Technical Appendix to State of the Tourism Industry 2016

This reference document contains supporting data to accompany the State of the Industry 2016 and a copy of the SOI online survey.

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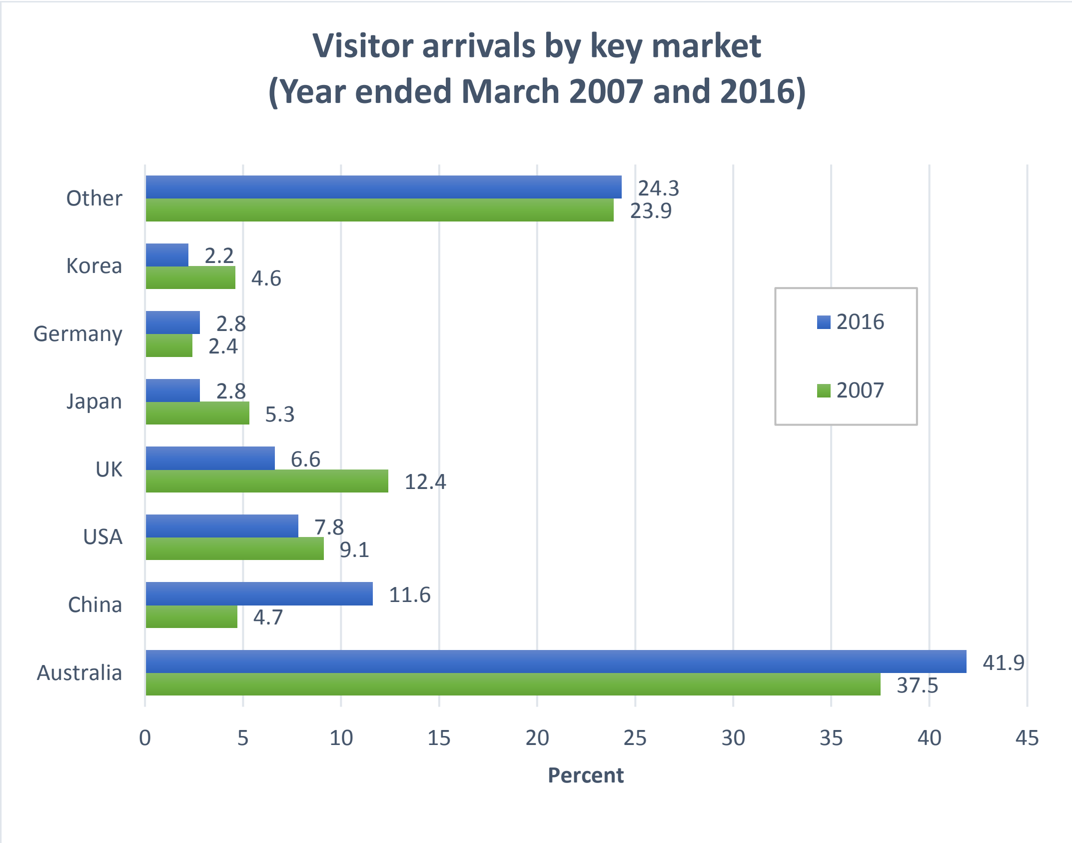
Supplementary SOI data

This section contains graphs and supporting material for the data presented in the State of the Industry 2016 report. This material relates to international arrivals, air connectivity, visitor experience, length of stay, convention/conference arrivals, seasonality data for selected markets and accommodation data.

International arrivals

Figure 1 shows the percentage change in arrivals by key markets between 2007 and 2016. The graph also includes Korea as it was the sixth largest market in 2007 (Germany was seventh) – in 2016 these positions were reversed.

Figure 1 Visitor arrivals by top 7 markets (Year ended March 2007 & 2016)



Source: Statistics New Zealand

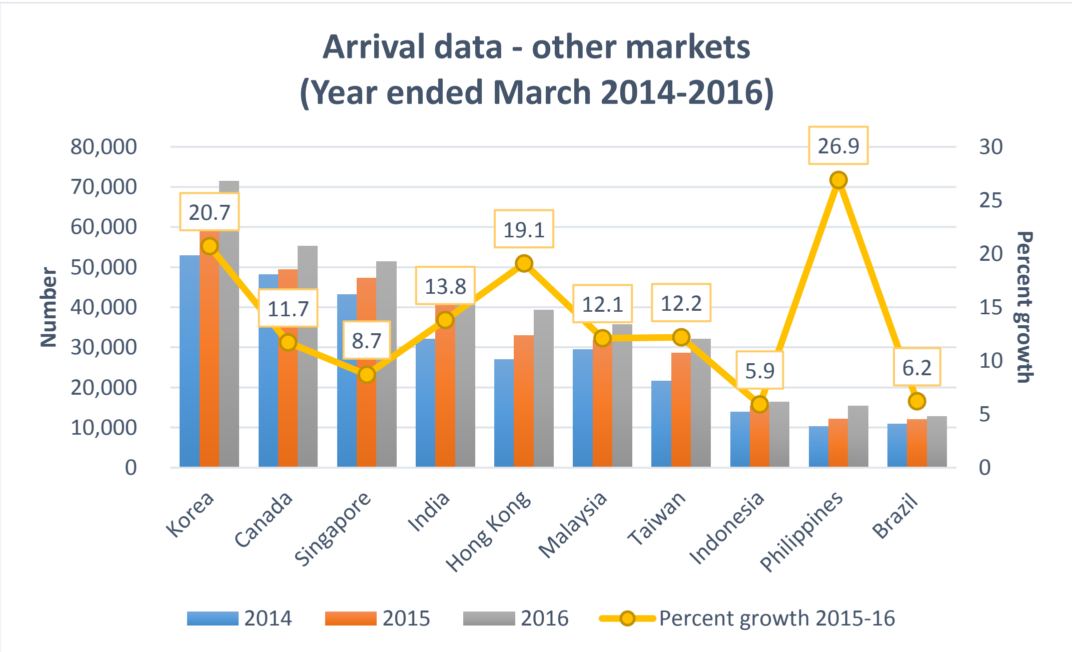
Figure 2 shows the change in the number of arrivals in the 12 months to March 2016. Figure 7 in the SOI presents these data as percentages (growth).

Figure 2 Change in international arrivals (Year ended March 2015-2016)

Growth of other markets

Figure 3 shows the arrival data for selected markets over the last three years (Year ended March 2014-2016) and the percentage growth of each market for the year ended March 2016. These data show strong growth from the Korean (20.7%), Hong Kong (19.1%) and Philippine (26.9%) markets, although arrivals from the Philippines are still relatively small (15,456 in 2016).

Figure 3 Arrival data – other markets (Year ended March 2014-2016)

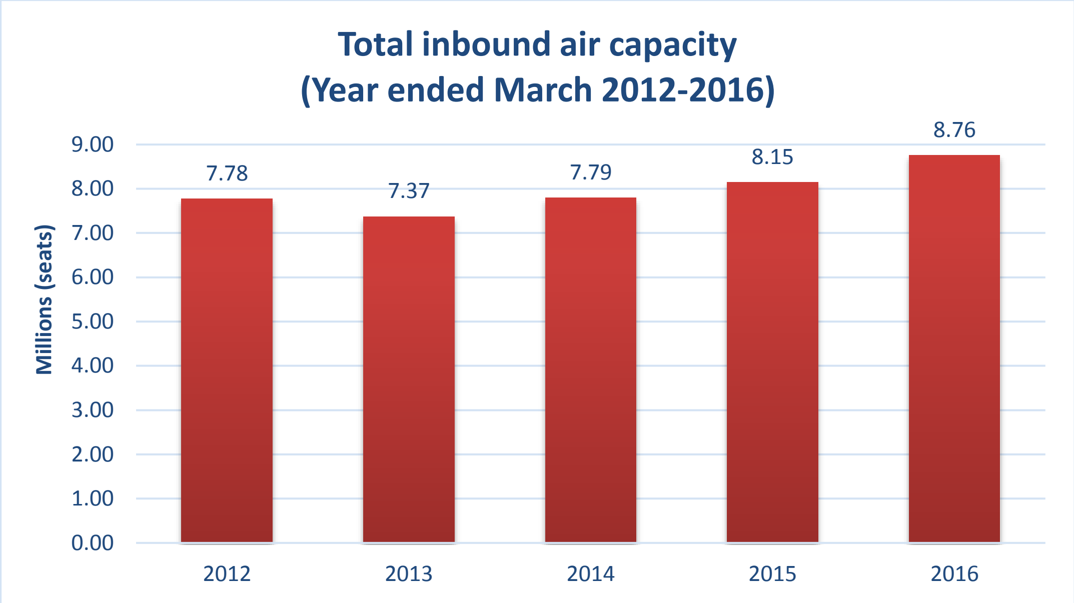


Source: Statistics New Zealand

Air connectivity

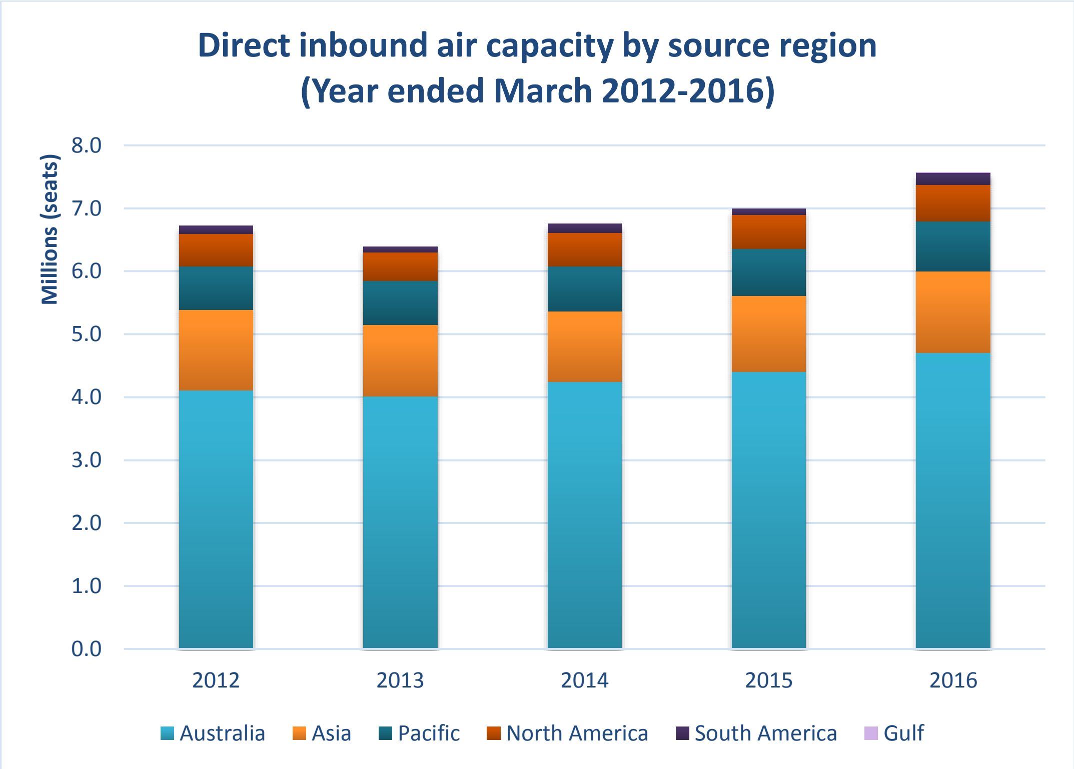
Total inbound air capacity includes those arriving in NZ on through flights (Figure 4) while direct inbound refers only to those disembarking flights in NZ (Figures 5 and 6).

