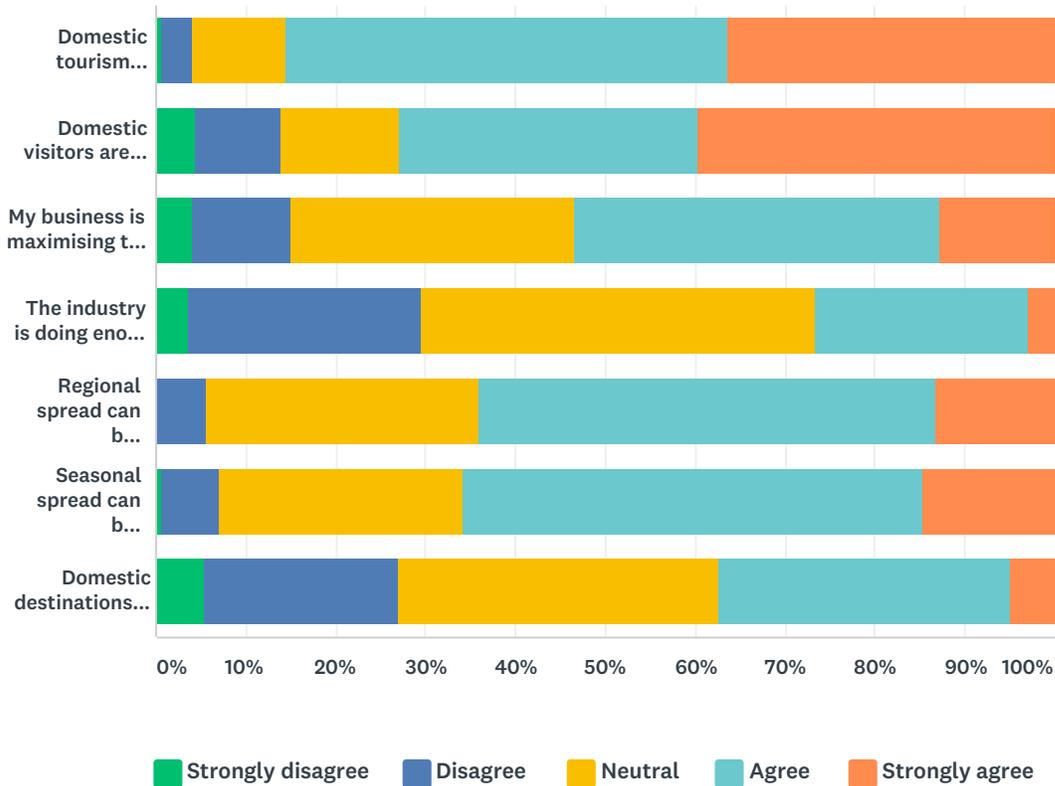
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	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
Current infrastructure can generally meet the needs of visitors	16.24% 70	42.23% 182	21.58% 93	19.03% 82	0.93% 4	431	2.46
Infrastructure projects require additional central 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

**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**

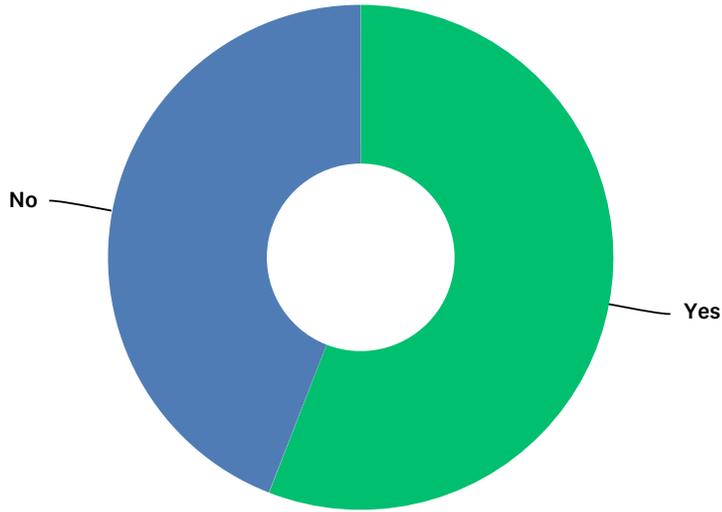
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	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
Domestic tourism significantly contributes to regional economies	0.70% 3	3.25% 14	10.44% 45	49.19% 212	36.43% 157	431	4.17
Domestic visitors are important for my business	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

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 Commitments. Has your business signed up to the tourism sustainability commitment?

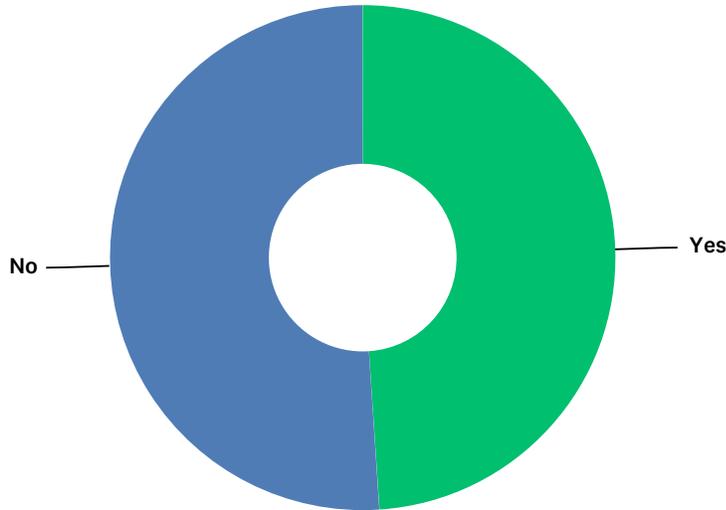
Answered: 431 Skipped: 0



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

### 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

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

Answered: 246 Skipped: 185

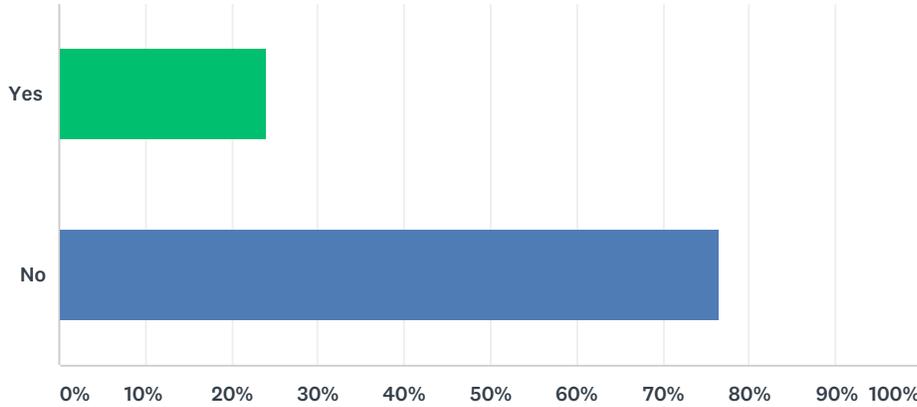
## Q20 Contact Information(Not compulsory)

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

## 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		