SURVEY OF BUSINESS OPERATIONS 2026

Prepared for Ministry of Business, Innovation & Employment and Stats NZ

SOBO 2026 Technical Report

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MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT
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Stats NZ
Tatauranga Aotearoa

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1 Introduction

1.1 Background

The Survey of Business Operations (SOBO) 2026 was commissioned by the Ministry of Business, Innovation, and Employment (MBIE) in partnership with Statistics New Zealand (Stats NZ) to provide a robust evidence base on the operations, performance, and experiences of NZ businesses. The survey was designed to support evidence-based policy development by collecting information on business operations, innovation, workforce challenges, access to finance, and emerging technologies.

SOBO 2026 builds on the paused Business Operations Survey (BOS) by retaining sample design and selected questions and measures that allow continuity with historical business data while introducing new content to address identified information gaps and emerging policy priorities. The survey was developed to balance the need for continuity with the need to capture information on emerging issues relevant to New Zealand's business environment.

SOBO 2026 included four key topic areas:

- **Module A: Business Operations** – covering topics such as business investment, research and development, access to finance, workforce challenges, and skills shortages, drawing on selected questions from BOS Module A.
- **Module B: Innovation** – covering innovation activities, product and process innovation, collaboration, intellectual property, and barriers to innovation, drawing on selected questions from BOS Module B.
- **Module C: Current Business Practices** – examining organisational practices and business management approaches used by NZ businesses.
- **Module D: Artificial Intelligence (AI)** – examining awareness, adoption, and use of AI technologies by NZ businesses, drawing on selected questions from the OECD AI Survey of Employers, the UK Employer Survey on Skills for Life and Work, and the Australian SME AI Adoption Tracker.

Together, these four modules provide a comprehensive picture of the current state of NZ businesses and support policy development across a range of economic, innovation, workforce, and technology-related domains.

In addition to the survey, a programme of qualitative follow-up research was undertaken with a subset of participating businesses. This research was designed to explore businesses' experiences, perceptions, and use of AI in greater depth and to provide context to the survey programme. Details of the qualitative research design, sample, and analysis approach are provided in Chapter 5 *Qualitative Follow-Up on AI*.

1.2 Objectives

The key objectives of SOBO 2026 were to:

- Provide nationally representative data on the operations and performance of NZ businesses
- Maintain continuity with selected BOS measures to support longitudinal analysis where possible
- Address priority information gaps identified by MBIE, Stats NZ, and policy stakeholders
- Generate robust evidence to inform government policy and programme development
- Support analysis across key business characteristics – industry sector, business size, Māori-owned businesses, and adoption of emerging technologies such as AI
- Complement the quantitative survey with qualitative research to provide deeper insight into business experiences and perspectives relating to AI

1.3 Survey partners

SOBO 2026 was delivered through a partnership between MBIE, Stats NZ, and Ipsos.

Ministry of Business, Innovation, and Employment (MBIE)

MBIE sponsored the survey and led the identification of policy priorities and information requirements. MBIE worked closely with stakeholders across government to determine the key topics and outputs required from the survey programme.

Stats NZ

Stats NZ provided expertise relating to official statistics, sample design, business population coverage, and continuity with the paused BOS programme. The survey sample was drawn from the Stats NZ Business Register.

Ipsos

Ipsos was responsible for survey implementation and delivery, including questionnaire programming, fieldwork management, respondent support, data processing, quality assurance, weighting, analysis, and reporting.

1.4 Business population, sample and completed responses

The conceptual target population for SOBO 2026 is the same as BOS, covering New Zealand businesses with six or more employees. For more detail about the sample design, see section 2.2. The total population for SOBO 2026 was 46,480[1]. A representative sample of 19,990 businesses was drawn from the Stats NZ Business Register for participation in SOBO 2026. All 19,990 businesses in the sample were sent an initial invitation either via email (n=12,520) or if there was no valid email address, via post (n=7,460). Complete responses were received from 9,900 businesses.

In addition, a qualitative follow-up programme was conducted with survey participants to explore business experiences and perspectives on artificial intelligence in greater depth. Some 1,217 businesses expressed interest in participating in the qualitative research, with 12 businesses taking part in in-depth interviews and 24 businesses participating in focus groups. These qualitative research figures are reported as actual counts and have not been rounded. Further details on the qualitative methodology are provided in Chapter 5 *Qualitative Follow-Up on AI*.

1.5 Fieldwork period

Survey fieldwork was conducted between 8 June and 26 July 2026, and the follow-up qualitative work was carried out between 17 July and 9 September 2026.

1.6 Data and Statistics Act 2022

SOBO 2026 uses mandatory collection powers under the Data and Statistics Act 2022. Stats NZ collects and uses business contact information under the authority of the Data and Statistics Act 2022 for approved statistical and research purposes.

Business contact information was included with the sample and shared with Ipsos to deliver SOBO 2026.

Contact details are used only for approved statistical or research purposes and managed carefully to maintain Stats NZ's high standards of privacy, security and confidentiality. All personal information collected for business surveys is subject to strict confidentiality obligations under the Data and Statistics Act 2022.

[1] Counts in this report have been rounded to the nearest 10, unless otherwise stated. As a result, component totals may not sum exactly to overall totals and percentages may not total 100% due to rounding.

1.7 ISO compliance

SOBO 2026 was conducted under Ipsos's ISO 20252 Market Opinion and Social Research certification. ISO (International Organisation for Standardisation) 20252 ensures adherence to strict quality processes throughout research studies, with all quality assurance procedures subject to independent annual audit requirements.

Ipsos acquired ISO 27001 certification for Information Security Management Systems in August 2026. This certification demonstrates that Ipsos has implemented internationally recognised controls and processes for managing information security risks, including the protection of confidential client, business, and respondent data through established governance, security, and risk management practices.

As a member of both the Research Association of New Zealand and the European Society for Opinion and Marketing Research, Ipsos complied with their respective codes of conduct throughout the survey implementation. The study was conducted in full compliance with NZ laws and regulations, including the Privacy Act 2020, ensuring appropriate data protection and participant privacy standards were maintained.

1.8 Use of Artificial Intelligence in SOBO 2026

Ipsos uses secure, enterprise-grade AI tools to support research activities and does not use publicly available AI tools. All project information and data processed through these tools remain within Ipsos' secure Microsoft 365 tenant and are not used to train AI models.

Within this project, AI was used to support the transcription of qualitative interviews and focus groups, as well as the analysis and synthesis of research findings.

Ipsos follows a human-in-the-loop approach, with all AI-assisted outputs reviewed by researchers to ensure accuracy, quality and alignment with Ipsos' research expertise and shared understanding of the findings. This report was reviewed and approved in accordance with Ipsos' standard quality assurance processes.

2 Survey Research Design

This chapter outlines the survey methodology, sample design, questionnaire development, survey programming, respondent materials, and fieldwork approach used for SOBO 2026.

Details of the qualitative research design, sample, data collection, and analysis are provided in Chapter 5 *Qualitative Follow-Up on AI*. Unless otherwise stated, all information presented in Chapters 2–4 relates to the quantitative survey component only.

2.1 Method

SOBO 2026 was conducted via an online survey targeting NZ businesses with six or more employees.

The survey was administered through a secure web-based questionnaire. Sample records were sourced from the Stats NZ Business Register, with businesses invited to participate through a combination of email and postal communications. Businesses with a valid email address recorded on the sample frame were invited via email, while businesses without a valid email address were invited by post to participate in the online survey.

A programme of reminder communications and telephone follow-up activities was undertaken throughout fieldwork to encourage participation and support response rates. Telephone interviewers did not administer the survey by phone. Instead, follow-up calls were used to remind businesses about the survey, encourage participation, answer respondent queries, and support businesses that had not started or had partially completed the questionnaire.

The survey was designed to be overseen by a person with a broad understanding of the business, such as a general manager or senior leader. However, recognising that different areas of a business may be best placed to answer specific questions, respondents were able to share their unique survey link with colleagues and delegate the completion of relevant modules. For example, employment-related questions may have been completed by Human Resources staff, while innovation or financial questions may have been completed by other subject matter experts within the business. Respondents were allowed to complete the survey in multiple sessions, however, once a module had been submitted, it could not be edited.

Respondents were able to save their progress and return to the questionnaire later. This approach reduced respondent burden and enabled businesses to gather information from multiple staff members where required before submitting a final response.

A separate programme of qualitative interviews and focus groups was undertaken following completion of the survey. Details of the qualitative methodology are provided in Chapter 5 *Qualitative Follow-Up on AI*.

2.2 Sample design

The survey sample was drawn from the Stats NZ Business Register. A representative sample was selected for participation. Industry and business size were used as the primary sampling strata.

Some 19,990 businesses were drawn that:

- Have 6 or more employees, and
- Have been active on or before 1 April 2024, and
- Were still in operation at the time of sample selection
- Were private enterprises, as defined by NZ Institutional Sector 1996 Classification
- Were economically significant enterprises, with an annual GST turnover figure of greater than $30,000
- Were classified within the in-scope ANZSIC06 industries

Table 1 presents the distribution of the business population and selected sample by business size and industry. Business size is defined by Rolling Mean Employment (RME) as per the Stats NZ Business Register. RME is a 12-month moving average of monthly employment figures obtained from tax data. Comparison of the population and sample proportions illustrates how the sample was deliberately stratified, with some groups oversampled relative to their population share to support robust subgroup analysis.

Table 1. Sample by business size and industry

Business size	Population	% of population	Sample	% of sample
6–19	33,600	72%	10,280	51%
20–49	8,390	18%	5,220	26%
50–99	2,420	5%	2,420	12%
100+	2,070	4%	2,070	10%
Total	**46,480**	**100%**	**19,990**	**100%**
Industry groupings	**Population**	**% of population**	**Sample**	**% of sample**
Primary industries	3,840	8%	2,030	10%
Goods production	11,980	26%	5,200	26%
Trade & hospitality	14,030	30%	3,860	19%
Transport services	1,630	3%	730	4%
Business services	9,010	19%	4,970	25%
Social & personal services	6,000	13%	3,200	16%
Total	**46,480**	**100%**	**19,990**	**100%**

2.2.1 Quality of the sample

Sample information contained:

- Unique survey reference number (SOBO reference)
- Legal business name
- Industry classification (ANZSIC) and sampling strata information
- Business size classification
- Sampling probability
- Business postal address
- Stats NZ relationship manager status and historical response behaviour indicators
- Up to three nominated business contacts, including:
  - Name
  - Job title and role
  - Business telephone numbers and mobile numbers
  - Business email addresses
  - Company and address details
  - Date contact details were last updated
- Consolidated contact name and email fields for survey administration purposes

The quality and completeness of contact information varied across the sample. During fieldwork, 3,500 email invitations were returned as undeliverable, 400 businesses contacted through telephone follow-up were found to have invalid contact numbers, and 710 postal invitations and reminders were returned to sender due to incorrect or outdated addresses. These issues reduced the range of contact methods available for some businesses and affected recruitment efficiency.

Additional contact quality challenges were identified during data collection. In some cases, businesses had multiple contact records containing different contact details, such as an email address on one record and a telephone number on another. This made follow-up activities more complex to coordinate. Duplicate contacts were occasionally identified where businesses had multiple records or operated under similar business names, while some contact details related to former employees or third parties such as accountants. The presence of multiple contact records also created challenges for tracking telephone follow-up activity, as it was not always possible to clearly identify which contact details had been used for individual call attempts. As a result, auditing call outcomes and undertaking quality assurance checks on telephone follow-up activity was more complex than anticipated. Despite these challenges, the sample frame provided broad coverage of New Zealand businesses and supported the achievement of the target sample.

2.2.2 Transferring the sample

Stats NZ securely transferred the sample information to Ipsos via the Manager File Transfer process (https://filetransfer.stats.govt.nz/).

2.2.3 Adaptive sample design

A key objective of the SOBO 2026 fieldwork approach was to achieve a sample that was as representative as possible of the NZ business population while maintaining comparability with previous waves of the BOS. To support this objective, Ipsos implemented an adaptive sample design (ASD) framework throughout data collection. The ASD approach involved ongoing monitoring of response patterns across key sample strata, including industry and business size, allowing recruitment activities to be adjusted in response to emerging response trends.

Throughout fieldwork, achieved response distributions were compared with sample targets by industry and business size. Groups that were under-represented relative to target were prioritised for additional recruitment effort, including reminder communications, targeted telephone follow-up, and adjustments to calling priorities.

The achieved responses include a comparatively strong representation of larger businesses. This outcome was intentional and reflects both the sample design and fieldwork strategy. Larger businesses make a significant contribution to the NZ economy but represent a relatively small proportion of the overall business population. Accordingly, additional effort was directed towards securing participation from larger businesses, including dedicated engagement through Stats NZ relationship managers and targeted follow-up by a dedicated Ipsos fieldwork resource.

The ASD approach helped reduce the risk of non-response bias by enabling recruitment resources to be redirected towards under-represented groups during fieldwork, rather than relying solely on weighting adjustments after data collection.

2.2.4 Sample targets

To support the ASD framework, sample targets were established to guide fieldwork monitoring and recruitment activities throughout data collection.

As SOBO 2026 used a different methodology from the former BOS, the likely response rate was uncertain at the outset of fieldwork. A range of target sample sizes was, therefore, developed based on response-rate scenarios from 5% to 60%, enabling fieldwork progress to be assessed against multiple potential outcomes. The final achieved response was closest to the 50% response-rate scenario, which is highlighted in Table 2.

Table 2: Target sample across expected response rates by business size and industry

Business size	Population	Target sample at 5% RR	Target sample at 10% RR	Target sample at 20% RR	Target sample at 30% RR	Target sample at 40% RR	Target sample at 50% RR	Target sample at 60% RR
6–19	33,600	720	1,450	2,890	4,330	5,780	7,220	8,670
20–49	8,390	180	360	720	1,080	1,440	1,810	2,170
50–99	2,420	50	100	210	310	420	520	620
100+	2,070	50	90	180	270	360	450	540
Total	**46,480**	**1,000**	**2,000**	**4,000**	**6,000**	**7,990**	**9,990**	**11,990**
Industry	**Population**	**Target sample at 5% RR**	**Target sample at 10% RR**	**Target sample at 20% RR**	**Target sample at 30% RR**	**Target sample at 40% RR**	**Target sample at 50% RR**	**Target sample at 60% RR**
Primary industries	3,840	80	170	330	500	660	830	990
Goods production	11,980	260	520	1,030	1,550	2,060	2,580	3,090
Trade & hospitality	14,030	300	600	1,210	1,810	2,410	3,020	3,620
Transport services	1,630	40	70	140	210	280	350	420
Business services	9,010	190	390	770	1,160	1,550	1,940	2,320
Social & personal services	6,000	130	260	520	770	1,030	1,290	1,550
Total	**46,480**	**1,000**	**2,000**	**4,000**	**6,000**	**7,990**	**9,990**	**11,990**

Sample targets were set independently for business size and industry. No separate targets were established for the intersection of business size and industry. These characteristics are nonetheless reported throughout the summary reports and data tables as key analytical variables. Headquarters region was also used as an analytical variable throughout the summary reports and was based on the region assigned to each business as per the Stats NZ Business Register.

2.3 Questionnaire design

The SOBO 2026 questionnaire was developed collaboratively by MBIE, Stats NZ, and Ipsos.

The questionnaire was designed to provide robust, policy-relevant information on NZ businesses while maintaining continuity with existing business statistics and previous business survey programmes where appropriate. The survey topics covered are outlined in section 1.1 *Background*.

Questionnaire development commenced in January 2026 with a workshop involving Ipsos, the MBIE project team, and key stakeholders. The purpose of the workshop was to introduce the project, confirm research objectives, and identify priority topics for inclusion in the survey. Particular consideration was given to the inclusion of questions relating to artificial intelligence, which had not previously formed part of BOS.

As part of the development process, MBIE identified an initial set of candidate questions drawn from BOS 2023 and the Organisation for Economic Cooperation and Development (OECD) AI Survey of Employers. A questionnaire review template was then distributed to representatives from the Science, Innovation, and Technology (SIT); Economic Growth (EG); Employment, Skills, and Immigration Policy (ESIP); and Workplace

Relations and Safety Policy (WRSP) groups. Stakeholders were asked to identify the questions and topics considered most valuable for their policy and research needs.

Ipsos subsequently conducted a series of workshops with individual stakeholder groups during 3–9 February 2026 to review existing BOS content, discuss priorities for the new survey, and identify any additional information requirements. Stakeholders considered the value of retaining existing questions, emerging topics requiring new measures, and opportunities to expand the survey's coverage of AI and other priority policy areas. Questions and topics were prioritised through a tiered framework to support decision-making.

Following stakeholder consultation, Ipsos collated and consolidated the prioritised question lists and developed an overall questionnaire framework for consideration by MBIE.

Where information needs could not be addressed via the use of questions from BOS 2023, other BOS questionnaires, or the OECD AI Survey of Employers, Ipsos reviewed a range of established international business surveys to identify suitable measures and question wording. Using questions from established international surveys helped maximise comparability with overseas data collections and supported the ability to benchmark NZ businesses against international trends and performance measures.

Key questionnaire sources included:

- Stats NZ Business Operations Surveys 2022, 2023 and 2024, which informed questions in Modules A and B on business operations and innovation. Note that the questionnaire for BOS 2024 was developed prior to the decision to pause BOS.
- OECD AI Survey of Employers, which informed Module D questions on motivations and barriers to AI adoption, impacts on tasks and employment, productivity, and changing skill needs.
- UK Government Department for Science, Innovation and Technology Employer Survey on Skills for Life and Work, which informed Module D questions on AI awareness, adoption and use, employee AI knowledge, training, and recruitment for AI skills.
- Australian National AI Centre SME AI Adoption Tracker, which informed the Module D question on business outcomes supported by AI use.

The questionnaire is provided in *Appendix 7.1*. A summary of the source and status of each questionnaire item, including whether the question was new, identical to an existing source question, subject to minor adaptation, or substantively adapted from an existing source can be found in *Appendix 7.1.1.*

MBIE, Stats NZ and Ipsos worked collaboratively to refine the question wording, response options, questionnaire structure and routing. Comparability with the Business Operations Survey and relevant international surveys was maintained wherever possible. However, minor changes were made to some questions and response options to ensure they were appropriate for the New Zealand context. A draft questionnaire was subsequently approved for testing and programming.

The financial reference period varied across the four survey modules:

- Module A: Business Operations collected information relating to the 2024/25 financial year, which is the most recent complete financial year ending in 2025.
- Module B: Innovation collected information relating to the 2024/25 financial year and, where applicable, both the 2023/24 and 2024/25 financial year.
- Modules C and D: Current Business Practices and Artificial Intelligence collected information about businesses' current and emerging practices, experiences and use of technology at the time of the survey.

2.3.1 Cognitive testing

Cognitive testing of the questionnaire was undertaken to ensure that survey questions were appropriate, clearly understood, and interpreted consistently by the target population. Particular emphasis was placed on testing new questions that had not previously been included in BOS and questions that had undergone substantial revision.

Cognitive testing was conducted during 10–21 April 2026 with six businesses representing a range of industries and business sizes across New Zealand. Interviews were conducted online via Microsoft Teams, lasted

approximately 60 minutes, and were facilitated by a team of three Ipsos researchers. As recognition of their contribution, participants received either a $100 payment or a $100 donation to a charity selected from an approved list provided by MBIE.

The testing employed a think-aloud approach, whereby participants were asked to verbalise their thought processes while answering survey questions. This methodology allowed researchers to assess how respondents interpreted questions, recalled relevant information, and formulated their responses.

A total of 42 questions were tested. These included questions that were new to SOBO 2026, as well as questions where wording had been modified from previous BOS surveys. In addition to questionnaire content, participants were asked about factors that would encourage or discourage participation in the survey, which staff within their organisation would be best placed to answer particular modules, and their reactions to draft respondent materials, including the invitation letter and frequently asked questions (FAQs).

Findings from the cognitive testing informed refinements to question wording, response options, respondent instructions and supporting communications. Table 3 summarises the key findings from the cognitive testing and the corresponding changes made to improve question clarity.

