



*Ehara taku toa i
te toa takitahi,
engari he toa
takitini*

*My success is not mine alone,
it is the success of the collective.*

Tourism Data Leadership Group Initial Report

DECEMBER 2022

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Executive Summary

The Tourism Data Leadership Group (TDLG) has been given a significant strategic opportunity and a critical initial task.

The Tourism Data Leadership Group (TDLG) has been given a significant strategic opportunity and a critical initial task. The strategic opportunity is to create a consistent, reliable, and trusted tourism data system that meets the information needs of a diverse set of tourism data users and delivers wide benefits for Aotearoa New Zealand. This is a vision to be achieved over the next three to five years.

The way tourism happens and is managed is rapidly evolving globally. TDLG firmly believes that good data can be a catalyst for change. We want tourism in Aotearoa New Zealand to be mana-enhancing and data can be used to ensure tourism is making a positive contribution.

The critical first task allocated to the TDLG is to identify the elements of the tourism data system that need immediate attention and investment. \$5 million has been allocated from the International Visitor Levy to support this initial work programme and sector contributions will be sought in terms of co-funding, provision of data, or in-kind capacity for use by the TDLG.

This Initial Report is an output from our first 6 months of discussions and deliberations. It covers the wider strategic tourism context, the specific strategic approach adopted by the TDLG, a stocktake of the current data provision, a Te Ao Māori perspective, an assessment of the key issues and opportunities, an analysis of the diverse needs of different user groups, and an initial package of initiatives to pursue.

The TDLG recommends improving the quality and usefulness of existing tourism data sets, developing new data sets, and bundling together regional tourism indicators. The TDLG also recommends investigating ways of measuring the full impact of tourism activities and designing a data capability-raising programme for tourism stakeholders. A more detailed list of the TDLG's recommendations can be found in Table 1.

The TDLG looks forward to receiving feedback on this Initial Report and making progress on the recommended package of proposed initiatives in 2023.

Table 1. The TDLG's recommendations

1. Improvements to existing data sets	
1a	TDLG to engage with MBIE and Stats NZ to review the design of the IVS and consider options that lessen the responder burden and future proof the data quality.
1b	TDLG to explore with MBIE how the IVS can be a platform for a wider set of tourism indicators across the Wellbeing Framework.
1c	TDLG to be a key stakeholder in the process to digitise the Arrivals Card to protect and enhance the range and depth of tourism data generated, as well as improve the timeliness of the data availability.
1d	TDLG supports MBIE's current investigation into expanding the coverage of the ADP to short-stay (Airbnb-type) accommodations and the increased automation of data provision from respondents.
1e	TDLG to provide input to the MBIE process to identify a new provider and methodology for resuming the MRTes.
2. New data sets	
2a	TDLG to investigate options for domestic travel measures, providing knowledge that is equivalent to that available for international visitors.
2b	TDLG to explore the feasibility of agreements with international agencies to obtain data that can contribute to a new international arrival forecasting data series.
2c	TDLG to initiate a process to identify a product that meets, down to a regional level, community perceptions of tourism (including social, environmental, cultural, and economic measures).
2d	TDLG to investigate the use of mobile phone data or other technology solutions to provide nationally consistent regional volumes and flows measures.
2e	TDLG to investigate a framework for determining the merits of sector-specific data collections, what data should be collected, and which sectors should be included.
3. Regional data bundling	
3a	TDLG to facilitate a tourism stakeholder discussion on reaching agreement on identifying and co-funding a set of Regional Tourism Indicators.
4. The impact of Tourism	
4a	TDLG to liaise with the Tourism Industry Transformation Project's environment workstream to identify possible ways of measuring the environmental impact of tourism, from New Zealand sources, international sources, or through a collaborative design process.
4b	TDLG to investigate possible ways of measuring the impact of tourism on communities using New Zealand and international sources, or through a collaborative design process.
4c	TDLG to investigate potential methods to measure the visitor carrying capacity of different locations and regions.
4d	TDLG to identify concepts for measuring the net costs and benefits of tourism and the total value delivered by visitors in Aotearoa.
5. Data accessibility	
5a	TDLG to commission advice on best practice for a centralised data hub for tourism, including assessment of the TEIC's potential to be that tourism data one-stop-solution.
5b	MBIE to review the Sustainable Tourism Explorer with TDLG's input to determine whether it can meet its stated purpose to "measure and monitor the sustainability of the tourism ecosystem in Aotearoa New Zealand" or whether a new approach is needed.
5c	MBIE, with TDLG input, to determine what additional international visitor insights can be included in the quarterly release of data from the IVS.
5d	Stats NZ, MBIE, and TDLG to discuss how the IVS raw data can be made more accessible for analysis.
5e	TDLG to engage with Immigration NZ and Customs to explore whether aggregated travel intention information can be shared from the NZeTA and visitor visas.
5f	TDLG and MBIE to discuss with DOC potential enhancements, additional insights, and data sharing from their Visitor Insights.
5g	TDLG to discuss with Tourism New Zealand whether additional and more consistently produced visitor insights can be shared from their existing data sources.
5h	TDLG to investigate the capacity for existing and future tourism data and insights held by government agencies, private organisations, and data agencies to be centralised and shared.
6. Understanding and using the data	
6a	TDLG and MBIE to analyse and consider the potential and feasibility of a capability-raising programme for the vast range of tourism stakeholders.

Background

The Tourism Data Co-Governance Group was established to provide consistent, reliable, and trusted tourism data and insights to support better decision-making, long-term value gains, and sustainability for all New Zealanders.

The tourism industry has long identified a need for quality tourism data and insights, and the New Zealand-Aotearoa Government Tourism Strategy released in May 2019 identified Data and Insights as one of four immediate priorities for the Government's stewardship role in tourism.

At the Tourism Information and Data Hui, which was held in October 2019, industry, government, and other stakeholders agreed to move towards a more collaborative approach in which users of data are involved in decisions on what data is provided and how it is provided.

Subsequently, the COVID-19 pandemic further highlighted the need for better tourism data and information to support resilience and sustainability.

In 2021, the Minister of Tourism agreed to establish a Tourism Data Co-Governance Group.

The stated vision for the Group was to facilitate the provision of consistent, reliable, and trusted tourism data and insights that enable improved understanding through timely reporting to support better decision-making, long-term value gains, and sustainability for the benefit of all New Zealanders.

The Group membership was announced in May 2022, and it met for the first time on 30 June 2022. In August 2022, the Group's name was amended to Tourism Data Leadership Group (TDLG) to better reflect the Group make-up, with individuals selected for their leadership and knowledge.

Group Members

Dr Wikitera and Roberts were appointed as co-chairs of TDLG, with eight members from academia, research, government, and the tourism industry.

Dr Keri-Anne Wikitera, Senior Lecturer in Tourism at AUT and Chris Roberts, former CEO of Tourism Industry Aotearoa were appointed as co-chairs of TDLG.

Dr Wikitera and Mr Roberts were joined by eight members with a wealth of experience across academia, research, government and the tourism industry. All members were appointed for their individual expertise, not as representatives of the organisations they work for.

- Dr Keri-Anne Wikitera, Senior Lecturer, AUT (Co-Chair)
- Chris Roberts, Senior Executive (Co-Chair)
- Bruce Bassett, Strategy and Policy Manager at Tourism Industry Aotearoa
- Dr Susanne Becken, Principal Science Investment Advisor at Department of Conservation; Professor of Sustainable Tourism at Griffith University, Australia
- Dr Antony Kennedy, Senior Manager Spatial & Processing Services, Stats NZ Tauranga Aotearoa
- Justin Kimberley, Research Manager at Rotorua Economic Development
- Graeme Osborne, Senior Tourism Consultant for Stafford Strategy
- Carolyn Parker, Research Director, Angus & Associates
- David Perks, Chair of Regional Tourism New Zealand
- Wiremu Stone, Head of Shared Services & Company Secretary at Whale Watch Kaikoura

Terms of Reference

The intention with the establishment of the TDLG was to create a collaborative forum to identify the information needs of the diverse set of tourism data users (industry, central and local government, communities, iwi, researchers, academics, and commentators), and support the implementation of solutions.

Up to \$5 million of funding has been allocated from the International Visitor Levy to support the initiatives identified by the TDLG. Contributions will also be encouraged from non-government stakeholders, which may be in the form of funding, data, or in-kind services.

