

## **Tourism Information and Data – informal working group paper**

This paper captures the work of the informal working group, and is being made available for those seeking more detail ahead of the Tourism Information and Data Hui.

The Tourism sector is working together to achieve sustainable tourism growth that enriches all New Zealanders.

The tourism system encompasses industry, central government, local government, and service providers (the latter, in a data context, includes academics, consultants, investors etc).

The aims of the information system that supports tourism is to:

- Track progress towards our goal of sustainable tourism growth that enriches all New Zealanders
- Inform decision-makers about how to achieve those goals, or the ways in which delivery (business and government) impacts on those goals (positive or negative)
- To offer insight on the current situation, and the range of scenarios we are presented with for the future.

## **How do we build an agile system that responds to changing needs and opportunities?**

The current tourism data and information system is dispersed, with components developed to meet different, but overlapping, interests. To pull it together, we need a shared vision. This vision helps organisations to recognize when they have something to contribute, to guide future investment by the stewards of the system, and to recognize when data may no longer be meeting the information needs of the sector.

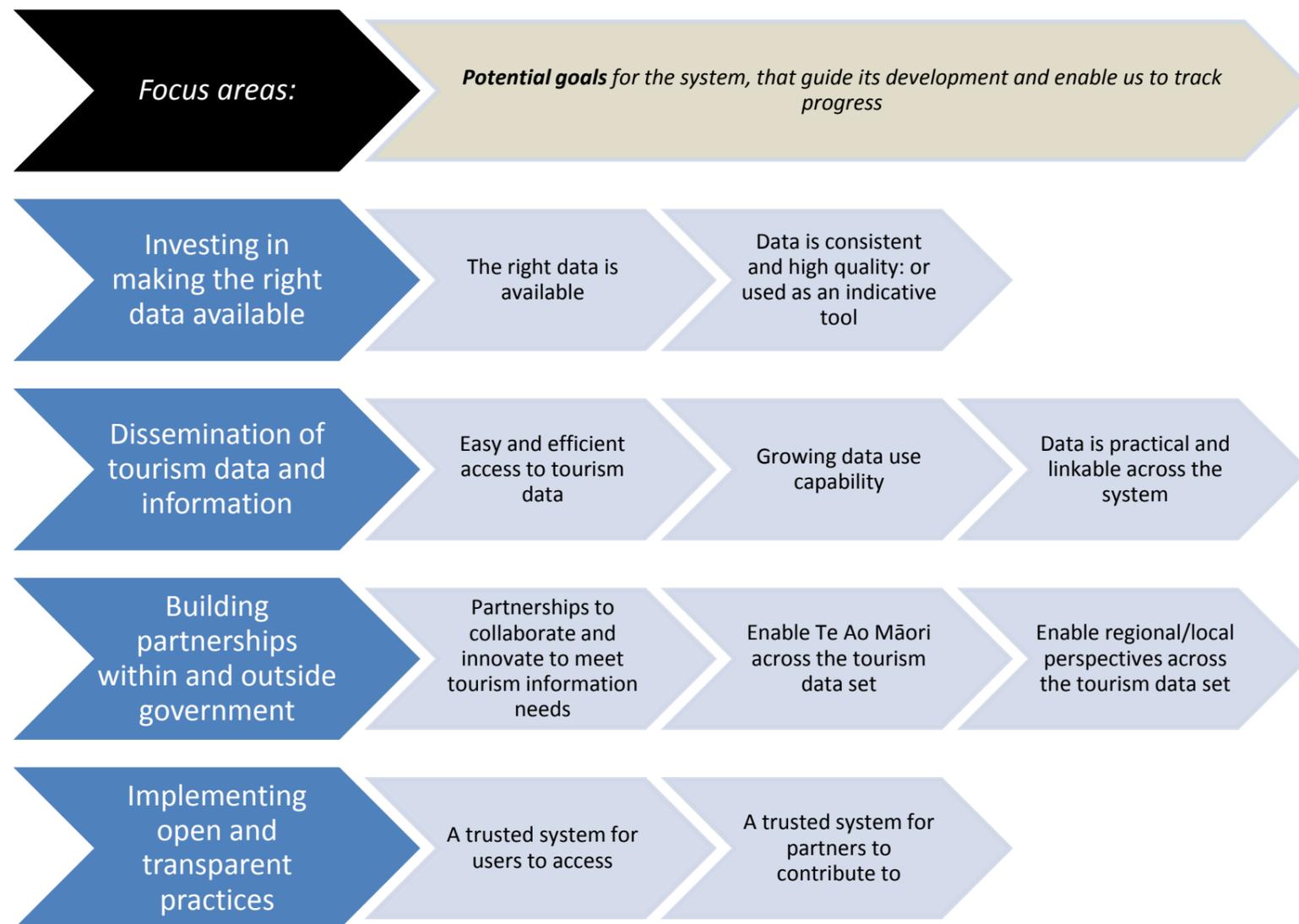
The working group looked at [Stats NZ's Data Strategy and Roadmap](#) as an example of how the tourism sector could build its own data system.