Table 3. Key findings from cognitive testing and corresponding changes implemented to the questionnaire

Key finding	Change implemented
Introduction – Module A: The introduction was generally clear, although concerns were raised about businesses using different financial year dates & unclear wording.	Added a new question that was a simplified version of the BOS question (using a dropdown menu & asking respondents to select their financial reporting month).
BOps6: The respondent who answered this question found it clear but noted that code 5, *"change in ownership of the business"*, was ambiguous.	Rephrased code 5 to *"change in ownership of this business"* to remove ambiguity.
BOps18: Several respondents found this question difficult to answer. Code 1 was considered ambiguous & multiple respondents wanted to select more than one response option.	Reworded code 3 to *"Our workforce was stable, and we were occasionally recruiting to replace staff who left"*.
CBP5a/b: Respondents provided mixed feedback. Some found the question easy to answer, while others misunderstood the definition of the 'starting-out' minimum wage.	Moved the definition of 'starting-out' minimum wage to just before CBP5a & revised the response options at CBP5a/b.
CBP6a/b: Respondents provided mixed feedback. Some found the question easy to answer, while others expressed uncertainty.	Moved the definition of 'training' minimum wage to just before CBP6a & revised the response options at CBP6a/b.
CBP10: Responses were mixed. Some respondents found the question easy to answer, while others were unaware of the starting-out minimum wage or were confused by the context of the question.	Provided respondents with the option to view the definitions again.
CBP11: The question was generally easy for respondents to answer. Sensitivity regarding the topic was observed & one respondent suggested an option indicating they did not use the starting-out rate.	Added a new response option*: "I don't think it should be used at all"*.
CBP12: Similar feedback was received to CBP10 & CBP11.	Implemented the same changes as for CBP10.
CBP13: Similar feedback was received to CBP10 & CBP11.	Implemented the same changes as for CBP10.
Introduction – Module D: The introduction was clear, although one respondent requested additional examples.	Added *"intelligence gathering software"* as a new bullet point & included additional examples.
QAI2a/b: Respondents found it difficult to select a single response representing their entire organisation & often selected middle response options as an average. Several respondents suggested additional response options.	Split from a single overall AI knowledge measure into organisational- and employee-level AI knowledge measures
QAI6: The question was generally clear, although respondents reported difficulty attributing outcomes directly to AI.	Clarified in the introductory text that precise measurement was not required & respondents could provide their best estimates.
QAI7: Responses were mixed, with around half of respondents feeling that the list of motivations was too narrow.	Added an 'Other (specify)' open-ended response option

Key finding	Change implemented
QAI8: The question was generally clear, although respondents identified barriers that were not covered by the existing options.	Expanded code 2 to *"lack of skills, knowledge or training"*.
QAI10: Responses were mixed. Some respondents found the question straightforward, while others struggled to apply it to their business context.	Bolded *"this business" & "sector"* across all relevant questions.
QAI13: Responses were mixed & some respondents could not apply the response categories to their situation.	Added an *"N/A"* option. For comparisons with OECD results, *"N/A"* & *"Don't know"* responses could be grouped together.
QAI14: Multiple respondents found it difficult to predict how AI would evolve over the next 10 years.	Bolded *"your sector"*; no other changes were made.
QAI15: The question was generally clear, although respondents interpreted the timeframe differently.	Bolded the timeframe; no other changes were made.
QAI16: Responses were mixed. Some respondents found the question clear, while others found the wording difficult. Concerns were also raised about whether the question referred to the overall business or only its most important area.	Added an instructional note: *"Please consider your business as a whole, even if experiences vary across different teams or departments."*
QAI17a: This was one of the more challenging questions for respondents. The wording was considered confusing & respondents felt that some response options required clearer definitions or examples. Several respondents did not understand what was meant by code 3, *"highly educated workers"*.	Retained the question wording, rephrased the *"highly educated workers"* response option & added a new question asking whether AI had changed the business's need for more experienced or qualified workers versus entry-level workers in the previous 12 months.
Respondent suitability: All respondents confirmed that they were the appropriate person to complete the survey, despite not necessarily being general managers. The main concern related to answering AI-related questions, as knowledge of AI varied across teams & roles.	Retained the target respondent group as general managers/ directors & clarified that respondents could consult others within their organisation when answering AI-related questions.
Postal invite: Responses were mixed. Some respondents felt that the stated survey duration could discourage participation. The Stats NZ & MBIE logos increased perceptions of trustworthiness, although the green icons reduced the perceived legitimacy of the invitation.	Clarified that the survey could be completed across multiple sessions & by multiple contributors if required & removed the green icons.

The changes made following cognitive testing improved question clarity, reduced the risk of misinterpretation, and contributed to the overall validity and reliability of the SOBO 2026 questionnaire. A complete copy of the final questionnaire is included in *Appendix 7.1*.

2.3.2 Further feedback on survey

Feedback received during fieldwork indicated that some respondents were uncertain about the survey reference period. The survey went into field later than originally planned, bringing fieldwork closer to the end of the 2025-26 financial year, which for many businesses would be the 12 months ending 31 March 2026. This increased the risk that respondents would interpret questions as relating to the current rather than the 2024–25 financial year. This was a known risk that was accepted in order to retain the intended reference period. Some respondents advised that the requested information was not yet available, which led them to defer completion or exit the survey before finishing. If SOBO is repeated, the reference period should be made more prominent throughout the questionnaire and respondent communications.

Some respondents also expressed a preference for being able to print or download a copy of their completed survey responses. Providing an option to export or print responses may be a useful enhancement for future survey waves.

2.4 Survey platform and programming

Askia – the survey

The questionnaire was programmed and administered via Ipsos's **Askia** survey platform. Askia provided the flexibility required for the large-scale self-completion survey design and supported the survey's complex routing, validation checks, and question logic. The platform's advanced scripting capabilities accommodated the

questionnaire's multiple modules and ensured respondents were presented with questions relevant to their business circumstances.

The platform also enabled respondents to save progress and return to complete the survey across multiple sessions, and supported participation by multiple contributors within the same organisation where specialist input was required.

Case management platform – Business contact coordination

Survey administrators used a case management platform to manage sample records and record all interactions with participating businesses throughout the fieldwork period. The system captured key business and contact information, including business name, contact details, industry, business size, region, and priority status. It also maintained a complete history of communications and contact attempts, including email, postal, and telephone interactions, together with contact outcomes, appointments, notes, and survey completion status. Integration with the Askia survey platform enabled administrators to monitor survey progress in real time, including record-level statuses such as not started, partial complete, and complete, supporting targeted follow-up and fieldwork management activities.

Both the survey platform and the case management system were hosted in Ipsos's data centre in New Zealand, ensuring all survey data and sample information remained onshore throughout the project. This onshore hosting approach maintained data sovereignty and provided additional security assurance for respondent information.

2.5 Recruitment

In total, 29,870 emails were distributed across invitations, reminders, and partial-completion follow-ups, while 9,190 postal invitations and reminders were issued during fieldwork. In addition, 19,200 phone calls were made to follow up with businesses to encourage participation.

2.5.1 Survey materials

A range of respondent communication materials were developed to support fieldwork and encourage participation in SOBO 2026. These materials included:

- Initial email invitations
- Initial postal invitations
- Reminder emails
- Postal reminders
- Partial-completion reminders
- FAQs
- Survey support materials

The communications outlined the purpose of the survey, why businesses had been selected, how the information would be used, confidentiality arrangements, legal obligations under the Data and Statistics Act 2022, and contact details for respondent support. All email and postal invitations included a QR code to provide businesses with quick and direct access to the online survey. Businesses were also provided with guidance on how multiple staff members could contribute to completion of the questionnaire where required.

On 23 June 2026, a respondent raised concerns regarding the wording used to describe the legal obligation to participate in the survey. Following a review, the relevant wording was updated to soften the language regarding the requirements of the Data and Statistics Act 2022. The revised wording was subsequently implemented across all ongoing email reminders, postal reminders, and other respondent communications issued during the remainder of fieldwork.

Copies of all respondent communications and supporting materials are included in *Appendix 7.2*.

2.5.2 Schedule of email and postal communications

A structured communications programme was implemented throughout fieldwork to maximise awareness of the survey and encourage participation. Prior to survey launch, Stats NZ relationship managers contacted selected large businesses to provide advance notice of the study. Formal survey invitations were subsequently issued through both postal and email channels, depending on the contact information available for each business.

As the sample could contain up to three nominated contacts for a business, Ipsos agreed with MBIE and Stats NZ that initial survey invitations would be sent to the first contact listed in the sample. Where no response had been received after approximately two weeks of fieldwork, reminder communications and telephone follow-up activities could be directed to a secondary contact within the business. These communications acknowledged that another individual within the organisation had previously been contacted and encouraged the business to determine internally who was best placed to coordinate and complete the survey.

Follow-up communications included postal reminders for priority businesses without email addresses, reminder emails targeted at businesses that had not yet started the survey, and partial-completion reminders for businesses that had commenced but not completed the questionnaire. This approach helped maximise the likelihood that survey materials reached an appropriate respondent while minimising unnecessary duplication of communications within businesses.

In total, 29,870 emails were distributed across invitations, reminders, and partial-completion follow-ups, while 9,190 postal invitations and reminders were issued during fieldwork. Table 4 details when written communication was sent to participants.

Table 4. Schedule of communication with businesses

Communication	Sent to	Date	No.
Stats NZ relationship manager advance warning	Large business who had an existing relationship with Stats NZ relationship manager were given advance warning that SOBO 2026 was coming	3 June	220 businesses via five relationship managers
Initial postal invite	All businesses with no email address	8 June	7,460
Soft launch, initial email invite	A sample of businesses with an email address	9 June	490
Initial email invite	All remaining businesses with email address	11 June	12,030
Postal reminder	Sent to high-priority businesses without email address[1]	13 July	1,720
Email reminder 1	Businesses with email address that had not yet started	19 June	8,950
Email reminder 2	Businesses with email address that had not yet started	3 July	4,740
Partial reminder 1	Businesses with email address that had started, but not yet completed	7 July	960
Email reminder 3	Businesses with email address that had not yet started	13 July	2,200
Partial reminder 2	Businesses with email address that had started, but not yet completed	22 July	500

[1] Due to limited funding available for postal reminder activity, postal reminders were targeted towards high-priority businesses. Ipsos reviewed fieldwork progress and response patterns to identify under-represented business groups and agreed the targeting approach with MBIE and Stats NZ prior to issuing reminder letters. High-priority businesses were those belonging to sample groups that were under-represented in the achieved sample at the time of selection for follow-up, including specific business size and industry categories.

2.5.2.1 Treatment of key data suppliers

As part of the recruitment strategy, Stats NZ leveraged its existing relationships with a group of businesses identified as key data suppliers. These businesses are considered particularly important contributors to New Zealand's business statistics and, therefore, are a priority for participation in surveys such as SOBO 2026.

Businesses assigned a dedicated Stats NZ relationship manager were notified in advance of the survey and advised that Ipsos would be contacting them regarding participation. This pre-notification activity was designed to raise awareness of the survey, reinforce its importance, and support engagement with these priority respondents.

Ipsos also assigned a dedicated member of the fieldwork team to manage engagement with key data suppliers throughout the collection period. This individual acted as a central point of contact for businesses, coordinated responses to survey queries, and worked closely with Stats NZ relationship managers to support participation. Relationship managers also provided reminders and follow-up contact where appropriate, helping to maintain engagement and encourage survey completion among this important group of respondents.

Particular attention was given to securing participation from key data suppliers to ensure their contribution was appropriately reflected in the achieved sample and to minimise the risk of non-response among businesses that play an important role in New Zealand's business statistics.

2.5.3 Follow-up phone calls

Telephone follow-up activity was conducted between 24 June and 22 July 2026, commencing during the third week of fieldwork. A dedicated team contacted businesses to encourage participation, provide survey support, and respond to queries. Calling priorities were informed by ongoing fieldwork monitoring and response-rate reporting, with businesses selected based on industry and business-size groups that were under-represented relative to sample targets at each stage of data collection.

Over the course of fieldwork, the telephone follow-up team made 19,200 outbound calls to businesses. Most calls were used to encourage completion of the online survey, arrange callbacks, provide respondent assistance, or confirm business eligibility. Table 5 summarises the outcomes of telephone follow-up activity.

In the final stages of fieldwork, targeted calls were made to businesses that had started but not yet completed the survey. These calls reminded respondents to complete the questionnaire, offered assistance where required, and helped address barriers to completion. This approach enabled follow-up efforts to be focused on businesses that had already engaged with the survey, supporting completion among partially responding businesses.

During telephone follow-up activities, 170 businesses were confirmed as no longer operating. Details of these businesses were extracted from the case management system and provided to Stats NZ following fieldwork to support maintenance of the Business Register and improve the quality of future survey samples.

Table 5. Outcome of follow-up phone calls

Outcome of phone call	Count
Respondent agreed to complete online (including appointments & callbacks)	7,000
Already completed online	80
No contact achieved (no answer, busy signal, voicemail)	11,080
Refused participation	330
Business no longer operating	170
Out of scope	130
Invalid number or language barrier	400
Total call outcomes	**19,200**

3 Data Collection

3.1 Soft launch

Prior to the commencement of main fieldwork, a soft launch was conducted to test survey delivery processes, recruitment procedures, questionnaire routing, and data capture functionality.

A total of 490 survey invitations were issued on 9 June 2026. An interim review of the incoming survey data was conducted on 11 June 2026 to assess questionnaire performance and identify any issues requiring modification before the main launch.

At the time of the interim review, the following responses had been recorded:

- Module A: Business Operations – 20 responses
- Module B: Innovation – 10 responses
- Module C: Current Business Practices – 10 responses
- Module D: Artificial Intelligence – 10 responses

The interim review was undertaken by an Ipsos survey programmer and senior research manager. The review focused on verifying that:

- survey responses were being captured correctly
- questionnaire routing operated as intended
- respondents were shown only questions relevant to their circumstances
- answer options were recorded correctly within the dataset

No issues were identified during the interim review.

Due to the relatively small number of responses available at the time of review, it was not possible to verify every survey route and response option. The following questions had not yet received any responses and, therefore, could not be assessed:

- **BOps32** – Equity finance availability
- **BOps33** – Equity finance provider
- **BOps34** – Equity finance usage intention
- **CBP8** – Starting-out minimum wage effect on hiring
- **CBP9** – Training minimum wage effect on hiring
- **QAI25** – Ease of recruiting staff with AI skills
- **QAI23** – Reasons why recruiting staff with AI skills was challenging

As no changes to the questionnaire or survey processes were required following the soft launch review, responses collected during the soft launch period were retained and included in the final survey dataset.

3.2 Response rate

A total of 9,900 completed responses were achieved by the close of fieldwork (see section 4.1 *Threshold for completion* for definition of a completed response). Based on the total sample issued of 19,990 businesses, this equates to an overall response rate of approximately 49.6%. However, not all records within the issued sample were ultimately eligible or usable for fieldwork purposes.

Throughout fieldwork, an ASD approach was used to monitor response outcomes and inform recruitment efforts. Fieldwork resources and follow-up activities were targeted towards under-represented industry and business-size groups where appropriate to support a balanced achieved sample and maintain representativeness across key business characteristics.

While there were some differences between the achieved responses and the original target allocations across industry and business-size groups, overall coverage of the key analytical segments was robust. Any imbalances in the achieved responses were subsequently addressed through the weighting process described in section 4.4 *Data weighting*, ensuring that survey estimates were representative of the target business population.

Tables 6 to 11 summarise response rates and achieved responses prior to weighting. Table 6 presents response rates by invitation contact mode. Tables 7 and 9 summarise achieved responses and response rates by business size and industry respectively. Tables 8 and 10 examine response outcomes by invitation contact mode within each business-size and industry group, while Table 11 presents the achieved responses by industry and business size.

Table 6. Completes by invitation contact mode

Invitation contact mode	Initial invitations sent	Completed responses achieved	Response rate %
Email	12,520	7,860	62.7%
Postal	7,460	2,050	27.4%
Total	**19,990**	**9,900**	**49.6%**

Note. These are crude response rates based on the full issued sample and do not exclude unusable or ineligible records. During fieldwork, 3,500 email invitations were returned as undeliverable, and 710 postal invitations and reminders were returned because of incorrect or outdated addresses. Telephone contact was attempted for some affected businesses; however, the rates shown may understate the response rate among businesses that successfully received an invitation.

Table 7. Achieved response by business size

Business size	Target completed responses at 50% RR	Initial invitations sent	Completed responses achieved	Response rate %
6–19	7,220	10,280	4,500	43.8%
20–49	1,800	5,220	2,770	53.1%
50–99	520	2,420	1,400	58.0%
100+	450	2,070	1,230	59.4%
Total	**9,990**	**19,990**	**9,900**	**49.6%**

Table 8. Achieved response by business size and invitation contact mode

Business size	Email invitation			Postal invitation		
	Initial invitations sent	Completed responses achieved	Response rate %	Initial invitations sent	Completed responses achieved	Response rate %
6–19	4,680	2,950	63.1%	5,610	1,550	27.7%
20–49	3,730	2,360	63.2%	1,490	410	27.6%
50–99	2,150	1,340	62.3%	270	60	23.3%
100+	1,970	1,210	61.3%	100	20	20.4%
Total	**12,520**	**7,860**	**62.7%**	**7,460**	**2,050**	**27.4%**

Table 9. Achieved response by industry

Industry	Target completed responses at 50% RR	Initial invitations sent	Completed responses achieved	Response rate %
Primary industries	830	2,030	840	41.4%
Goods production	2,580	5,200	2,670	51.4%
Trade & hospitality	3,020	3,860	1,780	46.1%
Transport services	350	730	350	48.6%
Business services	1,940	4,970	2,770	55.8%
Social & personal services	1,290	3,200	1,490	46.5%
Total	**9,990**	**19,990**	**9,900**	**49.6%**

Table 10. Achieved response by industry and invitation contact mode

Industry	Email invitation			Postal invitation		
	Initial invitations sent	Completed responses achieved	Response rate %	Initial invitations sent	Completed responses achieved	Response rate %
Primary industries	1,020	630	61.2%	1,010	220	21.5%
Goods production	3,180	2,020	63.6%	2,020	650	32.2%
Trade & hospitality	2,360	1,420	59.9%	1,500	360	24.3%
Transport services	510	300	57.9%	220	60	26.5%
Business services	3,670	2,410	65.6%	1,300	370	28.2%
Social & personal services	1,780	1,100	61.5%	1,420	390	27.6%
Total	**12,520**	**7,860**	**62.7%**	**7,460**	**2,050**	**27.4%**

Table 11 provides additional detail on the achieved response. No separate targets were established for business size within industry groups. However, these characteristics are reported throughout the summary reports and data tables as key analytical variables.

Table 11. Achieved response by industry and business size

Industry	Size	Completed responses achieved
Agriculture, Forestry & Fishing	6–19	430
	20–49	220
	50–99	80
	100+	50
Mining and Electricity, Gas, Water & Waste Services	6–19	110
	20–49	40
	50–99	20
	100+	20
Manufacturing	6–19	850
	20–49	500
	50–99	260
	100+	190
Construction	6–19	310
	20–49	210
	50–99	150
	100+	70
Wholesale Trade	6–19	270
	20–49	250
	50–99	140
	100+	100
Retail Trade	6–19	160
	20–49	150
	50–99	100
	100+	210
Accommodation & Food Services	6–19	170
	20–49	100
	50–99	80
	100+	70
Transport, Postal & Warehousing	6–19	110
	20–49	110
	50–99	60
	100+	70

Industry	Size	Completed responses achieved
Information Media & Telecommunications	6–19	140
	20–49	50
	50–99	20
	100+	10
Financial & Insurance Services	6–19	220
	20–49	90
	50–99	30
	100+	50
Rental, Hiring & Real Estate Services	6–19	160
	20–49	100
	50–99	20
	100+	20
Professional, Scientific & Technical Services	6–19	560
	20–49	370
	50–99	180
	100+	130
Administrative & Support Services	6–19	300
	20–49	160
	50–99	80
	100+	100
Education & Training	6–19	210
	20–49	130
	50–99	20
	100+	20
Healthcare & Social Assistance	6–19	220
	20–49	160
	50–99	120
	100+	90
Arts & Recreation Services	6–19	90
	20–49	60
	50–99	30
	100+	20
Other Services	6–19	200
	20–49	80
	50–99	20
	100+	10
Total	**All**	**9,900**

Table 12 shows the number of businesses that reported being fully or partly owned by a person or people who have Māori whakapapa, and a representative of that business identifies the business as Māori[2].

Table 12. Māori business ownership

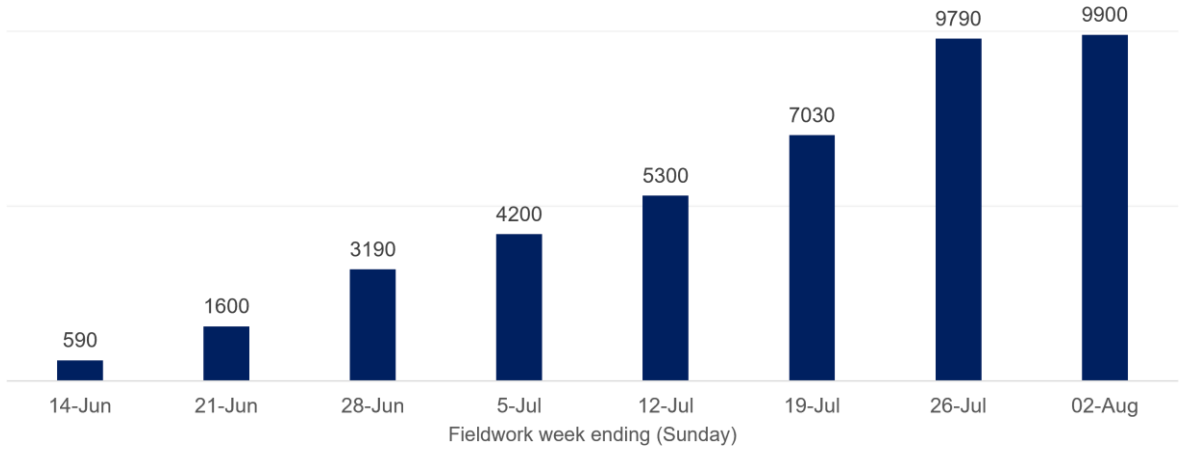
Business ownership status	Completed responses achieved	% of responses
Māori business ownership	410	4%
Non-Māori owned business	9,490	96%
Total	**9,900**	**100%**

3.3 Progress during fieldwork

The main study achieved 9,900 responses from businesses during 8 June–26 July 2026.