Under its [terms of reference](#), the TDLG does not have legally binding decision-making powers. However, MBIE will act on the TDLG recommendations if achievable within the available funding and provide secretariat support through the Tourism Evidence and Insights team.

The Terms of Reference require the TDLG to deliver an initial report on priorities and implementation in the fourth quarter of 2022.

PURPOSES

Three core purposes were identified for the TDLG:

- Provide leadership and/or 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 and steer 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 to manage it.

OBJECTIVES

A set of objectives were identified for the TDLG:

- Initiate and facilitate a collaborative forum to raise, discuss, and advance longstanding and emerging tourism data issues, as identified and agreed by the group.
- Align existing strategies, including the Aotearoa Tourism Strategy, the Tourism Data Domain Plan, Tourism 2025 & Beyond, district, and region Destination Management Plans.
- Provide thought leadership and advice concerning the strategic direction of data developments.
- Identify, agree upon, and fund new data and insight opportunities for tourism.
- Foster improved access to existing, publicly available tourism data sources.
- Uplift the sector's capability and understanding of tourism data and insights.

Strategic Context

The formation of the TDLG was an outcome of previous strategic discussions and issue identification going back many years. The TDLG is essentially an agreed-upon delivery mechanism for new and improved tourism data and insights, which have been identified by both industry and government as a strategic priority for supporting a flourishing tourism system.

TOURISM STRATEGIC FRAMEWORK

The New Zealand-Aotearoa Government Tourism Strategy and the Tourism Industry Aotearoa's Tourism 2025 & Beyond were released together in May 2019. They remain the guiding frameworks for creating a well-functioning tourism system that enriches New Zealand.

These frameworks commit to a sustainable tourism future. Sustainable and regenerative tourism gives more than it takes and can significantly boost our economy, bring greater prosperity to our regions, protect, and support our environment, and improve New Zealanders' quality of life and wellbeing. There is also a strong cultural thread to these strategies, including a commitment to "achieve better tourism outcomes by building better partnerships with Māori enterprise, iwi, hapū and tangata whenua."

Tourism 2025 & Beyond identified four sustainability themes:

- **Visitor:** New Zealand delivers world-leading experiences for both international and domestic visitors.
- **Community:** New Zealanders understand, support, and benefit from tourism operating in their communities.
- **Environment:** Tourism strongly contributes to protecting, restoring, and enhancing New Zealand's natural environment and biodiversity.
- **Economy:** Tourism delivers opportunity and prosperity across the New Zealand economy.

The New Zealand-Aotearoa Government Tourism Strategy has similar themes and adds a fifth—regional development:

- **International and domestic visitors:** New Zealand-Aotearoa delivers exceptional visitor experiences.
- **New Zealanders and our communities:** New Zealanders' lives are improved by tourism.
- **The Environment:** Tourism protects, restores, and champions New Zealand - Aotearoa's natural environment, cultural, and historic heritage.
- **The Economy:** The tourism sector's productivity improves.
- **Regions:** Tourism supports thriving and sustainable regions.

The critical role of reliable and accessible data and insights is identified in both strategic frameworks. The Government Strategy identified a number of specific data-related actions:

Strengthen data and insights:

Implement the Tourism Data Domain Plan; identify future trends and global megatrends that could impact on the New Zealand/Aotearoa tourism system; coordinate and share data and insights to support the industry.

Lift tourism system capability:

Increase our understanding on the support needed for tourism businesses, including Māori tourism operators, to build capability.

Protect and restore New Zealand-Aotearoa's natural capital and indigenous biodiversity:

Build a deeper understanding of the impacts of increased tourism and visitors on the natural environment, culture, and historic heritage.

Transition to a low-emissions and climate-resilient New Zealand - Aotearoa:

Deepen understanding of the implications for the tourism industry of climate change and the move towards a low-emissions economy.

Visitor market monitoring and forecasting data:

Visitor analysis, insights, and forecasting.

Regional Data:

Investigate or commission new data to deepen understanding of regional visitation, flows, motivations, and satisfaction (for international and domestic markets); improve understanding of tourism's impact on regional economies, productivity, employment, and the environment.

TOURISM DATA DOMAIN PLAN

The [2018 Tourism Data Domain Plan](#) identified the main priorities for tourism statistics over the next five to eight years. The plan was developed by MBIE's Evidence and Insights branch under the direction of a Project Steering Group that included MBIE, Stats NZ, and Tourism Industry Aotearoa. Consultation workshops and hui were held around the country. A Project Advisory Group, with representatives from various industry stakeholders and key government agencies, then provided post-workshop feedback and comment on the draft domain plan. Project Advisory Group voting determined the topic priorities and the list and rankings of the initiatives.

As illustrated in the following diagram from the Domain Plan, 29 ranked initiatives were grouped under four topics: Value of tourism, Sustainability of tourism, Tourism businesses and workforce, Tourism behaviours and characteristics, with Data usability and capability being a consideration applied to all topics.

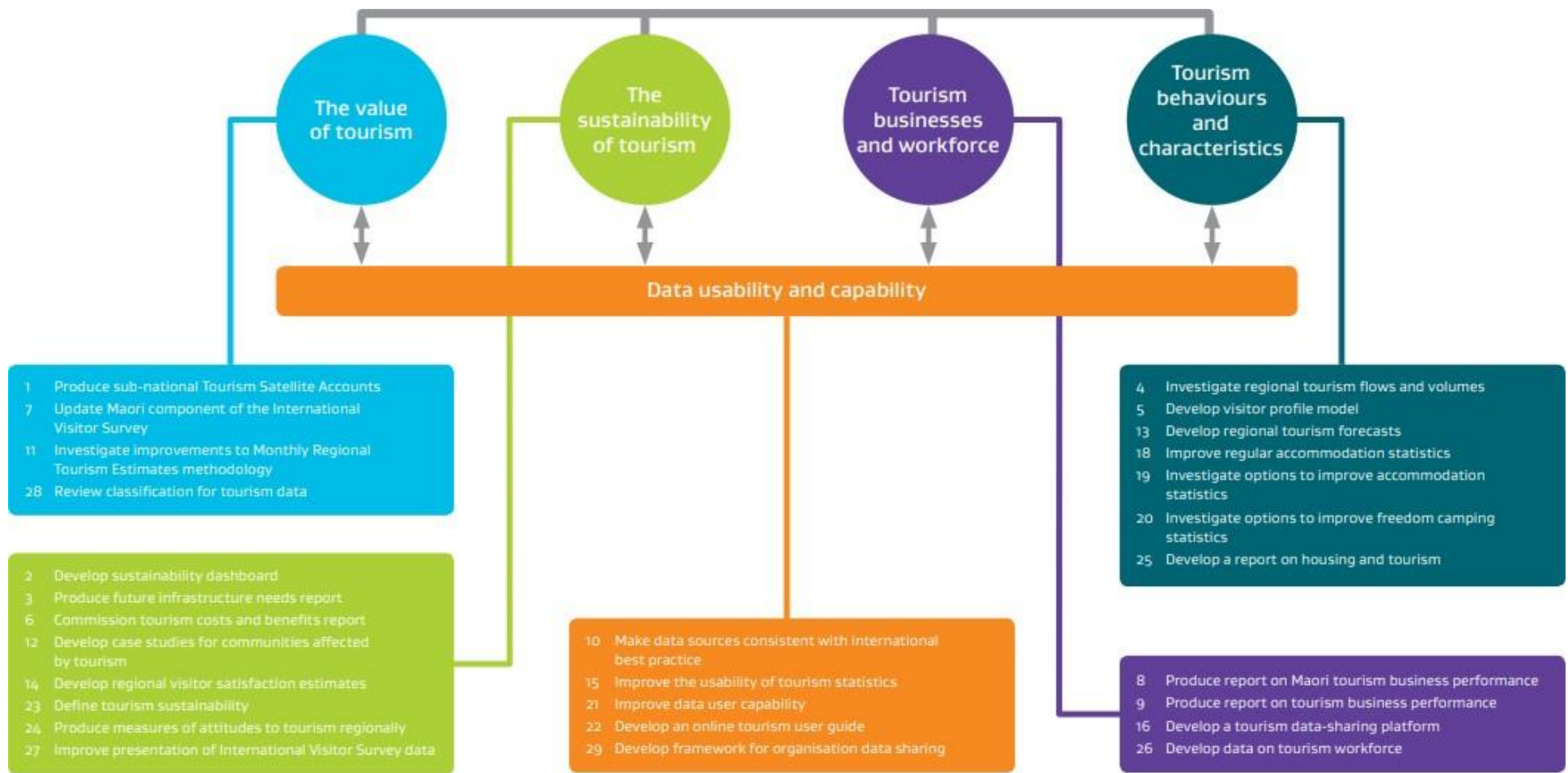


Figure 1. The tourism data domain plan

After the release of the Plan in 2018, progress on the identified initiatives was slow, as they could only be advanced within the existing resources and budgets. From 2020, resources were re-deployed to respond to the COVID pandemic, with real-time and near-real time data priority.