## Tourism information and data roadmap/strategy – a conversation starter

Building on from the Stats NZ model – the working group discussed a number of potential focus areas, goals, and outcomes. The diagram below captures the general themes and approach, but is just a basis for discussion

*An overarching ambition for tourism information and data, which sets the direction/mandate for governance/leadership/collaboration for example:*

*A collaborative system, supporting sustainable tourism growth, and gaining value through better use of information and data*



*What objectives/outcomes should the sector adopt?*

Note "sector" includes industry, central and local government, and service providers / commentators

**User perspective:**

*Does this capture your objectives?*

**Industry** has the right data to: support investment, monitor and manage impacts

**Central Government** can rely on data to: tackle the big tourism issues, inform decision making, evaluate and monitor the tourism strategy

**Local Government** can use the data to inform destination management, infrastructure, planning and funding decisions

**Service Providers** (data, research) /Commentators are able to inform evidence-based decision-making

**Thematic perspective**

*Does this capture objectives for the system and you?*

The sector uses data to support sustainability and well-being

The sector collaborates to solve complex problems

The data system meets priority information needs of the sector

The sector has the right data to inform evidence-based decision-making

## Information Needs – What would a well-functioning system deliver?

The New Zealand – Aotearoa Government Tourism Strategy goals are a useful framework for identifying our information needs. From these we can also infer some key indicators. While these are not all available, there are proxies available and/or they can be considered for future development



The working group has considered the broad range of information needs, and assessed the extent to which they are being met (or not) by the current information system.

Some areas of the system are well served, for example, measuring the size of the Tourism sector in the economy (Tourism Satellite Account), other areas are in earlier stages of development, for example monitoring the impact of tourism of communities, and the interaction between tourism and the environment.

The working group is proposing a package of initiatives, based on

- the relative priority of information gaps (drawing on strategy outcomes and sector information needs)
- optimal sequencing and feasibility of addressing those gaps

The key themes across information needs are:

- regional/local insights across most data sets (existing and pending)
- environmental and social impacts
- domestic tourism (visitors)
- māori tourism (offerings)

The working group are proposing a portfolio of initiatives that include some significant gains, as well as some quick wins; and that invest across the breadth of information needs. Annex 2 has the full list of possibilities, and assessment of their priority and feasibility.

	Regional/local	Environment/ social	Domestic tourism	Māori
<b>Shorter lead-time investments</b>				
Extend/enhance <i>Mood of the Nation</i> to provide regional/local insight		x		
Accommodation information (replacement for the Commercial Accommodation Monitor is underway)	x			
Sustainable tourism data (environmental, economic, social): <ul style="list-style-type: none"> <li>presenting information for easy access/use</li> <li>key metrics presented as currently available, longer term data developments will be incorporated.</li> </ul>		x		
Review of Monthly Regional Tourism Estimates	x			
Building sector data capability (through training, improved usability, etc)				
<b>Substantive / longer lead-time investments</b>				
<i>Regional volumes and flows - Mobile data project pipeline</i> <ul style="list-style-type: none"> <li>Exploratory work on use of mobile data (Data Ventures project) for robust visitor volumes data (domestic and international)</li> <li>Use of mobile data to support other data sources (eg domestic tourism surveys)</li> <li>Visitor flows model to show where visitors are going</li> <li>Improvements flowing from this work could also improve the basis for forecasts (nationally and at a regional/local level)</li> </ul>	x		x	
<i>Environmental and Social impact data</i> <ul style="list-style-type: none"> <li>Local government and Department Of Conservation data on nuisance (waste, noise etc), with initial focus on priority hot spots</li> <li>Breakdown of national indicators to regional levels</li> </ul>	x	x		
<i>Tourism business performance</i> <ul style="list-style-type: none"> <li>Develop an indicator to identify tourism businesses (to be linked to research datasets)</li> <li>Develop indicator for Māori owned tourism businesses</li> <li>Opens up potential to address a range of business performance indicators</li> </ul>				x
<i>Domestic tourism survey</i> <ul style="list-style-type: none"> <li>Build new data/leverage existing survey data to better understand domestic visitors</li> </ul>			x	
<i>Improved data on cultural activities</i> <ul style="list-style-type: none"> <li>More detailed data on expenditure, including differentiating between types of activity such as Māori cultural experiences/activities</li> <li>Information on location and volumes</li> </ul>				x

As these actions are both scalable and could be delivered in multiple ways, costs have not been included in this first round of considerations. Future development of these will depend on governance, funding and delivery.

## **Governance, funding and delivery**

The data system is an eco-system with parts connected to varying degrees to the total. We are proposing some form of governance to oversee the system, and sources of funding to support the newly identified information and data initiatives. These should be linked – it is important that those paying also have representation, and that those guiding the system are committed to delivering value. By enhancing governance and funding, we aim to create a data system that evolves with information needs and new technology.