Figure 4 Total inbound air capacity (Year ended March 2012-2016)



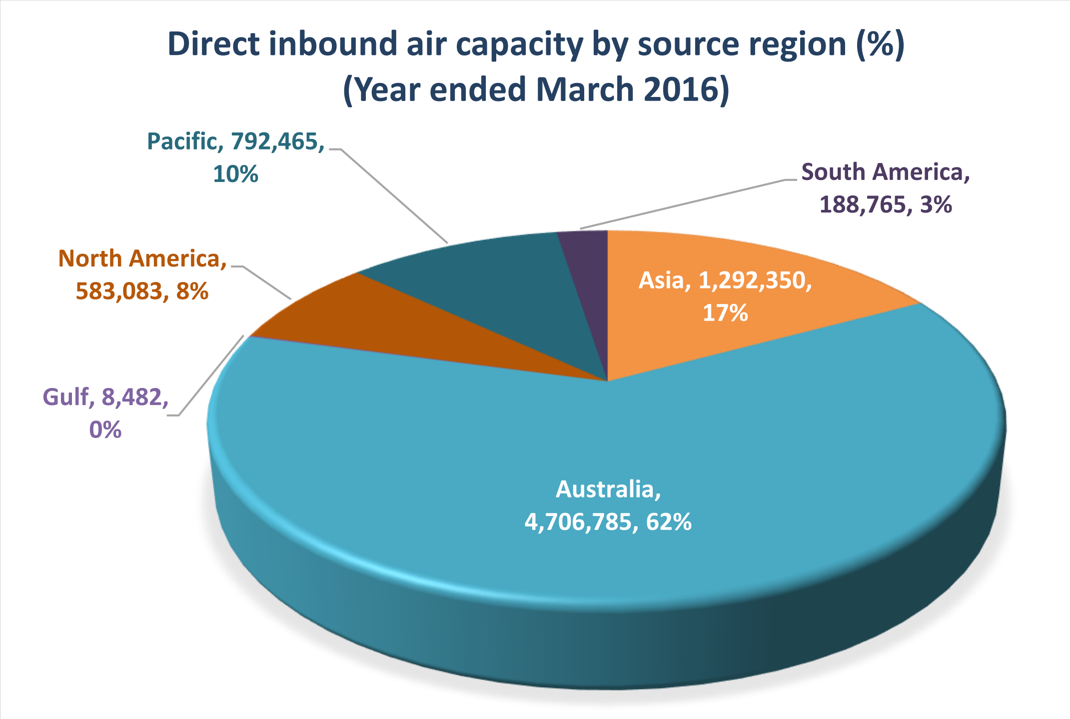
Source: Sabre Market Intelligence

Figure 5 Direct inbound air capacity by source region (Year ended March 2012-2016)



Source: Sabre Market Intelligence

Figure 6 Direct inbound air capacity by source region (%) (Year ended March 2016)

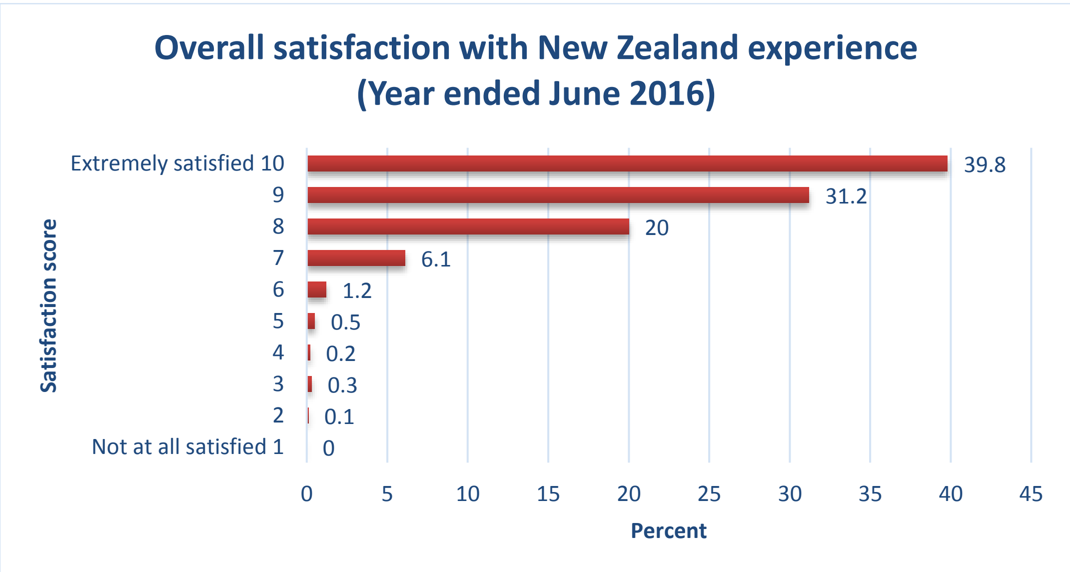


Source: Sabre Market Intelligence

Visitor experience

As reported in the SOI, visitor satisfaction is high with 91% scoring 8 or higher (out of 10) (Figure 7).

Figure 7 Overall satisfaction with New Zealand experience (Year ended June 2016)



Source: Experience Monitor 2016, Tourism New Zealand

Length of stay

The SOI 2016 only showed median stay days (Figure 11) and total stay days (Figure 12) for the six key markets in 2016. The graphs presented in Figures 8 – 13 show average, median and total stay days for each of the six key markets. Source for all graphs: Statistics New Zealand.