IMPACT OF THE COVID-19 PANDEMIC

The devastation wrought on New Zealand's tourism industry by the necessary closing of borders and restrictions on movement will have a lasting impact. There is a heightened understanding of the need to build sustainability and resilience across the tourism system. There is also an influence on short-term data and insight needs, including how and how quickly travel will resume.

Longer term, the sustainable and inclusive principles clearly expressed in the New Zealand - Aotearoa Government Tourism Strategy and the Tourism Industry Aotearoa's Tourism 2025 & Beyond remain valid.

A TE AO MĀORI PERSPECTIVE: MA MĀORI MO TE KATOA (BY MĀORI FOR ALL)

The TDLG is required to align its work with existing Government tourism priorities as stated in documents like the New Zealand-Aotearoa Government Tourism Strategy, which includes the goal to "achieve better tourism outcomes by building better partnerships with Māori tourism enterprise, iwi, hapū and tangata whenua."

The TDLG in establishing its strategy, priority areas, decision-making and funding frameworks 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 here in Aotearoa. The TDLG is therefore motivated to ensure it works in partnership with iwi and 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 and is working purposefully to incorporate Te Ao Māori views, mātauranga, and understand and apply manaakitanga and kaitiakitanga into the approach to its work. This work is ongoing.

The Co-Chair Māori is leading this response and has been consulting with NZ Māori Tourism, the NZ Māori Council, Māori tourism operators, the NZ Tourism Research Institute, the Māori Business manager of NZ Statistics, and MBIE staff working in the Māori data space. In addition, the TDLG members have met with different experts in Māori tourism and/or data to seek understanding in confirming and developing upon the priority areas. This included a meeting with a member of the Te Mana Raraunga - Māori Data Sovereignty Network to better understand indigenous data sovereignty issues.

To ensure the core principles of Te Tiriti are incorporated into the TDLG's decisions and action, and that best practices about Māori data sovereignty are met, the TDLG will continue to seek expertise and advice. The TDLG will also develop a communication plan to engage with, disseminate and test ideas, and seek feedback from Māori stakeholders.

TDLG's Strategic Approach to Its Work

The TDLG has a good understanding of the wider tourism strategic context for its deliberations.

While its immediate task is to determine how \$5 million in funding should be allocated and leveraged, it recognises that any recommendations it makes must support an improved tourism data system. That system change can come from:

- Improving the reliability and timeliness of existing data
- Filling identified data and insight gaps
- Progressing on agreed-upon government and industry priorities for tourism
- Improving access to data and insights
- Improving the capability of users to understand data and make better decisions

The TDLG is primarily guided by its Terms of Reference, including the three purposes.

STRATEGIC PURPOSE 1:

Provide leadership and/or 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.

This has required the TDLG to consider:

- How adequate are the current publicly available tourism data sets?
- Where is the data available and can access be improved?
- Who are tourism data users, what do they want to know, and how do they use data?
- What is the capability of users to understand tourism data and insights?

STRATEGIC PURPOSE 2:

Recommend and steer the collection of tourism data and correlated insights for the benefit of the tourism sector and policy development.

This has required the TDLG to consider:

- Who is currently collecting and providing tourism data?
- What changes or additions should be made?
- How well are insights being created from the available data?
- Does the available data support the delivery of the existing strategies, including the Aotearoa-New Zealand Government Tourism Strategy; if not, what is missing?

STRATEGIC PURPOSE 3:

Recommend what the priority needs are for future investment in tourism data and the infrastructure and processes required for its management.

This has required the TDLG to consider:

- Are the priorities identified in the Aotearoa-New Zealand Government Tourism Strategy and the Tourism Domain Plan still relevant?
- Have any new priority needs emerged?
- Where are the biggest gaps across economic, environmental, cultural, social, visitor, and regional themes?

- How to develop a robust decision-making framework that ensures that TDLG recommendations for investment in new tourism data, insights, and research initiatives have been rigorously assessed and will deliver against strategic objectives?

The necessary infrastructure and processes for future tourism data management have not been considered in this first phase of the TDLG's work but will be a focus in 2023. This includes the future structure and role.



Stocktake – Tourism Data in 2022

Tourism data collection and provision in Aotearoa occurs via the central government, local government, peak bodies, commercial providers, academic research, and individual business systems.

CORE DATA SETS

MBIE and Stats NZ are the major central resources for tourism data. Together, they deliver what is known as the Core Tourism Data Set. This data set has shrunk over the past decade and currently includes:

- **TSA** - Tourism Satellite Account: The annual official measure of the contribution made by tourism to the New Zealand economy.
- **IVA** - International Visitor Arrivals: All international arrivals, including returning New Zealanders. Suspended when borders closed and resumed in early 2022.
- **IVS** - International Visitor Survey: Survey of outbound international visitors that includes questions about spending, satisfaction, itineraries, and activities. Suspended when borders closed, and survey collection resumed in July 2022.
- **ADP** - Accommodation Data Programme: Provides capacity, occupancy, and revenue data by commercial accommodation type and location.

Two recent core data sets are currently inactive:

- **MRTEs** - Monthly Regional Tourism Estimates: Estimates domestic and international tourism spending by region and by origin market. Suspended when borders closed. Tourism Electronic Card Transactions (TECTs) are an interim replacement.
- **IVF** - International Visitor Forecasts: 5-year visitor arrival forecasts for key markets. Suspended in 2020.

Tourism New Zealand and the Department of Conservation are two other notable government sources of tourism data and insights. Tourism New Zealand publishes regular market insights. DOC releases its Visitor Insights annually, showing where people are visiting conservation and heritage areas, who is visiting, and the quality of their experience.

LOCAL GOVERNMENT

There are 31 Regional Tourism Organisations (RTOs) in Aotearoa and a number of other location-based tourism bodies. Many of the RTOs are part of council-owned Economic Development Agencies (EDAs). The larger RTOs/EDAs in particular provide regional tourism data and insights to their council owners and to local tourism businesses.

PEAK BODIES

Tourism Industry Aotearoa commissions Angus & Associates to undertake a quarterly Domestic Tourism Satisfaction Survey and publishes the results on its website.

Since 2020, the Business Events Industry Aotearoa has conducted a Venue Survey, collecting information quarterly from business event venues around the country about the number of events held and the number of delegates in attendance. This replaced the Business Events Activity Survey (BEAS) and the Business Event Delegate Survey (BEDS) which were funded by MBIE up until 2019.

Working with Stats NZ, the New Zealand Cruise Association publishes an annual review of the economic benefit of the cruise industry to New Zealand (suspended in 2021).

COMERCIAL PROVIDERS

There are around a dozen commercial providers of tourism data operating in Aotearoa. Several are contracted by the government to deliver aspects of the Core Data set. Regional Tourism Organisations are key customers for these providers, who charge a fee per service.

ACADEMIC RESEARCH

There is tourism research capability at most of New Zealand's universities. The New Zealand Tourism Research Institute (NZTRI) is based at the Auckland University of Technology and provides consulting services in New Zealand and the South Pacific.

BUSINESS SYSTEMS

Almost all tourism businesses have internal systems that provide valuable data and insights (booking platforms, websites, satisfaction measurement, etc.). The user survey conducted by TDLG in October 2022 (see appendices) showed that for 36% of respondents, their internal data was their primary source of tourism data and insights.

CO-FUNDED INITIATIVES

There is little sustained co-funding for tourism data provision. There are some ad hoc partnerships; for example, MBIE and TIA have partnered in the past on specific reports. And from 2015-2020, TIA and TNZ co-funded the Mood of the Nation Survey of New Zealand's perceptions of international tourism.