Figure 1 illustrates the progression of data collection throughout the fieldwork period. Each bar shows the cumulative number of completed responses received by the week-ending date shown. A relatively small number of completed responses arriving in the days after 26 July have been included in the survey data.

Figure 1. Completes during fieldwork period



[2] Data standard for Māori business | Stats NZ

Figure 2 shows the cumulative number of completed surveys received by each week-ending date during the fieldwork period by invitation mode.

Figure 2. Completes by invitation contact mode during fieldwork period

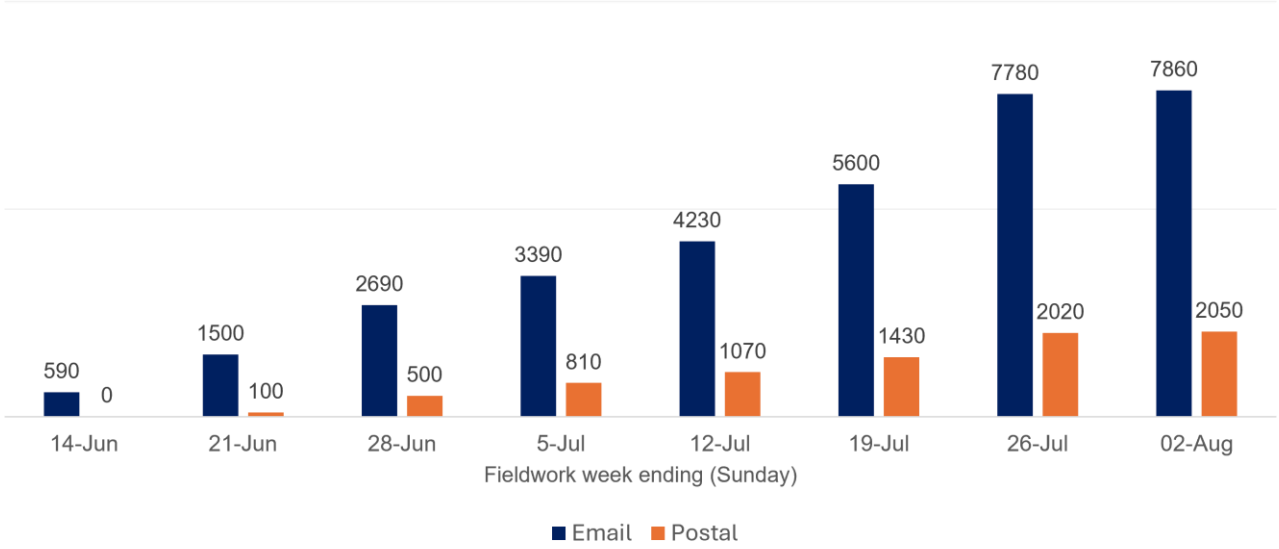
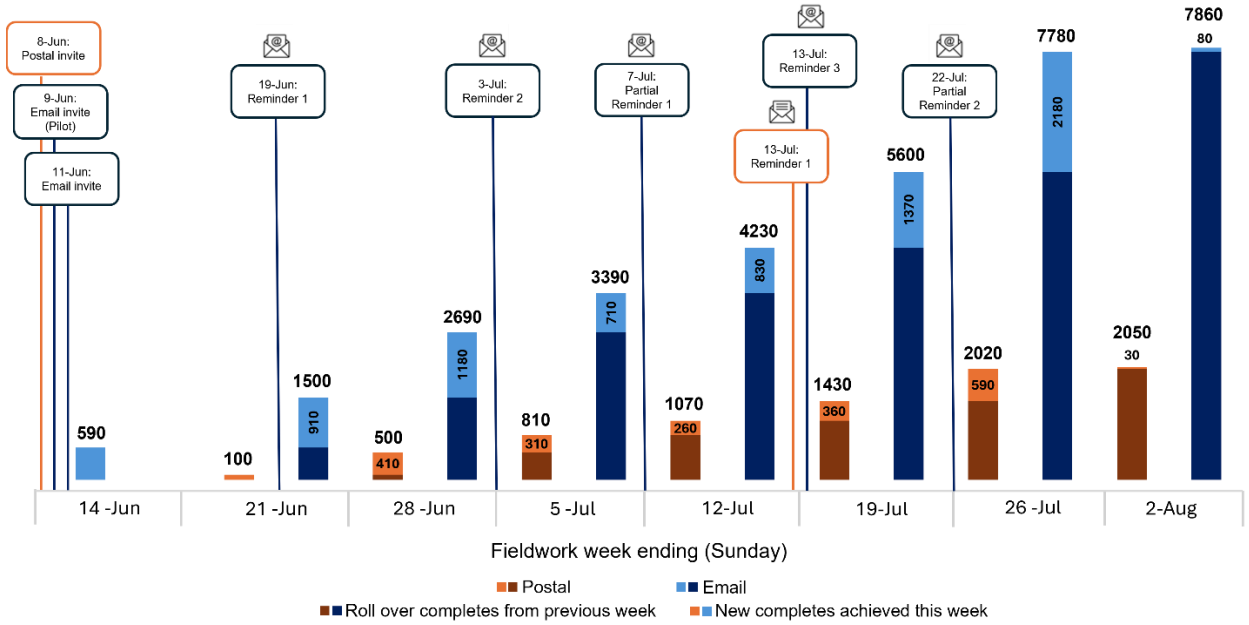


Figure 3 shows the cumulative number of survey completions during fieldwork by initial invitation mode, with postal completions shown in orange and email completions shown in blue. The timing of key email and postal contacts is overlaid. Postal invitations were issued on 8 June, followed by email invitations on 11 June. Three email reminders were sent to businesses invited by email that had not yet responded, while one postal reminder was sent to selected businesses invited by post that had not yet responded. Two partial-completion reminders were also sent by email to businesses that had started but not completed the survey. The figure distinguishes new completions achieved each week from completions carried forward from previous weeks.

Figure 3. Completes by invitation contact mode and fieldwork timeline



3.4 Survey length

Survey materials advised respondents that completing the full questionnaire would typically take 1–1½ hours if completed in a single sitting. While the median recorded survey duration was 35 minutes, the mean duration was 1 hour and 51 minutes. These metrics were calculated using questionnaire timestamps and represent the elapsed time between a respondent first accessing the survey and submitting their final response. The substantial difference between these measures reflects the extent to which respondents completed the survey across multiple sessions, involved multiple contributors, or, in some cases, kept the survey open over several days. Consequently, the recorded duration metrics should be interpreted with caution.

Table 13. Survey duration by module in main study among businesses that met the minimum reporting threshold (see section 4.1)

Main study module	Mean	Median	Std. Dev.
A: Business Operations	1:10:00	15:09	11:05:36
B: Innovation	21:46	6:04	6:06:10
C: Current Business Practices	8:29	3:14	1:33:23
D: Artificial Intelligence	13:52	6:22	2:35:50
Total	1:50:47	35:25	12:47:17

3.5 Feedback on fieldwork timing

SOBO 2026 fieldwork was initially scheduled for early 2026, with businesses asked to report on their financial year ending in 2025. Following delays to the project, fieldwork instead coincided with the period when many businesses were preparing or finalising their next year-end accounts. Although the intended reference period was stated in the questionnaire, some respondents did not interpret it correctly and assumed the questions related to the current financial year. As a result, some financial managers and accountants advised that the requested information was not yet available. Several deferred completion or requested a callback once their current financial statements had been finalised, including some after 30 July.

4 Data Processing

This chapter outlines the processes used to prepare the survey data for analysis and reporting – completion thresholds, coding, data cleaning and quality assurance, treatment of questionnaire errors, and weighting.

4.1 Threshold for completion

In consultation with MBIE and Stats NZ, a minimum completion threshold was established to determine inclusion in the reporting dataset.

To be considered a 'complete response' and to be included in summary reports and published data tables, businesses were required to complete at least 40% of the 'ask all' questions in both:

- Module A: Business Operations
- Module B: Innovation.

Businesses that did not meet this threshold were excluded from the weighted dataset used for reporting and analysis.

MBIE and Stats NZ received datasets containing all survey starts, including responses from businesses that did not meet the completion threshold but had at least one response (n=10,480 total). Unless otherwise stated, all results presented in this technical report are based on businesses that met the 40% completion threshold (n=9,900).

4.2 Coding

The Survey of Business Operations 2026 included six questions containing an *"Other (please specify)"* response option. The questionnaire did not include any open-ended 'free response' questions.

Responses were coded by Ipsos's specialist coding team. Respondents' comments were first reviewed to determine whether they could be coded to an existing response option. Where responses could not be accommodated within existing categories, new codes were developed and incorporated into the code frame. Similar responses were grouped into common themes and assigned a corresponding code, while retaining the original meaning and context of respondents' comments.

Open-ended responses provided under "*Other (please specify)*", and the draft code frame were reviewed by a Senior Research Manager and refined in consultation with MBIE and Stats NZ. Where coding decisions required additional subject-matter expertise, feedback was sought from relevant experts and incorporated into the final coding framework. The agreed coding was then applied to the final coded dataset and reporting outputs.

Questions with an *"Other (please specify)"* option were: BOps34, BOps35, QAI7, QAI20, QAI21, and QAI23.

4.3 Data cleaning and quality assurance checks

Survey data was extracted from the Askia survey platform into SQL tables, with extract, transform and load (ETL) code written in R to clean and format the data.

Quality assurance checks were undertaken to confirm that response values were permitted by the questionnaire and were consistent with the programmed survey routing and logic. Outlier checks were also undertaken and resulted in the suppression of a small number of data cells containing implausible values.

Survey completion time is typically used as an additional quality measure, with responses completed in less than one third of the median completion time subject to review. However, because businesses often completed the survey across multiple sessions, completion time was not considered a reliable exclusion criterion for this wave.

4.3.1 Outcomes and exclusions

A total of 10,480 businesses accessed and started the survey. Of these, 9,900 businesses met the minimum reporting threshold by completing at least 40% of the applicable questions in both Module A (Business Operations) and Module B (Innovation).

The remaining 570 businesses did not meet the 40% completion threshold and were excluded from the weighted dataset used for analysis, reporting, and publication of aggregate results. However, the raw dataset supplied to MBIE and Stats NZ includes all survey starts, regardless of completion level.

Accordingly, the final dataset used for weighting and reporting comprised 9,900 businesses, while the full survey dataset contained 10,480 survey starts.

4.3.2 Logic errors

Several questionnaire routing errors were identified following data collection.

BOps7: Future overseas sales plans

BOps7 asked: *Which of the following best describes this business's plans for overseas sales in the future?*

The question was intended to be asked of all respondents. However, a programming error resulted in BOps7 being shown only to respondents who answered *"Yes"* to BOps1 (*"In the 2024–25 financial year, did this business have any sales of goods and services that came from exports?").*

The error arose from questionnaire revisions made after survey programming had commenced, where question numbering was updated but the associated routing condition was not amended.

As a result, BOps7 was completed by **1,887 respondents** rather than the full survey sample. While this prevents reporting of the measure for the total sample as originally intended, the achieved base remains sufficient to support analysis of businesses currently engaged in exporting, including key subgroups such as business size and industry sector.

BOps33, BOps34, and BOps35: Finance question routing

Three additional routing errors affected a small number of respondents:

- **BOps33** (*"For your most recent equity finance request, who was the provider?"*) was incorrectly displayed to 26 respondents who had selected *"Don't know"* at BOps32.
- **BOps34** (*"For your most recent equity request, how did you intend to use the finance?"*) was incorrectly displayed to 26 respondents who had selected *"Don't know"* at BOps32.
- **BOps35** (*"For your most recent debt request, how did you intend to use the finance?"*) was incorrectly displayed to 58 respondents who had selected *"Don't know"* at BOps31.

The impact of these errors was minimal. Responses collected from those who were incorrectly routed to these questions were excluded from the final analysis dataset. Given the small number of affected cases, there was no material impact on survey estimates or reporting outputs.

4.3.3 Cross-question consistency checks

As part of data quality checks, responses to BOps13, BOps14 and Inv9 were compared. Some businesses reported non-zero research and development (R&D) expenditure in Inv9 but provided responses to BOps13 and BOps14 that were not consistent with this reporting. The reasons for these differences are not known. However, they may reflect differences in how respondents interpreted the questions, as BOps13 uses a specific definition of R&D, whereas Inv9 captures R&D expenditure within a broader question on product development activities. Differences may also reflect variation in who completed different sections of the questionnaire, or how respondents classified particular product development expenditures. No adjustments were made to responses, and results are reported as provided by respondents.

4.4 Data weighting

The achieved sample was subsequently weighted to ensure results were representative of NZ businesses by industry and business size. The principal weighting stratum was Australian and New Zealand Standard Industrial Classification 2006 (ANZSIC06) industry subdivision, as provided in the sample file. The weighting substratum was company size as rolling mean number of employees, with four levels (6–19, 20–29, 30–49, and 50+).

Government-owned trading entities did not have company size data provided. Several industry subdivisions for these government-owned trading entities did not receive any response. As a result, all government-owned trading entities were treated as belonging to the same stratum and substratum for weighting.

Businesses belonging to Stratum ‘AB’ (‘Aquaculture’, and ‘Fishing, Hunting, and Trapping’) had company size levels ‘20–29’ and ‘30–49’ combined due to the small number of respondents in each size level.

Sample weights were calculated based on the sampling probabilities provided by Stats NZ in the sample file. Non-response weight calculation used the ratio of business selected to the number of businesses responding at each level. The final weights were the product of the sample weights and the non-response weights.

4.5 Transfer of data

Secure encrypted channels were used to transfer data between Ipsos and Stats NZ. Prior to the transfer, data went through extensive cleaning and quality assurance processes. The dataset delivered to Stats NZ did not include any direct identifiers.

5 Qualitative Follow-Up on AI

The qualitative component of the research was undertaken to complement the survey findings by providing deeper insight into NZ businesses' experiences with AI. While the survey quantified patterns of AI adoption, attitudes, and behaviours, the qualitative research explored the factors underlying these findings, such as adoption decisions, implementation experiences, perceived risks and benefits, barriers to uptake, and future intentions regarding AI use.

All figures presented in this chapter relate to the qualitative component of the research and are reported as actual counts. Qualitative figures have not been rounded.

The qualitative research consisted of two phases:

- **Phase 1:** 12 online in-depth interviews with business decision-makers
- **Phase 2:** Five online focus groups with business decision-makers

Together, these methods provided both detailed organisational perspectives and broader discussion of experiences and attitudes towards AI across a diverse range of NZ businesses.

5.1 Objectives

The qualitative research was designed to:

- provide context and explanation for key quantitative findings
- generate policy-relevant insights to support MBIE decision-making
- capture perspectives from businesses with differing levels of AI adoption
- explore factors influencing AI adoption, planned adoption, and non-adoption
- understand implementation experiences, workforce impacts, governance considerations, and perceived risks and opportunities associated with AI

5.2 Method

The qualitative research was delivered in two phases. Phase 1 comprised a series of online in-depth interviews conducted during quantitative fieldwork, while phase 2 consisted of online focus groups conducted following an initial review of survey findings.

This staged approach enabled detailed exploration of individual business experiences before testing and extending emerging themes through group discussion.

5.2.1 Phase 1: Online in-depth interviews

Recruitment

Interview participants were recruited from SOBO 2026. At the conclusion of Module D, survey respondents were asked whether they would be willing to participate in follow-up qualitative research (QAI27, see *Appendix 7.1.2*). Respondents who agreed to be recontacted (n=1,217) were asked to provide contact details for the person within their organisation best placed to discuss the business's use of AI, plans for adoption, or reasons for non-adoption (QAI28).

A purposive sampling approach was used to recruit participants from this opt-in pool. Recruitment was primarily structured around businesses' responses to QAI1 (see *Appendix 7.1*), which was used to classify businesses into three AI adoption groups:

- AI adopters (businesses currently using AI)
- Planned AI adopters (businesses planning to use AI)
- AI non-adopters (businesses not planning to use AI)

The recruitment design aimed to achieve equal representation across each adoption category, resulting in four interviews with AI adopters, four interviews with planned AI adopters, and four interviews with AI non-adopters. Recruitment was further stratified by business size, with one participant recruited within each adoption group from businesses with 6–19, 20–49, 50–99, and 100+ employees.

To maximise diversity within the AI adopter group, additional recruitment criteria were applied. These included recruiting businesses that:

- integrated AI tools or technologies into products, services, or business processes (QAI3) and/or
- had responded to changing AI-related skill requirements through retraining, upskilling, or hiring staff (QAI18, see *Appendix 7.1* for both questions)

Recruitment also sought to achieve representation across a range of industry sectors and geographic regions.

Selected participants were contacted by Ipsos's follow-up team and invited to take part in the research. Those who agreed were provided with a consent form prior to the interview. The consent process covered participation in the research and permission for the interview to be audio-recorded and transcribed. Participants received a $150 koha from Ipsos in recognition of their time. Participants could choose either a digital Prezzy Card or a charitable donation made on their behalf to one of the MBIE-approved charities they selected from a list provided.

Data collection

A total of 12 online in-depth interviews were conducted during 17–29 July 2026, alongside the second half of the survey fieldwork period. Interviews lasted approximately 60 minutes, were held online via Microsoft Teams, and were conducted by experienced Ipsos qualitative researchers using a semi-structured discussion guide.

The discussion guide was developed iteratively, with draft versions reviewed and refined following feedback from MBIE. Final discussion guides were approved by MBIE prior to interviews commencing. The guide was informed by the study objectives, survey content, and areas of policy interest. While separate discussion pathways were developed for AI adopters, planned AI adopters, and AI non-adopters, a common set of core topics was explored across all interviews to enable comparison between participant groups.

Key discussion topics included:

- AI adoption and use
- organisational decision-making relating to AI
- barriers and enablers to adoption
- workforce capability and skills requirements
- perceived benefits and risks of AI
- governance and oversight considerations
- future intentions and support needs relating to AI

The in-depth interview discussion guide can be found in *Appendix 7.3.1*.

5.2.2 Phase 2: Online focus groups

Recruitment

Phase 2 comprised five online focus groups each designed to include five business decision-makers. Participants were recruited from the same pool of respondents who consented to being recontacted for follow-up research.

Recruitment for this phase was also designed to include participation from businesses across a range of AI adoption statuses, sizes, industries, and geographic regions. Four focus groups were organised by business size (6–19, 20–49, 50–99, and 100+ employees), while a fifth group comprised a mix of business sizes.

Within each focus group, recruitment aimed to include a mix of AI adoption experiences. Recruitment targets specified approximately three AI adopters, one planned AI adopter, and one AI non-adopter per focus group.

Selected participants were contacted by Ipsos's follow-up team via phone call to invite them to participate in a focus group. Those who agreed were provided with a consent form prior to the focus group. The consent process covered participation in the research and permission for the focus group to be audio-recorded and transcribed.

Participants received a $150 koha from Ipsos in recognition of their time and could choose either a digital Prezzy Card or a charitable donation made on their behalf to one of the MBIE-approved charities they selected from a list provided.

Data collection

The focus groups were conducted following completion of the interview phase and the conclusion of the survey. They were held online via Microsoft Teams during 7–9 September 2026. Each group lasted approximately 1.5 hours and was facilitated by experienced Ipsos qualitative researchers using a semi-structured discussion guide.

The focus groups were designed to build on findings from both the quantitative survey and the in-depth interviews. The group setting provided an opportunity for participants to discuss shared experiences, compare approaches, and reflect on the perspectives of other businesses. Unlike the interviews, which explored individual businesses' AI use in depth, the focus groups took a broader approach, focusing on wider themes, perceptions, and experiences of AI adoption across businesses.

The discussion guide was developed iteratively, with draft versions reviewed and refined after feedback from MBIE. Final discussion guides were approved by MBIE prior to focus groups commencing. The guide was informed by the study objectives, areas of interest, the in-depth-interview findings, and emerging survey findings.

Discussion topics included:

- AI adoption and use in businesses
- barriers and enablers to adoption
- workforce capability requirements
- organisational preparedness for AI
- governance and accountability considerations
- perceived risks and opportunities associated with AI
- support, guidance, and resources businesses would find useful

The focus group discussion guide is provided in *Appendix 7.3.2*.