### **Governance**

Some form of governance model will be needed to oversee the system. There are a number of options for what kind of mandate a governance group could have and what form it could take. It's important that central government, local government, industry and the information providers<sup>1</sup> are all represented in the final model, to reflect that we all need and use tourism information and data, and all should have input into the system.

Any governance model will need a mandate. Scope for that mandate broadly falls under 4 categories:

- direct the tourism data system,
- advise on the tourism data system,
- monitor the tourism data system, and/or
- share relevant information across the tourism data system.

A governance group does not necessarily need to work to just one of these mandates (e.g. a group could have an advisory and monitoring mandate).

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<sup>1</sup> Includes consultancy services, data providers, researchers, academics, etc.

Potential ideas for mandates under each of these categories are in the table below.

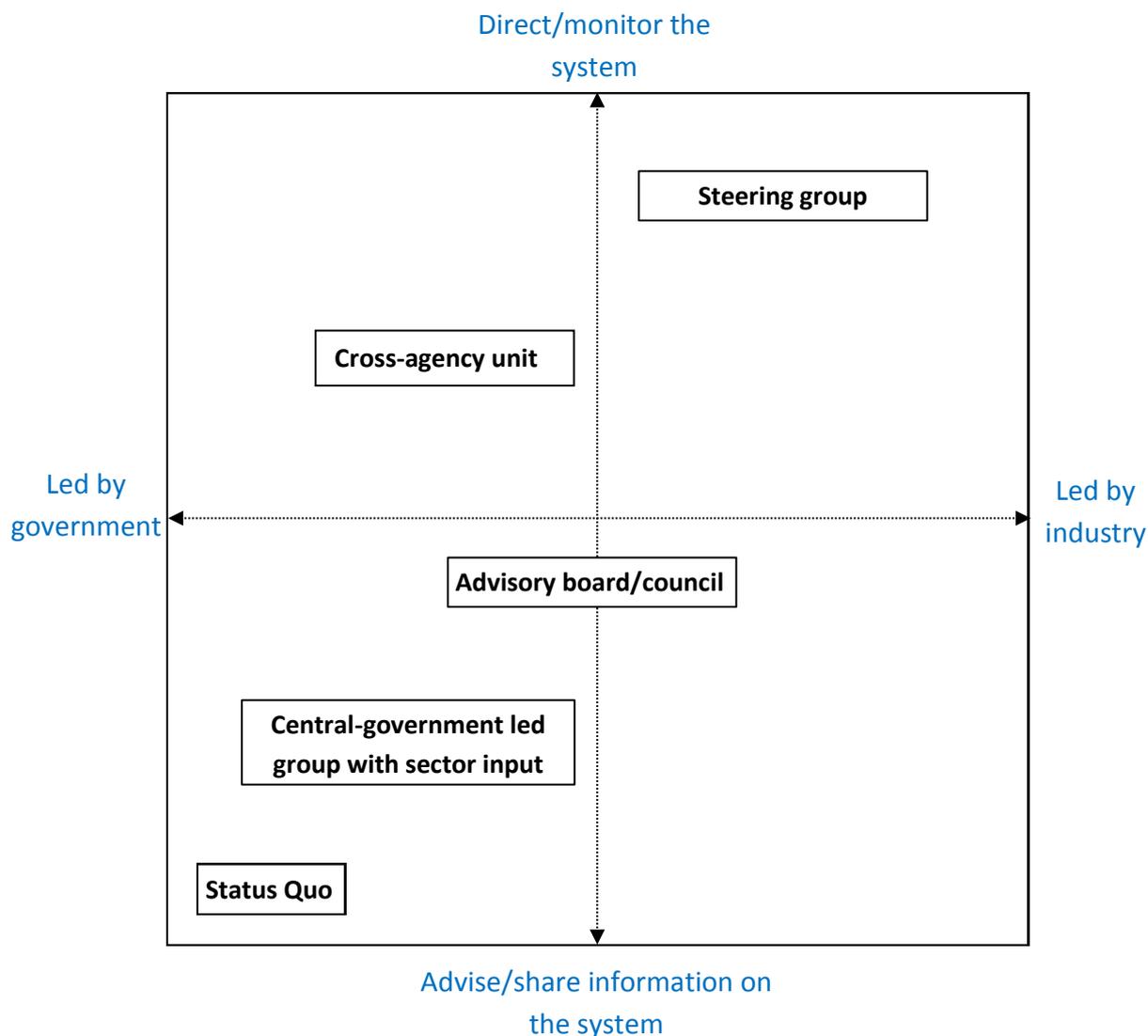
Potential Roles	Directing mandate	Monitoring mandate	Advisory mandate	Information sharing mandate
Leadership on tourism data issues and needs	x		x	
Shaping and collaboration across the system to evolve the data system to meet tourism sector needs	x			x
Oversight of delivery on information needs, starting with Hui outcomes, and ensure methods (and costs) are fit for purpose	x	x	x	
Identification of new datasets and data sets no longer fit for purpose (coverage, cost, need)	x		x	
Prioritisation of data needs and sources	x			
Monitoring how well the data system is meeting the needs of central government, local government and industry		x	x	
Sharing relevant information across users of tourism data	x			x

Before choosing a governance model, we also need to consider what criteria we think are important to have and which of these would best serve the mandate of the governance model (e.g. speed to set it up, flexibility to adapt to change, co-led by government and industry)?