In 2022, TNZ, supported by TIA, DOC, RTNZ and MBIE, commissioned a New Zealanders' Views of Tourism survey. Intended to replace "Mood of the Nation" and include perceptions of domestic tourism, the initial results of the survey have not been made public as they are not considered robust enough at a regional level.

DATA AND INSIGHT PROVISION

In 2021, in response to a key recommendation of the 2019 Tourism Data Hui, the Tourism Evidence and Insights Centre (TEIC) was launched by MBIE in collaboration with representatives from the tourism industry, academia, and government. This website provides insights, data, and information about tourism in Aotearoa New Zealand, collected from multiple sources.

A key feature of the TEIC is the Sustainable Tourism Explorer (STE), an interactive application that allows users to explore datasets related to the environmental, social, and economic sustainability of tourism in Aotearoa New Zealand. Of the 21 planned measures in the STE, data is currently available for 10, with three of those at a regional level.

Tourism NZ has an Insights section on its corporate website, with infographics and other regular updates.

Stats NZ has some tourism data on www.stats.govt.nz and detailed data tables on <https://nzdotstat.stats.govt.nz> and <https://infoshare.stats.govt.nz>

Issues and Opportunities

The TDLG was formed to facilitate the provision of consistent, reliable, and trusted tourism data and insights. It is to provide leadership and advice, recommend and steer the collection of tourism data and insights, and recommend what the priority needs are for future investment.

The TDLG does not have legally binding decision-making powers, but it is a significant step towards a better coordinated tourism data system.

Current data governance occurs per data set, not at a system level. For the core data set, the provision is governed by New Zealand legislation and the policies of the entity that collects it. Data sharing can be challenging due to discrete data governance arrangements.

This situation means data provision is not always coordinated and can be disjointed. There are a range of different data sources and providers, often serving a specific need. As a result, data sources do not always integrate easily and/or the sector is not able to use all the data sets that exist. The provision of some sources is affected by cost increases or other priorities taking over. As a result, some data sources are no longer being provided or are more limited.

There is also a risk that existing products will no longer be fit for purpose, due to insufficient levels of detail, falling response rates, and/or some traditional techniques of collecting data becoming more difficult.

Tourism businesses may miss opportunities to use tourism data as they may not be aware of what data are available, or how to access them to support their decision-making.

Changes in technology and the availability of a wider range of administrative data mean there are also new opportunities emerging. There are also opportunities to make greater use of the data we have - through better provision and access and improving data literacy and capability.

There is a reasonable body of national-level tourism statistics available, but much of that data are not available at a regional/local level, and where it is, it requires a high level of expertise to access and interpret.

Many of the existing data series are narrowly focused on economic measures. The social, cultural, and environmental impacts of tourism, both positive and negative, are not well captured and/or readily available. There is a clear and obvious need to develop a mix of qualitative and quantitative social and environmental data sources that are consistent over time and provide national, regional, and local insights. Without these data, it is impossible to measure and improve the sustainability of the sector.

When compared with data on international visitors, our information on domestic visitors is not adequately captured or readily available currently. We do not have a good understanding of the scale of Māori tourism, either in terms of cultural experiences or Māori business operators in the tourism sector. Māori are a key partner and a unique part of New Zealand's tourism offering, and tourism offers Māori opportunities to achieve environmental, social, economic, and cultural objectives.

June-December 2022 TDLG Work Programme

MEETINGS

30 June 2022:

The Group met for the first time in Wellington This meeting had four objectives:

- **Whakawhanaungatanga** – establish relationships.
- **Tikanga** – agree on how the Group will conduct itself.
- **Whāinga** – common understanding of the Group’s purpose (including roles and responsibilities, expectations, deliverables, and timeframes).
- **Kotahitanga** – agreed-upon collective actions.

The vision, purpose, and objectives as outlined in the terms of reference for the Group were discussed, along with the function of MBIE’s Tourism Evidence and Insights team as Secretariat for the Group. There were presentations from MBIE covering the Tourism Domain Plan 2018, the Tourism Data Hui 2019, and the Tourism Evidence and Insights Centre (TEIC).

An initial discussion was held on current data and insight gaps, and priorities. It was noted that not everything could be achieved and that the Group should focus on areas where it can make real differences. Group members were encouraged to provide feedback to the co-chairs ahead of the next meeting. It was proposed and agreed that the name of the Group be changed.

4 August 2022:

The Group held an online meeting and covered stakeholder engagement, Māori as part of the tourism eco-system, data and insight priority areas, and timelines. It was agreed that the Group should be known as the Tourism Data Leadership Group (TDLG). It was agreed to form sub-groups to investigate various aspects of tourism data, insights, and research and then report back to the full group with possible initiatives.

16 August 2022:

The TDLG held an online meeting. It discussed the need for a strategic framework to guide its decision-making process. It was also essential to put a Māori lens on the Group’s decision-making. MBIE had advised that for the Core Data Set, decisions lie with MBIE and the Minister of Tourism, but the TDLG could make recommendations for changes or additions. The tasks allocated to each sub-group were discussed, and members indicated which sub-groups they would join.

29 August 2022:

The TDLG met in Wellington for the second time. Minister of Tourism Stuart Nash joined the first part of the meeting. The Minister thanked the TDLG members for their time, insights, and expertise in taking on work that will help improve New Zealand tourism. The TDLG then discussed the relevancy of existing tourism strategies, what decision-making framework could be used by the TDLG in making its recommendations, and how to apply a Māori lens to the work. There were presentations from MBIE’s Manager Insights Stewardship and Practice Development, and MBIE’s Director Māori Digital Data and Insights. The convenors and members of four sub-groups were confirmed.

31 October 2022:

The TDLG held its third in-person meeting in Wellington. MBIE’s Tourism Evidence and Insights Manager gave an update on their work programme. Co-chair Keri-Anne Wikitera led a discussion on identifying a

strategic approach that ensures a Māori lens. The results of an industry data user survey commissioned by the TDLG were presented and discussed (see appendices). The four sub-group convenors reported on their work to date. An option for an idea assessment form was discussed, and an early draft of this report was noted.

14 November 2022:

The TDLG held an online meeting. The MBIE secretariat was asked to collate the work of the sub-groups into a discussion document that summarises key points, recommendations, feedback, and the recommended next steps. Co-chair Chris Roberts will continue to update the draft the Interim Report, which will be re-circulated for comment. The TDLG will seek to sign off on the report at its scheduled 12 December meeting.

5 December 2022:

The TDLG held an online meeting. A high-level summary of recommendations from each subgroup was discussed and it was noted that some common themes had emerged. It was agreed to compile a long list of potential recommendations for assessment at the next meeting. The content and structure of the Interim Report were discussed.

12 December 2022:

The TDLG held its fourth in-person meeting in Wellington. It discussed the best way to capture its internal strategies and decision-making processes and was briefed on the processes being used by the Tourism Industry Transformation Plan project. The long list of potential recommendations was assessed, and a consolidated package of recommendations was agreed on for inclusion in the Interim Report.

SUB-GROUPS

Four sub-groups were formed to investigate various aspects of tourism data, insights, and research and then report back to the full group with possible initiatives.

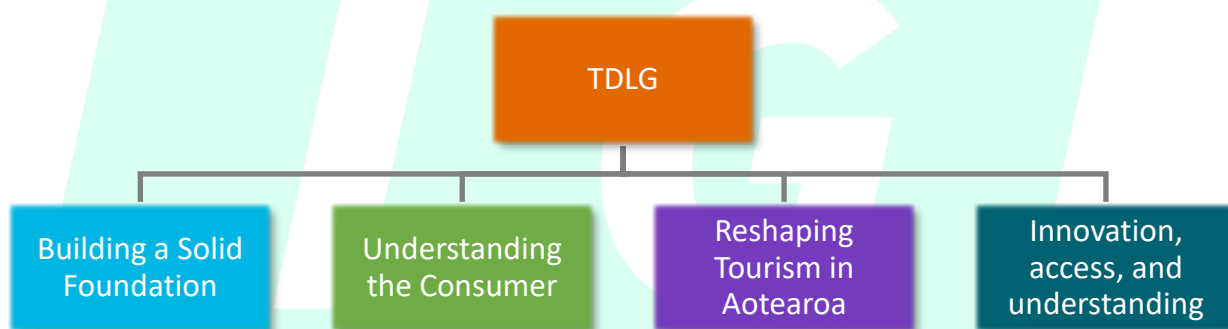


Figure 2. The TDLG's four sub-groups

All TDLG members joined at least two of the sub-groups. The sub-groups operated from September to November, and their areas of investigation included:

Building a Solid Foundation (core data)

- Improving the core tourism data sets
- Tourism definitions that deliver more meaningful information
- The desired regional-level data
- Improving the understanding of domestic tourism

Understanding the Consumer

- The key information that recovering tourism businesses need
- How this information is best delivered

- What additional forward-looking data could be accessed
- Where responsibility for identifying consumer preferences should sit
- Is there a place for national-level partnerships with commercial providers
- Is a Domestic Travel Survey needed
- Is outbound tourism within scope

Reshaping Tourism in Aotearoa

- Addressing gaps in the Sustainable Tourism Explorer
- Possible qualitative research (case studies) on tourism sustainability
- Initiatives to support tourism businesses become more sustainable
- Research into tourism's environmental contribution
- Measuring tourism's overall contribution to wellbeing
- Opportunities for partnerships in assessing sustainability and wellbeing
- Creating a common definition and measure of tourism value
- Identifying and responding to community concerns

Innovation, access, and understanding

- Respecting and supporting Māori data sovereignty
- Supporting data and research innovation
- Increasing access to meaningful tourism insights
- Connecting tourism to the science and innovation system
- Increasing users' ability to interrogate and understand tourism data

Each sub-group engaged with other stakeholders and experts as deemed appropriate and reported their findings back to the TDLG.

STAKEHOLDER ENGAGEMENT

The Terms of Reference suggest that the TDLG should supplement the expertise of its members by consulting with a wide range of stakeholders in the course of its work. Stakeholder engagement has been a regular feature in the first six months.

A wide net was cast with the issuing of a user survey in October 2022, with 223 responses received. On three occasions, the Co-Chairs have spoken to the Tourism Insight User Group (TIUG), a MBIE-convened group of technical data experts from government and industry. Regular engagement has been maintained with Tourism NZ and the Tourism Policy Branch at MBIE.

Other stakeholder engagement has included:

Aotearoa Circle, NZ Māori Council, NZ Māori Tourism, Regional Tourism Organisations, Stats NZ, Fresh Information Company, NZ Tourism Research Institute, Te Mana Raraunga, Air New Zealand, TripTech, Joots, Mountain Jade, Aura Motel, Ngāi Tahu Tourism, Queenstown Lakes District Council, Tourism Export Council, Hotel Council Aotearoa, Business Events Industry Aotearoa, Holiday Parks NZ, Accommodation Forum, Border Forecasting Network.

In addition, TDLG members have regularly engaged with their own organisations and networks.

User Groups' Needs

The TDLG has been tasked with understanding and responding to the information needs of a diverse set of tourism data users. In some cases, these user groups are largely intermediaries, interpreting and packaging the data to provide the insights that the end users, often small tourism businesses, are looking for.

A summary of our understanding of the needs of different user groups is included here.

TOURISM OPERATOR MEETINGS

Put simply, tourism operators need easily accessible and easily understood insights that allow them to make better business decisions. Most of our tourism operators are SMEs with limited in-house research capabilities, so they are not looking to interrogate raw data. They rely on the information they get from their own systems (e.g., bookings), supplemented by insights sourced from regional tourism organisations, national tourism bodies, and government sources. Many find it hard to find the information they need or to interpret the data when they do find it.

REGIONAL TOURISM ORGANISATIONS AND LOCAL GOVERNMENT

The capability at a local government level to access and use tourism data varies widely, reflecting the very different sizes of local authorities. Regional Tourism Organisations need accurate data, ideally available at a regional or district level, to provide valuable insights to their local tourism businesses. They also need data that allows for regional comparisons for their reporting requirements to their local authority owners. Every RTO is now required to have a Destination Management Plan and these contain measurable KPIs that rely on having access to reliable data.

CENTRAL GOVERNMENT

Many departments and agencies across government have some interest in tourism data (e.g., Customs is interested in forecast visitor arrivals). The responsibility for tourism policy and strategy lies with the tourism policy branch at MBIE, which advises the Minister of Tourism and his Cabinet colleagues on what is required for a healthy, well-functioning tourism system. Data and insights provide critical evidence for policy and strategy decisions. Stats NZ's national accounts are the main source of data used by MBIE Policy. Current priorities of the Policy Branch include:

- Workforce (First project of the Tourism Industry Transformation Plan)
- Environment (Second project of the Tourism ITP)
- Climate Change (Aotearoa Circle project for the Tourism ITP)
- Localised effects (congestion, waste management, regenerative activities)
- Waste (particularly plastics and packaging)
- Social licence

OUR COMMUNITIES

Tourism happens at places; it occurs where New Zealanders live, work, and play, so our residents and communities have a natural interest in tourism. Communities across Aotearoa are interested in understanding the impacts of tourism, both positive and negative. They are less likely to be interested in the data than in the insights that can be gleaned from it. The media and local government are likely to be their primary sources of tourism information.

IWI/HAPŪ/WHANĀU

An understanding of the tourism data needs of iwi, hapū, and whānau is still developing. Responding to their needs requires engagement with Māori to determine how the rights of Māori are advanced and

included in the tourism data system. To this end, there has been initial consultation with the MBIE Māori data manager, the NZ Māori Council, NZ Māori Tourism, Stats NZ Māori managers and others. An initial scan of existing frameworks that respond to Māori data sovereignty has been undertaken, and a Māori-informed conceptual model is being developed. Expertise and advice have been sought from various data users, including Ngāi Tahu Tourism, in identifying how the future needs of Māori can be built into the tourism data system. The intent is to build into the TDLG’s work, processes, decisions, and recommendations that establish a solid foundation to ensure the rights of Māori and pathways for Māori advancement in tourism are embedded.

RESEACHERS/ACADEMICS

The fields of research vary widely and include both quantitative and qualitative research. For qualitative research, the focus will generally be on working directly with a target cohort, so data specific to that cohort is needed. Academics using tourism data for quantitative research need three things:

- the raw data set so that primary analysis can be undertaken (e.g., statistical testing)
- metadata that explains the nature of the data at a level of detail that misinterpretation is unlikely
- methodology that provides detail on anything related to research design and data collection. The gold standard here is that the description would enable a researcher to replicate the work.

COMMENTATORS/MEDIA

Regular tourism data releases are reported on by the media. The former “Mood of the Nation” survey was one data series that garnered a lot of media attention. Monthly arrival numbers are also regularly covered, but there is more interest in what is going to happen than what has already happened. Business journalists seeking more in-depth information often approach industry representatives, as they do not know where to find the information they need.

USER PERSONAS

Data and insight users can also be classified into different personas, as in the approach used by Stats NZ.



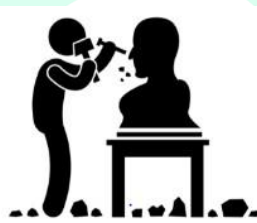
Scout

Finding high level information quickly is important to me. I want a trusted source, so I don’t have to dig around.



Sleuth

I’m looking for evidence to make a case. I like to understand where the data have come from. I want to tell stories with what I find.



Sculptor

My queries are complex, and I dig deep into the data. I use multiple data sources and need to understand how they can be put together.



Strategist

I provide tools for others to use. I need lots of detailed information and data. I often partner and work actively in the data system.

The vast majority of tourism data users are Scouts. There are some capable Sleuths, a limited number of Sculptors and only a small handful of Strategists.

Data User System

There is a complex and inter-connected tourism data user system, as illustrated in this diagram developed by sub-group 4.

