Strategic Business Plan 2024-2025

Tē tōia, tē haumatia
Nothing can be achieved without a plan, workforce and a way of doing things

MARCH 2024

Tourism Data Leadership Group

Te Kāwanatanga o Aotearoa
New Zealand Government

Tourism Data
Leadership Group

ONLINE: ISBN 978-1-991143-36-5

MARCH 2024

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The Tourism Data Leadership Group

The Tourism Data Leadership Group is an independent sector group which includes representatives from the tourism industry, academia, and government. The Group advises the Minister for Tourism and Hospitality, and the Ministry of Business, Innovation and Employment (MBIE) on how to spend the $5 million from the International Visitor Conservation and Tourism Levy (IVL) to improve the tourism data system. The Group's role is defined in the Terms of Reference issued by MBIE. The government (and more specifically MBIE) supports this work through the provision of a Secretariat.

Left to Right: **Dr Antony Kennedy** (Senior Manager Spatial & Processing Services, Statistics New Zealand), **David Perks** (Chair, Regional Tourism New Zealand), **Steve Armitage** (Chief Executive, Hospitality New Zealand), **Graeme Osborne** (stepped down February 2024, former Tourism Consultant), **Wiremu Stone** (Head of Shared Services & Company Secretary, WhaleWatch), **Justin Kimberley** (Head of Business Growth, Insights, and Innovation, RotoruaNZ), **Dr Susanne Becken** (Department of Conservation (until February 2024); Professor of Sustainable Tourism, Griffith University)

Front: **Bruce Bassett** (Chief Advisor, Tourism Industry Aotearoa)

Absent: **Dr Keri-Anne Wikitera** (stepped down November 2023, Consultant)

Foreword

Tourism is a cornerstone of Aotearoa New Zealand's economy and society. Pre-COVID-19, tourism accounted for 19.9% of exports and directly contributed 5.4% of GDP and 7.9% of employment; recovery to these levels is underway[1]. This means that for our country, it is important we get tourism right.

Data is both the lifeblood and the compass of a well-functioning tourism system. Whether it be at the operator level, or within central or local government, the sector requires access to reliable, timely, consistent and high-quality information so that everyone - ranging from people working in the sector to our communities and our manuhiri - can make better informed decisions.

The Tourism Data Leadership Group (TDLG) recognises that the true value of quality data goes beyond mere collection to broader utilisation; a spectrum that ranges from improving sustainability, resilience, and non-economic values, through to encouraging the right investments and stimulating growth.

The TDLG have been tasked with making recommendations to the Minister for Tourism and Hospitality and the Ministry of Business, Innovation and Employment (MBIE) for the immediate future of the tourism data system. In doing so, the TDLG has been considered in its approach, seeking to preserve the system's pre-COVID-19 foundations, while also thinking about how the International Visitor and Conservation Levy (IVL) allocation could be optimally used to generate greater value than the investment itself. The TDLG is both ambitious (in the quantum of work), and purposeful (focusing in the short-term on the provision of solid foundations), with a firm awareness that intervention is needed now more than ever. As for the current challenges in the system, the TDLG sees these as opportunities to do things better.

The purpose of this plan and roadmap is not to rehash the perennial tourism data issues (which are well captured elsewhere e.g., the Data Domain Plan). Instead, within the current context, this document's purpose is to outline a vision for the future and to provide clear direction for a way forward for the next two years (with consideration to longer term outcomes).

The TDLG is excited by the potential outcomes that could be generated but is fully aware that there is lingering instability and uncertainty. In short, there remains a lot to navigate and negotiate. The TDLG and MBIE (responsible for implementation), have a lot of work do in a challenging environment where there is great competition for already constrained resources.

It is clear that our tourism sector, once a beacon of strength, is poised for resurgence post-COVID, and with it, the opportunity to redefine excellence. It is imperative that we use data more effectively and efficiently and that we work together more collaboratively. Together we can shape a future where Aotearoa New Zealand's tourism sector shines brighter than ever before.

Steve Armitage
Tourism Data Leadership Group Co-chair

1 The outlook for New Zealand-Aotearoa tourism | Ministry of Business, Innovation & Employment

Ara Whānui Two-Year Roadmap

Introduction

The TDLG have the responsibility of providing thought leadership and advice concerning the strategic direction of tourism data developments. The following roadmap is the TDLG's blueprint for the future – a directive for the next two years with an eye on longer-term goals. The development of the roadmap has been informed by:

- the tourism data landscape
- the purpose of the Group and its vision, principles and strategic direction
- the TDLG's agreed scope.

The key areas of focus are represented by four Strategic Pou. In summary these are:

Māuitanga and Innovation	Core Datasets	Regenerative Tourism	Leadership and System Capability
Inspired by the Māori creation story, this Pou endeavours to shift Māori tourism data from its current state of te kore (the nothingness) to ko te ao mārama (the future) through the provision of innovative solutions.	This Pou recognises a foundational set of data (both existing and new) critical to ensuring the sector have access to quality data in a timely manner.	Long-term tourism system change i.e. tourism gives back to people and places more than it takes, will be both measured and informed by this Pou.	This Pou provides oversight of the tourism data system; it establishes the long-term vision, inclusive of sector involvement and capability development.

For simplicity's sake, the recommended MBIE actions in the roadmap have been visually mapped against a single Pou; however, there is much interconnectivity between the actions. An example of the interconnectivity is the recommended re-use of core datasets (e.g., tourism flows and volumes) to tell a variety of stories via MBIE's Tourism Evidence and Insights Centre (TEIC):

- māuitanga and innovation – how well do we manaaki our manuhiri?
- core datasets – the domestic landscape (both visitors and hosts; regional bundling would be a key feature if implemented)
- regenerative tourism – progress towards sustainable tourism and beyond (regeneration)

The majority of recommendations (and related investment) are focused on increasing the range of data to the sector, however a number of key recommendations are about improving the tourism data system and ensuring that it is sustainably managed into the longer-term.