Some potential options for models include the following (more detail in Annex 3 on how they could work):

- Advisory board/council
- Cross-government unit reporting to a board
- Central government led group with sector input (expanded mandate from the status quo)
- Steering group of industry and government
- Status quo - central government led group with sector input

The diagram below illustrates the range of options, depending on mandate and who would lead the group.



### Funding

We are looking to create a package of on-going funding for information and data sources. It is important that (a significant part of) the system is on a financially sustainable footing, where we are not having to source new money every few years in order to meet key information needs. As government and industry both use information and data sources, both should have some input into funding. We will also need to consider the capacity of different organisations to deliver the information, in a world where the funding to do so is made available.

Some potential sources of funding include the below.

#### *Central government funding*

Central government is deploying baselines on projects identified in the TDDP – including the sustainable tourism dashboard and investigating the potential for using mobile data to meet tourism

information needs. This kind of development work can continue, but the scope for committing ongoing funding for significant new data sources or products is limited.

#### *International Visitor Conservation and Tourism Levy revenue*

The International Visitor Conservation and Tourism Levy is projected to raise \$450 million over 5 years. Responsible Ministers have agreed that 5-10% of this funding will be set aside for tourism system capability. Priorities for using this funding include tourism data and insights, and tourism sector workforce.

#### *Sector contributions*

This could be an in-kind contribution (such as providing existing data sets for wider use) or monetary contribution, depending on agency/organisation resources. It would need to be a firm commitment. This type of model funds a dedicated tourism sector research programme in Australia (Tourism and Transport Forum).

#### *Pay-models*

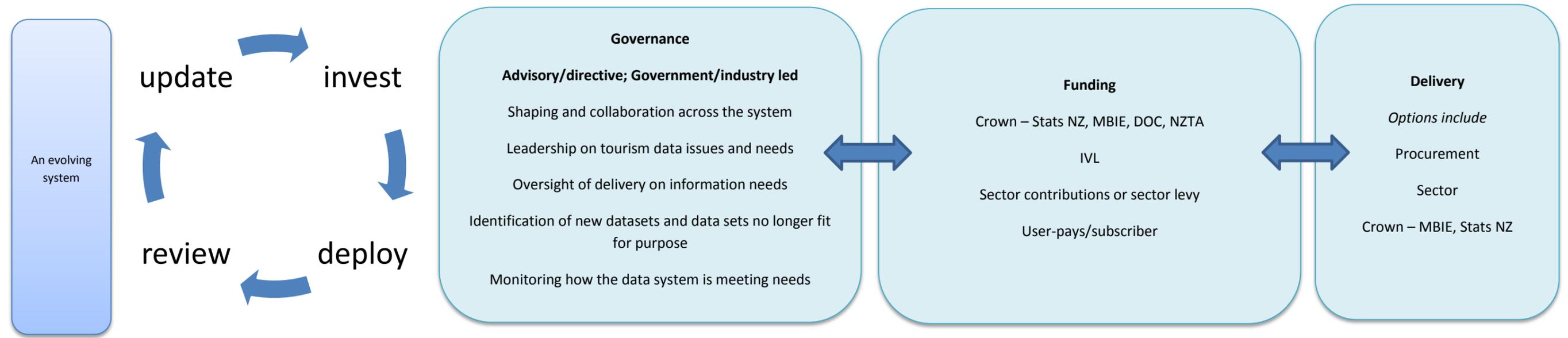
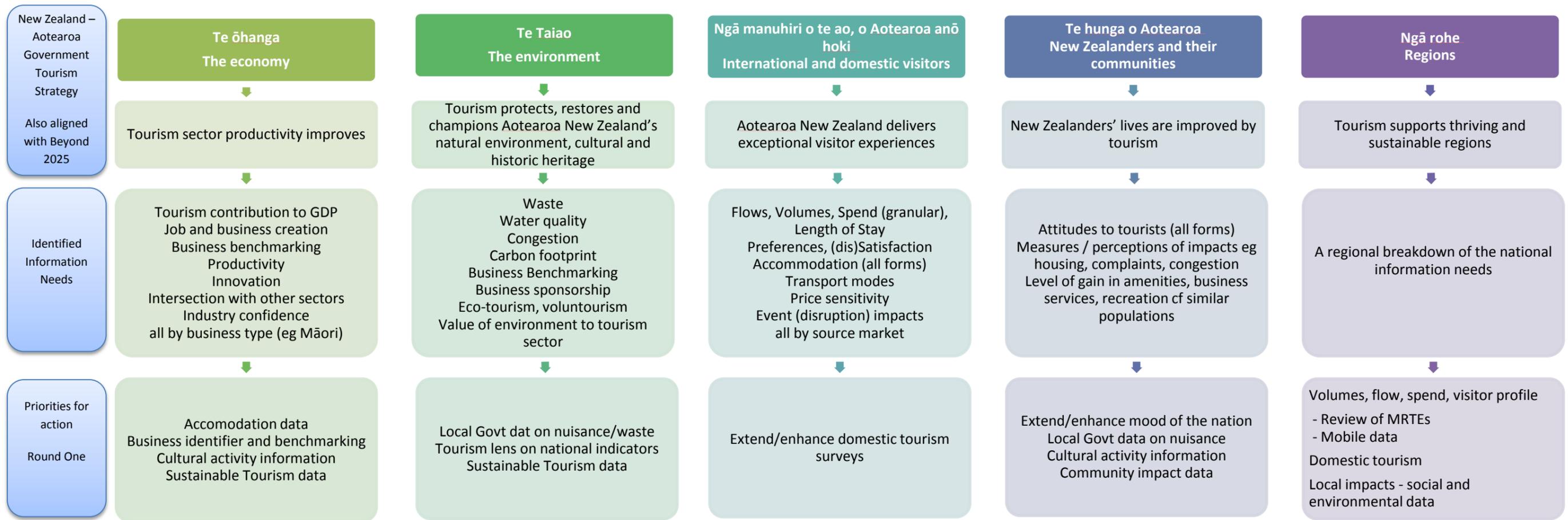
This could take the form of a pay per use or subscriber system, whereby some information (such as existing publicly available data) would be freely available, but people could pay for more in-depth access as needed, or for particular data sets. Scope of access could be determined by the governance group, taking into account the various sources of funding and the types of information needs being met.