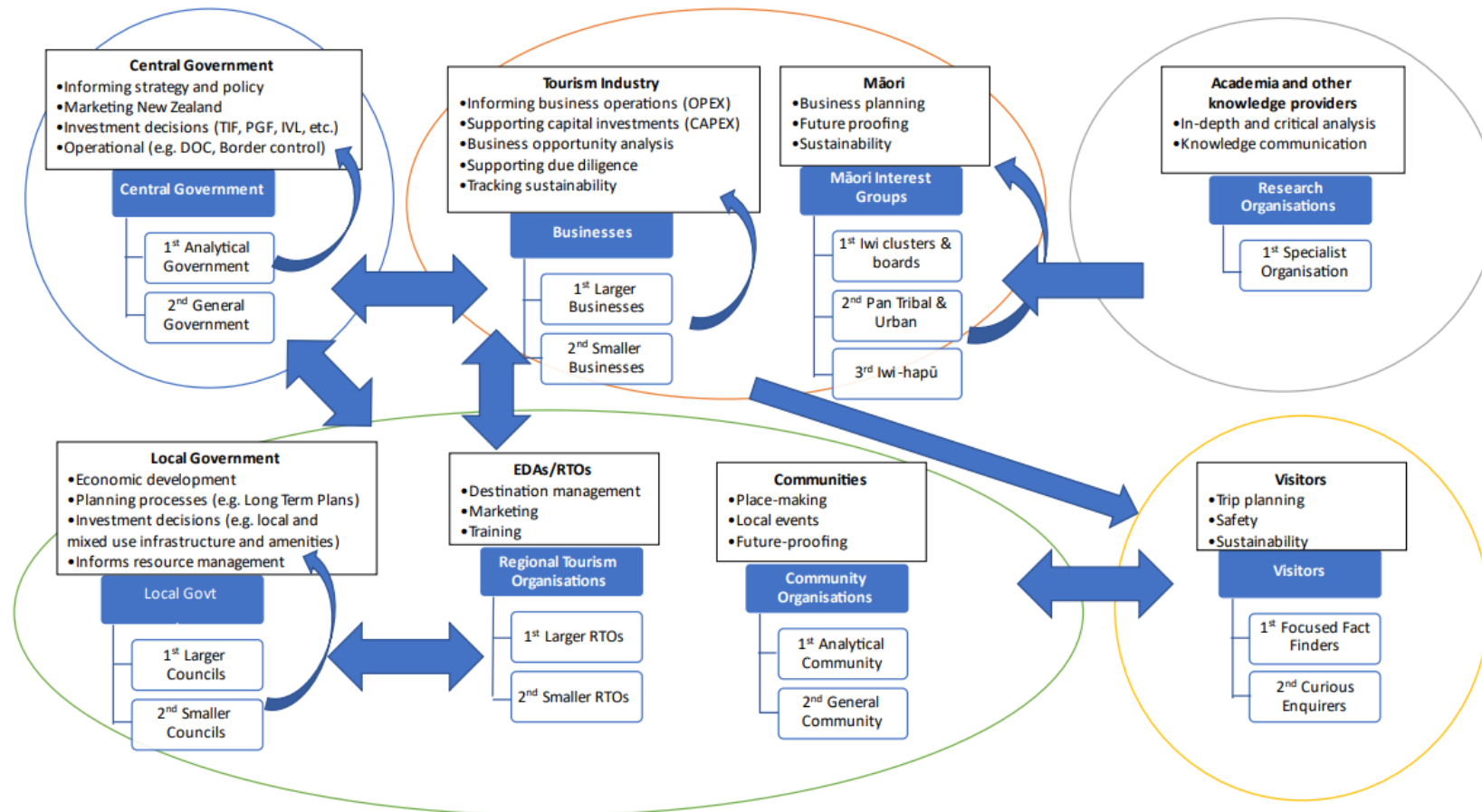


Figure 3. Data user system

Decision-Making

The first task and unique opportunity handed to the TDLG is to recommend how the \$5 million made available from the International Visitor Levy should be allocated.

The funding can be spent on new or enhanced data, insights, and research initiatives that contribute to the provision of consistent, reliable, and trusted information that supports better decision-making, long-term value gains, and sustainability for the benefit of all New Zealanders.

There are more great ideas than the available funding can support. It is essential that the TDLG uses a robust decision-making process that rigorously tests each idea to ensure it is a high-quality investment that fills a known knowledge gap and will deliver against agreed-upon strategic objectives.

DATA FRAMEWORK

Informed by and referencing the New Zealand-Aotearoa Government Tourism Strategy, Tourism Data Domain Plan, Tourism 2025 & Beyond, and Treasury’s Living Standards Framework, the TDLG has developed a matrix framework for categorising and assessing tourism data and insights.

This has been used to identify existing gaps in the tourism data system and assess ideas that might address those gaps.

There are three broad areas of need:

1. Data – what data are required; do they exist; and are they of sufficient quality?
2. Access – where, how, and by whom can the data be assessed?
3. Understanding – Do users understand the data? Do the data lead to better decision-making?

These needs are matched against six categories of impact:

1. Economic
2. Environment
3. Visitor
4. Social/Community
5. Māori/Cultural

Table 2. Decision making framework TDLG used for identifying and prioritising the recommendations

Regional Need	Initiative	Impact					
		Economic	Environment	Visitor	Social/Community	Māori/Cultural	Regional
Quality Data	xxx ¹		✓			✓	✓
	xxx	✓			✓		
Accessibility	xxx		✓				✓
	xxx	✓		✓			
Understanding	xxx		✓		✓	✓	
	xxx			✓		✓	✓

The framework has been very valuable in enabling the TDLG to identify the greatest needs and put together a coherent package of initiatives as an initial response to those needs.

¹ The xxx is an illustration of data examples.

Recommendations

Resulting from its first six months of deliberations, the TDLG has determined that the following initiatives should be advanced in 2023. Feedback on this package of recommendations will be sought from the Minister of Tourism, MBIE, Iwi, data providers, and user groups.

Ideas were identified, debated, and tested by the sub-groups, with those having broad support being put forward to the TDLG for further consideration (see the appendices for the Long List). The TDLG has rigorously assessed the ideas to produce this initial package of initiatives.

In identifying these initiatives for its initial recommendation package, the TDLG has asked itself a number of questions:

- Does the idea respond to a priority need identified by data users?
- Does the idea respond to a priority identified in government and industry tourism strategies?
- Does the idea address a current gap in the tourism data system?
- Will the idea contribute to the provision of consistent, reliable, and trusted information that supports better decision-making, long-term value gains, and sustainability for the benefit of all New Zealanders?
- How easily implementable is the idea? Is it a “quick win” or an embryonic idea needing further investigation?
- Who are the expected users of the new knowledge?
- What is the capacity of the targeted users to understand and use the knowledge?

The balance within the total package of ideas was also considered.

The TDLG is pleased to make the following recommendations.

1. IMPROVEMENTS TO EXISTING DATA SETS

The TDLG has determined that there are a number of steps that can be taken to improve the quality and usefulness of the current tourism data sets².

IVS - International Visitor Survey

The IVS is a survey of departing international visitors. Survey collection resumed in mid-2022 after being suspended when borders closed in 2020. Spending data from the survey is an input into the national accounts. Information is also gathered on satisfaction, itineraries, and activities undertaken by international visitors.

Recommendation 1a: TDLG to work with MBIE and Stats NZ to review the design of the IVS and consider options that reduce the responder burden and future-proof the data quality.

Recommendation 1b: TDLG to explore with MBIE how the IVS can be a platform for a wider set of tourism indicators across the Wellbeing Framework.

² The TDLG is not making any recommendations at this time for changes to the Tourism Satellite Account (TSA) but recognises its critical importance as a central feature of the tourism data system.

IVA - International Visitor Arrivals

The IVA records information on all international arrivals and returning New Zealand residents. The paper form is to be replaced in mid-2023 by a digitised form.

Recommendation 1c: TDLG to be involved as a key stakeholder in the process to digitise the Arrivals Card to protect and enhance the range and depth of tourism data generated and improve the timeliness of the data's availability.

ADP - Accommodation Data Programme

The ADP collects occupancy, length of stay, and other information voluntarily provided by commercial accommodation providers, with aggregated data available by accommodation type and location.

Recommendation 1d: TDLG supports MBIE's current investigation into expanding the coverage of the ADP to short-stay (Airbnb-type) accommodations and the increased automation of data provision from respondents.

MRTes - Monthly Regional Tourism Estimates

Estimates of monthly expenditure on tourism (domestic and international), with aggregated data available by visitor source market and locality. The MRTes were suspended when borders closed in 2020, and Tourism Electronic Card Transactions (TECTs) are an interim replacement.

Recommendation 1e: TDLG to provide input to the MBIE process to identify a new provider and methodology for the resumption of the MRTes.

2. NEW DATA SETS

The TDLG has determined that there are some significant information gaps in our understanding of tourism that can be best addressed by the provision of a new data series.

Domestic Travel Measure

There are less data available for domestic tourism than there are for international tourism, despite domestic providing the majority share of the visitor economy. A Domestic Travel Survey was previously government-funded but was stopped around 15 years ago. A resumed– and broadened– survey is one option, but there may also be other technology-based solutions.