The TDLG have expectations that for all recommendations, best practice in relation to data governance[2], ethics, privacy, and security would be adhered to by MBIE.

2 Where appropriate the TDLG recommend that Te Kāhui Raraunga - Māori Data Governance Model is applied.

Context and Risk

As previously noted, the roadmap provides a high-level view of the TDLG's recommendations and priorities for the tourism data system over the next two years. In preparing this roadmap, it should be noted that:

- under the Terms of Reference, the TDLG:
  - is an independent advisory board, and it does not have legally binding decision-making powers
  - will not prescribe research agendas for individual agencies and organisations
- there are significant implications for MBIE. MBIE have had input into the roadmap but are not currently resourced to deliver all the identified recommendations[3].

Given dependencies on MBIE and other agencies and organisations, the actions, and timelines (including possible deliverables) in the roadmap are indicative only. While there is a strong intent for work to happen at identified times, there will be factors outside the TDLG's and MBIE's control that may impact the timing and delivery of initiatives in the roadmap. At a minimum, the TDLG recommend the order/priority of the actions is maintained. Recommendations have been staggered so MBIE can sustainably manage new work coming into the agency.

It should be noted that not all recommendations proposed in the Data Domain Plan are able to be included in the two-year roadmap. This was always a possibility given the extent of the recommendations, the resourcing needed to deliver on them, and the limited IVL pool alone. Some initiatives which could be expected to be delivered from 2026 on (once foundations are in place) are:

- A productivity measure for the sector (an outcome of the New Zealand-Aotearoa Government Tourism Strategy). This has not been included in the two-year road map due to conceptual and measurement challenges with developing appropriate productivity statistics for a service-intensive sector like tourism. Standard measures of productivity are problematic given the complexity of tourism as a sector with diverse enterprises and firms providing a range of goods and services of varying quality to a multitude of consumers.
- Other tourism business and workforce measures, such as workforce skills, and business benchmarking. While the Group do not explicitly address these gaps in the two-year roadmap, opportunities exist for business and workforce data to be delivered across 2024 and 2025. For example:
  - priority Māori tourism data needs (which will be established in 2024), may identify Māori business and workforce data as a priority data gap (again, a small amount of funds are proposed to be available to support this).
  - the framework being developed (in 2024) to support the measurement of sustainable and regenerative tourism, may identify some business data as a priority gap (again, a small amount of funds are proposed to be available to support this).
- Domestic forecasting – this will be reliant on a range of information, including potentially the domestic tourism measures which are recommended to be commissioned from 2024 on. Until time-series data is available, domestic forecasting won't be enabled.

Additionally, with the two-year roadmap focusing on the provision of foundational data, research has not been able to be prioritised in the immediate term. The Group however recognise that research (especially that which is more future focused) is critical to the effective functioning of the tourism system. It is anticipated that such work would be undertaken in the future,

The Group have plans to refresh the roadmap before the beginning of 2025 (when new governance arrangements are recommended to be in place). By this time, there will be greater certainty over resourcing, structure and data needs.

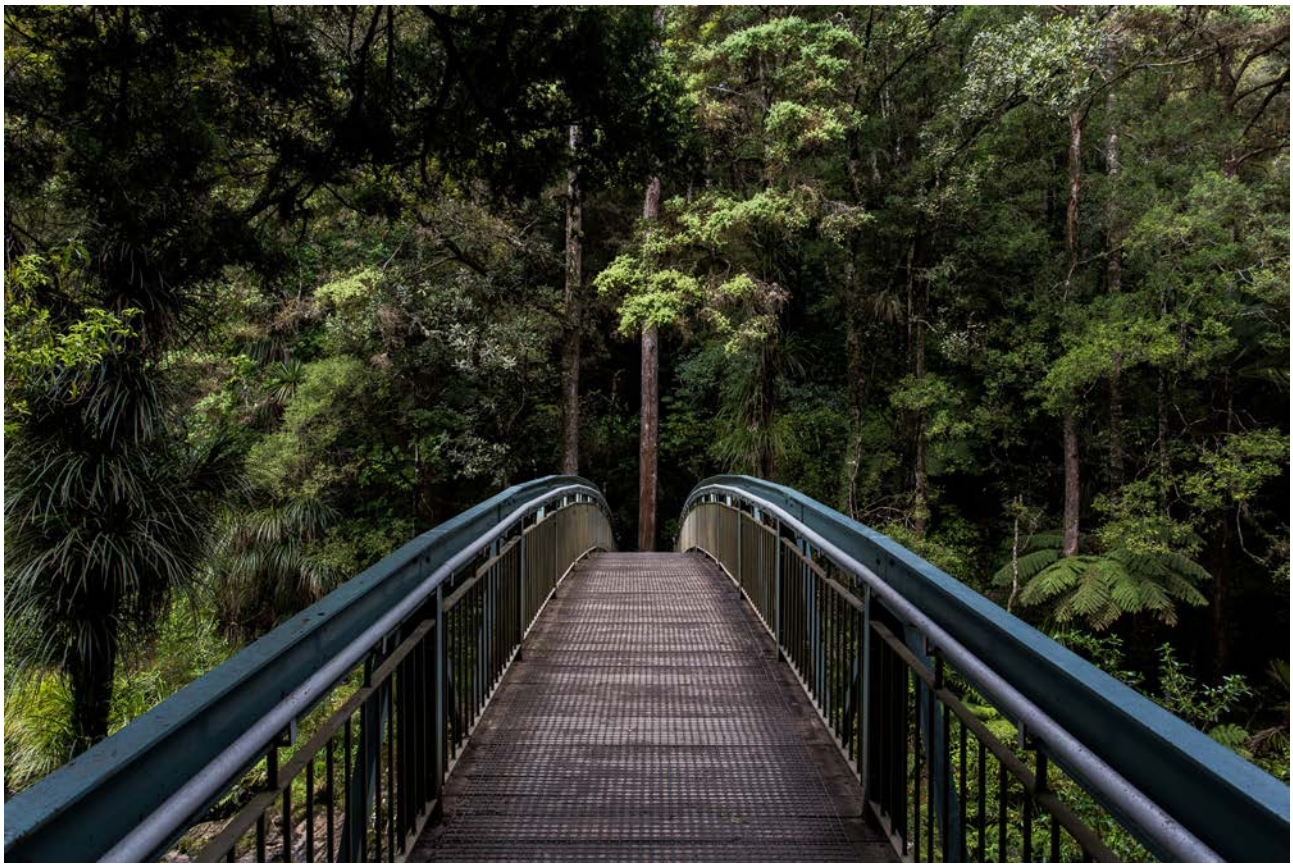
3 Such resourcing (both Secretariat resourcing to support procurement activities, and data scientist resource to support data accessibility) would need to be supported by the IVL allocation. The TDLG are supportive of this, with the end goal being their vision for a more fit-for-purpose central repository for tourism data, and greater storytelling.