Figure 8 Length of stay – Australia

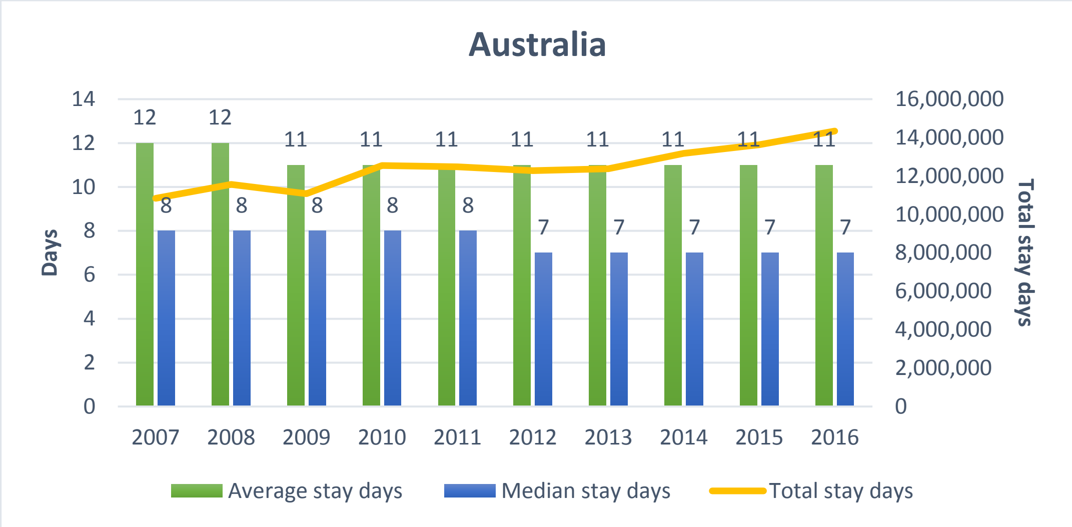


Figure 9 Length of stay – China

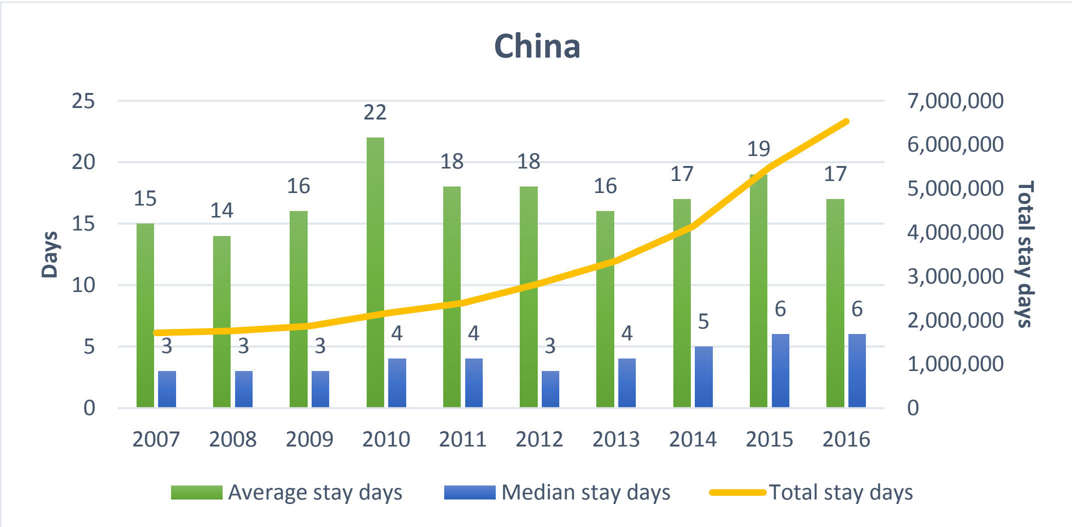


Figure 10 Length of stay – USA

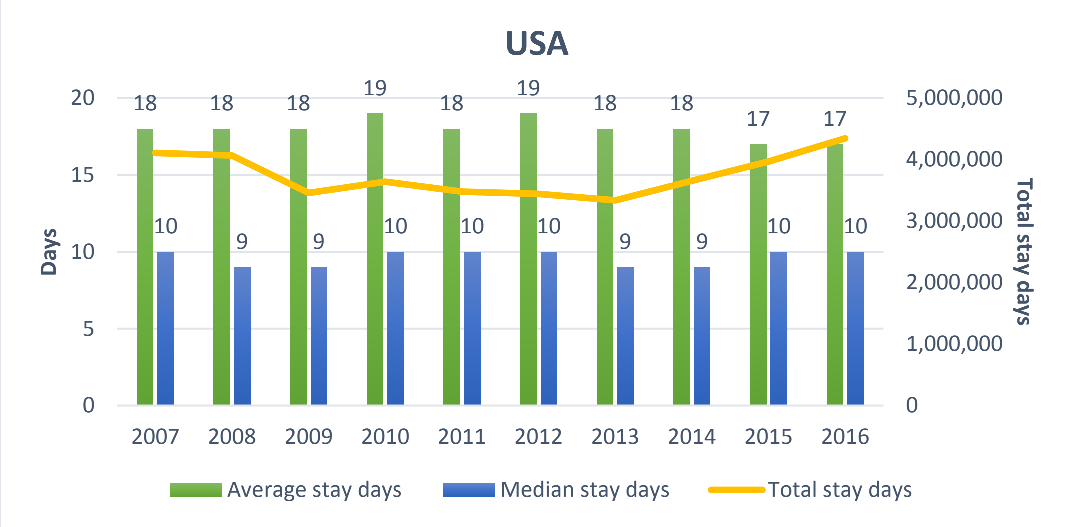


Figure 11 Length of stay – UK

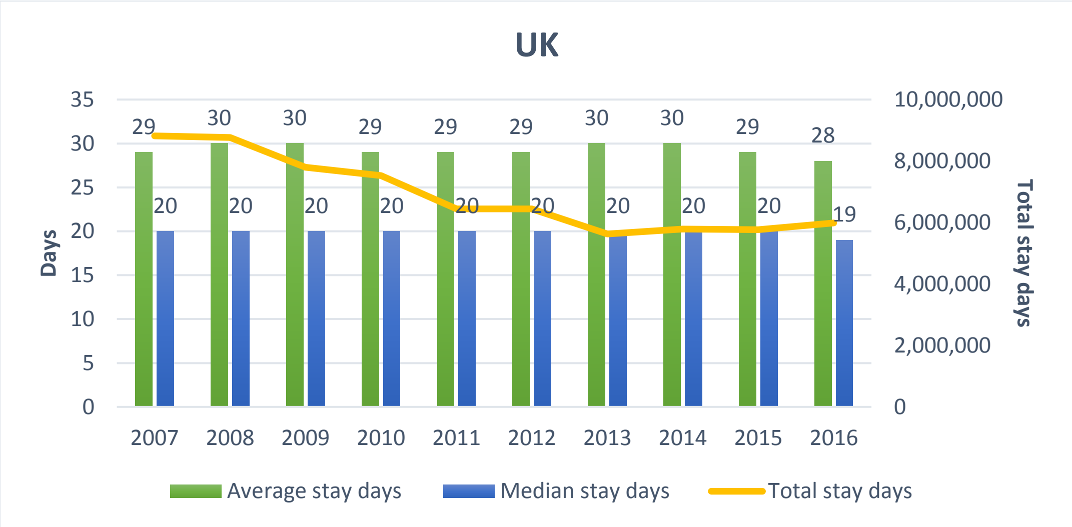


Figure 12 Length of stay – Japan

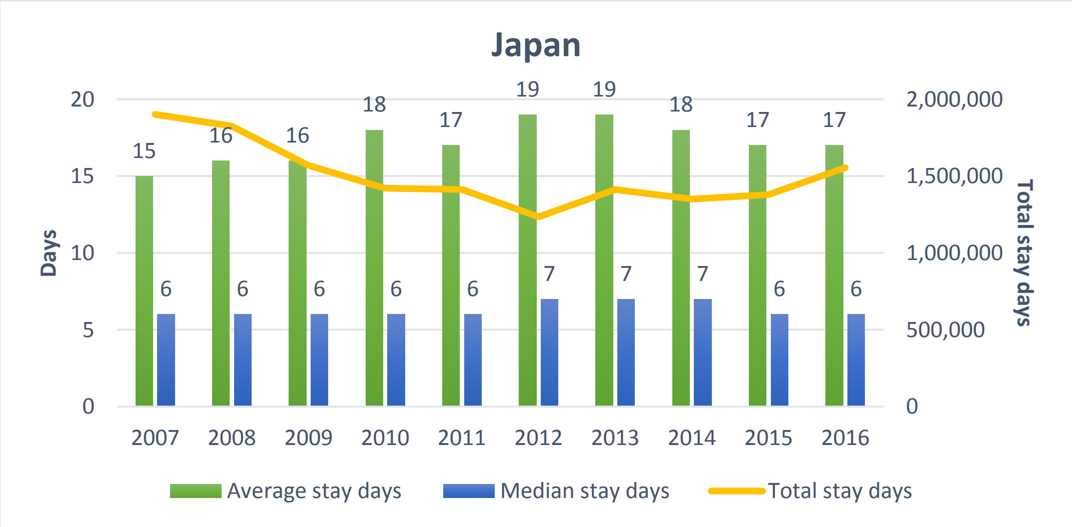
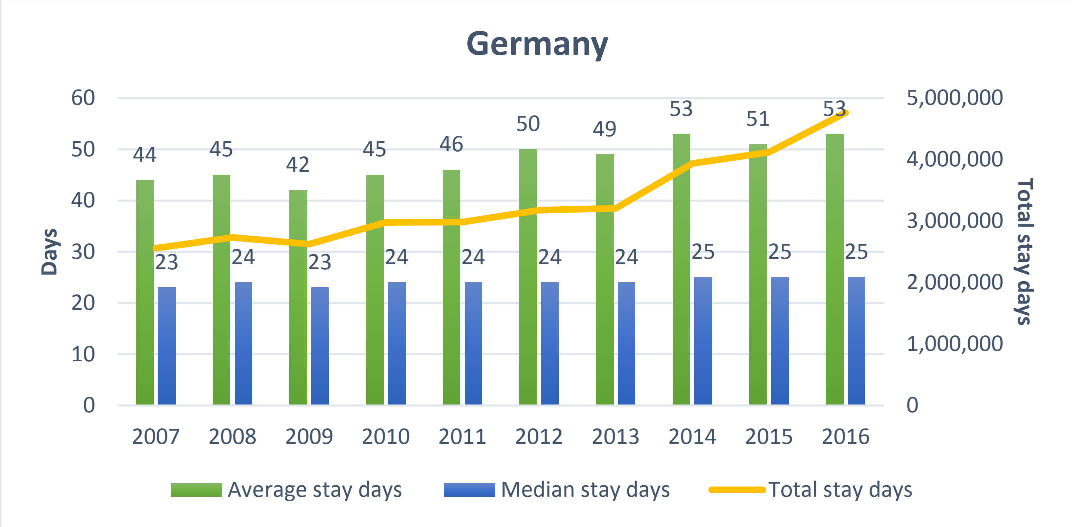


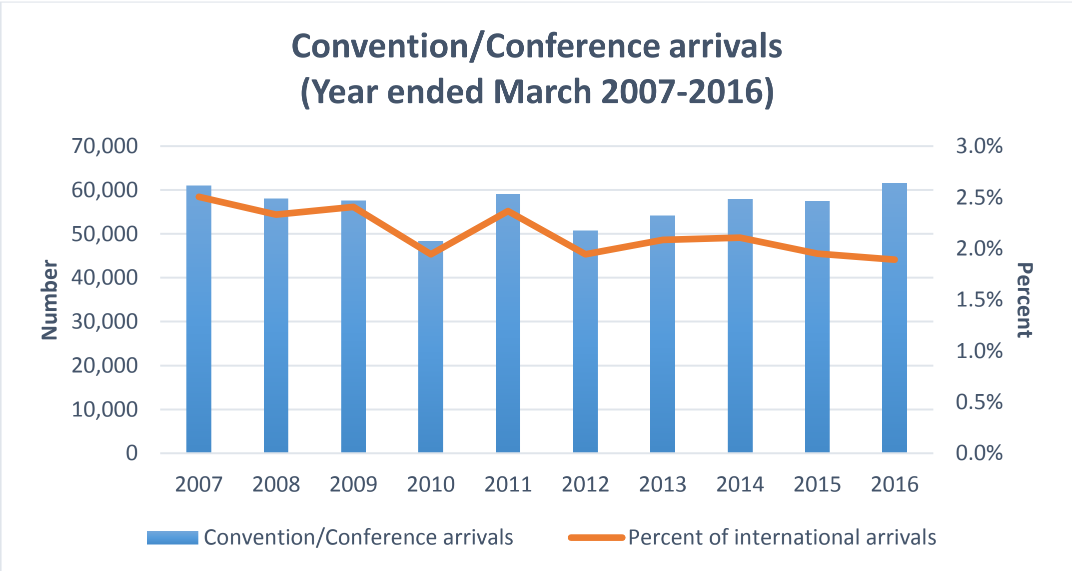
Figure 13 Length of stay – Germany



Convention/Conference data

Figure 14 shows that although the number of Convention/Conference visitors have increased they have fallen as a percentage of all arrivals. The peak month for Convention/Conference arrivals in 2016 was November (see Figure 15).

Figure 14 Convention/Conference arrivals (Year ended March 2007-2016)

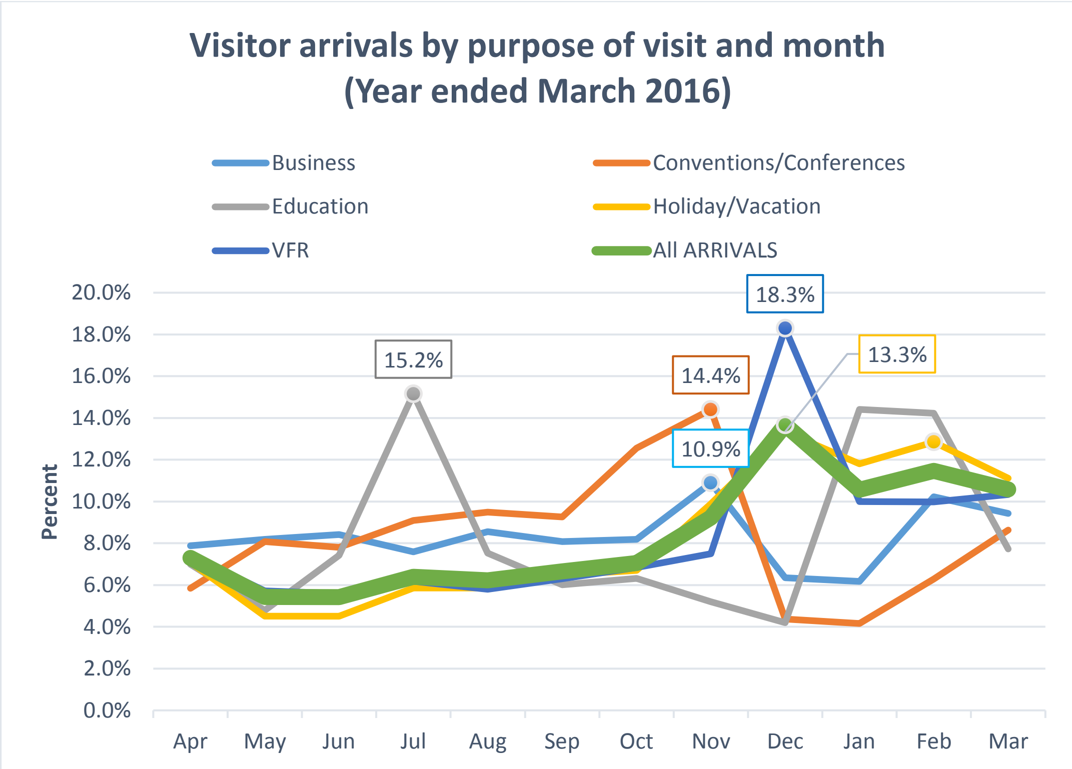


Source: Statistics New Zealand

Seasonality

To allow easy comparison of arrivals from different markets, the seasonality graph in the SOI 2016 report (Figure 16) showed the percentage of arrivals by month for only the top four markets and for total arrivals. Figure 15 shows seasonality by purpose of visit for the year ended March 2016 for all international arrivals.

Figure 15 Visitor arrivals by purpose and month of visit (Year ended March 2016)



Source: Statistics New Zealand

The graphs presented in Figures 16 – 19 show the number of arrivals from 12 markets (the top six and six selected) by month, for the 2006, 2011 and 2016 March end years. These graphs clearly illustrate the changes in arrivals from each market, as well as seasonal distribution for these arrivals. Over the last decade, seasonality has become more pronounced for the majority of these markets with most having a pronounced peak in December. Other arrival peaks of note include:

- a January peak in arrivals from Brazil (related to new air services)
- May peak in arrivals from Philippines (possibly related to new air services)
- July peak from Indonesia (related to Ramadan)
- May peak from India (monsoon-related)
- August peak from Japan (skiing)
- June 2006 peak from the UK (related to the Lions rugby tour)

Figure 16 Seasonality – Australia, China and USA (Year ended March 2006, 2011 & 2016)