#### *Sector levy*

A sector levy could be imposed on the tourism industry, payable to an industry organisation, as happens in the dairy sector, or for other primary sector commodities. This levy could fund industry good activities like tourism data, to give benefits back to those making the investments.

A board or other governance group could then decide how to invest revenue collected, supported by advice from the tourism industry and government.

**Annex One: Tourism Information and Data Proposal on a page**



**Annex Two: Long list of potential information and data projects and assessment**

Column	Criteria	Scoring
Government Strategy	Indicator (or proxy) for monitoring key outcomes	5 for direct fit, 3 for proxy, 0 for not relevant NB Govt tourism, B2025 aligned. DOC strategy also has relevant components.
Sector Priority	Identified as 'need to have' by working group (note only two returns), or ranked highly in TDDP or Tourism Insight Leadership Panel	5='need to have', good to have=3; Or TDDP scale: top 5=5, 6-10=4; 11-20=3; 21-30=2; 31+=1
Multi-purpose	Foundational data source (meets many needs, or could be built on to meet many needs)	5 underpins multiple significant needs (as scored above); 3 underpins multiple info needs
Feasibility	Feasibility – how easily or quickly could the data be delivered. Including interim steps/proxies; exploratory work required first.	Goes to 'quick win' or 'significant impact' investment; or any show-stoppers 5 – relatively easily (with funding); 3- requires some system changes (legislation/co-op/commercial issues) or requires subjective survey methods; 1 – absence of collection points/other substantial hurdles

Theme	Information need	Data gap	Existing data	Work in progress	Potential projects (no.s indicate TDDP project)	Description	Govt Strategy	Sector Priority	Multi-purpose	Priority	Feasibility	Comments
Te ōhanga - The Economy	Tourism GDP (national and subnational)	Partial data gap	Tourism Satellite Account, Regional Economic Activity web tool, MRTEs, IVL	2) Develop sustainability dashboard (economic, social, and environmental)	1) Regional Tourism Satellite Accounts  Peer2Peer accom (incl below)	Produce regional Tourism Satellite accounts would require regional tourism-specific regional GDP and LEED. This could require significant work to develop	4	5	3	12	5	Regional insight is the key extension.
	Visitor expenditure*	Partial data gap	TSA, MRTEs, MBIE Forecasts, DOC booking data		11) Investigate improvements to Monthly Regional Tourism Estimates methodology; 13) Develop regional tourism forecasts	This would require a full review of the current methodology code and source data; a consultation with users to assess whether needs are met. It could involve a new portal to release data through, new fit for purpose industry categories, and a potential new revision approach. Any regional forecast development will require a baseline set of data first.	included under regions					Regional insight is the key extension. Strengthening MRTEs could be achieved by improving the use of TSA product categories. MRTE improvement and the development of regional TSA would be complementary projects.
	Forecasts	Partial data gap	MBIE tourism forecasts (volumes, spend, by market); Sector forward booking information, DOC booking information		Domestic tourism forecast	Extending current forecast work to include scenarios (for plausible shocks), a regional outlook, and domestic tourism.	3	5	3	11	2	Regional insight is the key extension. Mobile admin data likely to be key to delivery
	Identifying tourism businesses	Partial data gap	Sectoral analysis/ANZIC codes, DOC concessions		9) Tourism business performance project	Identify tourism businesses (and Maori tourism businesses (links to other MBIE? Stats/NZ work)), and creating a range of benchmarks.	4	4	5	13	2	Key insights derived from tourism identifier.
	Job and business creation	Current data gap	LBD/IDI; BOS; AES	-	9) Tourism business performance project	This will inform individual businesses about their own performance, and policy development.	4	3	0	7	2	
	Business benchmarking	Current data gap	TIA hotels, industry data (eg STR)	-	10) Maori business performance project	A solution to identify or otherwise register tourism businesses could be found through the IRD, Stats NZ or the NZBN. This data would then be incorporated into Stats NZ's Longitudinal Business Database (LBD)/ Integrated Data Interface (IDI), which would then allow the development of regular statistics on business performance	3	2	0	5	2	
	Productivity	Current data gap	LBD/IDI	-	16) Develop tourism productivity measures		5	3	0	8	2	
	Business type (eg Maori)	Current data gap	-	-			4	3	3	10	2	Could link in with other Government interests
	Innovation	Current data gap	LBD, BOS	-	-	What is the level and nature of innovation in the tourism system. This could then inform ways in which we might leverage, enhance, and encourage uptake.	3	3	0	6	2	Could be a one-off research piece, or establish on-going reporting