5.3 Qualitative sample

5.3.1 Phase 1: In-depth interviews sample

A total of 12 in-depth interviews were completed. Recruitment quotas were achieved across all three AI adoption categories and all four business size categories. The achieved sample also provided diversity across industry sectors and geographic locations.

Table 14. Phase 1 sample by AI adoption status

AI adoption status	Total sample achieved	% of sample
AI adopters	4	33%
Planned AI adopters	4	33%
AI non-adopters	4	33%
Total	**12**	**100%**

Table 15. Phase 1 sample by business size

Business size	Total sample achieved	% of sample
6–19 employees	3	25%
20–49 employees	3	25%
50–99 employees	3	25%
100+ employees	3	25%
Total	**12**	**100%**

Table 16. Phase 1 sample by sector

Sector	Total sample achieved	% of sample
Primary industries	2	17%
Goods production	1	8%
Trade & hospitality	2	17%
Transport services	2	17%
Business services	3	25%
Social & personal services	2	17%
Total	**12**	**100%**

Table 17. Phase 1 sample by region

Region	Total sample achieved	% of sample
Auckland	3	25%
Gisborne	1	8%
Hawke's Bay	1	8%
Manawatū-Whanganui	1	8%
Wellington	1	8%
Marlborough	1	8%
Canterbury	2	17%
Otago	2	17%
Total	**12**	**100%**

5.3.2 Phase 2: Focus group sample

The five focus groups included a total of 24 participants. While the groups aimed to include 25 participants overall, a participant did not attend as intended due to illness. Recruitment was designed to achieve variation across AI adoption status, business size, industry sector, and geographic region.

Table 18. Phase 2 sample by AI adoption status

AI adoption status	Total sample achieved	% of sample
AI adopters	14	58%
Planned AI adopters	5	21%
AI non-adopters	5	21%
Total	**24**	**100%**

Table 19. Phase 2 sample by business size

Business size	Total sample achieved	% of sample
6–19 employees	6	25%
20–49 employees	5	21%
50–99 employees	7	29%
100+ employees	6	25%
Total	**24**	**100%**

Table 20. Phase 2 sample by sector

Sector	Total sample achieved	% of sample
Primary industries	3	13%
Goods production	4	17%
Trade & hospitality	6	25%
Transport services	3	13%
Business services	6	25%
Social & personal services	2	8%
Total	**24**	**100%**

Table 21. Phase 2 sample by region

Region	Total sample achieved	% of sample
Auckland	5	21%
Manawatū-Whanganui	5	21%
Wellington	3	13%
Marlborough	2	8%
Canterbury	5	21%
Otago	4	17%
Total	**24**	**100%**

5.4 Analysis

Interviews and focus groups were audio-recorded, transcribed with participants' consent, and analysed using a thematic analysis approach.

Researchers reviewed interview and focus group data against the research objectives and discussion topics. Analysis focused on identifying common themes, patterns, and differences across participant groups, including comparisons between AI adopters, planned AI adopters, and AI non-adopters. Emerging themes were reviewed collaboratively by the research team to ensure interpretations accurately reflected participants' experiences and perspectives.

The qualitative findings were used to support interpretation of the quantitative survey results by providing additional context and explanation for observed patterns. As the qualitative research was based on a relatively small purposive sample, findings should be interpreted as illustrative of participant experiences and perspectives rather than statistically representative of the wider business population. Throughout the Artificial Intelligence Topline report, qualitative findings were used to enrich understanding of the quantitative results and provide additional insight into businesses' experiences with AI.

6 Deliverables

The SOBO 2026 deliverables comprised two summary reports, detailed aggregate tables and two unit-record datasets.

6.1 Summary reports

Two summary reports were produced to present the key findings from SOBO 2026:

- Survey of Business Operations 2026 Summary Report: Business Operations and Innovation (covering Modules A, B and one question from Module C)
- Survey of Business Operations 2026 Summary Report: Artificial Intelligence (AI) (covering Module D)

Both reports are based on the weighted reporting dataset and include businesses that met the agreed 40% completion threshold for the 'ask all' questions in Modules A and B.

6.2 Public data

Weighted aggregate tables were produced to provide detailed results for survey questions. The tables include overall results as well as cross-tabulations by business size and industry. The tables are based on the same weighted reporting dataset used for the summary reports and include businesses that met the agreed 40% completion threshold for the 'ask all' questions in Modules A and B.

6.3 Sampling error and significance testing

As with any sample survey, estimates from SOBO 2026 are subject to sampling error. Sampling error arises because results are based on a sample of businesses rather than a census of all New Zealand businesses. For the achieved sample of 9,900 businesses, the maximum margin of error is approximately ±1 percentage point at the 95% confidence level. Sampling error will be larger for analyses based on smaller subgroups of businesses.

Statistical significance testing was undertaken using two-tailed tests at the 95% confidence level. This tests for differences in either direction, meaning a result may be significantly higher or significantly lower. A difference is considered statistically significant where the probability of observing a difference of that size through random sampling variation alone is less than 5%, assuming there is no true difference between the groups compared.

Significance testing takes into account the underlying unrounded percentages and the number of respondents answering each question. Results based on larger sample sizes can be estimated more precisely and therefore have smaller standard errors, while results based on smaller sample sizes are subject to greater uncertainty. As a result, two groups displaying the same rounded percentage may have different significance outcomes if their base sizes, underlying unrounded results, or comparison percentages differ.

6.4 Datasets

Unit-record datasets were prepared to support approved research and analytical use. Two datasets were produced: one for inclusion in the LBD managed by Stats NZ, and one for MBIE's analytical and reporting requirements. These datasets provide access to individual survey responses and supporting metadata, subject to the relevant confidentiality, governance, and access requirements.

All summary reports are available on the MBIE website: https://www.mbie.govt.nz/business-and-employment/business/support-for-business/survey-of-business-operations-2026.

7 Appendices

7.1 SOBO 2026 Questionnaire

This appendix contains a printed version of the electronic questionnaire. Routing and questionnaire guidance is included as [red]. The source of questions is included in [blue].

Module A: Business Operations

Reporting Information **[BOS2023 & BOS2024]**

Before you begin this section:

- These questions should be overseen by the General Manager or someone with a good knowledge of all aspects of the business.
- Some answers may need to be confirmed with other specialist staff.
- **Please provide information relating to your most recent complete financial year ending in 2025.** This will be referred to as the 2024-25 financial year throughout the rest of the survey.

[Ask all, Single Response per drop down]

RI1 The balance date for this business's 2024-25 financial year was the year ending:
[Drop down Month: Jan-Dec] 2025

96. Not applicable (specify) [OE Box]
99. Don't know

International engagement **[BOS2023 & BOS2024]**

[Single Response]

BOps1 [BOS2024:BOps7]

In the 2024-25 financial year, did this business have any sales of goods and services that came from exports?

1. Yes
2. No
99. Don't know

[Ask if BOps1 = 1 Yes, Single Response]

BOps2 [BOS2023:BOps8]

For the 2024-25 financial year, estimate the proportion of this business's sale of goods and services that came from exports:

Note: Please round to the nearest %. If your exports are between 0 and 1%, please round up to 1%.

Open ended, validate as percentage max 100%
95. Prefer not to say [exclusive]

[Ask if BOps1 = 1 Yes, Single Response]

BOps3 [BOS2023:BOps9]

In the 2024-25 financial year, did this business enter any new export markets?

1. Yes
2. No
99. Don't know

[Ask if BOps1 = 1 Yes, Single Response]

BOps4 [NEW, FROM BOS2024]

How long has this business been selling goods and services to overseas markets?

1. Less than 1 year
2. 1-5 years
3. 6-10 years
4. More than 10 years

[Ask all, Single Response]

BOps5 [NEW, ADAPTED FROM BOS2024 asks about 1 FY, not 2 FYs]

In the 2024-25 financial year**,** did this business withdraw from or substantially reduce sales in any overseas markets?

1. Withdrew completely from all previous sales
2. Withdrew completely from all sales in one or more countries
3. Substantially reduced sales in one or more countries
4. No
98. No previous sales overseas

[Ask if BOps5 = 1, 2, 3, Multiple Response, Randomised]

BOps6 [NEW, FROM BOS2024]

Why did this business withdraw from or substantially reduce sales in those countries?

Please select all that apply.

1. Exchange rate volatility or level
2. Low market demand or increased competition in overseas markets
3. Overseas government tariffs (e.g. import duties)
4. Overseas government regulations (e.g. product standards)
5. Change in ownership of this business
6. Specific orders or jobs completed
7. Profitability lower than expected
8. Costs, risks, or barriers were prohibitive
9. Refocused on different markets
98. None of the above [anchor, exclusive]

[Ask all, Single Response]

BOps7 [NEW, FROM BOS2024]

Which of the following best describes this business's plans for overseas sales in the **future**?

1. Initiatives underway and new or increased sales expected within the next 12 months
2. Actively exploring options for new or increased sales
3. No action currently, but interested in exploring options
4. Currently have overseas sales, but not interested in expanding
5. Not currently interested in commencing overseas sales
98. Business not suitable for overseas sales

[Ask All, Single Response, Require text if code 1 selected]

BOps8 [BOS2023:BOps10]

As at the end of the 2024-25 financial year, did any individual or business located overseas hold an ownership interest or shareholding in this business?
If yes, please enter the total percentage.

1. Yes [OE Box]
2. No
99. Don't know

[Ask All, Single Response]

BOps9 [BOS2023:BOps11]

As at the end of the 2024-25 financial year, did this business hold any ownership interest or shareholding in a business located overseas?
This includes its own branch, subsidiary, or sales office.

1. Yes
2. No
99. Don't know

[Ask if BOps9 = 1 Yes, Single Response]

BOps10 [BOS2023:BOps12]

In the 2024-25 financial year, did this business establish, or gain any **new** ownership interests or shareholding in businesses located overseas?
This includes establishing a new branch, subsidiary, or sales office overseas.

1. Yes
2. No
99. Don't know

Business expenditure [BOS2023]

[Ask All, Multiple Response with OE, validate as numeric]

BOps11 [BOS2023:BOps14]

For the 2024-25 financial year, how much did this business **spend** on each of the following (including in-house costs)?

Please select all that apply.

- *Where actual figures are not available, please give careful estimates.*
- *Costs should include all in-house costs including staff wages and salaries. Please include costs of services purchased from others.*
- *Please enter costs **excluding** GST.*

1. Design (e.g. industrial, product, fashion design) [OE box]
2. Computer software, databases, data analysis [OE box]
3. Marketing, brand building, advertising [OE box]
4. Registering, filing, monitoring own intellectual property [OE box]
5. Acquisition of intellectual property from others (e.g. purchasing licences, patents) [OE box]
6. Formal training for staff (direct costs of purchased training and staff costs to develop and deliver internal training) [OE box]
95. Prefer not to say [exclusive]

[Ask all, Single Response]

BOps12 [BOS2022:BOps8]

For the 2024-25 financial year, did this business invest in its expansion?

Include:

- *Purchase of one or more businesses or assets (e.g. land, buildings, equipment)*
- *Development or introduction of new or significantly improved products, services, or processes*
- *Entry into new markets*

***Do not** include:*

- *Increases in turnover for existing business*
- *Ongoing operational expenses*

1. Yes
2. No
99. Don't know

Research and development [BOS2022 & BOS2023 & NEW]

[Ask All, Single Response]

BOps13 [BOS2023:BOps15] RDTA requirement

In the 2024-25 financial year, did this business undertake or fund any research and development (R&D) activities?
R&D is defined as systemic work to create new knowledge, or to use existing knowledge to develop new or improved goods, services, materials, or processes.
This work should be characterised by originality and have investigation as its primary objective.
*Please include basic research, applied research, and experimental development. **Do not** include market research, efficiency studies, or style changes to existing goods or services.*

1. Yes
2. No
99. Don't know

[Ask if BOps13 = 1 Yes, OE, validate as numeric]

BOps14 [BOS2023:BOps16]

For the 2024-25 financial year, how much did this business **spend** on R&D activities?

- *Include any relevant expenditure already reported earlier*
- ***Do not** include GST*

Open ended
95. Prefer not to say [exclusive]

[Ask if BOps13 = 1 Yes, OE]

BOps15 [BOS2023:BOps17]

Please estimate the percentage of R&D expenditure previously reported that relates to **in-house** activities.

- *Include contractors working in-house*
- ***Do not** include R&D funded by this business but carried out by other organisations*

Open ended, validate as percentage max 100%
95. Prefer not to say [exclusive]

Employment [BOS 2022 & 2023]

[Ask All, OE must add to 100%]

BOps16 [BOS2023: BOps18]

In the 2024-25 financial year, what percentage of staff (working proprietors and employees) worked for this business on the following basis?

Include:

- *Those temporarily absent from work (e.g. on sick leave, strike, or temporary lay-off)*
- *Casual staff*
- *All managerial and executive staff (e.g. Chief Executive)*

***Do not** include:*

- *Contractors (e.g. temporary staff paid by employment agencies)*
- *Working proprietors not actively engaged in the operation of this business*

1. Full-time (working 30 hours or more per week) [OE, validate as %]
2. Part-time (working less than 30 hours per week) [OE, validate as %]

[Ask All, OE must add to 100%, treat as 0% if empty]

BOps17 [BOS2022, BOps16]

In the 2024-25 financial year, approximately what percentage of positions in this business were for the following roles?

Note:

- ***Managers and professionals:** Managers lead organisations, departments, or divisions and determine the policy of the organisation or department (e.g. General Manager, Finance Manager). Professionals perform analytical, conceptual, or creative tasks with skills equivalent to a bachelor's degree or higher (e.g. accountant, engineer, journalist, computer programmer)*
- ***Technicians and associate professionals:** Technicians and associate professionals perform complex technical or administrative tasks, often in support of professionals or managers (e.g. technical officer, building inspector, legal executive)*
- ***Tradespersons and related workers (including apprentices):** Tradespersons and related workers perform tasks requiring trade-specific technical knowledge. Include all apprentices and trade supervisors (e.g. electrician, mechanic, hairdresser, baker)*
- ***All other occupations, including:***
  - *Clerical, sales and service workers who perform administrative, organisational, liaison, sales, and clerical tasks and may provide support services in fields of finance etc. (e.g. secretary, receptionist, waiter)*
  - *Production and transport workers who operate vehicles or complex equipment (e.g. bulldozer operator, bus driver, store person)*
  - *Labourers and related workers who perform routine tasks, either manually or using equipment (e.g. cleaner, factory hand, trades assistant)*

1 Managers and professionals [OE, validate as %]

2 Technicians and associate professionals [OE, validate as %]

3 Tradespersons and related workers (including apprentices) [OE, validate as %]

4 All other occupations [OE, validate as %]

5 Don't know [EXCLUSIVE]

[Ask All, Single Response]

BOps18 [NEW, Steering Group]

Which statement best characterises this business's main reason for recruiting over the 2024-25 financial year?

1. Our business was expanding and we recruited for newly created roles
2. We were frequently recruiting due to high workforce turnover
3. Our workforce was stable, and we were occasionally recruiting to replace staff who left
4. We recruited to anticipate seasonal peaks in demand
5. Not actively recruiting during this period

[Ask if BOps18 = 1, 2, 3, 4, SR with OE, if option selected require text entered]

BOps19 [BOS2023:BOps21]

In the 2024-25 financial year, how many vacancies did this business have for the following roles?
Where actual figures are not available, please give careful estimates.

1. Managers and professionals [OE]
2. Technicians and associate professionals [OE]
3. Tradespersons and related workers (including apprentices) [OE]
4. All other occupations [OE]
5. Don't know [EXCLUSIVE]

[Ask if BOps19 = 1, 2, 3, 4, Single Response per row, display only types of roles based on selected at Bops19]

BOps20 [BOS2022:BOps17]

In the 2024-25 financial year, to what extent did this business experience difficulty filling the vacancies mentioned with suitable applicants?

	1. No difficulty	2. Moderate difficulty	3. Severe difficulty	98. Don't know
Managers and professionals				
Technicians and associate professionals				
Tradespersons and related workers (incl. apprentices)				
All other occupations				

[Ask all, Multiple Response except code 98]

BOps21 [BOS2023:BOps23]

In the 2024-25 financial year, what were the main reasons some of this business's staff did not have all the skills required to do their jobs?

Please select all that apply.

1. Changes in technology (e.g. new computer software or production equipment)
2. Changes in the business environment (e.g. new customers, suppliers, or competitors)
3. Increased scope of roles
4. Staff turnover (e.g. loss of on-the-job experience)
5. Recruitment difficulties (e.g. persistent vacancies or employing people with incomplete skillsets)
6. Constraints on training (e.g. due to budgets or available staff time)
7. Other reasons
98. All staff fully skilled [Exclusive]

[Ask all, Carousel, Single response per option]

BOps22 [BOS2023:BOps24]

In the 2024-25 financial year, to what extent did this business do the following **in response to recruitment difficulties or skill gaps**?
Include responses to recruitment difficulties or skill gaps that were anticipated but did not occur.

	1. Not done	2. Done a little	3. Done a lot	96. Not applicable
Increased advertising/recruitment spend				
Recruited employees from overseas to come to New Zealand				
Employed people living in areas outside the main business location (e.g. Work From Anywhere roles)				
Relaxed hiring conditions (e.g. employed people with incomplete skillsets)				
Brought in contractors or contracted work out to other businesses				
Hired temporary employees to fill gaps				
Increased hours worked by existing employees (e.g. increased overtime)				
Increased wages or salaries to attract or retain staff				
Increased training given to employees				
Invested in new technology or automation of activities to reduce the impact of recruitment difficulties or skill gaps				

[Ask all, Multiple Response except code 98]

BOps23 [BOS2023:BOps25]

In the 2024-25 financial year, did recruitment difficulties or skill gaps affect this business in any of the following ways?

Please select all that apply.

1. Decreased capacity
2. Reduced the range of goods or services offered
3. Increased costs
4. Increased stress on staff
5. Reduced productivity
6. Led to missed sales opportunities
7. Created difficulties meeting quality standards or customer service goals
8. Prevented or made it more difficult to introduce new technologies or work practices

97. Other negative impacts
98. No negative impacts from recruitment difficulties or skill gaps [Exclusive]

[Ask all, Single Response]

BOps24 [BOS2023:BOps26]

As at the end of the 2024-25 financial year, what percentage of this business's employees were covered by a collective employment agreement?

1. Zero
2. 1-10%
3. 11-50%
4. 51-90%
5. 91-100%

99. Don't know

Business performance [BOS 2023]

[Ask all, Multiple Response except code 98]

BOps25 [BOS2023: BOps27]

Where are this business's main competitors located?

Please select all that apply

1. In this business's local area(s)
2. Elsewhere in New Zealand
3. Overseas
98. Captive market or no effective competition [Exclusive]

[Ask if BOps25 = 1, 2 3, Single Response]

BOps26 [BOS2023: BOps28]

How would you describe this business's competition?

1. No more than one or two competitors
2. Many competitors, several dominant
3. Many competitors, none dominant
99. Don't know

[Ask all, Single Response]

BOps27 [BOS2023: BOps32]

In the 2024-25 financial year, did this business develop or introduce any new or significantly improved goods, services, or processes?

1. Yes
2. No
99. Don't know

Other business factors [BOS 2023]

[Ask all, Carousel]

BOps28 [BOS2023: BOps35]

When thinking about the city, town, or district in which this business operates, how would you rate the following factors?
If this business has more than one location, please answer for the location where the largest share of the business activities occurs.

	1. Bad	2. Neither bad nor good	3. Good	99. Don't know
Transport infrastructure				
Information and communications technology infrastructure (e.g. broadband availability, mobile phone coverage)				
Water and waste infrastructure				
Local body planning and regulatory processes (e.g. building consents, Resource Management Act approvals)				
Skilled labour market				
Unskilled labour market				
Business networks (e.g. local business associations)				

[Ask all, Single Response]

BOps29 [BOS2023:BOps36]

In the 2024-25 financial year, did this business merge with or acquire a shareholding in any other New Zealand business?

1. Yes
2. No
99. Don't know

[Ask all, Single Response]

BOps30 [BOS2023:BOps37]

In the 2024-25 financial year, did this business request any new or additional debt or equity finance?
Debt finance *is any finance that the business must repay (e.g. overdrafts, credit cards, convertible debt).*
Equity finance *is any finance which is provided in exchange for a share in the ownership of this business.*

Include requests that were fully approved, partly approved, withdrawn, or declined.

1. Yes, debt financing only
2. Yes, equity financing only
3. Yes, both debt and equity financing
4. No
99. Don't know

[Ask if BOps30 = 1 OR 3, Multiple response except code 99]

BOps31 [BOS2023: BOps38]

When requesting new or additional **debt** finance in the 2024-25 financial year, were funds…?

Please select all that apply.

1. Available on acceptable terms
2. Available, but **not** on acceptable terms
3. Not available
99 Don't know

[Ask if BOps30 = 2 OR 3, Multiple response except code 99]

BOps32 [BOS2023: BOps39]

When requesting new or additional **equity** finance in the 2024-25 financial year, were funds….?