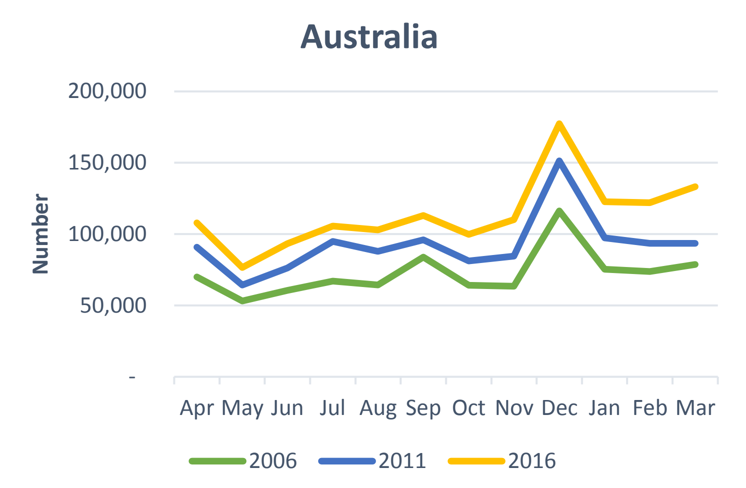
1,364,736 arrivals in 2016

↑57% since 2006

<u>Arrival peak</u>

13% December

41% Dec-Mar



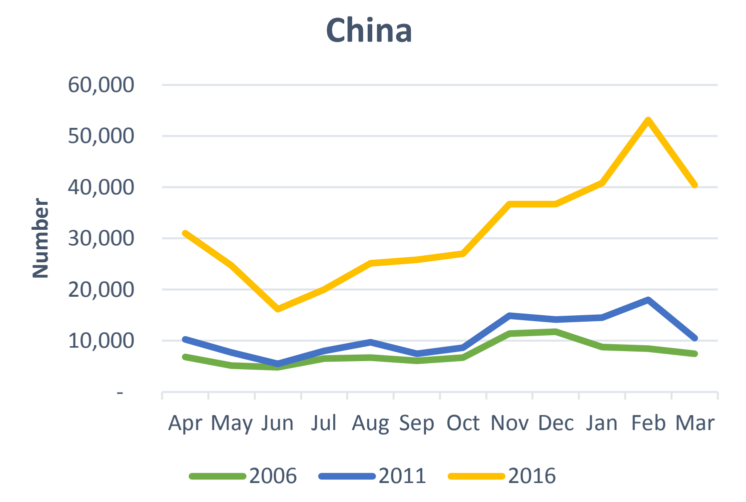
377,840 arrivals in 2016

↑316% since 2006

<u>Arrival peak</u>

14% February

36% Jan-Mar



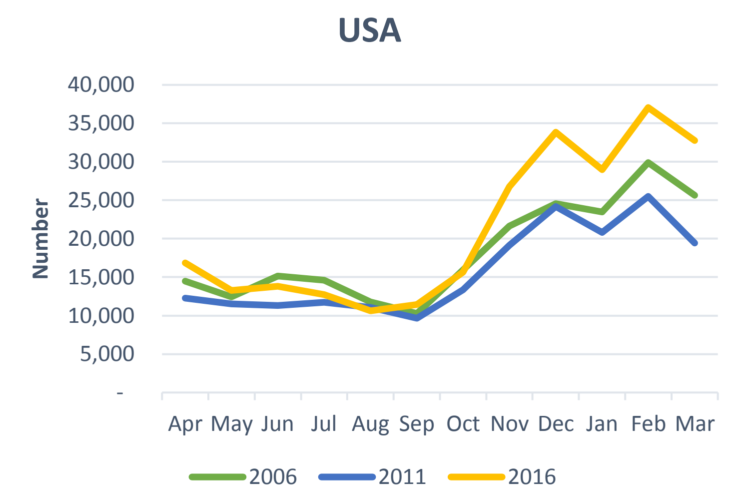
253,792 arrivals in 2016

↑15% since 2006

<u>Arrival peaks</u>

15% February

13% December



Source: Statistics New Zealand

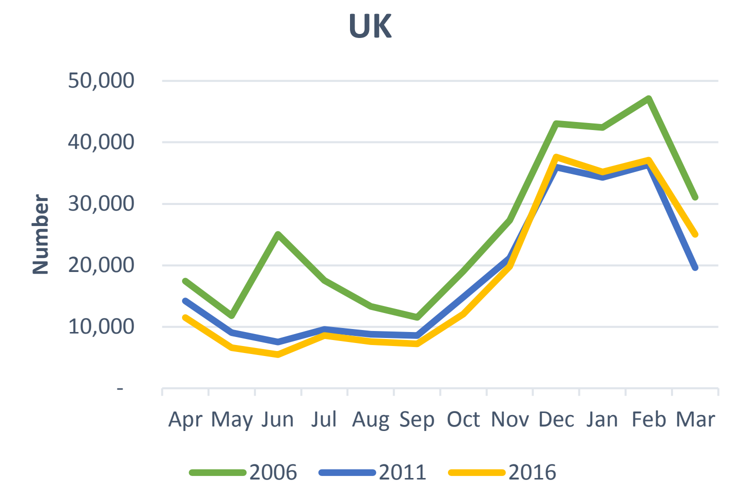
Figure 17 Seasonality – UK, Japan and Germany (Year ended March 2006, 2011 & 2016)

213,792 arrivals in 2016

↓30% since 2006

<u>Arrival peak</u>

51% Dec-Feb



91,344 arrivals in 2016

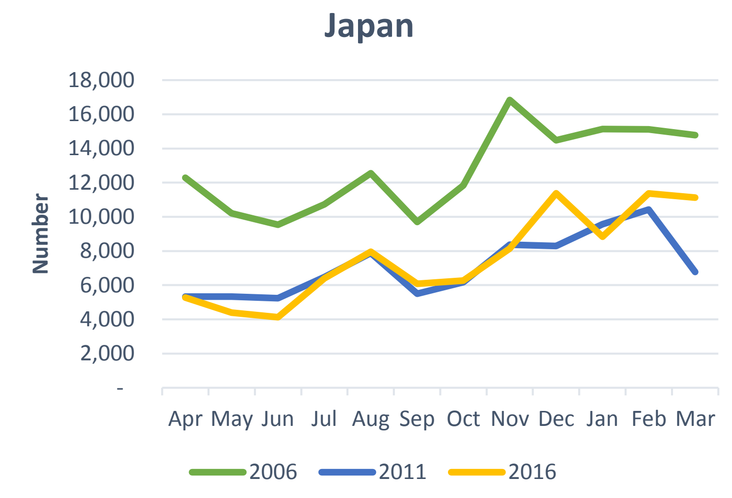
↓40% since 2006

<u>Arrival peaks</u>

12% December

12% February

12% March



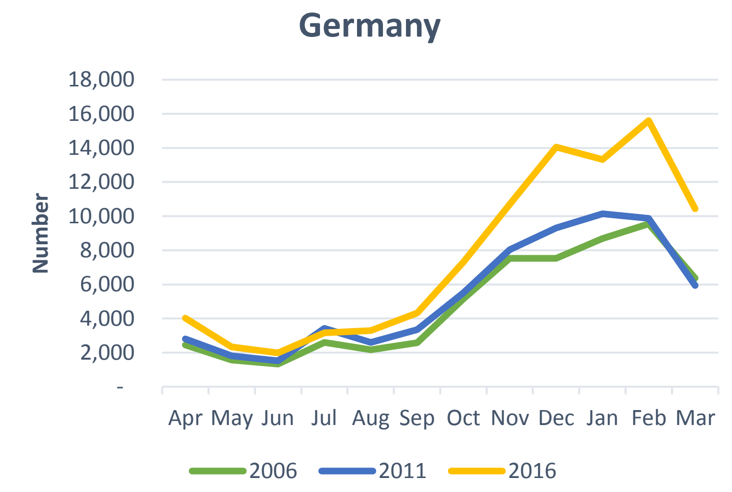
90,496 arrivals in 2016

↑57% since 2006

<u>Arrival peak</u>

17% February

47% Dec-Feb



Source: Statistics New Zealand

Figure 18 Seasonality – Singapore, India and Malaysia (Year ended March 2006, 2011 & 2016)

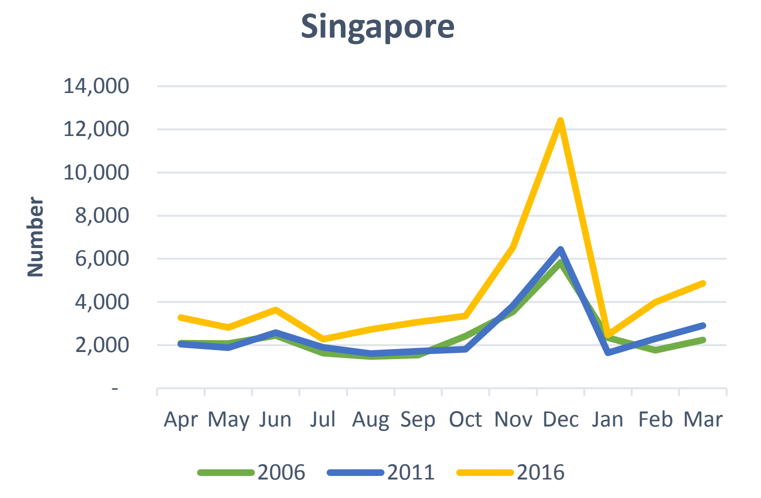
51,408 arrivals in 2016

↑75% since 2006

<u>Arrival peak</u>

24% December

Peak becoming more pronounced



46,512 arrivals in 2016

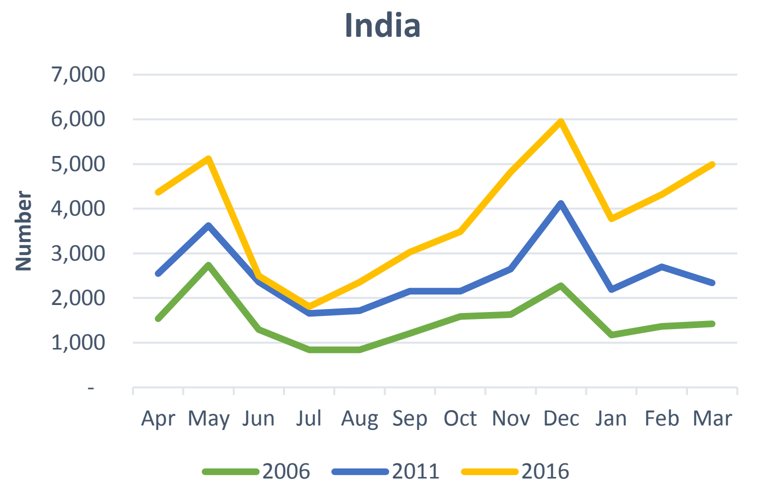
↑159% since 2006

<u>Arrival peaks</u>

13% December

11% March

11% May



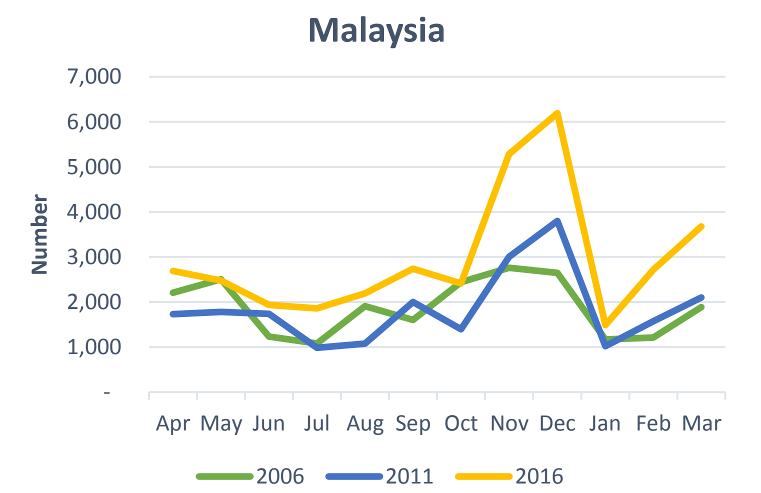
35,664 arrivals in 2016

↑57% since 2006

<u>Arrival peaks</u>

17% December

10% March



Source: Statistics New Zealand

Figure 19 Seasonality – Indonesia, Philippines and Brazil (Year ended March 2006, 2011 & 2016)

16,368 arrivals in 2016

↑132% since 2006

<u>Arrival peaks</u>

25% July

15% December

15,456 arrivals in 2016

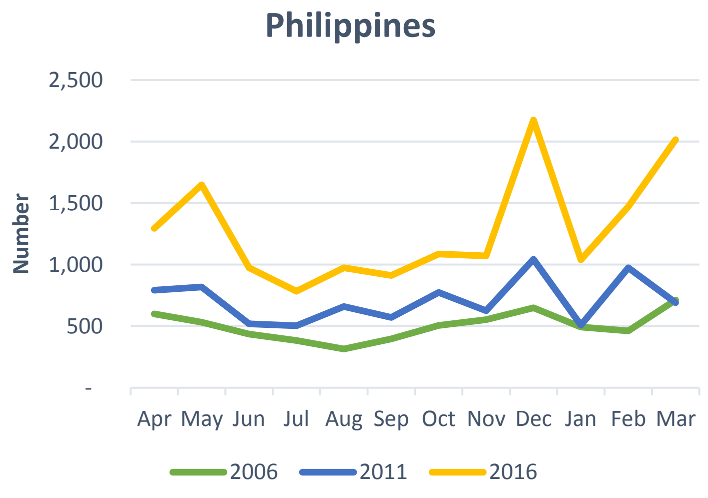
↑156% since 2006

<u>Arrival peaks</u>

14% December

13% March

11% May



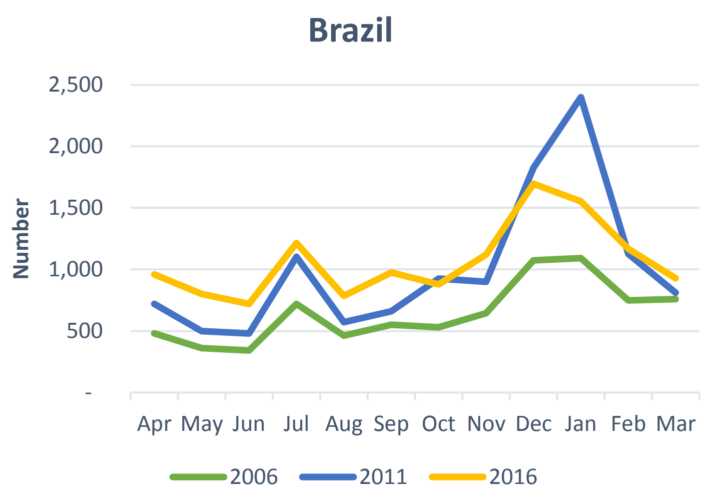
12,800 arrivals in 2016

↑65% since 2006

<u>Arrival peak</u>

13% December

43% Nov-Feb



Source: Statistics New Zealand

Expenditure

Table 1 shows the average spend for the key markets in 2016 and 2015. While spend has gone up for all six key markets it has grown the most for the USA and Japanese markets.