Māuitanga and Innovation Pou

Innovation underpins this Pou and is the starting point for the recommended work. Innovation will extend across the design, collection, analysis, reporting, and visualisation of data. There is interest in data integration, Artificial Intelligence, machine learning, real-time and streaming data. Successful innovations are recommended to be adopted elsewhere across the tourism data system.

A report has been proposed to be commissioned to better understand what innovation could look like in the tourism data system, including global initiatives and understanding what is feasible within MBIE systems and government practice. Such a report could result in new initiatives not explicitly identified in the roadmap (a small amount of funding is proposed to be available to support this).

Additionally, establishing a better understanding of Māori tourism data needs is a priority recommendation in this Pou. The TDLG recommend both they and MBIE collaborate with Māori stakeholders on this work. Such engagement and design work is already underway to re-present existing data to better meet Māori needs. Recommendations include working with both existing and new sources (e.g., the new digital arrival cards), the provision of iwi/hāpu breakdowns where feasible (in a similar manner to Te Whata), and adopting cultural storytelling based around manaakitanga.



Core Datasets Pou

This Pou is focused on building the foundations for the tourism data system; it is about both continual improvement[4] and ensuring core data and gaps (many perennial) are filled as is required. (See the section on Core Data and Gaps).

At this stage, the TDLG is deliberately steering away from recommendations that create a precedent by investing in sector specific data that is not of benefit to all tourism stakeholders (this aligns with the TDLG's Prioritisation Framework, and in particular the reach and accessibility, and public good criteria).

Consistent with the TDLG's 2023 Interim Action Plan, domestic tourism measures are a recommended priority. Since the release of that Plan, some changes have occurred in the tourism data landscape (such as the discontinuation of the Domestic Visitor and Local Population Estimates tool). Sector-wide concerns around the loss of such data, resulted in the TDLG recommending that tourism flows and volumes data is integrated and prioritised into the domestic tourism measures work[5,6]. Additionally, other immediate actions proposed are a domestic visitor tool (that will deliver similar metrics to the International Visitor Survey (IVS)), and short-term rental accommodation measures, which will need to be integrated into the Accommodation Data Programme. Procurement of such measures planned for late 2023 was paused to ensure the work aligned with the priorities of the incoming Government. In February 2024, this work was endorsed by the Minister for Tourism and Hospitality and will begin in March 2024.

There is recognition that the quantum of data in some datasets will need to be built in order for MBIE to progressively tell more comprehensive and more in-depth stories (the IVS is an example of this, where each quarter a richer story is able to be told as a result of having larger samples of data). Other proposed work in 2024 includes the provision of international visitor forecasts (which have not been updated since before COVID-19).

In addition to initiatives identified by the TDLG as priorities, the Group are aware of a number of possible sector-driven initiatives that may be worth investing in. The TDLG has recommended establishing a Partnership Fund, with investment aligned to the Group's prioritisation framework.

All core datasets will be incorporated within the TEIC and be made publicly available.

- Wherever there is experimental data, MBIE will put in place processes to ensure sufficient review.

Regenerative Transformation Pou

The TDLG's Interim Action Plan identified this Pou as a priority near-term recommendation. Initial work is being led by the TDLG, with input from global sustainability thought leaders (some of whom are doing similar work led by the Organisation for Economic Co-operation and Development (OECD) in Europe). Preliminary design of an enduring monitoring framework considerate of both sustainable and regenerative tourism is seen as critical by the TDLG and many parts of the sector. Early design work is already being seen as having the potential to be world leading. Designing a monitoring framework for sustainable tourism is a well-advanced notion; sector engagement on this component of the framework will occur early in 2024. Further thinking and work is required to understand how, and whether, it is possible to measure regenerative tourism (the broader positive environmental, social, and socio-cultural impacts of tourism).

Following the development of the framework, a number of data needs (ranging from national to at place) will be identified and recommended by the TDLG as priorities for design and implementation (a small amount of funds is proposed to be available to support this). In the future it is possible that more datasets could be recommended as core, while others may be one-off to support the evaluation of a policy or initiative. Better storytelling at place (e.g., establishing and reporting on carrying-capacity), or within a sector (e.g., use of case studies) may also be enabled.

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4 In the roadmap the MRTEs are currently identified as a part of MBIE's continuous improvement programme, reflecting the current state, although this might change in the future depending on the outcome of Statistics New Zealand restructuring.

5 TDLG have taken a wide interpretation of domestic tourism measures (i.e., while some datasets such as tourism flows and volumes cover both domestic and international visitors, the majority of visitors (around 70%) are domestic).

6 The TDLG note the ongoing importance of this dataset is captured by both the Data Domain Plan and 2022 stakeholder survey findings.

One key recommended data source within this workstream is a Community Sentiment Survey. Identified as a priority in the TDLG's Interim Action Plan, procurement of this data was planned to begin in late 2023, however work was paused to ensure the work aligns with the priorities of the incoming Government. In February 2024, this work was endorsed by the Minister for Tourism and Hospitality. It will begin in March 2024. While similar work has been undertaken for a number of years, the TDLG recommend a tighter focus on community (i.e., regional) needs, cultural licence, and publicly available data. This data source is considered core data moving forward.