Please select all that apply.

1. Available on acceptable terms
2. Available, but **not** on acceptable terms
3. Not available
99 Don't know

[Ask if BOps30 = 2 OR 3 AND BOps32 ≠99], Multiple response]

BOps33 [BOS2022: BOps26]

For your most recent **equity** finance request, who was the provider?

Please select all that apply.

1. Individual(s) principally in control of this business
2. Friends or family of the individual(s) above
3. Employees of the business (if not already selected in one of the categories above)
4. Other individual(s)
5. Angel investors / venture capital funds / private equity funds
6. Other businesses
7. Shareholders via a listed share market (e.g. NZX or overseas exchange)
99. Don't know [exclusive]

[Ask if BOps30 = 2 or 3 AND BOps32 ≠99, Multiple response]

BOps34 [BOS2022:BFin8]

For your most recent **equity** request, how did you intend to use the finance?

Please select all that apply

1. Purchase of land or buildings
2. Purchase of vehicles
3. Purchase of ICT equipment
4. Purchase of machinery or equipment (not ICT)
5. Purchase of business(es)
6. Product development (including research and development)
7. Debt consolidation
8. Working capital or operating capital
9. International expansion
10. Expansion within New Zealand
97. Other (please specify) [OE]

[Ask if BOps30 = 1 or 3 AND BOps31 ≠99, Multiple response]

BOps35 [BOS2022: BFin15]

For your most recent **debt** request, how did you intend to use the finance?

Please select all that apply

1. Purchase of land or buildings
2. Purchase of vehicles
3. Purchase of ICT equipment
4. Purchase of machinery or equipment (not ICT)
5. Purchase of business(es)
6. Product development (including research and development)
7. Debt consolidation
8. Working capital or operating capital
9. International expansion
10. Expansion within New Zealand
97. Other (please specify) [OE]

Business identity and ownership [BOS 2023]

[Text to display] BOS2023:BOps40]

The next questions are about businesses that have Māori identity and ownership. A business needs to self-identify as Māori and have at least some ownership by Māori to be counted as a Māori business.

Collecting this information helps to produce an accurate picture of the contribution that Māori businesses make to the Aotearoa New Zealand economy and to the wellbeing of whānau, hapori, hapū, and iwi.

[Ask all, Single response]

BOps36 [BOS2023: BOps41]

Does this business consider itself to be a Māori business?

1. Yes
2. No

[Ask all, Single response]

BOps37 [BOS2023: BOps42]

Do any of the people who own this business whakapapa to / descend from Māori? That is, did they have a Māori birth parent, grandparent, great-grandparent, etc.?

1. Yes
2. No

[Ask if BOps37 = 1, Single response]

Bops38 [BOS2023: BOps43]

How much of this business is owned by people who whakapapa to / descend from Māori?

Note: If this business has only one owner, select 'half or more'.

1. Half or more
2. Less than half
3. Don't know

Module B: Innovation

Before you begin this section:

- In this section, **we will ask about the 2023-24 AND the 2024-25 financial years.**
- If your business is new, please provide information for any relevant parts of the 2023-24 and 2024-25 financial years.
- These questions should be completed by the General Manager.
- Some answers may need to be confirmed with other specialist staff.

For the purposes of this survey, innovation is broadly defined. It includes the development or introduction of any new or significantly improved activity for this business.

This includes goods, services, and processes that this business was the first to develop and those that have been adopted from other organisations.

New goods or services

[Ask all, Single Response]

Inv1 [BOS2023:Inv3]

In the **financial years 2023-24 and 2024-25**, did this business introduce onto the market any new or significantly improved **goods or services**?
Do not *include the selling of new goods or services wholly developed and produced by other businesses.*

1. Yes
2. No

[Ask if Inv1 = 1 Yes, Multiple Response]

Inv2 [BOS2023:Inv4]

Were any of those new or significantly improved goods or services…?

Please select all that apply.

1. Developed by this business
2. Developed by this business in partnership with others
3. Obtained from others and significant improvements were made by this business
4. Obtained from others and **no** significant improvements were made by this business

[Ask if Inv1 = 1 Yes, Single Response per row]

Inv3 [BOS2023: Inv5]

Were any of those new or significantly improved goods or services…?

	1. Yes	2. No	99. Don't know
New to New Zealand			
New to world			

[Ask if Innovation3 = 1 Yes, Single Response]

Inv4 [BOS2023: Inv6]

For the **2024-25 financial year**, please estimate the percentage of sales for this business that came from those new or significantly improved goods or services.

1 Zero
2 1-10%
3 11-30%
4 31-80%
5 81-100%
99. Don't know

New processes

[Ask all, Carousel]

Inv5 [BOS2023: Inv7]

In the **financial years 2023-24 and 2024-25**, did this business implement any new or significantly improved **processes** in the following areas?

	1. Yes	2. No	99. Don't know
Methods for producing goods or providing services			
Sales and marketing			
Logistics, delivery, or distribution of goods and services			
Information processing or communication			
Accounting or administration			
Organising work tasks, decision making, or human resource management			
Organising external relations (e.g. outsourcing, subcontracting)			
Organising internal procedures (e.g. quality management)			

[Ask if Inv5= 1 Yes for any statement, Multiple Response]

Inv6 [BOS2023: Inv9]

Were any of those new or significantly improved processes…?

1. Developed by this business
2. Developed by this business in partnership with others
3. Obtained from others and significant improvements were made by this business
4. Obtained from others and **no** significant improvements were made by this business

[Ask if Inv5 = 1 Yes for any statement, Single Response]

Inv7 [BOS2023: Inv10]

Were any of those new or significantly improved processes required because this business **introduced** new goods or services?

1. Yes
2. No

Activities to support innovation

[Ask all, Carousel (MR per row except 98 and 99)]

Inv8 [BOS2023: Inv11]

In the **financial years 2023-24 and 2024-25**, did this business do any of the following?

Note:

- *To innovate means to develop or introduce new or significantly improved goods, services, or processes.*
- *It is acceptable to select both "done to support innovation" and "done for other reasons", if applicable.*

Please select all that] apply and then click the arrow to continue.

	1. Done to support innovation	2. Done for other reasons	98. Not done	99. Don't know
Acquisition of machinery or equipment				
Acquisition of computer hardware and software				
Acquisition of other knowledge (e.g. licences, patents, or other intellectual property)				
Implementing new business strategies or management techniques				
Organisational restructuring				
Design (e.g. industrial, product, or fashion design)				
Marketing the introduction of new goods or services				
Market research				
Significant changes to marketing strategies				
Employee training				
Recruitment of specialist staff				
Applying for government funding (including tax credits)				

[Ask All, OE with validation]

Inv9 [BOS2023: Inv12]

For the **2024-25 financial year**, please estimate this business's combined expenditure on **product development and related activities**:

- *Please do not include GST*
- *If any answers are 'zero', please enter a 0*

1. Research and development (as stated earlier in the survey) [OE box]
2. Any other expenditure related to product development (e.g. design, market research, commercialisation) [OE box]

Sources of information or ideas

[Carousel (SR per row except 99)]

Inv10 [BOS2023:Inv17]

In the **financial years 2023-24 and 2024-25**, did this business find any of the following important as a source of information or ideas for innovation?
Note: To innovate means to develop or introduce new or significantly improved goods or services, or processes.

	1. Yes	2. No	99. Don't know
New staff (those appointed in the last 2 years)			
Existing staff			
Customers			
Suppliers			
Other businesses			
Professional advisors, consultants, banks, or accountants			
Books, journals, patent disclosures, or the internet			
Conferences, trade shows, or exhibitions			
Industry or employer organisations			
Universities or polytechnics			
Crown Research Institutes, other research institutes or research associations, including Callaghan Innovation			
Government agencies			

Co-operative arrangements

[Text to display] [BOS2023:Inv18]

In the following questions, **co-operative arrangements** means actively participating with another organisation or individual in activities for the purpose of **innovation.**

Note:

- *This includes collaborative arrangements for the purpose of innovation*
- *Each party should bring its own knowledge or expertise to the co-operation*
- *Partners do not necessarily derive immediate commercial benefit from the co-operation*
- ***Do not** include any arrangement where development work is contracted out without this business taking active part in it*

[Ask all, Single Response]

Inv11 [BOS2023: Inv19]

In the **financial years 2023-24 and 2024-25**, did this business have any co-operative arrangements for the purpose of innovation?

1. Yes
2. No

[Ask if Inv11 = 1 Yes, Carousel, MR per row except 98]

Inv12 [BOS2023: Inv20]

In the **financial years 2023-24 and 2024-25**, what types of businesses or institutions did this business have those co-operative arrangements with?

Please select all that apply and then click the arrow to continue.

	1. New Zealand	2. Overseas	98. No co-operation
Customers			
Suppliers			
Other businesses			
Universities or polytechnics			
Crown research institutes, other research institutes or research associations, including Callaghan Innovation			

Other factors

[Ask all, Multiple Response]

Inv13 [BOS2023: Inv21]

Which of the following does this business or the parent company use to protect intellectual property?

Please select all that apply.

1. Patents
2. Copyrights
3. Trademarks
4. Registration of designs
5. Secrecy
6. Confidentiality agreements
7. Reaching the market first
8. Goods, services, or processes too complex to copy

98. None of the above [exclusive]

[Ask all, Carousel, SR per row except 98]

Inv14 [BOS2023: Inv22]

In the **financial years 2023-24 and 2024-25**, to what degree did the following factors hamper this business's ability to innovate?

Note: To innovate means to develop or introduce new or significantly improved goods, services, or processes.

	1. High degree	2. Medium degree	3. Low degree	98. Did not hamper
Costs to develop or introduce				
Lack of information				
Lack of marketing expertise				
Lack of co-operation with other businesses				
Access to intellectual property rights (e.g. licensing of patents or copyrights)				
Lack of appropriate personnel				
Lack of management resources (e.g. time)				
Government regulation				

Module C: Current Business Practices

Before you begin this section:

- In this section, **please answer the questions based on current business practices and feel free to share your personal views and understanding.**
- These questions should be completed by the General Manager or someone with a good knowledge of all aspects of the business although some answers may need to be confirmed with other specialist staff.

Emerging sectors

[Ask all, Multiple Response except 98]

CBP1 [New]

Does this business belong to any of the following sectors?

Please select all that apply.

1. Space / advanced aviation
2. Critical minerals
3. Agritech
4. Medtech
5. Biotech
6. Screen sector/ game development

98. None of the above [exclusive]

Investment Boost scheme

[Ask all, Single Response]

CBP2 [NEW]

Has this business ever made use of the Investment Boost ⚐ scheme?

1. Yes
2. No, but plan to
3. No, and don't plan to
4. I was not aware of the scheme

⚐ Investment Boost is a new tax incentive aimed at encouraging New Zealand businesses to invest in productive assets like machinery, tools and equipment. From 22 May 2025, businesses can deduct 20% of a new asset's cost from that year's taxable income. Normal depreciation deductions can also be claimed for the remaining 80% of the asset's cost.

[Ask all, Single Response]

CBP3 [NEW]

Since 22 May 2025, has this business invested in new depreciable business assets?

1. Yes
2. No

99. Don't know

[Ask CBP2 = 1 Yes OR CBP3 = 1 Yes, Multiple Response except 3]
[DO NOT ASK IF CBP2=4 Not aware]

CBP4 [NEW]

How did Investment Boost affect or not affect your purchase of new assets?

Please select all that apply.

1. We made purchases we otherwise would not have
2. We brought investment forward
3. It did not, we were going to make these purchases anyway

'Starting out' and 'training' minimum wage

Please share your insights on the upcoming questions about wages. The questions can be answered by the General Manager although some answers may need to be confirmed with other specialist staff such as a member of the Human Resources team or someone handling payroll. Your perspective is valuable.

[Show all]

We're now going to ask you some questions about the '**starting-out'** minimum wage.

Eligibility criteria for the starting-out minimum wage
The starting-out minimum wage applies if the employee is:

- 16 or 17 years old and has not worked for their current employer for 6 continuous months. After 6 months with one employer, the employee must be paid the adult minimum wage.
- 16 to 19 years old and their employment agreement states that they have to undertake industry training for at least 40 credits a year to become qualified in the area they are working in.
- 18 or 19 years old and:
  - they have been paid one or more specified social security benefits for 6 months or more continuously and
  - they have not worked for one employer for 6 continuous months since they started being paid a benefit.

The starting-out minimum wage does not apply if the employee's role includes supervising or training other workers. If they are, then they must be paid at least the adult minimum wage.

[Ask all, Single Response]

CBP5a [NEW]

Before this survey, had you heard of the **'starting-out'** minimum wage?

1. Yes
2. No
99. Don't know

[Ask if CP5a=1, Single Response]

CBP5b [NEW]

And which of the following best describes how much you already knew about the **'starting-out'** minimum wage?

1. I had heard of it, but I didn't know the rate or who the rate can apply to
2. I only knew the rate, I didn't know who was eligible for the rate
3. I only knew who was eligible for the rate, I didn't know what the rate was
4. I knew the rate and who was eligible for it

[Show all]

We're now going to ask you some questions about the **'training'** minimum wage.

Eligibility criteria for the training minimum wage
The training minimum wage applies if:

1. the employee is 20 years old or over, and
2. their employment agreement states that they have to do at least 60 credits a year of an industry training programme to become qualified in the area they are working in.

The training minimum wage usually applies to apprentices. An apprentice has the same minimum rights and protections under employment law as any other employee but can be paid the training minimum wage.

[Ask all, Single Response]

CBP6a [NEW]

Before this survey, had you heard of the **'training'** minimum wage?

1. Yes
2. No
99. Don't know

[Ask if CP6a=1, Single Response]

CBP6b [NEW]

And which of the following best describes how much you already knew about the **'training'** minimum wage?

1. I had heard of it, but I didn't know the rate or who the rate can apply to
2. I only knew the rate, I didn't know who was eligible for the rate
3. I only knew who was eligible for the rate, I didn't know what the rate was
4. I knew the rate and who was eligible for it

[Ask all, Single Response per row]

CBP7 [NEW]

As of today, does this business pay any employees the following minimum wage rates?

	5. Yes	6. No	99. Don't know
1_ The **'starting-out'** minimum wage rate ($19.16)			
2_ The **'training'** minimum wage rate ($19.16)			
3_ An amount between starting-out/training minimum wage rate ($19.16) and the adult minimum wage rate ($23.95)			

[Ask if CBP7_1="Yes" OR CBP7_3 = "Yes", Single Response]

CBP8 [NEW]

To what extent did the **'starting-out'** minimum wage affect the business's decision to hire these new employees?

1. We were more likely to hire
2. Had no effect on our hiring
3. We were less likely to hire
99. Don't know

[Ask if CBP7_2="Yes" OR CBP7_3="Yes", Single Response]

CBP9 [NEW]

To what extent did the **'training'** minimum wage affect the business's decision to hire these new employees?

1. We were more likely to hire
2. Had no effect on our hiring
3. We were less likely to hire
99. Don't know

[Ask all, Single Response]

CBP10 [NEW]

Do you think the eligibility criteria for the ⚐ **'starting-out'** minimum wage are appropriate or not appropriate?

1. I believe the criteria are appropriate
2. Not appropriate. They should include more people or circumstances
3. Not appropriate. They should be limited to fewer people or circumstances
99. Don't know

DP: Tooltip information to pop up:

⚐ ***Eligibility criteria for the starting-out minimum wage***

The starting-out minimum wage applies if the employee is:

- 16 or 17 years old and has not worked for their current employer for 6 continuous months. After 6 months with one employer, the employee must be paid the adult minimum wage.
- 16 to 19 years old and their employment agreement states that they have to undertake industry training for at least 40 credits a year to become qualified in the area they are working in.
- 18 or 19 years old and:
  - they have been paid one or more specified social security benefits for 6 months or more continuously and
  - they have not worked for one employer for 6 continuous months since they started being paid a benefit.

The starting-out minimum wage does not apply if the employee's role includes supervising or training other workers. If they are, then they must be paid at least the adult minimum wage.

[Ask all, Single Response]

CBP11 [NEW]

Do you think the **'starting-out' rate of $19.16** is appropriate?

1. Yes
2. No, the rate should be lower
3. No, the rate should be higher
4. I don't think it should be used at all
99. Don't know

[Ask all, Single Response]

CBP12 [NEW]

Do you think the eligibility criteria for the ⚐ **'training'** minimum wage are appropriate or not appropriate?

1. I believe the criteria are appropriate
2. Not appropriate. They should include more people or circumstances
3. Not appropriate. They should be limited to fewer people or circumstances
99. Don't know

DP: Tooltip information to pop up:

⚐***Eligibility criteria for the training minimum wage***

The training minimum wage applies if:

- the employee is 20 years old or over, and
- their employment agreement states that they have to do at least 60 credits a year of an industry training programme to become qualified in the area they are working in.

The training minimum wage usually applies to apprentices. An apprentice has the same minimum rights and protections under employment law as any other employee but can be paid the training minimum wage.

[Ask all, Single Response]

CBP13 [NEW]

Do you think the **'training' rate of $19.16** is appropriate?

1. Yes
2. No, the rate should be lower
3. No, the rate should be higher
4. I don't think it should be used at all
99. Don't know

Resolving employment disputes

[Ask all, Single Response]

CBP14 [NEW]

In the last 12 months, what proportion of employment problems or disputes did this business resolve internally (without seeking external assistance)?

1. Zero
2. 1-10%
3. 11-50%
4. 51-90%
5. 91-100%
98. There were no disputes
99. Don't know

Module D: Artificial Intelligence

[OECD AI Definition; UKEmp: AWARETEXT - adapted]

In the questions that follow, the term 'artificial intelligence' is used. No matter how familiar you are with the term, please have the following definition in mind when answering the subsequent questions:

By Artificial Intelligence (AI), we mean machines or software that can imitate human behaviour such as problem-solving, learning, playing and communicating.

This can include:

- Virtual assistants (e.g. Microsoft Copilot, Chat GBT enterprise, Google Gemini for Workspace)
- Online recommendation algorithms (e.g. Google's recommendations AI, Adobe Target, Agentforce, Amazon Personalise)
- Generative AI chatbots (e.g. ChatGPT, Google Gemini, Microsoft Copilot Chat, Claude)
- Intelligence gathering software (e.g. Perplexity AI, Klue, AlphaSense, other AI-powered search engines)
- AI image generators (e.g. DALL-E, Midjourney, Adobe Firefly)
- Self-driving vehicles (e.g. Tesla Autopilot, Waymo)

Before you begin this section:

- In this section, **please answer the questions based on current business practices given your personal understanding.**
- These questions should be completed by the General Manager although some answers may need to be confirmed with other specialist staff.

AI Use & Impact on Tasks

[Ask all, Single response]
QAI1 [UKEmp: QAIOVERALL]

Is this business using or planning to use AI?

1. Yes, currently using AI
2. Not currently using AI, but we are planning to
3. Not planning on using AI at all

[Ask all, Single response]

QAI2a [NEW]

Which of the following best describes **your own** level of AI knowledge?

1. **Expert** – have a deep knowledge and can design and implement AI solutions
2. **Advanced** – proficient and able to handle complex scenarios with AI
3. **Intermediate** – comfortable using AI for routine tasks
4. **Beginner** –basic understanding of AI but don't use it very much
5. **Novice** –limited or no experience with the technology

99. Don't know

[Ask Adopters and Planned Adopters, Single response per row. Reverse question order i.e. Novice - Expert for half of the respondents]

QAI2b [UKEmp: QAIAAWAREA - adapted]

For each AI knowledge level below, please estimate how many of your employees fall into that category.

Please select the relevant option and click the arrow to continue.

	None	Very few	Some	Most	All – EXCLUSIVE*	Don't know
1_**Expert** – have a deep knowledge and can design and implement AI solutions						
2_**Advanced** – proficient and able to handle complex scenarios with AI						
3_**Intermediate** – comfortable using AI for routine tasks						
4_**Beginner** –basic understanding of AI but don't use it very much						
5_**Novice** –limited or no experience with the technology						

*DP Rules

1. They cannot select 'none' for all questions 1-5

2. If they select 'all' for any of the codes 1-5 then they must select none for all other questions or change their response from 'all'

[Ask Adopters, Single response. Reverse scale for half of the respondents, except code 99]

QAI3 [UKEmp: QAIDEPNOW]

Thinking about your current business model, which of the following statements is most accurate?

1. Your business integrates AI tools or technologies into products/services or processes
2. Your business uses, but does not integrate AI tools or technologies into products/services or processes
99. Don't know [Anchor]

[Ask Adopters AND Planned Adopters, Single response per row, randomise A-I]

QAI4 [UKEmp: QAIUSETYPE]

How would you describe this business's use of the following AI-driven products and services?

REVERSE SCALE FOR HALF OF RESPONDENTS, ANCHOR CODES 99 and 96.