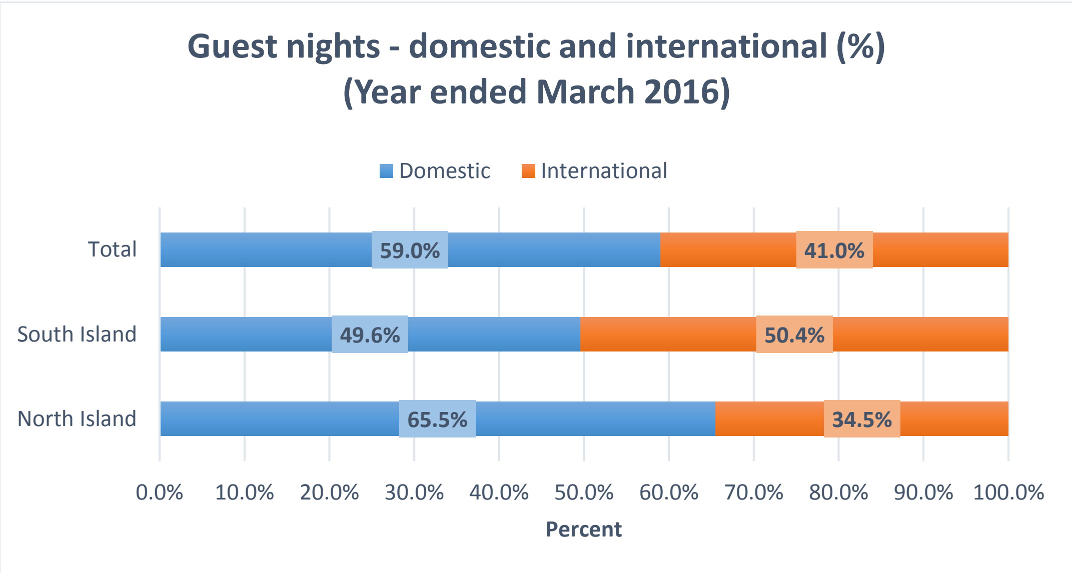
Table 1 Change in average expenditure for key markets (Year ended March 2015 and 2016)

	Average spend 2016	Average spend 2015	Change	% Change
Australia	$1,864	$1,746	$118	6.76%
China	$4,694	$4,265	$429	10.06%
USA	$4,717	$3,578	$1,139	31.83%
UK	$4,917	$4,669	$248	5.31%
Japan	$2,893	$2,326	$567	24.38%
Germany	$5,993	$5,664	$329	5.81%

Accommodation

Domestic visitors accounted for 66% of North Island commercial accommodation guest nights and 50% of South island guest nights in 2016 (Figure 20).

Figure 20 Guest nights – domestic and international (%) (Year ended March 2016)

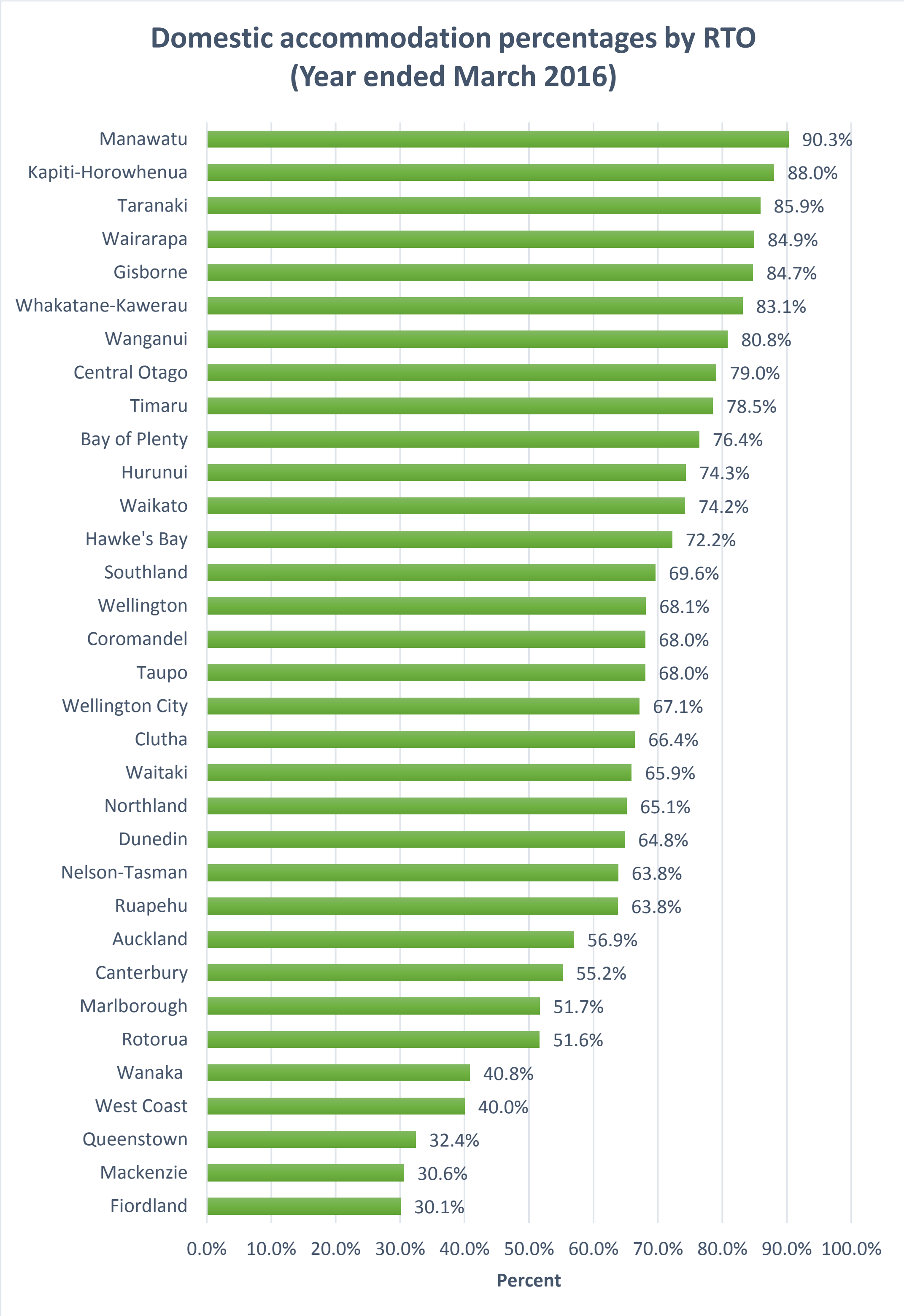


Source: Statistics New Zealand

Figure 21 shows the percentage of domestic visitor guest nights in commercial accommodation by RTO regions (Year ended March 2016). These data show that all five RTO regions with a majority of international guest nights were in the South Island (Wanaka, West Coast, Queenstown, Mackenzie and Fiordland). Between 50 and 60 percent of guest nights in the Auckland, Rotorua, Canterbury and Marlborough RTO regions were domestic. At the other end of the scale, all seven

RTO regions with more than 80% of guest nights taken by domestic visitors were in the North Island. These data are displayed in the SOI in map format (Figure 18).

Figure 21 Domestic accommodation percentages by RTO (Year ended March 2016)



SOI survey results

The SOI 2016 report contains key survey results. Although the online survey was designed so that respondents were unable to skip answering questions there was some drop-off by respondents with progression through the survey itself. For example, the first question was answered by 261 respondents, whereas the final six questions were only answered by 246 respondents (*n*=number of respondents answering each question). Not all respondents answered the open-ended questions.

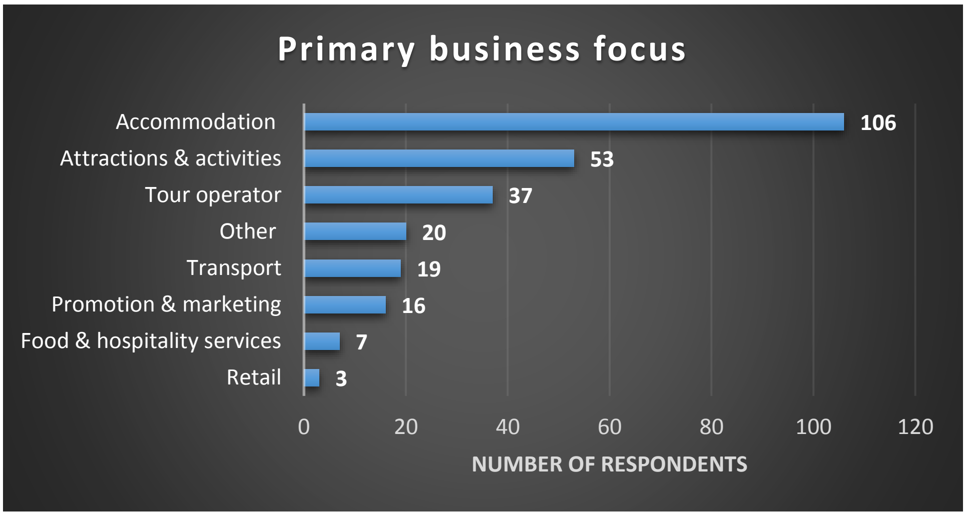
As a result of overlap in association membership, with some potential respondents listed on multiple databases, and having no information on the size of various databases accessed, it was not possible to estimate a response rate for the survey. A similar number of responses (*n*=269) were attained in the 2015 SOI Survey.

Survey data were transported directly into SPSS 23 (Statistical Package for Social Sciences) for analysis. The survey respondents are described according to their tourism business/role and regional location. Frequency and mean scores are reported for each of the agree/disagree statement questions. Data collected via open-ended questions are presented according broad categories identified during analysis with raw survey data in support. The 2016 SOI Survey was designed as a standalone data set and the majority of results are presented accordingly. However, the re-use of a number of question items from the SOI 2015 Survey allows for some comparison of results between survey years.

Sample description

Figure 22 shows the tourism business type/role reported by 261 respondents. The largest group of respondents were from the accommodation sector (40.6%, *n*=106) followed by attractions and activities (20.3%, *n*=53) and tour operators (14.2%, *n*=37).

Figure 22 Primary business focus



The 20 respondents reporting an 'other' focus or role included those whose roles spanned multiple categories (e.g. RTO - marketing and destination development) as well as those involved in tourism education, local government, research, and information, translation and consultancy services (Table 2).

Table 2 Other tourism business focus/roles

Other tourism focus/roles			
Consultancy	2	Research	1
RTO	2	Market research	1
Publishing & marketing	1	Research & education	1
Inbound operator	1	Tourism service	1
Local government	1	Tourism organisation	1
Education/training	1	Museum & information provision	1
Travel & tourism education	1	1-SITE	1
Working holiday programme	1	Translation	1
Real Estate – tourism property	1	Sheep & beef farm	1

Survey respondents were almost equally split between the North Island (49.4%, *n*=129) and South Island (50.6%, *n*=132). One third of all North Island respondents were from Auckland (Figure 23). Of the South Island respondents, slightly more than a third were from Otago and just under a third were from Canterbury (Figure 24).