Leadership and System Capability Pou

As aforementioned, the TDLG was established to provide leadership of the tourism data system and encourage greater cooperation and collaboration across the public and private sector contributions to the overall tourism data system. While individual initiatives will draw in stakeholders' in-kind contributions during the design phases, the TDLG also recommends that sector collaboration and contribution is facilitated via a Partnership Fund. The concept and value of sector driven initiatives is supported by the TDLG and harks back to the 2018 Data Domain Plan.

Additionally, the TDLG was established to facilitate agreement on a sustainable co-funding model for essential tourism data provision. This is another recommended action for 2024. The TDLG have proposed a handful of actions that will result in a TDLG sector-led recommendation to MBIE and the Minister on what this model should be. Proposed priority work is to understand the cost of an essential tourism data system, and what a sustainable co-funded tourism data system could look like. This is proposed to result in the development of a sector wide co-funding model, which would be consulted on, and with MBIE and the Minister's agreement operationalised in 2025. As a part of this, the aim is to secure central government commitment to an enduring IVL allocation to improving and maintaining the tourism data system, as well as a fair contribution (financial and otherwise) from the sector. Once a co-funding model is in place, the TDLG proposes new governance arrangements where all major players in the funding and management of tourism data are officially represented; providing oversight of a business-as-usual state and ensuring that agreed initiatives to support a sustainable data system are being achieved.

While it may appear a small component of this Pou, addressing the sector's data capability needs is critical to extracting meaningful value from the data. In 2024 it is proposed that both a capability needs assessment, and an up-lift plan will be commissioned. In 2025 an industry capability development programme will be implemented.

Finally, the TDLG will be working towards increased and improved communication and engagement with the sector, along with undertaking typical governance activities such as reporting on performance, thus ensuring accountability for the initiative.

Tourism Data Leadership Group

Ara Whānui Two-year Road Map

Key

- Māuitanga innovation
- Core dataset
- Regenerative transformation
- Leadership & system capability
- ★ Indicative deliverables

Q2 – 2024	Q3 – 2024	Q4 – 2024	Q1 – 2025	Q2 – 2025	Q3 – 2025	Q4 – 2025	Q1 – 2026

- Procure – report – What could innovation look like in the tourism data system ★
- Develop priority work plan (including for TEIC)
- MBIE/other existing core datasets – integrated into new landing page (e.g. iwi/Māori breakdowns are enabled)
- ☆ Purpose built dedicated Māori landing page on the TEIC
- Procure/source – new data
- Data gap 1 design
- Data gap 1 implementation
- Staged data release ★
- Procure – research – Māori tourism data needs ★
- Continuation of MBIE's core dataset continuous improvement programme inclusive of industry input (e.g., IVS, monthly tourism spend) ★ ★ ★ ★
- MBIE/other existing core datasets with a domestic component – integrated into new landing page
- **Procure – New Tourism Measures**
- Domestic Visitor measures (DVM) design
- DVM implementation / report ★
- DVM – staged transition from reporting to data releases ★ ★
- MURPE review
- Tourism volumes/flows design
- Tourism volumes/flows data releases ★ ★ ★
- STRA design
- STRA data releases ★ ★ ★ ★ ★
- New partner initiatives ★ ★ ★
- ☆ **Dedicated Domestic Tourism and host community Landing Page on the TEIC**
- Forecasting procurement
- Forecast consultation and design
- Forecast implementation
- Forecast report ★
- Draft sustainable and regenerative tourism measurement framework – industry engagement
- Identification of existing data / integration into TEIC
- ☆ **Redesign of Sustainable Tourism Explorer on the TEIC**
- Design sustainable tourism measurement framework and metrics (includes identification of gaps)
- Capturing regenerative tourism 'measurement'
- New datasets to be integrated into new explorer
- Procure – priority data gaps
- Priority 1 design
- Priority 1 implementation
- Priority 1 report ★
- Staged transition from reporting to data releases
- Community Sentiment measures procurement
- Community Sentiment – Redesign regional lens
- Community Sentiment report ★
- ☆ Community Sentiment – staged transition from reporting to data releases ★
- Procure – Report – Modelling a sustainable co-funded tourism data system ★
- Sustainable co-funding model consultation and refinement
- Model operationalisation
- New model of co-investment is ongoing
- New governance model with industry representation
- Partnership Fund activated
- Stakeholder communications/engagement (including a specific Māori focus) enabling regional and local involvement
- Long-term perspective and policy integration
- Monitoring and reporting
- Commission / undertake evaluation ★
- Paper: capability needs assessment ★
- Paper: uplift plan ★
- ☆ Industry capability development programme (including a specific Māori focus) ★

STRA: Short-Term Rental Accommodation
TEIC: Tourism Evidence and Insights Centre
IVS: International Visitor Survey
MRTE: Monthly Regional Tourism Estimates
MURPE: Monthly Unique Regional Population Estimates

Where appropriate, all Pou will consider innovation, as well as Māori perspectives/needs and look to provide improved data for Māori/Māori businesses