Recommendation 2a: TDLG to investigate options for domestic travel measures, providing knowledge that is equivalent to that available for international visitors.

International Visitor Forecasts

MBIE's macro-economic 5-year forecasts were suspended in 2020 and there are no current plans to resume them. However, as a pandemic response, a group of data experts from several government border agencies – the Border Forecasting Network – provided Ministers with regular forecasts of visitor arrivals. The BFN used a range of inputs, including acquiring international data on bookings and flight schedules, to produce 1-month to 3-year arrival forecasts. This forecasting work has now ended, but it has successfully tested a concept that could be explored as a new publicly available forecasting tool.

Recommendation 2b: TDLG to explore the feasibility of agreements with international agencies to obtain data that can contribute to a new international arrival forecasting data series.

Community Sentiment Measure

The "Mood of the Nation" survey, funded by Tourism NZ and Tourism Industry Aotearoa, ran from 2015 to 2020. It was a highly regarded and referenced indicator of community sentiment. However, it had limitations, as it only surveyed community perceptions of international visitors and provided a limited regional breakdown. A Tourism NZ-led survey titled "New Zealanders View of Tourism" was

conducted in mid-2022, but the results have not been released as the findings were not considered sufficiently robust.

Recommendation 2c: TDLG to initiate a process to identify a product that meets, down to a regional level, community perceptions of tourism (including social, environmental, cultural, and economic measures).

Regional Tourism Volumes and Flows

There has never been any reliable and consistently available data that measure the number of visitors in a particular region and/or how they have travelled to and from that region. However, there are emerging technologies which hold a lot of promise. MBIE is running a trial with Data Ventures using cell phone data called MURPE (Monthly Unique Regional Population Estimates). There is also some innovative work happening in Tasmania.

Recommendation 2d: TDLG to investigate the use of mobile phone data or other technology solutions to provide nationally consistent regional volumes and flows measures.

Sector Data: Cruise, Business Events, Māori businesses, Aviation, Other

Various sectors of the tourism industry are keen to have consistent and reliable data measuring their contribution and impact. This sector-specific data measurement is an area that tends to come and go, with initiatives funded for a period and then withdrawn. A better approach is needed for understanding the place of different tourism sectors and supporting decision-making in those sectors.

Recommendation 2e: TDLG to investigate a framework for determining the merits of sector-specific data collections, what data should be collected, and which sectors should be included.

3. REGIONAL DATA BUNDLING

Inconsistency in the provision of regional data is a known issue with the current tourism data system. Tourism happens at places; national level data are useful, but local and regional data are what influence local decisions. Regional tourism organisations and economic development agencies need reliable data to measure progress against Destination Management Plans and report to their communities. There is currently no consistency in what data are accessed and used. A broad agreement with the government, national tourism associations, regional tourism bodies, and commercial providers to co-fund and bundle together a set of regional tourism indicators would provide a more efficient and consistent approach.

Recommendation 3a: TDLG to facilitate a tourism stakeholder discussion on reaching agreement on identifying and co-funding a set of Regional Tourism Indicators.

4. THE IMPACT OF TOURISM

There is no current way of measuring the full impact of tourism activities in Aotearoa. The Tourism Satellite Account provides an annual measure of the economic contribution made by tourism in terms of expenditure and employment. The Sustainable Tourism Explorer on MBIE's Tourism Evidence and Insights Centre is intended to measure and monitor the sustainability of the tourism ecosystem across the environment, economy, visitors, community, and regions, but less than half the necessary measures are currently available.

Recommendation 4a: TDLG to liaise with the Tourism Industry Transformation Project's environment workstream to identify possible ways of measuring the environmental impact of tourism, from New Zealand sources, international sources, or through a collaborative design process.

Recommendation 4b: TDLG to investigate possible ways of measuring the impact of tourism on communities, from New Zealand sources, international sources or through a collaborative design process.

Recommendation 4c: TDLG to investigate potential methods to measure the visitor carrying capacity of different locations and regions.

Recommendation 4d: TDLG to identify concepts for measuring the net costs and benefits of tourism and the total value delivered by visitors in Aotearoa.

5. DATA ACCESSIBILITY

All user groups having good access to the right information is an essential element of a well-functioning data system. The TDLG has identified a significant disconnect between the tourism data that are produced and the user's awareness of that data, where to find them, and how to use them.

Data Centralisation

A key outcome of the 2019 Tourism Data Hui was the Tourism Evidence and Insights Centre (TEIC), launched by MBIE in mid-2021. Analysis shows the TEIC is getting limited use and industry feedback suggests it is not currently meeting its intended purpose of being the "go-to" place for insights, data, and information about tourism in New Zealand.

Recommendation 5a: TDLG to commission advice on best practices for a centralised data hub for tourism, including an assessment of the TEIC's potential to be that tourism data one-stop solution.

Recommendation 5b: MBIE to review the Sustainable Tourism Explorer with TDLG's input to determine whether it can meet its stated purpose to "measure and monitor the sustainability of the tourism ecosystem in Aotearoa New Zealand" or whether a new approach is needed.

International Visitor Survey

The International Visitor Survey collects a wealth of information, but only top-line economic measures are currently included in the quarterly public release. MBIE is looking at whether non-economic data can also be included in the releases. The IVS raw data can be accessed via Stats NZ but is in a format that is not intuitive for analysis, even for research experts.

Recommendation 5c: MBIE, with TDLG input, to determine what additional international visitor insights can be included in the quarterly release of data from the IVS.

Recommendation 5d: Stats NZ, MBIE, and TDLG to discuss changes that ensure the IVS raw data can be made more accessible for analysis.

NZeTA and Visitor Visas

Other than people with New Zealand or Australian passports (and some other minor exemptions), international visitors must obtain either a visitor visa or complete an electronic travel authority (NZeTA) before coming to New Zealand. "You may not be allowed to board your flight or cruise to New Zealand if you do not have a valid passport, the right visa, or an NZeTA." The NZeTA and visitor visas provide the earliest indication of intentions to travel to New Zealand, but these data are not currently accessible beyond the border agencies.

Recommendation 5e: TDLG to engage with Immigration NZ and Customs to explore whether aggregated travel intention information can be shared from the NZeTA and visitor visas.

DOC Visitor Insights

The Department of Conservation has an annual release of data from its Visitor Insights, which combines surveys, an activity counter, and bookings data. The report shows where people are visiting conservation and heritage sites, who is visiting and the quality of their experience.

Recommendation 5f: TDLG and MBIE to discuss with DOC potential enhancements, additional insights, and data sharing from their Visitor Insights.

Visitor Profiling

Tourism New Zealand has the free DGiT online tool, where users can generate their own useful but basic domestic visitor profiles for their product. TNZ also has its long-running Active Considerer series running across all major international markets, with market or visitor segment profiling provided on an ad hoc basis.

Recommendation 5g: TDLG to discuss with Tourism New Zealand whether additional and more consistently produced visitor insights can be shared from their existing data sources.

Data Sharing

In its explorations, TDLG has confirmed that many public and private sector agencies have data that can provide important tourism insights, which is not currently shared. These represent lost opportunities for better decision-making. A culture of data-sharing needs to be encouraged.

Recommendation 5h: TDLG to investigate the capacity for existing and future tourism data and insights held by government agencies, private organisations, and data agencies to be centralised and shared.

6. UNDERSTANDING AND USING DATA

Raising the capability of the diverse range of users to understand and use tourism data in their decision-making is one of the key objectives for the TDLG. This workstream requires a thorough analysis of who the users are, what their needs are, and designing a data system that responds to those needs. In this first phase of the TDLG work, the emphasis is firstly to examine existing data sets, identify gaps in data to ensure current and future data systems meets the needs of users. Second to this is ensuring accessibility to that data and the insights that can be drawn from it. The need to improve the understanding and use of tourism data cannot be overlooked and will become more important as new and improved data sources are provided.

Recommendation 6a: TDLG and MBIE to analyse and consider the potential and feasibility of a capability-raising programme for the vast range of tourism stakeholders.

Mātauranga Māori that contributes to tourism development is a priority consideration and the TDLG views data sovereignty as an important element in designing the tourism data system. Therefore, to determine how the rights of Māori are advanced and included in the tourism data system and to understand the tourism data needs of iwi, hapū and whanau, key Māori stakeholders will be invited to engage in TDLG decisions. Alignment with MBIE's Māori data programme will be considered.