		1. Currently using	2. Planning to use	3. Not planning to use, but would consider using	4. Not planning to use and would not consider using	99. Don't know	96. Not applicable
A	Real-time conversational AI and text or speech analysis (such as ChatGPT and Copilot)						
B	Sales and business forecasting using AI						
C	Personalised marketing and retail using AI						
D	Fraud detection and prevention using AI						
I	AI to reduce repetitive tasks and improve business efficiency						

[Ask All Adopters and Planned Adopters , single response per row, randomise E-M]

QAI5 [UKEmp: QAIUSETYPEB]

For each of the following AI-driven products or services, please can you tell us whether your business is using them, planning to use them, or would consider using them?

		1. Currently using	2. Planning to use	3. Not planning to use, but would consider using	4. Not planning to use, and would not consider using	99. Don't know	96. Not applicable
E	Optimising supply chains						
F	Dynamic price optimisation						
G	Pattern and image detection						
H	Customer segmentation and predictive customer service						
J	Enhancing research and development						
K	AI image generation						
L	Robotics and autonomous devices						
M	AI consultancy and training services (for example, AI strategy, ethics or technical training)						

[Ask Adopters, Single response per row, randomise 1-10]

QAI6 [Adapted from AU SME AT: Q3]

In the last 12 months, has the use of AI helped or not helped you achieve the following business outcomes?

Please provide your best estimate based on your overall impression – precise measurement is not required.

		1. Helped	2. Not helped	99. Don't know	96. Not applicable
1	Enhanced resource optimisation and productivity				
2	Improved customer experience/engagement				
3	Improved employee experience/engagement				
4	Increased revenue/profit/cashflow				
5	Improved quality control				
6	Strengthened security, data protection and fraud detection				
7	Enabled faster access to accurate data to inform decision-making				
8	Enabled more agile product and service innovation				
9	Enhanced engagement and response to marketing activities				
10	Enabled more effective supply chain and supplier management				

AI Adoption and Challenges NB. *Light touch in survey, will be addressed in qualitative work*

[Ask if Adopters and Planned Adopters, Multiple Response, randomise]

QAI7 [OECDQ021]

To the best of your knowledge, in the last 12 months, were any of the following motivations for this business adopting AI?

Please select all that apply.

1. To help staff work more efficiently
2. To reduce staff costs
3. To improve workers' health and safety
4. To address skill shortages
5. Other (specify) [OE box]
98. None of these factors were motivators [Anchor, Exclusive]
99. Don't know [Anchor, Exclusive]

[ASK ALL, Multiple Response, randomise]

QAI8 [OECDQ076]

What barriers is this business facing to adopting AI?

Please select all that apply.

1. High costs
2. Lack of skills, knowledge or training to adopt artificial intelligence
3. Government regulation
4. Not convinced by the technology
5. Security concerns
6. Ethical concerns and safety
97. Other barriers not previously mentioned [anchor]
98. Business is not facing any barriers to adopting AI [Anchor, Exclusive]
99. Don't know [Anchor, Exclusive]

[Ask All, Single Response]

QAI9 [NEW]

To what extent do you agree or disagree with the following statement:

'Public attitudes and perceptions towards AI contribute to limiting its adoption in New Zealand businesses'?

1. Strongly agree
2. Agree
3. Neither agree nor disagree
4. Disagree
5. Strongly disagree
97. Don't know

Impact on tasks and productivity

For the following section, please think of what you have heard of AI, particularly how it is used in your sector here in New Zealand.

[Ask Adopters, Single response per row]

QAI10 [OECDQ026]

Thinking about **this business**, in the last 12 months, has artificial intelligence…

		1. Yes	2. No	99. Don't know
1	Automated tasks that workers used to do?			
2	Created new tasks that workers did not do previously?			

[Ask Adopters if QAI10_1= 1, Single response per row]

QAI11 [OECDQ027]

To what extent were those tasks that **AI automated**…

		1. Very	2. To some extent	3. Not very	99. Don't know
1	Repetitive?				
2	Complex?				
3	Dangerous?				

[Ask Adopters if QAI10_2= 1, Single response per row]

QAI12 [OECDQ028]

To what extent were those new tasks that **AI created**…

		1. Very	2. To some extent	3. Not very	99. Don't know
1	Repetitive?				
2	Complex?				
3	Dangerous?				

[Ask Adopters, Single response per row]

QAI13 [OECDQ030, Q034, 035, 038]

In **this business**, has AI increased, decreased or had no effect on the following in the last 12 months?

		1. Increased	2. Decreased	3. No effect	96. Not applicable	99. Don't know
a	Overall employment					
b	Worker productivity					
c	Worker satisfaction					
d	Managers' ability to measure worker performance					

[Ask all, Single response]

QAI14 [OECDQ044]

Over the **next 10 years**, how do you think that AI **will** affect **overall employment in <u>your sector</u>**?

1. Increase
2. Decrease
3. No effect
99. Don't know

[Ask Adopters & Planned Adopters, Single response]

QAI15 [OECDQ048]

Thinking about the **next 3-5 years**, do you think that artificial intelligence **will** increase, decrease or have no effect on **worker productivity in <u>your sector</u>**?

1. Increase
2. Decrease
3. No effect
99. Don't know

Impact on skills

[Ask Adopters and Planned Adopters, Single response]

QAI16 [OECDQ066]

How do you think that AI has changed skill needs in this business in the last 12 months?

Please consider your business as a whole, even if experiences vary across different teams or departments.

1. Increased skill needs
2. No effect on skill needs
3. Decreased skill needs

99. Don't know

[Ask Adopters, Single response]

QAI17a [OECDQ068]

In the last 12 months, to what extent has AI made each of the following skills and resources more or less important for this business?

	1. More important	2. Less important	3. No change	99. Don't know
1_Human skills, such as creativity and communication				
2_Specialised AI skills, such as those needed to maintain or develop AI				
3_More experienced/ qualified workers				

[Ask if Adopters AND AI has changed skills needed QAI16=1 OR 3, Single response per row, randomise]

QAI18 [OECDQ069]

In the last 12 months, has this business addressed these changing skill needs in any of the following ways?

		1. Yes	2. No	99. Don't know
1	By retraining or upskilling internal workers			
2	By hiring new workers			
3	By buying services from external companies			
4	By attrition or redundancies [anchor]			

AI training

[Ask if Adopters AND they have done training (QAI18_1=1), Single response per row, REVERSE SCALE FOR HALF OF RESPONDENTS EXCEPT CODE 99]

QAI19 [UKEmp: QAITRAINPROP]

In the last 12 months, approximately what proportion of your current employees have undertaken any internal or external training to improve AI knowledge or skills?

1. 1-10%
2. 11-25%
3. 26-50%
4. 51-75%
5. 76-99%
6. All, or virtually all of them (i.e. 100%)

99. Don't know

[Ask if Adopters AND they have done training (QAI18_1=1), Multiple response, randomise]

QAI20 [UKEmp: QAITRAININGTYPE]

What did this training consist of?

Please select all that apply.

1. Learning how to communicate with AI systems
2. Learning how to share and use the outputs of AI systems
3. Learning how to judge the accuracy and reliability of information provided by AI systems
4. Learning how to register and apply for AI services or training
5. Learning how to solve problems using AI systems
6. Understanding the risks and threats associated with using AI systems
7. Learning how to keep my information safe and private while using AI

97. Other (please specify) [anchor, OE]
99. Don't know [anchor]

[Ask all, Multiple response, randomise]

QAI21 [UKEmp: QAITRAINBAR]

In the last 12 months, what barriers has your business faced to engaging with training or upskilling related to AI?

Please select all that apply.

1. Lack of access to training
2. Lack of time
3. Cost
4. Lack of availability of relevant or appropriate training
5. Lack of interest from staff
6. Unsure what training is relevant for the business

97. Other (please specify) [anchor, OE]
99. Don't know [anchor]
98. No need for training / Not applicable [anchor]

Recruiting for AI skills

[Ask all, Single response]

QAI22 [UKEmp: QRECRUITAI]

In the **last 3 years**, has this business tried to recruit anyone with the knowledge or skills to work with AI tools or technologies? Please include any current vacancies.

1. Yes
2. No
99. Don't know

[Ask if tried to recruit in last 3 years QAI22=1, Single response, REVERSE SCALE FOR HALF OF RESPONDENTS EXCEPT CODE 99]

QAI25 [UKEmp: QRECRUITPROC]

For most of the **last 3 years**, how easy or difficult was it to find candidates for such roles?

1. Very straightforward
2. Fairly straightforward
3. Neither straightforward nor challenging
4. Fairly challenging
5. Very challenging
99. Don't know

[Ask if recruitment challenges QAI25=4 OR 5, Multiple response except 99, randomise within group]

QAI23 [UKEmp: QRECRUITCHALLENGES]

What were the reasons that recruitment for AI knowledge and skills was challenging?

Please select all that apply.

Job not appealing

1. Competition from other employers
2. Job is difficult/challenging
3. Low pay or benefits / salary demand too high
4. Lack of prospects / career progression opportunities
5. Not offering training

Lack of suitable candidates

6. Candidates do not have required attitude / motivation / personality
7. Candidates do not match our culture
8. Lack of soft skills, e.g. communication skills
9. Lack of technical skills or knowledge
10. Lack of qualifications
11. Lack of work experience

Other reasons

12. Hard to recruit non-NZ nationals / visa requirements
13. Lack of candidates/applications
14. Location / poor transport links
15. Recruitment budget cuts

97. Other (please specify) [anchor]
99. Don't know [anchor]

7.1.1 Questionnaire Source and Status Summary

Source definition

- **BOS:** Stats NZ Business Operations Survey (2022, 2023 and 2024*)
- **OECD AI Survey:** OECD AI Survey of Employers
- **UK Employer Survey:** UK Government Employer Survey on Skills for Life and Work
- **Australian SME AI Tracker:** Australian National AI Centre SME AI Adoption Tracker

Status definition

- **New:** Newly developed question not directly sourced from an existing survey
- **Identical:** Source question retained with only minor editorial or formatting changes that do not affect interpretation
- **Adapted (minor):** Source question retained but modified through minor changes to wording, instructions, presentation or contextualisation that do not materially alter the underlying concept measured
- **Adapted:** Source question modified through substantive changes to the question structure, response format, response options or underlying construct measured

*References to BOS 2024 relate to questionnaire content developed for the BOS 2024 survey. As BOS 2024 was not fielded, questions marked as “NEW, From BOS2024” in the SOBO 2026 questionnaire (*Appendix 7.1*) that were carried forward without substantive modification have been classified as “Identical”.

Question	Source	Status	Notes
RI1	BOS 2023 & BOS 2024	Adapted (minor)	Drop down menu of months added
BOps1	BOS 2024 [BOps7]	Identical	
BOps2	BOS 2023 [BOps8]	Identical	
BOps3	BOS 2023 [BOps9]	Identical	
BOps4	BOS 2024 [IE4]	New	
BOps5	BOS 2024 [IE13]	Adapted (minor)	Reference period expanded from one financial year to two financial years.
BOps6	BOS 2024 [IE14]	Adapted (minor)	Response option wording refined to improve clarity and interpretation.
BOps7	BOS 2024 [IE15]	New	
BOps8-11	BOS 2023 [BOps10-12, BOps14]	Identical	
BOps12	BOS 2022 [BOps8]	Identical	
BOps13-16	BOS 2023 [BOps15-18]	Identical	
BOps17	BOS 2022 [BOps16]	Identical	
BOps18	Steering Group	New	
BOps19	BOS 2023 [BOps21]	Identical	

BOps20	BOS 2022 [BOps17]	Identical	
BOps21-26	BOS 2023 [BOps23-28]	Identical	
BOps27	BOS 2023 [BOps32]	Identical	
BOps28-32	BOS 2023 [BOps35-39]	Identical	
BOps33	BOS 2022 [BOps36]	Identical	
BOps34-35	BOS 2022 [BFin8, BFin15]	Identical	
BOps36-38	BOS 2023 [BOps41-43]	Identical	
Inv1-4	BOS 2023 [Inv3-6]	Identical	
Inv5-6	BOS 2023 [Inv7, Inv9]	Identical	
Inv7-9	BOS 2023 [Inv10-12]	Identical	
Inv10	BOS 2023 [Inv17]	Identical	
Inv11-14	BOS 2023 [Inv19-22]	Identical	
CBP1-14	MBIE	New	
QAI1	UK Employer Survey [QAIOVERALL]	Identical	
QAI2a	UK Employer Survey [QAIAAWAREA]	New	Created based on QAI2b employee-level wording.
QAI2b	UK Employer Survey [QAIAAWAREA]	Adapted	Adapted from a single organisational AI knowledge measure to an employee-level AI knowledge distribution measure.
QAI3-5	UK Employer Survey [QAIDEPNOW, QAIUSETYPE, QAIUSETYPEB]	Identical	
QAI6	Australian SME AI Adoption Tracker [Q3]	Adapted	Adapted to assess actual benefits achieved rather than potential AI benefits.
QAI7	OECD AI Survey [OECDQ021]	Adapted	Changed from a Yes/No matrix to a multiple-response format.
QAI8	OECD AI Survey [OECDQ076]	Adapted	Changed from a Yes/No matrix to a multiple-response format, with additional barrier categories added.
QAI9	MBIE	New	
QAI10	OECD AI Survey [OECDQ026]	Adapted (minor)	Added a 12-month reference period.
QAI11-12	OECD AI Survey [OECDQ027-028]	Adapted	Response scale changed from Yes/No to an extent-based scale.

QAI13	OECD AI Survey [OECDQ030, OECDQ034, OECDQ035, OECDQ038]	Adapted	Multiple OECD questions combined and response options modified (including addition of 'Not applicable').
QAI14	OECD AI Survey [OECDQ044]	Adapted (minor)	Question wording and bold text emphasis refined for readability.
QAI15	OECD AI Survey [OECDQ048]	Adapted (minor)	3–5-year reference period specified and wording refined.
QAI16	OECD AI Survey [OECDQ066]	Adapted (minor)	Additional respondent instruction added to clarify interpretation, referring to the business as a whole.
QAI17a	OECD AI Survey [OECDQ068]	Adapted	OECD question restructured and expanded to include an additional skill category.
QAI18	OECD AI Survey [OECDQ069]	Identical	
QAI19	UK Employer Survey [QAITRAINPROP]	Adapted	Response option scale adjusted.
QAI20-22, 25	UK Employer Survey [QAITRAININGTYPE, QAITRAINBAR, QRECRUITAI, QRECRUITPROC]	Identical	
QAI23	UK Employer Survey [QRECRUITCHALLENGES]	Adapted (minor)	Answer option referencing non-UK nationals changed to non-NZ nationals.

7.1.2 Qualitative research invite

These contact questions are asked at the end of Module D.

[ASK ALL]

QAI27

MBIE and Stats NZ would like to better understand how businesses use AI (or plan to use AI), or why your business does not use AI, alongside other aspects of business operations.

Would you be open to Ipsos contacting you to invite you to a follow-up interview?

1. Yes
2. No

[ASK IF QAI27=1]

QAI28

To participate in the follow-up interview, we'd need to speak with the person in your business who knows most about your AI use – including what's used, why, and how.

Please provide the contact details for the most suitable person to talk to in your business.

Name:	
Business name:	
Role:	
Phone number:	
Email:	

7.2 Survey communications

7.2.1 Email invitation

The survey invitation email below was issued to a pilot group of selected businesses on 9 June 2026, with the main invitation sent to the remaining sampled businesses on 11 June 2026. The subject line was: "*Your business has been selected to participate in the 2026 Survey of Business Operations*".

Reference number: {{ .Subscriber.Attribs.SoboRef }}

Dear General Manager of {{ .Subscriber.Name }},

Your business has been selected to participate in the 2026 Survey of Business Operations.

Whether your business is small or large, the way your business operates contributes to New Zealand's overall economic performance. With **your help** we can form a complete picture of the opportunities and challenges faced by businesses in New Zealand today.

The survey asks about business operations, innovation, and use of artificial intelligence in your organisation. It is being run by **Ipsos**, an independent research company on behalf of the Ministry of Business, Innovation and Employment (MBIE) and Stats NZ. The results will be used to inform policy development in a range of areas including minimum wage structures, usage of artificial intelligence and Research and Development Tax Incentives.

Individuals, public sector agencies, and organisations have a legal obligation to answer all questions as requested under section 23 of the Data and Statistics Act 2022. Under section 76 of the Act, it is an offence for an individual or organisation to fail or refuse to provide the information (conviction can lead to a fine of up to $2,000 for an individual or $12,000 for an organisation).

This survey **should be completed by the General Manager** (although some questions may need to be confirmed with other specialist staff).

What You Need to Know

- It should take about 1–1.5 hours (it can be completed across multiple sessions and by multiple contributors, if needed).
- It must be completed and submitted by **22 July 2026**.
- It is a **legal requirement to complete this survey** under the Data and Statistics Act 2022.
- To view or print a **copy of the survey** and to see answers to **Frequently Asked Questions** about this survey, please visit www.mbie.govt.nz/sobo.

Ready to Get Started?

Please use the survey URL or QR code below and enter your unique Access Code to begin:

- Survey link: https://ipsos.co.nz/sobo2026.
- Unique Access Code: {{ .Subscriber.Attribs.AccessCode }}



For more information about the survey, please visit www.mbie.govt.nz/sobo.

What if I Need Help or Have Questions?

Please don't hesitate to reach out to the Ipsos project team:

- Email: NZ-Field-Help@ipsos.com
- Phone: 0800478783
- Visit the Ipsos website: www.ipsos.com/en-nz/current-ipsos-surveys-field

Thank you in advance for your help with this important survey.

Yours sincerely,

Dr Karlene Tipler
Head of Data Service Delivery
Ministry of Business, Innovation and Employment
On behalf of Statistics New Zealand and Ipsos

7.2.2 Email reminder

Email Reminder 1 – this email reminder was sent on 19 June 2026 to businesses with an email address that had not yet started the survey. The subject line was: *"REMINDER - Your business has been selected to participate in the 2026 Survey of Business Operations".*

Reference number: {{ .Subscriber.Attribs.SoboRef }}

Dear General Manager of {{ .Subscriber.Name }},

This is a reminder to complete the 2026 Survey of Business Operations by 22 July 2026. On 9 June 2026, we sent you an email inviting you to take part.

Your participation is important. This one-off survey is crucial for the Ministry of Business, Innovation and Employment (MBIE) and Stats NZ to gather up-to-date insights into New Zealand's business landscape.

Individuals, public sector agencies, and organisations have a legal obligation to answer all questions as requested under section 23 of the Data and Statistics Act 2022. Under section 76 of the Act, it is an offence for an individual or organisation to fail or refuse to provide the information (conviction can lead to a fine of up to $2,000 for an individual or $12,000 for an organisation).

This survey **should be completed by the General Manager** (although some questions may need to be confirmed with other specialist staff). Please make sure you complete the survey as soon as possible.

What You Need to Know

- It should take about 1–1.5 hours (it can be completed across multiple sessions and by multiple contributors, if needed).
- It must be completed and submitted by **22 July 2026**.
- It is a **legal requirement to complete this survey** under the Data and Statistics Act 2022.
- To view or print a **copy of the survey** and to see answers to **Frequently Asked Questions** about this survey, please visit www.mbie.govt.nz/sobo.

Ready to Get Started?

Please use the survey URL or QR code below and enter your unique Access Code to begin:

- Survey link: https://ipsos.co.nz/sobo2026.
- Unique Access Code: **{{ .Subscriber.Attribs.AccessCode }}**



For more information about the survey, please visit www.mbie.govt.nz/sobo.

What if I Need Help or Have Questions?

Please don't hesitate to reach out to the Ipsos project team:

- Email: NZ-Field-Help@ipsos.com
- Phone: 0800478783
- Visit the Ipsos website: www.ipsos.com/en-nz/current-ipsos-surveys-field

Thank you in advance for your help with this important survey.

Yours sincerely,

Dr Karlene Tipler

Head of Data Service Delivery
Ministry of Business, Innovation and Employment
On behalf of Statistics New Zealand and Ipsos

Email Reminder 2 – this email reminder was sent on 3 July 2026 to businesses with an email address that had not yet started the survey. The subject line was: *"REMINDER - Your business has been selected to participate in the 2026 Survey of Business Operations".*

Reference number: {{ .Subscriber.Attribs.SoboRef }}

Dear General Manager of {{ .Subscriber.Name }},

This is a reminder to complete the 2026 Survey of Business Operations by 22 July 2026. On 9 June 2026, we sent an email inviting your business to take part. This invite was sent to another contact in your organisation, and we have not yet had a response to the survey. Please discuss internally who the best person is to respond to the survey and use the access code below to complete the survey.

Your participation is important. This one-off survey is crucial for the Ministry of Business, Innovation and Employment (MBIE) and Stats NZ to gather up-to-date insights into New Zealand's business landscape.

Individuals, public sector agencies, and organisations have a legal obligation to answer all questions as requested under section 23 of the Data and Statistics Act 2022.

This survey **should be completed by the General Manager** (although some questions may need to be confirmed with other specialist staff). Please make sure you complete the survey as soon as possible.