Figure 23 Location of sample – North Island regions

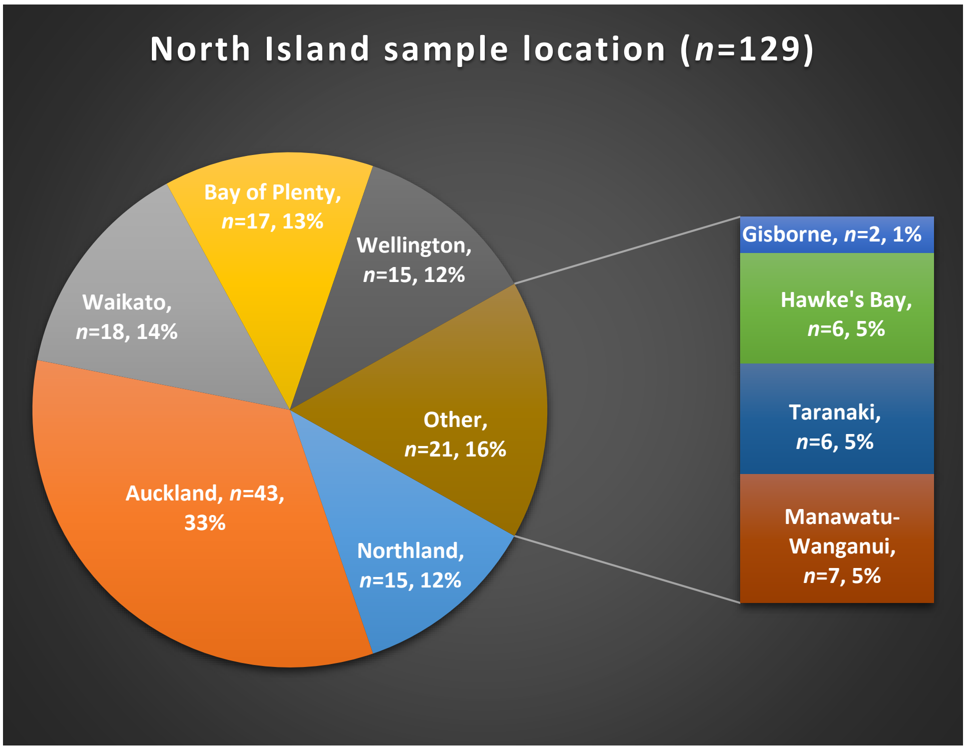
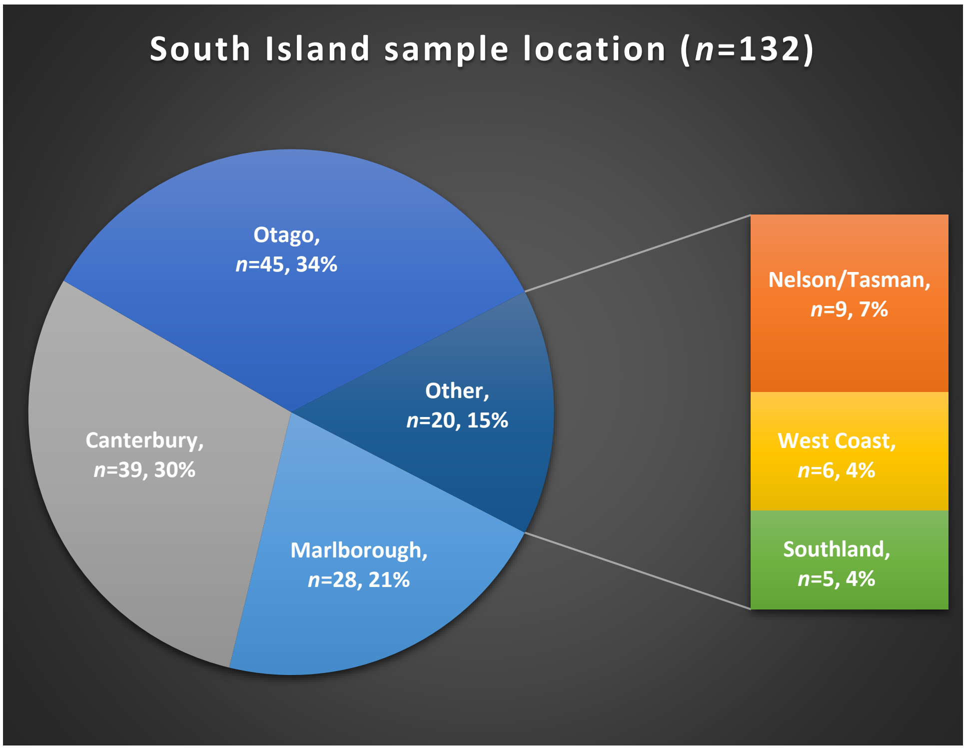


Figure 24 Location of sample – South Island regions



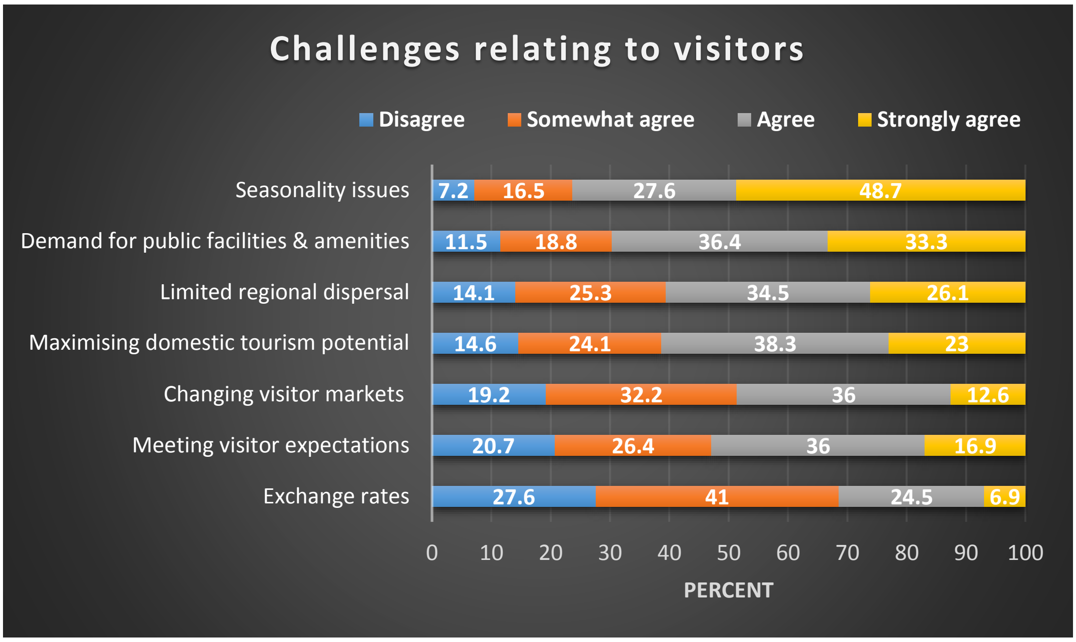
Challenges

Respondents were given a list of 22 tourism industry challenges and asked to indicate the extent to which they agreed or disagreed that each was a challenge facing the tourism industry. For ease of survey formatting the challenges were split into three groups relating to visitors (7 challenges), business (5 challenges) and the operating environment of the tourism industry (10 challenges). The results are presented here according to these three groupings with 261 respondents answering the visitor challenge question, 258 respondents answering the business challenge question and 257 respondents answering the operating environment question. The State of the Industry 2016 report presents these challenge results in a collated form.

Visitor challenges

Altogether, 261 respondents answered the visitor challenge question. As Figure 25 shows, the most significant visitor challenge was seasonality, with 242 respondents (92.8%) agreeing that this was a challenge and almost half (48.7%, *n*=127) strongly agreeing. One third of all respondents (*n*=87) strongly agreed that satisfying demand for public facilities and amenities. Slightly more than quarter of all respondents (*n*=68) strongly agreed that limited regional dispersal was a challenge.

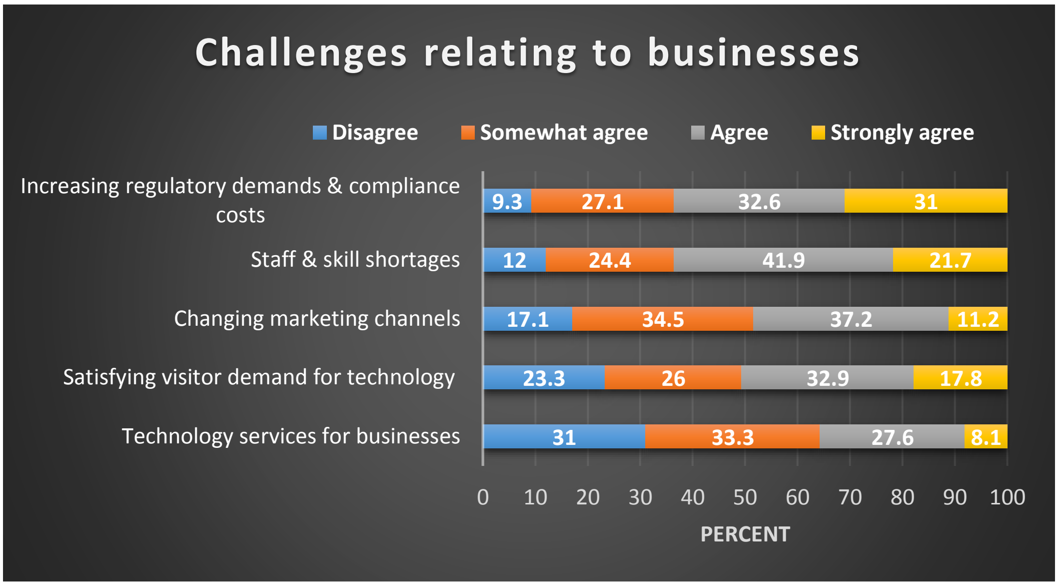
Figure 25 Visitor challenges



Business challenges

Altogether, 258 respondents answered the business challenge question. The most significant business challenges were increasing regulatory demands and compliance costs, reported by 234 respondents (90.8%) and staff and skill shortages reported by 227 respondents (88%). Almost a third (31%) and a fifth (21.7%) of respondents strongly agreed that these were challenges (Figure 26).

Figure 26 Business challenges



Operating environment challenges

Altogether, 257 respondents answered the operating environment challenge question. The highest levels of agreement with operating environment challenges were with infrastructure issues. As Figure 27 shows, the two items attracting the highest levels of strong agreement were lack of investment in infrastructure (37.4%) and lack of investment in hotel accommodation (30.7%). The challenge items attracting the highest levels of overall agreement were 'achieving ongoing sustainability' (94.5% agreement) and environmental concerns (92.6% agreement).

Figure 27 Operating environment challenges

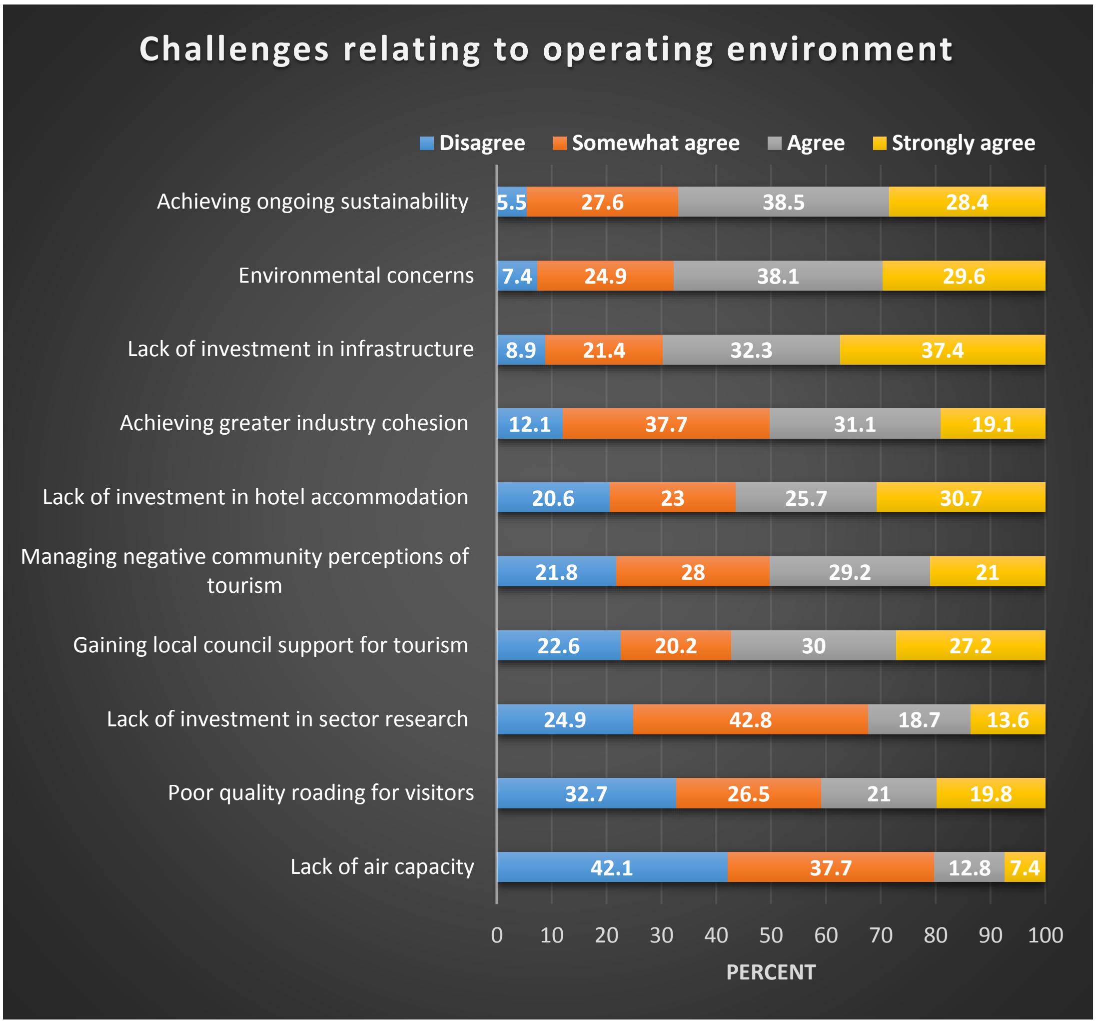


Table 3 presents a summary of all the challenge items (i.e., visitor, business and operating environment) according to which ones attracted the most 'disagree' responses, the most 'agree' responses, the most 'strongly agree' responses and the 'most ambivalent' responses.