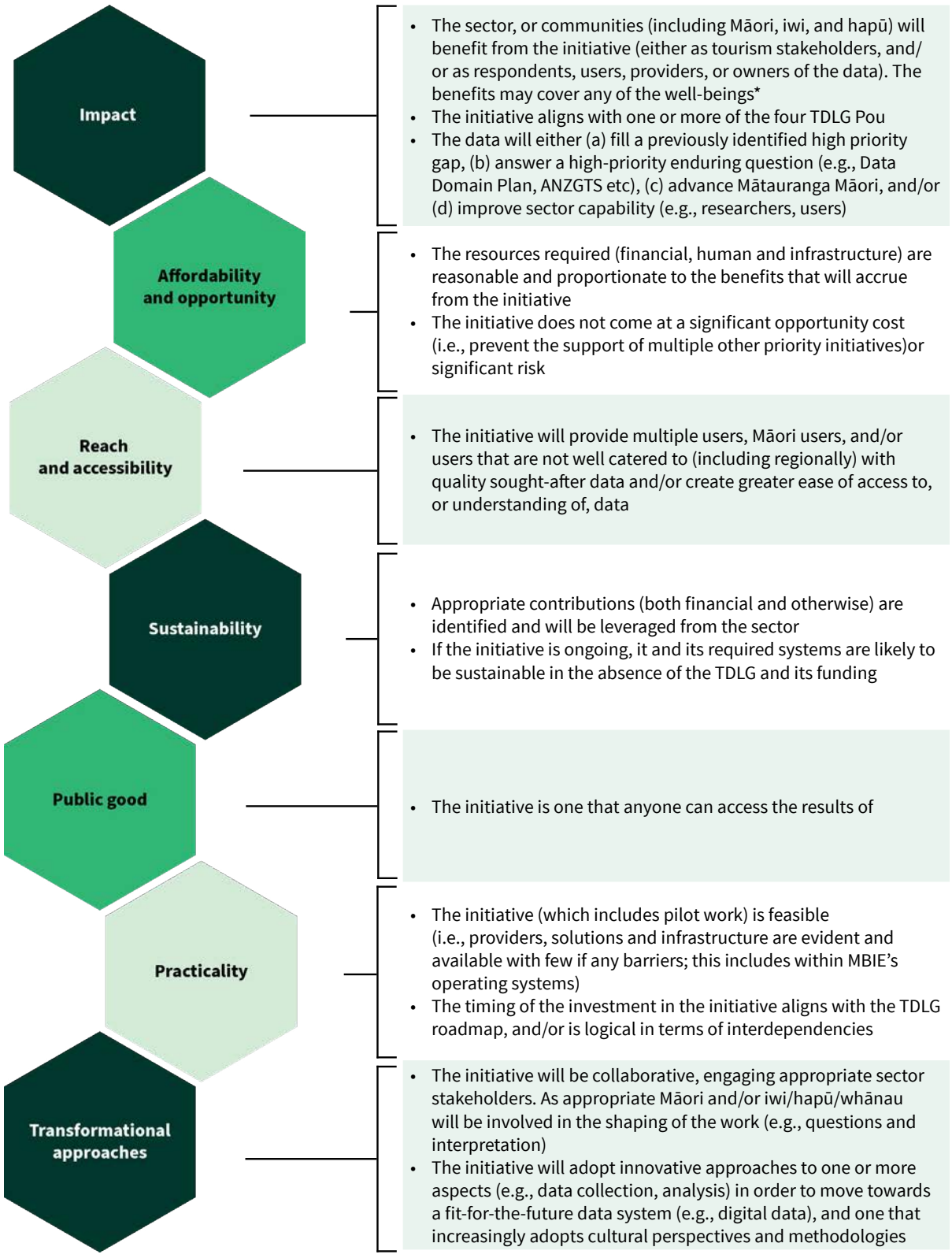
Investment Approach

Prioritisation Framework

The recommended actions listed in the roadmap have been included for a variety of reasons. This includes, among other things, alignment with various existing tourism strategies, the Data Domain Plan, and sector support for the initiatives identified in the TDLG's Initial Report.

Moving forward the TDLG will apply a prioritisation framework (see following page) when deciding whether to recommend particular actions. The following is a summary of the framework that will be used. Thresholds will apply; in some instances (e.g., the Partnership Fund) possible actions will be compared. Further, where MBIE agrees with TDLG recommendations, and subsequently commissions related services, they have agreed to apply related criteria.

Prioritisation Framework



**The TDLG recognise both Treasury's Living Standards Framework and He Ara Wairoa.*

Allocation of Funding

The TDLG have been tasked with recommending how the allocation of $5.08 million from the International Visitor Levy (IVL) is used to support improvements in the tourism data system. The purpose of this IVL allocation is to:

- support new or enhanced data, insights, and research initiatives that help realise consistent, reliable, and trusted information that benefit all New Zealanders moving forward
- enable the functioning of the TDLG, including procurement of professional and technical services

The Group have agreed to recommend the following indicative allocations. The recommended roadmap allocations are estimates across the four Pou, based on the best available information. For the four new data generation initiatives[7], two years of collection is covered by the recommended allocation. Investment in subsequent years, to be confirmed as a result of the work to develop a new sector-wide co-funding model.

<table>
<tr><th colspan="4">Roadmap initiatives - TDLG recommended</th><th>Partnership Fund</th><th>Operational Costs</th></tr>
<tr><td colspan="4">$4.1m</td><td>Up to $400,000</td><td>$500,000</td></tr>
<tr><td>Māuitanga and Innovation</td><td>Core Datasets</td><td>Regenerative Transformation</td><td>Leadership and Capability</td><td rowspan="2">Sector-led initiatives (not already identified in the roadmap) that align with the TDLG's long-term vision.</td><td rowspan="2">Operational costs (including those to date), increased Secretariat support, monitoring and evaluation.</td></tr>
<tr><td>$300-$400k</td><td>$2.6-$2.82m</td><td>$575-$630k</td><td>$210-$250k</td></tr>
</table>

Partnership Fund

The TDLG have recommended to MBIE the creation of a Partnership Fund targeted at sector bodies. The TDLG recommend the tenets of such a fund are:

The investment incentivises...	• responsiveness to the sector's needs and innovation. • contributions, both financial and in-kind, to be identified, leveraged, and drawn upon.
The investment supports...	• the goals and objectives set out in the TDLG ToR and the 2-year work plan. • long-term view consistent with TDLG's vision. • provision of high quality and cost-effective data leadership.
The allocation approach...	• is disclosed and can easily be understood by all stakeholders. • is consistently applied.

MBIE are actively considering the design, implementation and MBIE oversight of such a Fund. This recommendation, if implemented, is expected to be available to the sector later in 2024.

7 Tourism volumes and flows, short-term rental accommodation, community sentiment measures, and domestic visitor measures.