Theme	Information need	Data gap	Existing data	Work in progress	Potential projects (no.s indicate TDDP project)	Description	Govt Strategy	Sector Priority	Multi-purpose	Priority	Feasibility	Comments
	Intersection with other sectors	Current data gap	Indirect contribution of tourism to GDP and employment (TSA)	-	-	What is the economic benefit of the tourism sector to other businesses/sectors. This may include the indirect GDP, for example, services provided to tourism businesses, but also the benefits to other businesses who use those services (the extent to which tourism offers scale, that other businesses then benefit from)	1	0	0	1	3	Some proxy analysis is possible, and could be modelled as ongoing.
	Workforce insight	Partial data gap	MBIE/Stats NZ Labour market data, HNZ/RANZ surveys	Building the Tourism Workforce Programme (specifics in development)	Skills gaps/shortages by region, current and forecast	MBIE is working with the tourism industry and other stakeholders to co-develop a <i>Building the Tourism Workforce</i> programme. Below is a list of potential data and insight projects related to workforce. - Identify workforce requirements based on occupations, region/sub regions and seasons - Develop a model for regional workforce and skills planning - What skill areas would benefit from micro-credentials? - Insight into the effectiveness of tourism pathways (secondary to tertiary, tertiary to industry and within industry)	4	5	1	10	3	Unclear at this stage how much of this will be related to on-going data source needs.
	Industry confidence	Partial data gap	TIA member surveys, non-sector specific monitors	-	-	Tracking a measure of tourism business confidence over time.	1	3	0	4	5	
Te Taiao - The Environment  <i>There could be merit in adopting some kind of coherent framework for environmental measures. For example, the pressure-state-impact-response approach.</i>	Waste	Current data gap	LG monitoring of key sites/complaints; TIA survey (TSC, currently Y/N)	2) Develop sustainability dashboard (economic, social, and environmental)	Further work to assess attribution, develop measures to address gaps	Identify existing datasets that will allow the best monitoring of the sustainability of tourism, provide tourism sustainability information, and then identify gaps that must be filled to complete the suite of indicators. Then Any additional data/improvements to existing data required should be designed, developed and/or collected.	3	5	2	10	2	
	Water quality	Partial data gap	MfE Water quality data, DOC. Requires further analysis			Key product: Dashboard to report on a range of indicators for monitoring tourism' sustainability across environmental, social, and economic dimensions	3	5	2	10	2	Data sources from other Govt projects could be helpful
	Congestion	Current data gap	NZTA data, DOC visitor perceptions of the experience, DOC noise pollution			Potential to investigate adjusting national metrics and/or aggregate key local ones in tourism hot spots. A portion of this data gap is about how to present the data.	4	4	2	10	2	
	Carbon footprint	Partial data gap	MBIE's carbon emissions data; Stats NZ estimate of ground tourism emissions, Qualmark Green AirNZ greenhouse gas emissions (dom and intl)				4	5	2	11	3	