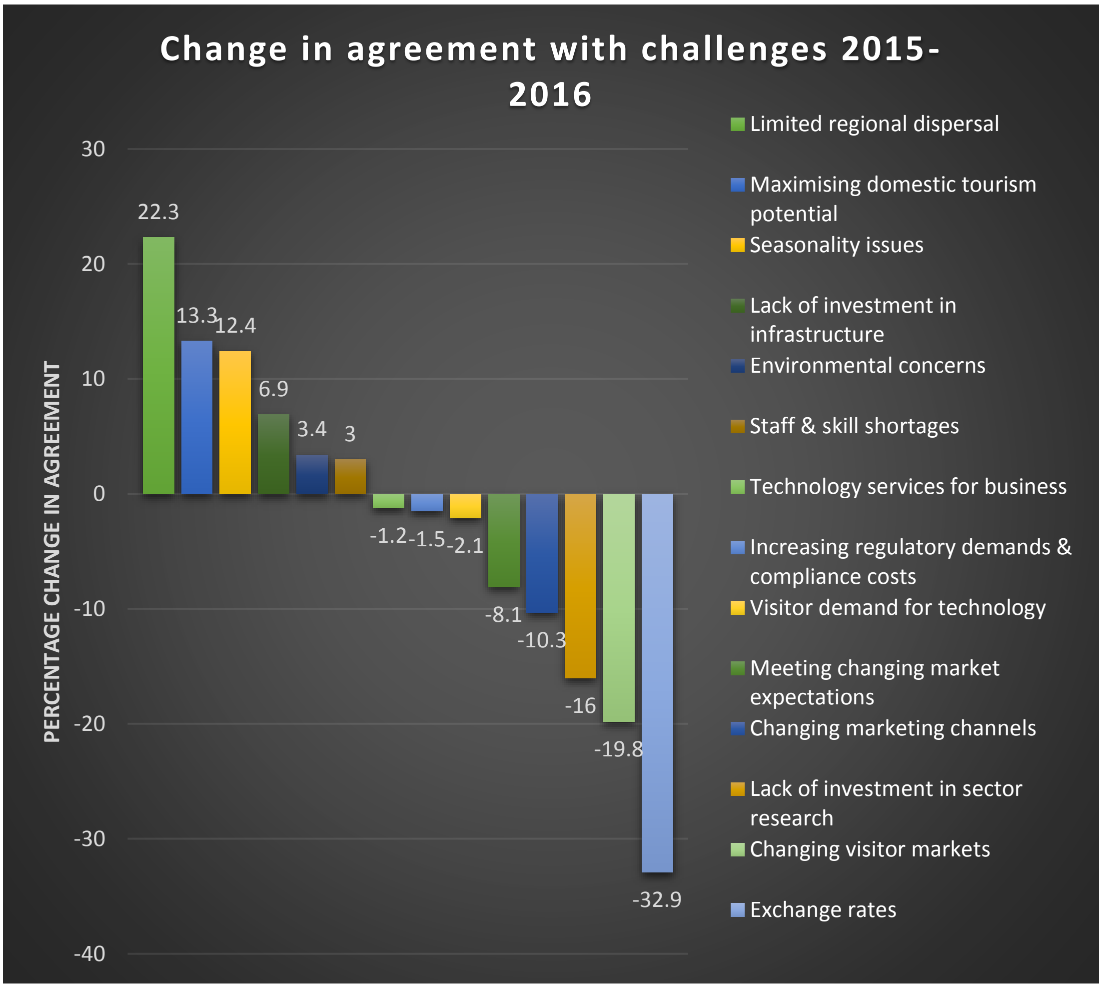
Table 3 Summary of key challenge agreement/disagreement results

Challenge items	% of respondents	
Most ‘disagree’ responses		
• Lack of air capacity	42.1	
• Poor quality roading for visitors	32.7	
• Technology services for businesses	31.0	
• Exchange rates	27.6	
• Lack of investment in sector research	24.9	
Most ‘agree’ responses		
• Achieving ongoing sustainability (mean=4.89)	94.5	
• Seasonality issues (mean=5.15)	92.8	
• Environmental concerns (mean=4.88)	92.6	
• Lack of investment in infrastructure (mean=4.96)	91.1	
• Increasing regulatory demands & compliance costs (mean=4.81)	90.7	
Most ‘strongly agree’ responses		
• Seasonality issues	48.7	
• Lack of investment in infrastructure	37.4	
• Satisfying demand for public facilities & amenities	33.3	
• Increasing regulatory & compliance costs	31.0	
• Lack of investment in hotel accommodation	30.7	
Most ambivalent (i.e., ‘somewhat’ agree/disagree) responses		
• Exchange rates	66.7	
• Lack of air capacity	62.2	
• Lack of investment in sector research	58.8	
• Lack of investment in infrastructure		28.8
• Satisfying visitor demand for technology		24.9
• Seasonality issues		21.1

Figure 28 compares the percentage change in agreement for the challenge items used in both the 2015 and 2016 surveys (*n*=14). Some caution is advised with respect to these comparative data as a result of differences in the way data was collected. In 2015, for example, respondents were simply asked if they thought the items listed were challenges (i.e., with a yes/no option); in 2016 these questions employed a scale-format asking for agreement/disagreement and in Figure 28 we only report the percentage of respondents (in 2016) indicating that they ‘agree’ or ‘strongly agree’ with each challenge listed.

The 2016 data indicates more agreement with challenges associated with limited regional dispersal (up 22.3%), maximising domestic tourism potential (up 13.3%), seasonality issues (up 12.4%), lack of investment in infrastructure (up 6.9%), environmental concerns (up 3.4%) and staff and skill shortages (up 3%). The two challenge items recording the largest falls in agreement in 2016 were exchange rates (down 32.9%) and changing visitor markets (down 19.8%) (Figure 28).

Figure 28 Percentage change in agreement with challenges (2015 & 2016)



Changing visitor markets

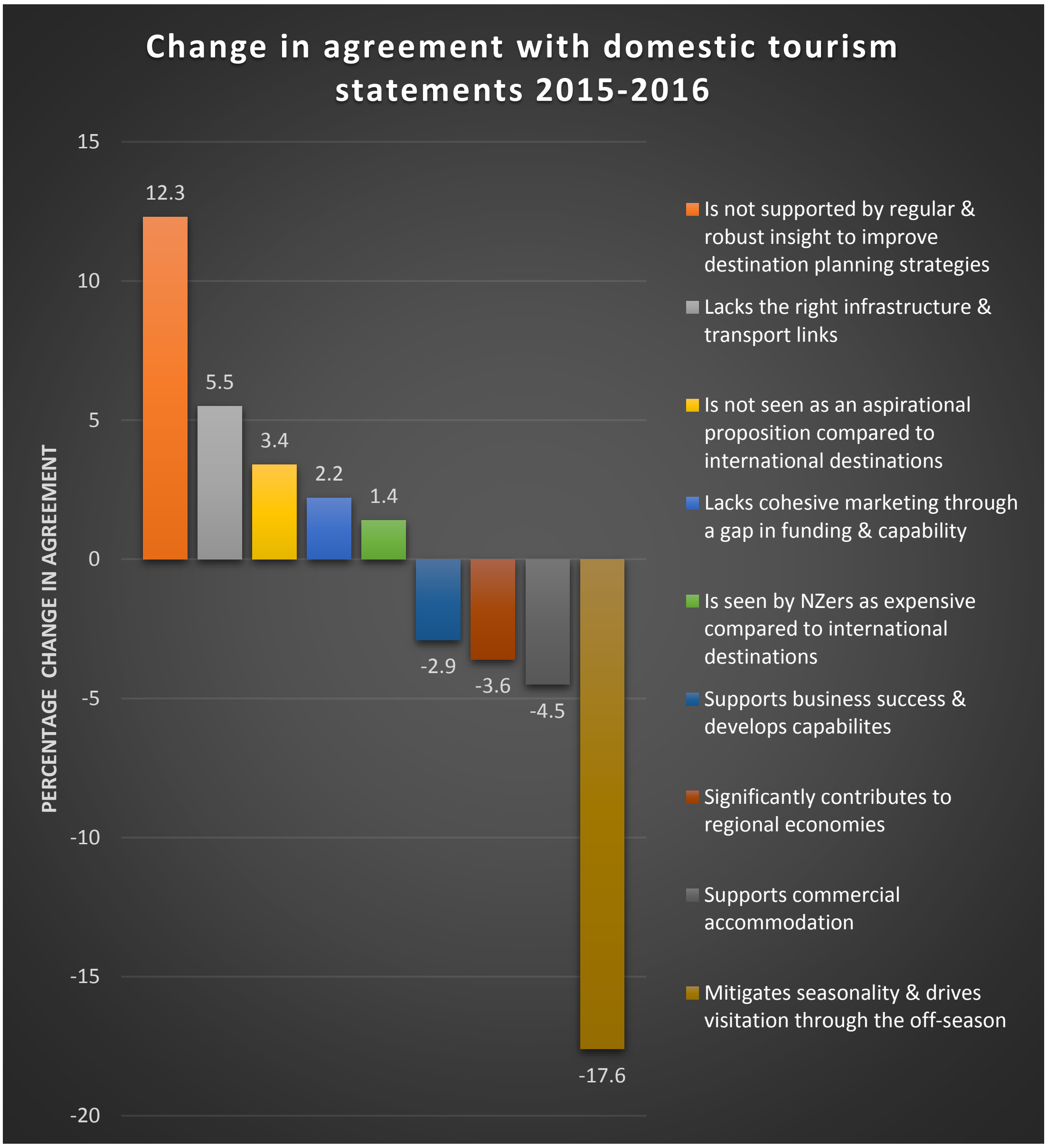
Changing visitor markets was selected for more detailed examination on the basis of having presented the most reported challenge to the industry in the 2015 survey, although as Figure 28 shows the percentage of respondents reporting this as a challenge in 2016 was 19.8 percentage points lower. As noted above, direct comparison of all challenges reported was not possible due to different question formatting, while no specific question relating to issues associated with changing markets was included in the 2015 survey. Altogether, in 2016 the total number of respondents (i.e., also including those who only ‘somewhat agreed’) agreeing that ‘changing visitor markets’ was a challenge was 211 (80.8%) indicating that this remains a significant challenge for the industry.

Domestic tourism

Figure 29 shows the change in the percentage of respondents indicating that they either ‘agree’ or ‘strongly agree’ with each domestic tourism statement in the 2015 and 2016 surveys. The biggest increase in agreement was with the statement that domestic tourism is ‘not supported by regular and robust insight to improve destination planning strategies’ (up 12.3%). The biggest decrease was with

agreement that domestic tourism 'mitigates seasonality and drives visitation through the off-season' (down 19.6%).