Appendix

The Tourism Data Landscape

New Zealand has a tourism data system that partially meets the needs of the wide constituency of users. The system has some strong elements, some elements where the quality can be improved, and there are important gaps that need to be filled. Some of these gaps have been obvious for some time, others have arisen from the more recent emergence of a wider range of strategic obligations, such as environmental and biodiversity regeneration, community, and cultural licence.

The importance of tourism data and the need to improve the tourism data ecosystem is highlighted in key strategic documents. For instance, the Tourism Industry Association (TIA)'s Tourism 2050 - A Blueprint for Impact identified 'Power up Data and Research' as one of its ten actions. Tourism 2050 specifies that 'a tourism industry supported by quality data and insight will be much more assured in taking the many strategic, commercial and operational decisions that are essential to it achieving the vision set out in the Blueprint'.

To support a tourism industry that has sustainability objectives, a spectrum of data is needed, including economic, environmental, community, visitor, and cultural dimensions. In recent times the core tourism data system has covered only a portion of the desired coverage, and has comprised of:

- International Travel and Migration. Funded by MBIE, delivered by Statistics NZ (Stats NZ)
- International Visitor Survey. Funded and managed by MBIE (in partnership with Stats NZ)
- Accommodation Data Programme. Funded and managed by MBIE
- Tourism Satellite Account. Funded by MBIE, delivered by Stats NZ
- Forecasts (paused). Previously funded and managed by MBIE
- Monthly Regional Tourism Estimates (paused). Funded by MBIE
- Monthly Unique Regional Population Estimates (MURPEs) (paused, under review). Experimental data funded by MBIE, delivered by Stats NZ

In addition, two surveys, the Views on Tourism: New Zealand (a partnership between Tourism New Zealand, the Department of Conservation and TIA) and Domestic Visitor Satisfaction (TIA) deliver data on community sentiment and domestic satisfaction.

For the TDLG, the key challenges to address in the tourism data system are twofold:

1. **Sustaining the existing data**. Ensuring the continuation of the existing core datasets (see Core Data and Gaps section) and increasing the quality of those is encouraged. In recent times datasets have not been retained due to resourcing constraints. This is a concern for the TDLG and other stakeholders. In addition, traditional surveying methods are getting progressively more difficult, including surveys such as the IVS and ADP. As such, protecting and improving the existing datasets (including through innovation) is a key requirement and a priority for the TDLG.

2. **Addressing data gaps**. There are currently important data gaps including for domestic tourism, Māori tourism and sustainability indicators, and for better regional and sectoral data. There is also next-generation data that will increasingly be needed, particularly around the four well-beings and for measuring regenerative tourism. At one level, utilising big administrative datasets will be important for providing future tourism data, while at the other very site-specific measurements will be needed to track regenerative tourism.

Increasing public data accessibility and usability are other issues to address. Neutral and credible provision of data is important, along with building the sector's data capability; ensuring the value of the data is maximised. A further key consideration is the importance of stable funding arrangements for the core data to both ensure its retention and to enable development of the datasets in light of changing user needs.

About the Tourism Data Leadership Group (TDLG)

The TDLG was established in 2022 following the 2019 Tourism Information and Data Hui to assist in strengthening the overall tourism data system.

The TDLG's Role

The central purpose of the TDLG is to provide a collaborative forum that recognises the information needs of Aotearoa's diverse set of tourism data users and identifies possible enhancements and improvements that will enable a world class tourism data system. Tourism data users include industry, central and local government, communities, iwi, interest groups, researchers, and academics.

The broader purpose of the TDLG is to:

- Provide advice on the current and future collection, dissemination and understanding of tourism-related data and insights, based on an agreed strategy by and for the diverse set of tourism data users.
- Recommend the collection of tourism data and correlated insights for the benefit of the tourism sector and policy development.
- Recommend what the priority needs are for future investment in tourism data and the infrastructure and processes required for its management.
- Identify the allocation of financial, in-kind and data contributions to priority tourism projects and work streams.
- Adhere to the principles of Te Tiriti o Waitangi in its work and its interaction with stakeholders and MBIE.

Commitment to Te Tiriti o Waitangi

The TDLG in establishing this strategic business plan, and in particular its key areas of focus and decision-making has adopted the approach Ma Māori mo te katoa (by Māori for all). This Te Ao Māori perspective assumes that what is good for Māori is good for all in Aotearoa. The TDLG is therefore motivated to ensure it works in partnership with Māori to realise the treaty principles and give practical effect to Te Tiriti o Waitangi.

Te Tiriti underpins decision-making in Aotearoa and our interactions with each other. The TDLG vision that supports "…better decision making, long-term value gains, and sustainability for the benefit of all New Zealanders" reflects the heart of Te Tiriti; that of a relationship of mutual respect and prosperity. As such, the TDLG acknowledges the unique and special place of Māori as tangata whenua. The TDLG recognises the responsibility to ensure its work appropriately acknowledges and supports Māori values, expectations, and equitable outcomes for Māori.

TDLG's Agreed Scope

Consistent with the United Nations for World Tourism Organisation (UNWTO) approach, tourism is differentiated from travel - "tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes".

The plan is consistent with the Tourism Data Domain Plan (section 1.3), where domestic and inbound tourism is in scope, and outbound tourism is out of scope.

Vision and Principles

Vision

Lead the direction of a world-class tourism data system

Principles

Mā Māori mo te katoa

- What is good for Māori is good for all
- Recognition of Stats NZ Data Strategy principles*

Manaakitanga
Respect and uphold the mana and dignity of the people, whānau, communities and groups who share their data and information.

Mana Whakahaere
Empower people by giving them a choice and enabling their access to, and the use of, their data and information.

Kaitiakitanga
A shared culture of respect, guardianship, care and protection for data as a strategic and value resource, recognising that for some Māori, Māori data is a taonga and iwi-Māori are kaitiaki over their taonga.

Rangatiratanga
Leadership that focuses on common purpose whilst also respecting the autonomy and independence of individuals, groups and agencies.