Theme	Information need	Data gap	Existing data	Work in progress	Potential projects (no.s indicate TDDP project)	Description	Govt Strategy	Sector Priority	Multi-purpose	Priority	Feasibility	Comments
	Business sponsorship	Current data gap	Qualmark Tourism Sustainability Commitment survey includes a Y/N question, DOC partnerships, Regional Councils (?)	-	-	Systematic capture of the level of business sponsorship/investment in conservation/environmental projects. Ideally include quantitative and in-kind contributions	1	2	1	4	4	
	Eco-tourism/voluntourism	Current data gap	Tiaki promise (sign ups) Qualmark (assess. Incl. sustainability)	Lightning Lab project	-	Assess the levels, and/or impact of eco-tourism and voluntourism in NZ. Could also consider the potential for extension	1	3	1	5	3	
	Value of environment to tourism sector	Current data gap	-	-	Potential to consider DOC concession data (could be considered as a proxy); Tourism Satellite Account (through some form of apportionment); TNZ reason for travel	Assess the value of New Zealand's natural environment in providing a platform for the tourism sector to operate on. Considering attraction of international visitors, direct use of natural environment in activities, and the importance of the environment as a backdrop for the tourism system (eg the view).	1	1	1	3	3	Some proxy analysis is possible, and could be modelled as ongoing.
Ngā manuhiri o te ao, o Aotearoa anō hoki - International and domestic visitors	Visitor volumes, Length of stay, Expenditure	Partial data gap	TSA, arrivals data, IVS, MBIE forecasts, DGiT(?), CAM, AA monitor, NZTA household travel survey, DOC booking data and counters	4) Data Ventures regional tourism volumes and flows CAM alternate	13) Develop regional tourism forecasts	Information on domestic tourism is considerably weaker. Improve regional info (below) Develop a visitor profile model that can provide regional estimates (by market) of the preferences of international and domestic visitors (likely to require additional data collection). Options for partnership with TLAs/ RTOs, regional surveys of visitors could be held annually. Options also include extending TNZ Active Considerer to look at regions; the DGiT tool could be extended/enhanced. This work needs to be further scoped.	4	5	5	14	3	
	Preferences/satisfaction	Partial data gap	TNZ Active considerer; DGiT; IVS TNZ Visitor Experience Monitor	-	5) Develop visitor profile model; 14) Develop regional visitor satisfaction estimates		4	5	3	12	3	Some components easier to progress than others
	Accommodation (all forms)	Partial data gap	Accommodation Survey	Alternative accommodation data project	Peer2Peer accommodation (note initial exploratory work from StatsNZ)	The new monthly research will guest nights; guest arrivals; average length of stay; by international and domestic visitor; at RTO and TLA level. It will also include the total number of establishments and capacity (daily and monthly). Future work needs to consider measures for freedom campers, luxury lodges and peer-to-peer accommodation (i.e. Airbnb, Bookabach).	3	5	3	11	5	Suggested that there may be other supply-side capacity data that could be useful. How would sector do this?
	Transport modes	Partial data gap	IVS, Prism (airlines)	4) Data Ventures regional tourism volumes and flows	-	The Data Ventures project may be able to infer air vs ground travel flows.	2	3	1	6	2	Existing data held by commercial entities, mobile data will offer limited insights
	Price sensitivity	Current data gap	Case by case assessments for cost recovery/levy impacts. Some data exists that would enable NZ to monitor pricing of holidays, relative to competitor destinations, by market and over time	-	Develop a price sensitivity model	Create a price sensitivity model that can be used to assess the impacts of new funding tools (eg user pays) or other charges (eg border); and potentially other economic factors (eg exchange rates). Another consideration is tracking data on pricing of New Zealand holiday (all components), relative to competitor destinations.	2	2	2	6	1	unlikely to be amenable to ongoing data stream.

Theme	Information need	Data gap	Existing data	Work in progress	Potential projects (no.s indicate TDDP project)	Description	Govt Strategy	Sector Priority	Multi-purpose	Priority	Feasibility	Comments
	Event (disruption) impacts	Current data gap	Previous modelling/assessment of events	-	-	Consider impact of shocks on tourism demand, eg natural adverse events, geopolitical changes etc. This could be an extension of a price sensitivity model, or draw on historical information (eg Kaikoura earthquake)	1	1	1	3	3	We can share insight from previous events, however unlikely to be amenable to ongoing data stream.
Ngā Rohe - Regions	Volumes and flows, length of stay	Partial data gap	CAM (and alternative), IVS, AA monitor, DOC bookings and counter data	4) Data Ventures regional tourism volumes and flows	13) Develop regional tourism forecasts	Explore with Data Ventures the potential for mobile data to provide an estimate of volumes of visitors to regions. And potentially flows across NZ. Any regional forecast development will require a baseline set of data first.	5	5	3	13	3	Exploratory work on mobile admin data will be key to delivering regional data
	Spend	Partial data gap	Monthly Regional Tourism Estimates	-	11) Investigate improvements to Monthly Regional Tourism Estimates methodology; 13) Develop regional tourism forecasts	This would require a full review of the current methodology code and source data; a consultation with users to assess whether needs are met. It could involve a new portal to release data through, new fit for purpose industry categories, and a potential new revision approach. Any regional forecast development will require a baseline set of data first (note Akld likely skew in data as main entry point).	4	3	1	8	3	
	Regional lens on most information needs listed	Partial data gap	Regional break down available for some existing data	As noted		Information currently available, or that may become available is often at a national or aggregated level. To help inform regional development, it is useful to have a regional set of data to consider.	5	5	5	15	3	
Te hunga o Aotearoa - New Zealanders and their communities	Attitudes to tourists (all forms)	Partial data gap	Mood of the Nation, TNZ qualitative assessment of local attitudes (could be repeated), LG surveys and complaints data, AA data, DOC compliance and enforcement data	-	12) Develop case studies for communities affected by tourism	A larger/more comprehensive Mood of the Nation would be required to be able to provide regional breakdowns of impact.	5	5	1	11	5	
	Measures/perceptions of impact	Partial data gap	-	Potential for some measures to be included in the Sustainability Dashboard	Strong overlap with other projects, could simply be about presentation	Tourism has a range of effects on communities - both quantitative and qualitative. This can range from housing affordability, to employment (and retention of population) etc. These vary from place to place, there is also questions to consider about attribution to tourism. Potential to build onto the Sustainable Tourism Dashboard	5	5	5	15	3	Requires aggregating local data, disaggregating national data. Some 'easy wins' with extending survey options
	Measures of cultural activities	Current gap	Currently included with gambling in the TSA		Identify expenditure separately, location, scope etc	Currently included with gambling in the TSA (sensitivity of dominant provider in gambling sector). Might align with Maori business data	5	5	3	13	3	