What You Need to Know

- It should take about 1–1.5 hours (it can be completed across multiple sessions and by multiple contributors, if needed).
- It must be completed and submitted by **22 July 2026**.
- It is a **legal requirement to complete this survey** under the Data and Statistics Act 2022.
- To view or print a **copy of the survey** and to see answers to **Frequently Asked Questions** about this survey, please visit www.mbie.govt.nz/sobo.

Ready to Get Started?

Please use the survey URL or QR code below and enter your unique Access Code to begin (or to continue the survey):

- Survey link: https://ipsos.co.nz/sobo2026.
- Unique Access Code: **{{ .Subscriber.Attribs.AccessCode }}**

For more information about the survey, please visit www.mbie.govt.nz/sobo.

What if I Need Help or Have Questions?

Please don't hesitate to reach out to the Ipsos project team:

- Email: NZ-Field-Help@ipsos.com
- Phone: 0800478783
- Visit the Ipsos website: www.ipsos.com/en-nz/current-ipsos-surveys-field

Thank you in advance for your help with this important survey.

Yours sincerely,

Dr Karlene Tipler

Head of Data Service Delivery
Ministry of Business, Innovation and Employment
On behalf of Statistics New Zealand and Ipsos

Email Reminder 3 – this email reminder was sent on 13 July 2026 to businesses with an email address that had not yet started the survey. The subject line was: *"REMINDER – Complete the 2026 Survey of Business Operations".*

Reference number: {{ .Subscriber.Attribs.SoboRef }}

Dear General Manager of {{ .Subscriber.Name }},

We recently sent you the 2026 Survey of Business Operations to complete. In case you missed it, the survey is due back by 22 July 2026.

Across New Zealand, businesses large and small provide a vital contribution to our economy. The Survey of Business Operations paints a picture of how businesses like yours are operating, innovating, and growing. Importantly, the insights help government establish how best to support the business community. Please make sure you complete the survey as soon as possible.

Getting started is easy

Use the URL or QR code below and enter your unique access code to begin:

- **Survey link:** https://ipsos.co.nz/sobo2026
- **Unique Access Code: {{ .Subscriber.Attribs.AccessCode }}**

Your input is important, and your information will be kept private, secure and confidential.

If you need help or have questions about completing the survey, please reach out to the Ipsos team who are conducting the survey on behalf of MBIE and Stats NZ. **You can call the Ipsos team on 0800 247 783 or email** nz-field-help@ipsos.com.

If you have any concerns or feedback, you can contact the MBIE team at info@mbie.govt.nz or for more information about the survey visit www.mbie.govt.nz/sobo.

Thank you in advance for your time. Your information helps build a strong business community.

Yours sincerely,

Dr Karlene Tipler

Head of Data Service Delivery
Ministry of Business, Innovation and Employment
On behalf of Statistics New Zealand and Ipsos

7.2.3 Email reminder (partial)

Partial Reminder 1 – this email reminder was sent on 7 July 2026 to businesses that had started, but not yet completed, the survey. The subject line was: "*REMINDER – Complete the 2026 Survey of Business Operations".*

Reference number: {{ .Subscriber.Attribs.SoboRef }}

Dear General Manager of {{ .Subscriber.Name }},

We see that you have started but not yet completed the 2026 Survey of Business Operations. This is a reminder that the survey is due back by 22 July 2026.

Across New Zealand, businesses large and small provide a vital contribution to our economy. The Survey of Business Operations paints a picture of how businesses like yours are operating, innovating, and growing. Importantly, the insights help government establish how best to support the business community.

Please make sure you complete the survey as soon as possible.

Returning to the survey is easy

Use the URL or scan the QR code below and enter your unique access code to begin:



- **Survey link:** https://ipsos.co.nz/sobo2026
- **Unique Access Code: {{ .Subscriber.Attribs.AccessCode }}**

Your input is important, and your information will be kept private, secure and confidential.

If you need help or have questions about completing the survey, please reach out to the Ipsos team who are conducting the survey on behalf of MBIE and Stats NZ. **You can call the Ipsos team on 0800 247 783 or email** nz-field-help@ipsos.com.

If you have any concerns or feedback, you can contact the MBIE team at info@mbie.govt.nz or for more information about the survey visit www.mbie.govt.nz/sobo.

Thank you in advance for your time. Your information helps build a strong business community.

Yours sincerely,

Dr Karlene Tipler

Head of Data Service Delivery
Ministry of Business, Innovation and Employment
On behalf of Statistics New Zealand and Ipsos

Partial Reminder 2 – this email reminder was sent on 22 July 2026 to businesses that had started, but not yet completed, the survey. The subject line was: *"FINAL REMINDER – Complete the 2026 Survey of Business Operations*".

Reference number: {{ .Subscriber.Attribs.SoboRef }}

Dear General Manager of {{ .Subscriber.Name }},

We see that you have started but not yet completed the 2026 Survey of Business Operations. The survey is now due back by 24 July 2026.

Across New Zealand, businesses large and small provide a vital contribution to our economy. The Survey of Business Operations paints a picture of how businesses like yours are operating, innovating, and growing. Importantly, the insights help government establish how best to support the business community.

Please make sure you complete the survey as soon as possible.

Returning to the survey is easy

Use the URL or scan the QR code below and enter your unique access code to begin:



- **Survey link: https://ipsos.co.nz/sobo2026**
- **Unique Access Code: {{ .Subscriber.Attribs.AccessCode }}**

Your input is important, and your information will be kept private, secure and confidential.

If you need help or have questions about completing the survey, please reach out to the Ipsos team who are conducting the survey on behalf of MBIE and Stats NZ. **You can call the Ipsos team on 0800 247 783 or email nz-field-help@ipsos.com.**

If you have any concerns or feedback, you can contact the MBIE team at info@mbie.govt.nz or for more information about the survey visit www.mbie.govt.nz/sobo.

Thank you in advance for your time. Your information helps build a strong business community.

Yours sincerely,

Dr Karlene Tipler

Head of Data Service Delivery
Ministry of Business, Innovation and Employment
On behalf of Statistics New Zealand and Ipsos

7.2.4 Postal invitation

Postal invitation – this postal invitation was sent on 8 June 2026 to sampled businesses that did not have an email address on record.

<Date>
<Recipient Name>
<Recipient Title>
<Business Name>
<Business Address Line 1>
<Business Address Line 2>
<Business Address Line 3>
<Postal Code>
Reference number: <SOBO_ref>
<NZBN>

Dear General Manager,
Your business has been selected to participate in the 2026 Survey of Business Operations.
Whether your business is small or large, the way your business operates contributes to New Zealand's overall economic performance. ***With your help*** we can form a complete picture of the opportunities and challenges faced by businesses in New Zealand today.
The survey asks about business operations, innovation, and use of artificial intelligence in your organisation. It is being run by **Ipsos**, an independent research company on behalf of the Ministry of Business, Innovation and Employment (MBIE) and Stats NZ. The results will be used to inform policy development in a range of areas including minimum wage structures, usage of artificial intelligence and Research and Development Tax Incentives.
Individuals, public sector agencies, and organisations have a legal obligation to answer all questions as requested under section 23 of the Data and Statistics Act 2022. Under section 76 of the Act, it is an offence for an individual or organisation to fail or refuse to provide the information (conviction can lead to a fine of up to $2,000 for an individual or $12,000 for an organisation).
This survey **should be completed by the General Manager** (although some questions may need to be confirmed with other specialist staff).

What You Need to Know

- It should take about 1–1.5 hours (it can be completed across multiple sessions and by multiple contributors, if needed).
- It must be completed and submitted by **22 July 2026**.
- **It is a legal requirement to complete this survey** under the Data and Statistics Act 2022.
- To view or print a ***copy of the survey*** and to see answers to ***Frequently Asked Questions*** about this survey, please visit www.mbie.govt.nz/sobo.

Ready to Get Started?
Please use the survey URL or QR code below and enter your unique Access Code to begin:

- Survey link: https://ipsos.co.nz/sobo2026.
- Unique Access Code: {{ .Subscriber.Attribs.AccessCode }}



For more information about the survey, please visit www.mbie.govt.nz/sobo.

What if I Need Help or Have Questions?
Please don't hesitate to reach out to the Ipsos project team:

- Email: NZ-Field-Help@ipsos.com
- Phone: 0800478783
- Visit the Ipsos website: www.ipsos.com/en-nz/current-ipsos-surveys-field

Thank you in advance for your help with this important survey.

Yours sincerely,

Dr Karlene Tipler
Head of Data Service Delivery
Ministry of Business, Innovation and Employment
On behalf of Statistics New Zealand and Ipsos

7.2.5 Postal reminder

Postal reminder – this postal reminder was sent on 13 July 2026 to selected high-priority businesses without an email address that belonged to under-represented sample groups.

<Date>
<Recipient Name>
<Recipient Title>
<Business Name>
<Business Address Line 1>
<Business Address Line 2>
<Business Address Line 3>
<Postal Code>
Reference number: <SOBO_ref>
<NZBN>

Dear General Manager,

We recently sent you the 2026 Survey of Business Operations to complete.

In case you missed it, the survey is due back by 22 July 2026.

Across New Zealand, businesses large and small provide a vital contribution to our economy. The Survey of Business Operations paints a picture of how businesses like yours are operating, innovating, and growing. Importantly, the insights help government establish how best to support the business community.

Please make sure you complete the survey as soon as possible.

Getting started is easy

Use the URL or QR code below and enter your unique access code to begin:

Survey link: https://ipsos.co.nz/sobo2026
Unique Access Code: <Unique Access Code Here>

Your input is important, and your information will be kept private, secure and confidential.

If you need help or have questions about completing the survey, please reach out to the Ipsos team who are conducting the survey on behalf of MBIE and Stats NZ. **You can call the Ipsos team on 0800 478 783 or email nz-field-help@ipsos.com.**

If you have any concerns or feedback, you can contact the MBIE team at info@mbie.govt.nz or for more information about the survey visit www.mbie.govt.nz/sobo.

Thank you in advance for your time. Your information helps build a strong business community.

Yours sincerely,

Dr Karlene Tipler
Head of Data Service Delivery
Ministry of Business, Innovation and Employment
On behalf of Statistics New Zealand and Ipsos

7.3 Qualitative discussion guides

7.3.1 Interview discussion guide

Discussion Guide Draft v1

Methodology: 60-minute one-on-one interview via Teams

Target Participants: N=12 businesses (4 Adopters, 4 Planned AI adopters, 4 AI non-adopters)

Incentive: $150 koha (Prezzy card or charity donation)

NOTE: The discussion guide is a guide and not a rigid set of questions. The moderator's style is not to go through the guide question by question, but to ensure the desired information is gained from the interviews. The timing for each activity is an approximation.

Topic	Purpose	Audience	Approx. time allocated
INTRODUCTION	*To establish rapport, set expectations, confirm consent & create a safe environment for open discussion. Ensure participant understands confidentiality & feels comfortable sharing candid information about potentially sensitive topics.*	**All**	**3 mins**
BUSINESS & ROLE SNAPSHOT	*To establish context about the business (size, sector, markets, regulatory environment) & the participant's role in decision-making. This information frames all subsequent responses & supports analysis by business type.*	**All**	**5 mins**
CURRENT BUSINESS CONTEXT & PRIORITIES	*To understand the business environment in which AI decisions are being made – including current priorities, pain points, technology maturity.*	**All**	**8 mins**
AI ADOPTION JOURNEY & CURRENT USE	*To understand the AI adoption journey – what triggered adoption, how decisions were made, what's being used & what outcomes have been achieved. What barriers have been faced? Anything not working? Support required for this audience? Captures real-world examples of AI implementation to bring quantitative findings to life. Addresses stakeholder interests in technology uptake, innovation & commercialisation outcomes.*	**Adopters**	**12 mins**
GOVERNANCE, COMPLIANCE & SAFEGUARDS	*To capture detailed, case-level evidence on how businesses are managing AI governance, legal compliance, risk management, human oversight & incident response. This is the core Module Addressing MBIE's priority areas for AI policy development. Provides insights into real-world practices that can inform regulatory & guidance frameworks. These topics are commercially sensitive & require the confidentiality of a one-on-one interview format.*	**Adopters**	**15 mins**
DECISION PATHWAYS & READINESS	*To understand how businesses that are not yet using AI are thinking about it – their awareness, consideration journey, governance readiness & what would need to be true for them to adopt. Captures insights on decision pathways & minimum requirements that could inform government support & guidance. Addresses the 'why not' behind non-adoption to complement quantitative data.*	**Planned AI Adopters & AI Non-Adopters**	**12 mins**

Topic	Purpose	Audience	Approx. time allocated
PERCEIVED RISKS, BARRIERS & ENABLERS	*To identify the real & perceived barriers to AI adoption, separate myths from genuine constraints, understand risk perceptions & explore what safeguards, assurances, or support would unlock adoption. Provides actionable insights for government policy on how to support businesses considering AI. Addresses stakeholder interests in understanding blockers & enablers (ESIP, SIT, Economic Growth)*	**Planned AI Adopters & AI Non-Adopters**	**12 mins**
FUTURE OUTLOOK & GOVERNMENT SUPPORT	*To capture forward-looking perspectives on AI's role in business, identify what government support would be most valuable & surface recommendations for policy & operational improvements. Directly informs MBIE's policy development & support design. Provides actionable insights that can be translated into tangible initiatives.*	**All**	**8 mins**
QUANT RESULTS REVIEW	*To gain a deeper understanding of the factors driving the survey results for questions QAI6, QAI8 & QAI16.*	**All**	**5 mins**
THANK & CLOSE	*To close the interview respectfully, capture any final thoughts & leave the participant with a positive impression of the research process. Provides an opportunity for participants to raise anything not covered.*	**All**	**5 mins**

Introductions 5 mins

Purpose: *To establish rapport, set expectations, confirm consent, and create a safe environment for open discussion. Ensure participant understands confidentiality and feels comfortable sharing candid information about potentially sensitive topics.*

Thank you so much for taking the time to speak with me today. My name is [NAME] and I'm a researcher from Ipsos, an independent research company.

We're working with MBIE and Stats NZ to better understand how New Zealand businesses are thinking about and using AI, as well as broader business operations. Your perspective is really valuable in helping shape government policy and support for businesses like yours.

Before we begin, I want to assure you:

- Everything you share today is confidential – nothing will be attributed to you or your organisation without your permission
- There are no right or wrong answers – we're interested in your honest experience and opinions
- If there's anything you'd prefer not to answer, that's completely fine
- The interview will take about 60 minutes
- Do I have your permission to record this conversation? The recording is for my notes only and will be stored securely for 3 months before being deleted.
- *Confirm receipt of consent and information form – as per the consent form:*
  - *Ipsos will keep my recording and transcript for archiving and possible quality control purposes, for up to 3 months*
  - *I have a right to request my recording and transcript within three months after my interview has taken place.*
  - *After three months Ipsos will responsibly destroy my recording and transcript*
- Do you have any questions before we start?"

Business and Role Snapshot	5 mins

Purpose: *To establish context about the business (size, sector, markets, regulatory environment) and the participant's role in decision-making. This information frames all subsequent responses and supports analysis by business type.*

All participants

Let's start with a bit of background about your business.

- Can you give me a brief overview of your business?
- What sector/industry are you in?
- Roughly how many employees do you have?
- Where are you based? Do you have multiple locations?
- Who are your main customers? (B2B, B2C, government, export markets)
- Does your business operate in a regulated environment or handle particularly sensitive data?
- Health, financial services, government contracts, personal data?

Role context

- What's your role in the organisation?
- What are your core responsibilities?
- What is your personal level of AI use?
- How involved are you in decisions about technology or AI?
- Who else in your organisation would typically be involved in those decisions?

Current Business Context & Priorities	8 mins

Purpose: *To understand the business environment in which AI decisions are being made – including current priorities, pain points, technology maturity*

All participants

Business Priorities and Pain Points

- What are your top 2-3 business priorities right now?
- What's driving those priorities?
- Are these short-term pressures or longer-term strategic goals?

What are your biggest operational pain points or challenges at the moment?

- Workforce/skills availability?
- Costs or access to capital?
- Technology or systems?
- Regulation or compliance?
- Supply chain or market conditions?

Technology and Digital Context

- At a high level, how would you describe your business's relationship with technology and digital tools?
- Are you generally early adopters, or do you tend to wait until things are proven?
- What digital tools or systems does the business rely on day-to-day?
- Are there any internal policies or external regulations that shape how you think about adopting new technology?
- Privacy, security, industry-specific requirements?

Workforce and Skills Context – AI Lens (stakeholder priority: ESIP, SIT)

- How would you describe your current workforce situation?
- Are you finding it easy or difficult to recruit the skills you need?
- Are there specific skill gaps you're experiencing?
- How are you addressing skills needs – training, hiring, outsourcing?
- Has your workforce composition or the nature of work changed in the last couple of years?
- More/less reliance on contractors or external providers?
- Changes in the types of roles you're hiring for?

AI Adoption Journey & Current Use — 12 mins

Purpose: *To understand the AI adoption journey – what triggered adoption, how decisions were made, what's being used, and what outcomes have been achieved. Captures real-world examples of AI implementation to bring quantitative findings to life. Addresses stakeholder interests in technology uptake, innovation, and commercialisation outcomes.*

Adopters Only

AI Overview

- Can you tell me about how your business is currently using AI?
- What AI tools or applications are you using?
- What business functions or processes are they used in? (e.g. customer service, operations, marketing, HR, product development)
- Who in the organisation uses them? Which roles/teams?

How would you describe the scale of AI use in your business?

- Is it still experimental/pilot stage, or more widely embedded?
- Roughly how many people use AI tools regularly?
- Is AI integrated into your core products, services, or processes – or is it more of a standalone tool that people use?
- If integrated – how central is it to your value proposition?

Adoption Journey

- Can you walk me through how you got to where you are today with AI?
- What was the trigger or catalyst for exploring AI?
- What was the first use case you tried?
- Did you build something in-house, buy a solution, or use a vendor/partner?
- Who were the key decision-makers and stakeholders involved?
- Did you pilot? What were your success criteria for the pilot?
- How long did it take from initial exploration to implementation?
- What were the main challenges or hurdles you faced along the way?
    - Technical challenges? Skills or capability gaps? Internal buy-in or resistance?
    - Cost or budget constraints?
    - Procurement, IT, or legal/compliance processes?
- What areas are you still working on (still to be resolved)?
- What were/are the main barriers preventing your business from using AI – or moving faster with AI?
    - Cost or budget constraints?
    - Skills or capability gaps?
    - Data quality or availability?
    - IT infrastructure or integration challenges?
    - Lack of clear use cases or business case?
    - Legal, compliance, or procurement hurdles?
    - Leadership buy-in or internal resistance?
    - Uncertainty about where to start?

Outcomes and Impact (Stakeholder priority: Commercialisation, Productivity, Innovation Metrics)

What outcomes or benefits have you seen from using AI?

- Productivity or efficiency gains?
- Cost savings?
- Revenue or new business opportunities?
- Customer experience improvements?
- Quality or accuracy improvements?
- Have you been able to measure or quantify these benefits?

Have there been any unexpected outcomes – positive or negative?

- Things that worked better than expected?
- Limitations or disappointments?
- Has AI adoption led to any new products, services, or ways of doing business?
- Have you commercialised any AI-related innovations?
- Has it opened up new markets or customer segments?

Governance, Compliance & Safeguards (15 mins)	15 mins

Purpose: *To capture detailed, case-level evidence on how businesses are managing AI governance, legal compliance, risk management, human oversight, and incident response. This is the core Module Addressing MBIE's priority areas for AI policy development. Provides insights into real-world practices that can inform regulatory and guidance frameworks. These topics are commercially sensitive and require the confidentiality of a one-on-one interview format.*

Adopters Only

Governance and Accountability (MBIE Priority Area)

- Who in your organisation is ultimately accountable for AI use and outcomes?
- Is there a named individual or role?
- Is there a committee, forum, or governance structure that oversees AI?
- How clear are the roles and responsibilities***?***

How are decisions about AI made in your organisation?

- What approval gates or sign-off processes exist before deploying AI?
- Who needs to be involved in those decisions?
- Is there a formal AI policy or acceptable use policy?
- How is accountability made real in practice – not just on paper?
- How do leaders set and reinforce expectations around responsible AI use?
- Is responsible AI use reflected in goals, KPIs, or budgets?
- What happens if something goes wrong – how is that handled?

Legal Compliance and Data Protection (MBIE Priority Area)

- How do you ensure your AI use complies with legal requirements – like the Privacy Act or Human Rights Act?
- Do you conduct Privacy Impact Assessments (DPIAs) or Technical Risk Assessments (TRAs) before deploying AI?
- How do you classify and handle data that's used by AI systems?
- What controls are in place around data access, retention, and deletion?
- How do you handle data sovereignty – where data is stored and processed?
- Have you sought legal advice or used external expertise to help with AI compliance?
- What prompted that? What was the outcome?