Whanaungatanga
Strong transparent relationships through respect, integrity, empathy and commitment to the kaupapa.

Strategy-led

Initiatives contribute towards the TDLG's overarching goal and one or more of the TDLG pou, as well as existing sector strategies defining the tourism data landscape (e.g. New Zealand-Aotearoa Government Tourism Strategy).

User-Centric

Initiatives meet the needs (including capability building) of a range of users (e.g. industry, local government, iwi/hapū), and/or users who are currently not well catered to.

Innovation

Innovation is strongly encouraged across all stages of related work (from data collection to access and dissemination, inclusive of capability building).

Collaboration

Development and maintenance of collaborative sector relationships that will enable a sustainable system in the future.

**Agreed with Data Iwi Leaders Group*

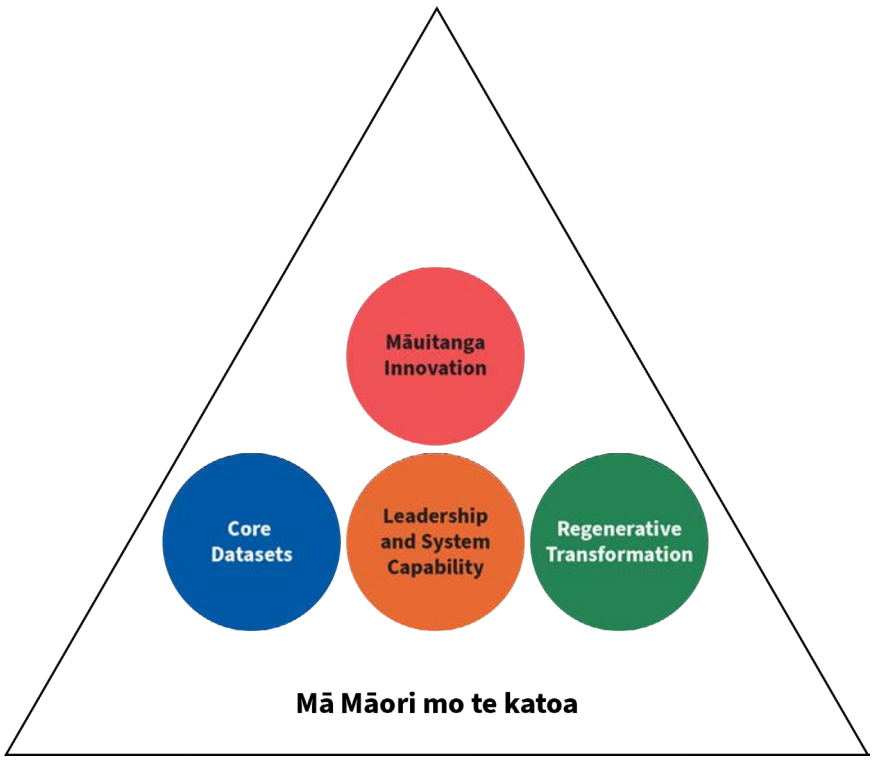
Strategic Direction

Our Strategic Pou

The TDLG's key areas of focus are represented by four Pou. The Pou model (see below) shows a bird's eye view of four Pou in a 'Kawau Maro' shaped formation that signifies leadership and direction with two wings providing balance and thrust. The triangle symbolises the interconnectedness of the four Pou.

- The **Māuitanga Innovation** Pou is positioned at the front to assert Innovation, inclusive of te ao Māori perspectives about data and data systems.
- The **Leadership and System Capability** Pou is positioned centrally and includes key enablers like engagement, partnerships, implementation and monitoring to bring together the achievement of activities across all Pou.
- The **Regenerative Transformation** and **Core Dataset** Pou are positioned to build and advance unique capabilities, influenced by Māuitanga, and supported by Leadership and System Capability.

Mā Māori mo te katoa is the underlying principle to elevate and embed Te Tiriti o Waitangi across TDLG work.



Strategic Logic

The logic model below illustrates the connections between the key recommended activity areas across each Pou and the TDLG's vision. The roadmap provides more detailed insight into the specific actions.

What Success Looks Like

While delivering on the key activity areas (see previous diagram) will reflect the short-term success of the initiative, mid-term success is:

Outcomes beyond this are not depicted in the model as these are things over which the TDLG does not have direct levers. It is likely that in the future the recommendations of the TDLG would contribute to new thinking, increased efficiencies, better investments, improved policies, and spill over benefits (the demand for data creates opportunities for data providers). The recommended activities will support the achievement of New Zealand-Aotearoa Government Tourism Strategy outcomes:

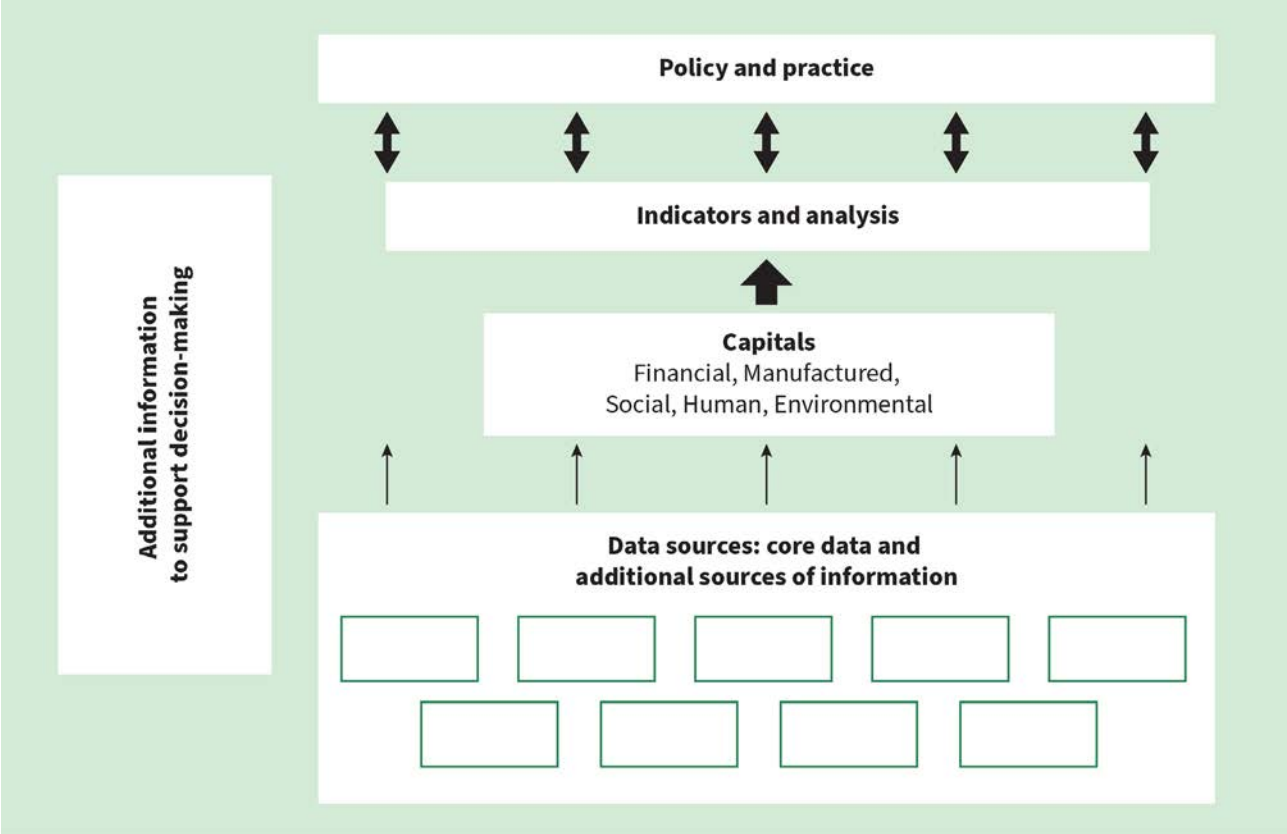
- **Economy** – data intense industries are known for having higher productivity
- **Environment** – increased availability of such data will improve understanding of what needs to be protected, as well as inform more sustainable environmental practices
- **International and domestic visitors** – domestic data measures (e.g., satisfaction, preferences) will be re-instated to support the development/ delivery of domestic tourism products, while MBIE's continuous International Visitor Survey improvement programme will enable similar for international tourism
- **New Zealanders and their communities** – local (not national) perspectives on tourism will be publicly accessible, enabling increased consideration of local aspirations for tourism
- **Regions** – an increase in both the amount, and the accessibility of regional data will support thriving regions.

The Tourism Data System

Monitoring Framework

The development of a world-class tourism data system requires a framework that connects data with policy and practice, and decision-makers' needs in ways that cover all aspects of tourism. The TDLG recommend the following holistic framework for monitoring New Zealand Tourism (noting that this is a simplistic depiction of it)[8]. The framework covers a range of Capitals: Financial (e.g., expenditure), Manufactured (e.g., infrastructure), Human (e.g., skills), Social (e.g., communities), and Natural (e.g., environment). Adopting a holistic approach will be enduring (consistent with the TLDG's long-term view), while enabling flexibility. The TDLG will be undertaking work throughout 2024 (as identified in the Regenerative Transformation Pou) to identify indicators and measures.

The proposed work across the four TDLG Pou (but in particular the Core Datasets Pou) will contribute to the development of the monitoring framework. Data/indicators will be able to be mapped across the five Capitals enabling monitoring of change, communicating the value of tourism, as well as identifying where impacts need to be managed. Some data (i.e., core data) should be routinely captured, while other data will reflect point-in-time priorities.



8 The structure of the framework is adapted from work undertaken by United Nations Tourism on their Measuring the Sustainability of Tourism (MST) programme.

Core Data and Gaps

The core elements of the tourism data system (depicted overleaf) are: International Travel and Migration, International Visitor Survey, Accommodation Data Programme, Monthly Regional Tourism Estimates, Tourism Satellite Account and Forecasts. In recent times sustainability data (e.g., community sentiment, tourism footprint) has become increasingly important, but more work in these areas is needed before they are regarded as part of the core tourism dataset.

The TDLG recognises several important gaps, including around domestic tourism, sector-specific data, short term accommodation, visitor volumes and flows within the country, Māori-specific data, biodiversity, waste, and others.

Tourism Data Model: Core Tourism Dataset

Core tourism datasets - green text

Future

Tourism Forecasts (MBIE) (Currently paused)
Medium-term forecast of visitor demand

Gap: Short-term outlook

Consumer knowledge

International market research **(TNZ)**
Insight of target markets

Gap: Domestic market research

Demand-side

International Travel and Migration (Stats NZ)
International arrivals and NZ returning residents

International Visitor Survey (MBIE)
Visitor spend and characteristics

Gap: Regional visitor volumes
Gap: Domestic Visitor Survey
Visitor spend and characteristics

Supply-side

Accommodation Data Programme (MBIE)
Use by type and region

Gap: Short-term rental accommodation
Gap: Bookable products **(DOC)** (Pending)

Gap: Regional employment
Experimental: Filled jobs **(StatsNZ)**
Source: IRD Employer Monthly Schedule

Gap: Maori tourism businesses
Gap: Sub-sector data - cruise, conferences, events, attractions, transport

Sustainability

Visitor Satisfaction
International Visitor Survey (MBIE)
Domestic satisfaction series **(TIA)**

Community Sentiment
National - Views of New Zealanders Survey **(TNZ)**
Gap: Regional level data

Tourism Footprint
Carbon series **(Stats NZ)**
Gaps: waste, biodiversity, others

Economic

Tourism Satellite Account (Stats NZ)
GDP, exports, employment, expenditure

Monthly Regional Tourism Estimates (MBIE) (Currently paused)
Regional expenditure data

Gaps: Range of economic analysis, including productivity, net benefit