Theme	Information need	Data gap	Existing data	Work in progress	Potential projects (no.s indicate TDDP project)	Description	Govt Strategy	Sector Priority	Multi-purpose	Priority	Feasibility	Comments
	Level of gain in amenities, business services, recreation of similar populations	Current data gap	-	-	Some overlap with other projects	Attempt to benchmark/assess the level of amenity gained by having tourism in a community. Could consider Local vibrancy measures – could benchmark tourism towns with non-tourist towns for variations in amenity levels, recreation opportunities, services (legal, banks, groceries...), infrastructure, employment – no. jobs created, SMEs created, wages , TSA, possible use of sources like the General Social Survey, or the Time Use Survey, for understanding local time-use or leisure-time preferences		?				Might be more of a research piece than on-going data source.
Other	Data capability building	N/A	Existing tools	Tourism Info Centre project; Sustainable Tourism Dashboard project	Training in RTOs/EDAs, for businesses	Improve the capability of users to understand, access and use tourism statistics (contributing to productivity). This could include the development of more easy to use tools based around a central hub, articles to explain issues, methods and data to users, potentially videos or other training materials. This could link to the digital development pilot.	3	5	3	11	5	Goes to productivity of the sector, and informing local government decision-making

**Annex 3: Options for governance**

*Data advisory board/council*

This could comprise a group of representatives from central government, local government, industry and academia/researchers, working together to oversee the system. This would have limited flexibility, as it would have a Minister-set mandate and appointments, but would be suited to stronger strategic guidance on the tourism data system. MBIE could provide the secretariat.

*Cross-government unit*

This would be comprised of representatives from tourism data-focussed agencies (e.g. MBIE, Stats NZ) and partner with industry to improve coordination and alignment across government and meet data needs. It could report to a board of government and industry representatives.

*Steering group*

This would be similar to an advisory board/council, but with a less strong mandate that is more directed by industry and greater flexibility to adapt as the needs of government and industry change. It would not be ministerially appointed, but could be comprised of representatives from peak industry bodies, central government and local government. Secretariat support could be provided by industry.

*User Group meeting - Status quo*

Central government has regular meetings/calls with a large group of industry representatives to share information about government’s work in tourism data. It’s an open invitation to present, but tends to focus on government offerings.

*Central government led group with sector input with expanded agenda*

The status quo group could be expanded to be a group for discussion of concerns and monitoring existing needs, and enhance it’s activity as an information sharing function.

**Evaluation of how well each option meets relevant criteria**

Each governance model above has been evaluated according to the following criteria (green for yes, orange for somewhat, red for no):

- Co-leadership from industry and government
- Co-participation from industry and government
- Mandate (directing the tourism data system, advising on the tourism data system, monitoring the tourism data system, information sharing)
- Flexibility to adapt in future if needs of the system change
- Whether it would be quick to establish
- Whether it could be a point of accountability for industry
- Level of funding required to establish the group

Governance model	Criteria for evaluation									
	Co-led	Co-participation	Directive mandate	Advisory mandate	Information sharing mandate	Monitoring mandate	Flexibility	Quick to establish	Point of accountability	Low cost to establish
Advisory board/council	Green	Green	Orange	Green	Red	Green	Orange	Orange	Green	Green
Cross-government unit	Green	Green	Green	Orange	Red	Green	Orange	Orange	Green	Orange
Steering group	Green	Green	Green	Orange	Red	Green	Green	Green	Green	Green
Status quo	Red	Green	Red	Red	Green	Red	Green	Green	Red	Green
Central government led group	Red	Green	Red	Orange	Green	Green	Green	Green	Red	Green

The degree of control that the sector has in a governance structure will also need to be linked with the scale of contribution to the sector ie funding and governance should be linked conversations.