Recommendation 6b: TDLG to design an engagement process with Māori tourism businesses and communities to better understand their tourism data needs and how these can be met.

Next Steps - Implementation Plan

Under its terms of reference, the TDLG has been given a clear leadership role to determine the strategic direction for tourism data collection and dissemination. It has also been allocated up to \$5 million from the International Visitor Levy to support its work and recommendations.

However, it cannot prescribe work programmes for any agency or organisation. This is reflected in the initial package of recommendations, which largely has the TDLG taking the lead in pursuing the initiatives while working in collaboration with relevant interests.

This will require a major shift in the nature of the TDLG's work and the resources needed to support it. In 2022, the TDLG has drawn heavily on the knowledge and expertise of its 10 members and received administrative assistance from an MBIE secretariat. The TDLG would like to acknowledge and thank Jirayu Brennan for her support. In 2023, the TDLG and MBIE will need to identify what additional resources are required.

The tasks ahead include socialising and communicating the initial package of recommendations; ensuring the rights of Māori and pathways for Māori advancement in tourism are embedded in the programme; identifying priorities and creating a 3- to 5-year roadmap for delivering on the vision of a world-class tourism data system; overseeing the issuing of expressions of interest and requests for proposals; managing engagement with relevant agencies; and initiating change. This will likely require engaging one or two suitably qualified individuals to support the TDLG. The TDLG wants as much as possible of the available \$5 million to be spent on tourism data initiatives, but it is essential to run a properly resourced and effective process to determine how those funds are allocated.

TDLG and MBIE have agreed to allocate the \$5 million across three fiscal years: 2022-23: \$200,000; 2023-24: \$3,800,000; and 2024-25: \$1,000,000.

This signals a clear intent to complete investigations in the first half of 2023 so that a majority of actions can be implemented in the 2023-24 year (from July 2023).

Conclusion

The TDLG has started on the journey towards the provision of consistent, reliable, and trusted tourism data and insights. When in place, this data system will support improved understanding and better decision making, creating long-term value gains, and sustainability for the benefit of all New Zealanders.

To achieve this vision, there are some interrelated tasks to tackle:

- Improving the reliability and timeliness of existing data
- Filling identified data and insight gaps
- Progressing agreed-upon government and industry priorities for tourism
- Improving access to data and insights
- Improving the capability of users to understand data and make better decisions.

In our first six months, we have considered the essential elements of a reliable data system, identified the desired coverage of that system across a broad wellbeing framework, identified where the existing elements could be improved, identified the major gaps that need to be filled, considered a long list of ideas, and distilled that down to an initial package of recommendations.

The TDLG has also made a commitment to work in partnership with Māori to give practical effect to Te Tiriti o Waitangi. Efforts are ongoing to incorporate Te Ao Māori views, mātauranga Māori, and the principles of manaakitanga and kaitiakitanga into our work.

2023 will be an important year for the TDLG. Feedback on our initial package of recommendations needs to be considered, decisions confirmed, and an action plan developed and implemented. Change does not happen immediately, but it is essential that we make a start on creating a comprehensive tourism data system that delivers real benefits for Aotearoa New Zealand.

15 December 2022

On behalf of the TDLG

Keri-Anne Wikitera Co-Chair

Chris Roberts Co-Chair

Appendices

Appendix 1

POSSIBLE IDEAS – THE LONG LIST

A diverse range of ideas were identified and explored during the first six months of the TDLG's existence. They range from minor changes to existing data provision to innovative ideas that may not yet be supported by available technology or legislative frameworks. Those considered to have sufficient merit were put forward by the TDLG sub-groups for consideration by the Group as a whole. For transparency and completeness, the collected ideas (not in priority order) are all listed in Table 3.



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Table 3. The TDLG's long list of recommendations

Data accessibility	
Data Centralisation	Identify world best practises for a centralised data hub for tourism, including assessment of the Tourism Evidence and Insight Centre's potential to be that one- stop solution.
Sustainable Tourism Explorer	Consider the intended purpose of the MBIE's Sustainable Tourism Explorer to "measure and monitor the sustainability of the tourism ecosystem in Aotearoa New Zealand" and whether it can be achieved.
IVS - International Visitor Survey	Make the IVS raw data more accessible. More detailed quarterly releases of IVS data and insights.
Department of Conservation Visitor Insights	Potential enhancements and additional insights from DOC's Visitor Insights Report.
Visitor Profiling	Sharing more visitor insights from Tourism NZ's existing data.
ETA - Electronic Travel Authority, and Visitor Visas	Using the ETA and Visitor Visas to gather travel intention information.
Tourism Data User Workshops	Format and timing for data user upskilling.
Data Sets	
TSA - Tourism Satellite Account	Addition of a constant price/volume-based series of TSA expenditures to aid emissions derivations.
IVA - International Visitor Arrivals	In the process to digitise the Arrivals Card protect and enhance the range and depth of tourism data generated and improve the timeliness of data availability.
IVS - International Visitor Survey	Review IVS methodology and consider alternatives to surveying. Can the IVS be a platform for a wider set of indicators across the Wellbeing framework.
Domestic Travel Measure	Re-establish a domestic travel measure, providing an equivalent set of measures to those generated by the IVS.
MRTes - Monthly Regional Tourism Estimates	Consider the scope and coverage of the MRTes when they are reinstated.
International Visitor Forecasts	Potential to obtain commercial data that can contribute to new forecasting data series.
Accommodation Data Programme	Expand coverage to short stay accommodations and increase automation of data provision from respondents.
Sector Data: Cruise, Business Events, Māori, Aviation, and Other	Assess the merits of redeveloping sector data collections and including additional sectors.
Community Sentiment Measure	Identify a product that meets a regional-level requirement for views on tourism (covering social, community, environmental, Māori and cultural measures).
Regional tourism volumes and flows	Using mobile phone data to provide a nationally consistent volume and flow measure.
Forward looking data sets	Opportunities to aggregate and share data held by tourism operators (e.g., accommodations, air transport, rental vehicles, campervans, etc.)
Regional Tourism Forecasts	Identify a Regional Visitation Forecasting tool.
Data Sets	
Regional Data Tools	Consider the scope and coverage of MBIE's proposed workstream in this area.
Tourism Carrying Capacity	Potential methods to measure and monitor the carrying capacity of the environment and regions.
Tourism Workforce	Working with the Tourism ITP project on determining the key characteristics and drivers of the Tourism Workforce.
Māori Tourism Businesses	Matching businesses with unique Māori business identification numbers with the Tourism NZ operator database.
Environmental Impact of Tourism	Working with the Tourism ITP project, consider ways of measuring the environmental impact of tourism.
Community Impact of Tourism	Consider ways of measuring the impact of tourism on communities.
Total Value of Visitors	Consider the expansion of recent research into the Total Value of Visitors.
Net costs/benefits of Tourism	Research into the net costs and benefits of tourism in Aotearoa.
Tourism Infrastructure and Investment needs	Research into long-term investment needs, including regional and infrastructure-type breakdown.
Tourism Productivity	Identify a tourism productivity measure.
Data System Infrastructure	
Regional Data Bundle	Bundle together and co-fund relevant data sets that have regional breakdowns.

Appendix 2

TOURISM DATA LEADERSHIP GROUP INDUSTRY SURVEY

In October 2022, the TDLG conducted a short industry survey. Some of the key survey findings were:

- Internal company systems are the most common primary source of data and insight (36%).
- Tourism New Zealand is the most common secondary source (56%).
- Combining primary and secondary data sources, internal systems, Tourism New Zealand, and Tourism Industry Aotearoa were all used by over 50% of respondents.
- On average, people were 6.1 out of 10 satisfied with the publicly available tourism data and insights, with timeliness getting the lowest score of 5.7 out of 10.
- Not surprisingly, larger businesses are more confident about their ability to interpret the data.
- Four suggested areas for improvement stood out.
- When asked what one change they could make to the tourism data system, the top choice was centralised data.

The four most notable areas for suggested improvement were:

- Regional tourism volumes and flows
- International arrivals and spending forecasts
- Visitor profile modelling
- Regional tourism forecasts

The full results of the industry survey are available on the MBIE webpage, [Tourism Data Leadership Group | Ministry of Business, Innovation & Employment \(mbie.govt.nz\)](https://www.mbie.govt.nz/tourism-data-leadership-group), under the “Documents” section.