Transparency and Explainability (MBIE Priority Area)

- How transparent is your business about its use of AI – both internally and externally?
- Do you tell customers or stakeholders when AI is being used?
- How and when do you disclose this?
- How do you explain how your AI systems work and make decisions?
- Do you provide explanations to users or customers about how AI outputs are generated?
- Are these explanations tailored to different audiences (e.g. technical vs non-technical)?
- Do you use things like model cards or documentation?

Risk Management, Safeguards and Harm Mitigation (MBIE Priority Area)

- What risks have you identified with your AI use?
- Accuracy or reliability risks?
- Bias or fairness concerns?
- Privacy or data security risks?
- Safety risks (if applicable)?
- Risks to vulnerable groups?

What safeguards do you have in place to manage these risks?

- Pre-launch testing (accuracy, bias, security)?
- Ongoing monitoring in production (metrics, alerts, thresholds)?
- Periodic reviews or audits?
- Red-teaming or adversarial testing?
- Additional controls for higher-risk use cases?

DECISION PATHWAYS & READINESS 12 mins

Purpose: *To understand how businesses that are not yet using AI are thinking about it – their awareness, consideration journey, governance readiness, and what would need to be true for them to adopt. Captures insights on decision pathways and minimum requirements that could inform government support and guidance. Addresses the 'why not' behind non-adoption to complement quantitative data.*

Planned AI Adopters and AI Non-Adopters

AI Awareness and Consideration

- When you think about AI, what comes to mind?
- What does AI mean to you in a business context?
- What have you seen or heard about how other businesses are using it?
- Has your business actively considered or explored using AI?
- If yes – what prompted that consideration?
- What use cases have you thought about?
- How far did you get in exploring it?
- If no – why hasn't it come up? Is it just not relevant, or are there other reasons?

FOR PLANNED AI ADOPTERS ONLY

You indicated you're planning to use AI. Can you tell me more about those plans?

- What use cases are you considering?
- What's driving the decision to move forward?
- What stage are you at – early exploration, actively evaluating options, or ready to implement?
- What's your expected timeline?
- Who's leading this in your organisation?

FOR AI NON-ADOPTERS ONLY

You indicated you're not planning to use AI. Can you tell me more about that decision?

- Is it a conscious decision, or just not something that's been considered?
- What would need to change for AI to become relevant or worth considering?
- Do you see AI as relevant to your industry/sector at all?

Decision-Making and Governance Readiness

- If your business were to adopt AI, who would be involved in that decision?
- Who would need to sign off?
- What functions would need to be consulted (IT, legal, finance, operations)?
- How do you typically make decisions about new technology?

Does your business have any existing policies or frameworks that would apply to AI?

- Data protection or privacy policies?
- Technology or acceptable use policies?
- Risk management frameworks?
- Would you need to create new policies specifically for AI?

PERCEIVED RISKS, BARRIERS AND ENABLERS 12 mins

Objective: *To identify the real and perceived barriers to AI adoption, separate myths from genuine constraints, understand risk perceptions, and explore what safeguards, assurances, or support would unlock adoption. Provides actionable insights for government policy on how to support businesses considering AI. Addresses stakeholder interests in understanding blockers and enablers (ESIP, SIT, Economic Growth).*

Planned AI Adopters and AI Non-Adopters

Perceived Risks and Concerns

What concerns or risks come to mind when you think about your business using AI

- Legal or compliance risks (Privacy Act, contracts)?
- Sharing confidential information with AI?
- Reputational risks?
- Technical risks (accuracy, bias, hallucinations, security)?
- Workforce impacts?
- Cost or ROI uncertainty?
- Are there specific things you've seen or heard about that have made you cautious?
- News stories, industry examples, peer experiences?
- Concerns about vendor reliability or lock-in?
- How do you think your customers, board, or stakeholders would react if you adopted AI? Would there be concerns or resistance?
- Would you need to communicate proactively about it?

Barriers to Adoption

What are the main barriers preventing your business from using AI – or moving faster with AI?

- Cost or budget constraints?
- Skills or capability gaps?
- Data quality or availability?
- IT infrastructure or integration challenges?
- Lack of clear use cases or business case?
- Legal, compliance, or procurement hurdles?
- Leadership buy-in or internal resistance?
- Uncertainty about where to start?

Which of these feels like the biggest barrier for your business right now?

- Are there any barriers that feel more like myths or misconceptions versus genuine constraints?
- For example, have you heard things about AI that you're not sure are actually true?
- What would help you separate fact from fiction?

Procurement, IT and Policy Pathways

- If you were to pursue AI, what would the process look like in your organisation?
- Walk me through the typical steps for adopting new technology
- Where do things tend to slow down or get stuck?
- What assessments or reviews would be required (security, privacy, legal, vendor risk)?
- Have you looked at AI vendors or solutions?
- What's been your experience with the vendor landscape?
- Any concerns about vendor reliability, data handling, or lock-in?

Skills and Capability Gaps (Stakeholder priority: ESIP, SIT – Research Workforce)

- Does your business have the skills internally to evaluate, implement, or manage AI?
- What skills are missing?
- Where would you look to fill those gaps – hiring, training, external support?
- What kind of training or upskilling would your team need to use AI effectively?
- Technical skills?
- Understanding of risks and limitations?
- Knowing when to trust or override AI outputs?

Minimum Safeguards and Assurances

- What would need to be true for your business to feel comfortable piloting AI?
- What safeguards would you want in place?
- What evidence or assurances would you need?
- If you were to create a checklist of minimum requirements before adopting AI, what would be on it?
- Human oversight or approval steps?
- Privacy or bias testing completed?
- Clear documentation of how it works?
- Audit trail of decisions?
- Named accountability?
- Incident response plan?

What proof points or assurances from vendors would give you confidence?

- Independent audits or certifications?
- Transparency about how models are trained?
- Data handling and security commitments?

Enablers and Support

What would make it easier for your business to adopt AI responsibly?

- What resources, tools, or guidance would help?
- What would reduce the friction or uncertainty?
- Are there examples from your industry or peers that have influenced your thinking?
- Businesses you've seen do it well?
- Examples that have made you more cautious?

FUTURE OUTLOOK AND GOVERNMENT SUPPORT (8 mins)

Objective: *To capture forward-looking perspectives on AI's role in business, identify what government support would be most valuable, and surface recommendations for policy and operational improvements. Directly informs MBIE's policy development and support design. Provides actionable insights that can be translated into tangible initiatives.*

All participants

Future Outlook

- Looking ahead, how do you see AI fitting into your business over the next 2-3 years?
- Do you expect your use of AI to grow, stay the same, or decline?
- What would drive that change?
- What use cases do you see as most promising or relevant?
- **For AI Adopters** What would help you scale your AI use or move to the next stage?
- What's currently holding you back from going further?
- What evidence, capabilities, or approvals would you need?
- **FOR PLANNED AI ADOPTERS & AI NON-ADOPTERS** What would it take to change your mind about AI?
- Is there a tipping point where it would become essential?
- What would need to happen in your industry or market?
- How do you think AI will affect your workforce over the next few years?
- New roles or skills needed?
- Roles that might change or be displaced?
- How are you preparing for that?
- Are there any broader changes in your industry or market that are influencing how you think about AI? Competitive pressures?
- Customer expectations?
- Regulatory changes?

Government Support and Policy (Stakeholder priority: All)

- What role, if any, do you think government should play in supporting businesses with AI?
- Are you aware of any effective international example of government support or policy that you would like to see in New Zealand?
- Is government support welcome or would you prefer to figure it out yourself?
- What's the right balance between guidance and regulation?
- What would be the most useful support government could provide to help businesses like yours adopt AI responsibly?
    - Plain-English guidance or templates (e.g. privacy impact assessments, risk registers, disclosure templates)?
    - A recognised assurance baseline, trust mark, or certification?
    - Curated lists of vetted vendors or procurement guidance?
    - Training or capability building for key roles?
    - Funding or co-investment for pilots or sandboxes?
    - Case studies or examples of good practice?
    - Sector-specific guidance?
- Of those options, what would make the biggest difference for your business?

- Is there anything government is currently doing that's helpful – or unhelpful – when it comes to AI adoption?
- Existing guidance, regulations, or programmes?
- **Only for businesses who have overseas activity**: Are there any overseas regulations that you must follow in order to use AI in your business?
- Things that are creating unnecessary friction or uncertainty?

Innovation and Collaboration Support (Stakeholder priority: SIT – Research Organisation Collaboration, Commercialisation)

- Are you aware of any government programmes or initiatives that support innovation or technology adoption?
- Have you engaged with any of them?
- If yes – what was your experience?
- If no – why not? What would make them more accessible or relevant?
- Would your business benefit from stronger connections with research organisations or universities?
- What kind of collaboration would be most valuable?
- What barriers exist to that kind of collaboration?

Data and Measurement (Stakeholder priority: SIT – Innovation Metrics, Future Evaluation)

- How do you currently measure the impact of technology investments in your business?
- Do you track ROI, productivity, or other metrics?
- What data do you have access to?
- If government wanted to better understand how AI is being used and its impact on NZ businesses, what information would be most useful to collect?
- What would you be willing to share?
- What would you not be comfortable sharing?

Results Review 5 mins

Purpose/objective: *To check participant response to quantitative survey results for a deeper understanding.*

I wanted to share with you some of the topline responses to a couple of questions in the survey and get your feedback.

Ask as appropriate for AI Adopters, Planned AI Adopters and AI Non-Adopters

Read question, share result and discuss with participant – how do they feel about these results?

Which response is closest to their experience in any way? Why do they feel participants have responded as they have to this question?

[For Adopters]
QAI6
In the last 12 months, has the use of AI helped or not helped you achieve the following business outcomes?
Please provide your best estimate based on your overall impression – precise measurement is not required.

		1. Helped	2. Not helped	99. Don't know	96. Not applicable
1	Enhanced resource optimisation and productivity	1,116	360	322	288
2	Improved customer experience/engagement	827	506	379	374
3	Improved employee experience/engagement	1,021	428	313	324
4	Increased revenue/profit/cashflow	455	765	351	515
5	Improved quality control	735	571	467	314
6	Strengthened security, data protection and fraud detection	446	608	452	580
7	Enabled faster access to accurate data to inform decision making	1,490	236	205	155
8	Enabled more agile product and service innovation	720	526	495	345
9	Enhanced engagement and response to marketing activities	733	465	477	411
10	Enabled more effective supply chain and supplier management	355	660	726	345

[Ask All]
QAI8
What barriers is this business facing to adopting AI?
Please select all that apply.

Barrier	Quant Response
High costs	632
Lack of skills, knowledge or training to adopt artificial intelligence	1,801
Government regulation	127
Not convinced by the technology	521
Security concerns	1,148
Ethical concerns and safety	785
Other barriers not previously mentioned	246
Business is not facing any barriers to adopting AI	818

[Ask Adopters and Planned Adopters, Single response]
QAI16 [OECDQ066]
How do you think that AI has changed skill needs in this business in the last 12 months?

Please consider your business as a whole, even if experiences vary across different teams or departments.

Skill	Quant Response
1. Increased skill needs	*33%*
2. No effect on skill needs	*6%*
3. Decreased skill needs	*50%*

Close 5 mins

Purpose/objective: *To close the interview respectfully, capture any final thoughts, and leave the participant with a positive impression of the research process. Provides an opportunity for participants to raise anything not covered.*

All participants

We're coming to the end of our conversation. Before we finish, is there anything else you'd like to share that we haven't covered

- Any final thoughts on AI adoption, risks, or opportunities?
- Anything you think MBIE should know?
- Do you have any questions for me about the research or how your feedback will be used?

Interviewer to confirm:

- *Thank participant for their time and insights*
- *Remind them their feedback is confidential and will be aggregated with others*
- *Confirm incentive process ($150 Prezzy card or charity donation – confirm preference and details)*

Thank you so much for your time today. Your insights are incredibly valuable and will directly help shape how government supports New Zealand businesses with AI. We really appreciate your openness and honesty.

7.3.2 Focus group discussion guide

DISCUSSION GUIDE v2

Job number: 25-098410

Methodology: 90-minute group interview via Teams/Zoom

- 5 online focus groups
- Approximately 90 minutes
- n=5 participants per group
- Mixed AI adoption status:
  - 3 AI Adopters
  - 1 Planned AI Adopter
  - 1 AI Non-Adopter
- Groups split by business size where possible.
- Incentive: $150 koha (Prezzy card or charity donation)

Objectives:

- Test and refine emerging themes from the depths
- Understand where businesses agree and disagree
- Explore social norms and peer influence around AI adoption
- React to key survey findings
- Surface differences by business size
- Generate richer discussion around future needs and government support
- Generate strong verbatims for the final report sections on barriers, workforce impacts, governance and support needs

NOTE: The discussion guide is a guide and not a rigid set of questions. The moderator's style is not to go through the guide question by question, but to ensure the desired information is gained from the interviews. The timing for each activity is an approximation.

Introductions — 5 mins

Purpose: *To establish rapport, set expectations, confirm consent, and create a safe environment for open discussion. Ensure participant understands confidentiality and feels comfortable sharing candid information about potentially sensitive topics.*

Thank you so much for taking the time to speak with me today. My name is [NAME] and I'm a researcher from Ipsos, an independent research company.

We're working with MBIE and Stats NZ to better understand how New Zealand businesses are thinking about and using AI, as well as broader business operations. Your perspective is really valuable in helping shape government policy and support for businesses like yours.

Before we begin, I want to assure you:

- Everything you share today is confidential – nothing will be attributed to you or your organisation without your permission
- There are no right or wrong answers – we're interested in your honest experience and opinions
- If there's anything you'd prefer not to answer, that's completely fine
- The interview will take about 90 minutes
- Do I have your permission to record this conversation? The recording is for my notes only and will be stored securely for 3 months before being deleted.
- Do you have any questions before we start?

Warmup and Introduction — 10 mins

Purpose: *To establish context about the business (size, sector, markets, regulatory environment) and the participant's role in decision-making. This information frames all subsequent responses and supports analysis by business type.*

Let's start with a quick introduction. Please tell me:

- Your role
- What your business does
- Approximate employee size
- One sentence that describes your relationship with AI today

Probe:

- *Enthusiastic user?*
- *Curious but cautious?*
- *Planning adoption?*
- *Sceptical?*
- *Not relevant?*

AI Adoption and Use	15 mins

Purpose: *To understand the factors influencing business decisions about AI adoption, including triggers, motivations, decision-making processes, and reasons for adoption, planned adoption, or non-adoption. Provides insight into how businesses move from awareness to action and what distinguishes adopters from AI non-adopters.*

Opening Discussion

Thinking about AI in business today...

- Has AI become unavoidable?
- Is it overhyped?
- Where does your business currently sit?

Adopters

- What has driven AI adoption?
- What use cases have delivered the most value?
- What has not worked?

Planned AI Adopters

- What's making AI attractive?
- What are you hoping it will solve?

For Adopters ***Business Impact of AI Adoption***

- Thinking about your AI use today, what would you say has been the biggest impact on your business so far?
- Where have you seen the greatest benefits from AI, if any?
- Have there been any impacts or outcomes that surprised you, either positively or negatively?
- Has AI changed the way your employees work, make decisions, or spend their time? How?
- If you stopped using AI tomorrow, what would your business miss the most?

Reaction to Survey Findings	15 mins

Purpose: *To explore participant reactions to key survey findings, identify the factors driving quantitative results, and test whether findings align with real-world business experiences. Provides context and explanation for patterns observed in the survey data and helps identify areas of consensus and disagreement across businesses.*

What we will do now in this part of the interview is talk further about some of the quantitative questions in the survey and get your feedback and interpretation on some of the themes that came through.

Moderator to choose 3-4 questions per group to explore as time allows

QAI6: Why AI Hasn't Delivered Expected Outcomes

For adopters only

- Have there been any areas where AI hasn't delivered the benefits you expected?
- What do you think has limited its impact?
- Was it an issue with the technology itself, implementation challenges, capability gaps, staff adoption, or simply a lack of relevance to the business need?

QAI7: Has AI Delivered on Its Promise?

For adopters only

- Many businesses adopt AI to improve efficiency, reduce costs, or address capability gaps. To what extent has AI delivered on these goals in your organisation?
- Has AI helped staff work more efficiently? If so, how?
- Has AI reduced costs or resource pressures in any meaningful way?
- Has it helped address skill shortages or capability gaps? Why or why not?

QAI13: Impact on Employment and Worker Satisfaction

- Many businesses report that AI has had little or no impact on employment levels. Why do you think that is?
- Has AI changed the type of work people do more than the number of people employed?
- How have businesses used any efficiency gains created by AI?
- What impact, if any, has AI had on employee satisfaction or engagement?
- Why do you think some businesses report positive impacts on worker satisfaction while others see little change?

QAI14 & QAI15: Future Employment Impacts

- Looking ahead, what impact do you think AI will have on employment over the next 10 years?
- Why do you think businesses hold such different views on whether AI will increase, decrease, or have little effect on employment?
- Do you think these impacts will vary across industries or sectors? In what ways?

QAI16: Future Skill Requirements

- What skills do you think will become more important as AI becomes more widely used?
- Are there particular technical, digital, or human skills that businesses will need more of in the future?
- Which skills are likely to remain important regardless of advances in AI?

QAI18: Upskilling vs Hiring

- Many businesses say they would prefer to retrain or upskill existing employees rather than hire new workers to meet changing skill needs. Why do you think that is?
- What are the advantages and challenges of developing existing staff compared with recruiting new talent?

QAI21: Training Needs and Government Support

- Many businesses say they are unsure what AI-related training is most relevant for them. Does that resonate with your experience?
- What would help businesses identify the right training, learning opportunities, or skill development pathways?
- What role, if any, should government play in helping businesses build AI capability and access relevant training?

Barriers, Trust and Confidence	15 mins

Purpose: *To identify the key barriers influencing AI adoption, understand perceptions of risk and trust, and distinguish genuine constraints from perceived concerns. Provides insight into what is helping or hindering AI uptake and what may be required to support wider adoption.*

Imagine a business very similar to yours that has not adopted AI.

What are the most likely reasons?

Build and rank a list: *Share following list on screen*

- Skills
- Time
- Cost
- Security
- Data concerns
- ROI uncertainty
- Culture
- Leadership
- Customer concerns
- Regulation

Probe:

- Which barriers are genuine?
- Which are excuses?
- Which barriers are likely to disappear over the next few years?

Workforce and Skills	12 mins

Purpose: *To understand how AI is changing workforce requirements, skill needs, and training priorities within businesses. Explores emerging capability gaps, workforce adaptation strategies, and the implications of AI adoption for future employment and skills development.*

Discussion:

- Does AI require new skills?
- Which skills are becoming more important?
- Which skills are becoming less important?
- Is AI creating work or replacing work?
- How readily available are workers with the required AI-related or digital skills?
- Are there particular skills that are especially difficult to find?
- When new skills are required, what is the business's preferred approach?
- Do you prefer to train and upskill existing employees, and if so, why?

Probe:

- Communication
- Critical thinking
- Prompt writing
- Technical AI skills
- Data literacy
- Governance skills

Mini exercise:

If you could train every employee in one AI-related skill, what would it be?

Governance and Responsible AI — 10 mins

Purpose: *To understand business expectations around responsible AI use, governance, risk management, privacy, transparency, and accountability. Explores what safeguards businesses consider necessary and what practical approaches are required to support responsible adoption of AI.*

Discussion:

- Do your businesses have any formal or informal policies governing the use of AI?
- How much governance is enough?
- What safeguards should every business have?
- Are small businesses realistically going to create AI policies?

Probe:

- Human oversight
- Privacy protections
- Employee guidance
- Data security
- Customer transparency

Exercise:

What would be on a minimum AI safety checklist for New Zealand businesses?

Future Outlook — 5 mins

Purpose: *To capture forward-looking perspectives on the role of AI in New Zealand businesses, including expected opportunities, challenges, and drivers of future adoption. Provides insight into how businesses anticipate AI will shape their organisation, workforce, and industry over the coming years.*

Looking ahead 3 years:

- What role will AI play in your business?
- What role will AI play in your industry?
- Who will benefit most?
- Who risks being left behind?
- How do you expect AI to shape your workforce in the future, both within their business and across their industry? *Probe workforce size, skill requirements, and the types of roles that will be needed.*

Government Support	10 mins

Purpose: *To identify the types of support, guidance, resources, and policy interventions businesses would find most valuable in enabling responsible AI adoption. Provides actionable insights to inform government policy development, business support initiatives, and future AI capability-building programmes*

Prioritisation Exercise

If government could only do three things, what should they be?

Discuss top of mind as a group – then share options on screen to discuss

Options:

- Practical guidance
- Templates
- AI governance frameworks
- Case studies
- Training
- Workforce support
- Funding
- Innovation sandboxes
- Vendor accreditation
- Regulatory clarity
- Industry-specific guidance

Close	5 mins

Finally, I would like to know…

- *Is there anything we haven't talked about today regarding AI that you think is important for me to know?*

Thank you for your time, I think we have covered everything we need to. Your input has been extremely useful.

- Any questions you would like to ask me?
- Thank and close