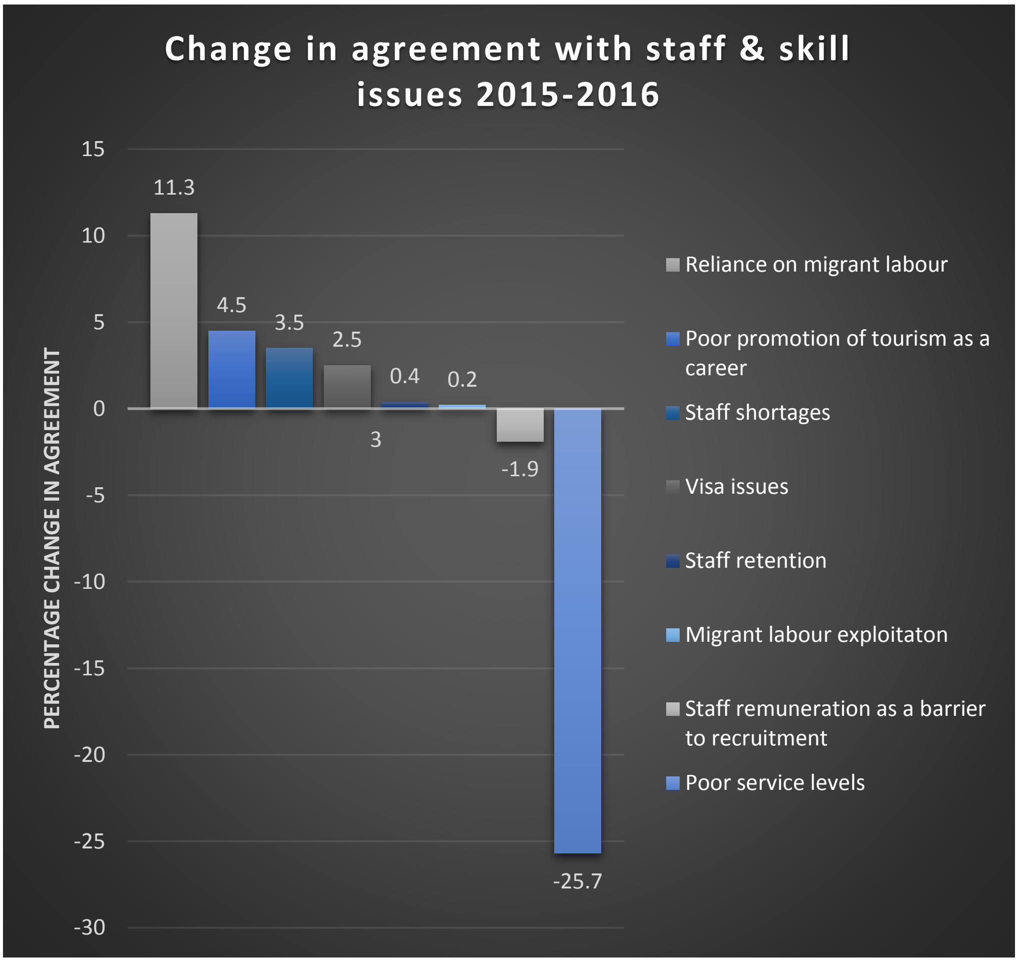
Figure 29 Percentage change in agreement with domestic tourism statements (2015 & 2016)



Staff and skill issues

Figure 30 shows the change in the percentage of respondents indicating that they either 'agree' or 'strongly agree' with each staff and skill issue in the 2015 and 2016 surveys. The issue with the largest increase in agreement was 'reliance on migrant labour' (up 11.3%) while the only issues to have improved were 'poor service levels' (down 25.7%) and 'staff remuneration as a barrier to recruitment' (down 1.9%).

Figure 30 Percentage change in agreement with staff and skill issues (2015 & 2016)



Sustainability

Table 4 presents a summary of rating scores for the individual sustainability components.

Table 4 Summary of rating scores for sustainability components

Sustainability component	Rating scores (%)			
	Range	Mean	Median	Mode
Economic	1 - 95	35.91	35	40
Environmental	3 - 80	29.97	30	30
Social	0 - 51	17.26	15	10
Cultural	0 - 50	16.87	15	10, 20

State of the Industry 2016 survey

State of the Tourism Industry 2016

Opening page of survey

Thank you for taking part in this survey. The survey has only 10 questions and should take you approximately 10-15 minutes to complete – the completion bar will show you how far you have progressed.

After starting the survey, the system will allow you up one week to complete the survey. The final cut-off/expiration date of the survey is 10 July 2016.

The *State of the Industry 2016* survey seeks your opinion on some of the challenges facing the tourism industry overall and, more specifically, in respect of changing markets, domestic tourism and issues associated with staff and skills. It also asks you what you think are the biggest opportunities in the current tourism industry. The survey concludes with a question about sustainability and gives you the opportunity to provide your own feedback about what you think of the State of the Industry.

Even if your business/operations/responsibilities are not totally focused on tourism we would still like to know what you think about the *State of the Tourism Industry* in 2016.

Before starting the survey we need you to acknowledge that you:

- Have read the description of the project in the accompanying email and agree to participate
- Understand that participation is voluntary
- Understand that you may withdraw from the survey at any time up until clicking on the 'submit survey' button
- Understand that any data collected via incomplete surveys will be excluded from analysis

❍ I agree to participate in the survey based on the above - clicking on the green arrow box will take you to the survey

Q1 What is your primary business focus?

❍ Accommodation
❍ Attractions and activities
❍ Transport
❍ Retail
❍ Food and hospitality services
❍ Tour operator
❍ Promotion/marketing
❍ Other - what type of business do you have? ____________________

Q2 In which region are you located?

❍ Northland
❍ Auckland
❍ Waikato
❍ Bay of Plenty
❍ Gisborne
❍ Hawke's Bay
❍ Taranaki
❍ Manawatu-Wanganui
❍ Wellington
❍ Marlborough
❍ Nelson/Tasman
❍ Canterbury
❍ West Coast
❍ Otago
❍ Southland

Q3 This question asks your views on some **challenges facing the tourism industry**. We have split the question into 3 parts to make it easier to read.

Q3a.The first group of challenges primarily relate to visitors. Please indicate the extent to which you agree or disagree that each item listed is a challenge for the tourism industry.

	Strongly disagree	Disagree	Somewhat disagree	Somewhat agree	Agree	Strongly agree
Changing visitor markets	❍	❍	❍	❍	❍	❍
Meeting visitor expectations	❍	❍	❍	❍	❍	❍
Seasonality issues	❍	❍	❍	❍	❍	❍
Exchange rates	❍	❍	❍	❍	❍	❍
Limited regional dispersal	❍	❍	❍	❍	❍	❍
Maximising domestic tourism potential	❍	❍	❍	❍	❍	❍
Satisfying visitor demand for public facilities and amenities	❍	❍	❍	❍	❍	❍

Q3b. The second group of challenges are business ones. Please indicate the extent to which you agree or disagree that each item listed is a challenge for the tourism industry.

	Strongly disagree	Disagree	Somewhat disagree	Somewhat agree	Agree	Strongly agree
Technology services for businesses (e.g., booking systems	❍	❍	❍	❍	❍	❍
Increasing regulatory demands and compliance costs	❍	❍	❍	❍	❍	❍
Staff and skill shortages	❍	❍	❍	❍	❍	❍
Changing marketing channels	❍	❍	❍	❍	❍	❍
Visitor demand for technology (e.g., free WIFI)	❍	❍	❍	❍	❍	❍

Q3c. The last group includes some of the broader challenges relating to the operating environment of the tourism industry. Please indicate the extent to which you agree or disagree that each item listed is a challenge for the tourism industry.

	Strongly disagree	Disagree	Somewhat disagree	Somewhat agree	Agree	Strongly agree
Lack of investment in infrastructure	❍	❍	❍	❍	❍	❍
Environmental concerns	❍	❍	❍	❍	❍	❍
Achieving greater industry cohesion	❍	❍	❍	❍	❍	❍
Achieving ongoing sustainability	❍	❍	❍	❍	❍	❍
Lack of air capacity	❍	❍	❍	❍	❍	❍
Gaining local council support for tourism	❍	❍	❍	❍	❍	❍
Managing negative community perceptions of tourism	❍	❍	❍	❍	❍	❍
Lack of investment in hotel accommodation	❍	❍	❍	❍	❍	❍
Poor quality roading for visitors	❍	❍	❍	❍	❍	❍
Lack of investment in sector research	❍	❍	❍	❍	❍	❍

Q4 Some of the challenges we asked you about related to **changing visitor markets** and, in our survey last year, changing visitor markets was reported as the most significant challenge facing the tourism industry. To what extent do you agree or disagree which each of these statements about changing visitor markets?

	Strongly disagree	Disagree	Somewhat disagree	Somewhat agree	Agree	Strongly agree
We have time to adapt to new visitor markets	❍	❍	❍	❍	❍	❍
There is good understanding of new visitor markets	❍	❍	❍	❍	❍	❍
We have adequate information to adapt products and services	❍	❍	❍	❍	❍	❍
We need skilled and language proficient staff to meet changing market requirements	❍	❍	❍	❍	❍	❍
New emerging markets are poor contributors to regional dispersal	❍	❍	❍	❍	❍	❍
New emerging markets offer a solution to seasonality issues	❍	❍	❍	❍	❍	❍
More effort should be made to attract niche markets	❍	❍	❍	❍	❍	❍

Q5 Another one of our challenges concerns **maximising domestic tourism potential**. In this question we are interested in your perception of the challenges and opportunities associated with the domestic visitor market.

Please indicate the extent to which you agree or disagree with each of the statements listed below. DOMESTIC TOURISM....

	Strongly disagree	Disagree	Somewhat disagree	Somewhat agree	Agree	Strongly agree
Supports commercial accommodation	❍	❍	❍	❍	❍	❍
Supports informal accommodation (e.g. holiday homes or AirBnB)	❍	❍	❍	❍	❍	❍
Significantly contributes to regional economies	❍	❍	❍	❍	❍	❍
Supports business success and develops capability	❍	❍	❍	❍	❍	❍
Mitigates seasonality and drives visitation through the off-peak season	❍	❍	❍	❍	❍	❍
Domestic market segments are not currently understood	❍	❍	❍	❍	❍	❍
Is seen by New Zealanders as expensive compared to international destinations	❍	❍	❍	❍	❍	❍
Is not seen by domestic tourists as an aspirational proposition compared to international destinations	❍	❍	❍	❍	❍	❍
Lacks cohesive marketing through a gap in funding and capability	❍	❍	❍	❍	❍	❍
Lacks the right infrastructure and transport links	❍	❍	❍	❍	❍	❍

Is not supported by regular and robust insight to improve destination planning strategies	❍	❍	❍	❍	❍	❍

Q6 Another challenge was **staff and skill shortages**. A selection of issues associated with staff and skills are listed below - please indicate the extent to which you either agree or disagree that each of these represents a significant challenge for the tourism industry.

	Strongly disagree	Disagree	Somewhat disagree	Somewhat agree	Agree	Strongly agree
Skill shortages	❍	❍	❍	❍	❍	❍
Staff shortages	❍	❍	❍	❍	❍	❍
Poor promotion of tourism as a career	❍	❍	❍	❍	❍	❍
Reliance on migrant labour	❍	❍	❍	❍	❍	❍
Migrant labour exploitation	❍	❍	❍	❍	❍	❍
Visa issues	❍	❍	❍	❍	❍	❍
Staff retention	❍	❍	❍	❍	❍	❍
Poor service levels	❍	❍	❍	❍	❍	❍
Lack of suitable off-job training options	❍	❍	❍	❍	❍	❍
Staff remuneration as a barrier to recruitment	❍	❍	❍	❍	❍	❍

Q7 What do you think are the **biggest opportunities** in the current tourism industry?

(Space given to write own answer)

Q8 To what extent do you agree or disagree with the statement – "Sustainability, in terms of economic, cultural, social and environmental sustainability, must become a genuine underpinning of the New Zealand tourism industry".

Strongly disagree	Disagree	Somewhat disagree	Somewhat agree	Agree	Strongly agree
❍	❍	❍	❍	❍	❍

Q9 How would you rate the importance of each of these individual components of sustainability in achieving overall sustainability for the tourism industry? (Please allocate a % to each so that the total adds up to 100%)

_______ Economic - profitable and viable businesses operating long term, with the capacity to act on opportunities that emerge
_______ Environmental - ensuring that the tourism industry both protects and champions the environment on which it is reliant
_______ Cultural - showcasing our unique culture to enhance visitor experience and create opportunities for Maori and non-Maori
_______ Social - making sure that tourism has the support of the NZ public

(NB – this question is set up so that the allocation must add up to 100)

Q10 If you have anything else you want say about the *State of the Tourism Industry* in 2016 you can write it here.

(Space given to write additional comments)

❍ Click here to submit survey - please note that if you do not click on this button your answers will not be included in the analysis

End of survey text

Thank you for completing this survey. If you wish to know more about this research you can contact either Jude Wilson (jude.wilson@lincoln.ac.nz) or Nienke van Dijken (Nienke.vanDijken@tia.org.nz) for more information. The results will be published as part of the *State of the Tourism Industry 2016* report scheduled to be released in November 2016.