Interim Action Plan

Jul - Dec 2023

Tourism Data
Leadership Group

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Update from the Tourism Data Leadership Group

Early in 2023 the Tourism Data Leadership Group (TDLG) publicly released its [Initial Report](). The report included a recommended package of proposed initiatives to be undertaken in upcoming years. Since then:

- key stakeholders, as well as the sector had the opportunity to [feedback]() on the package of recommendations
- the TDLG has begun transitioning from the establishment phase into a 2-year implementation phase, which includes the allocation of the funding. The transition has involved some [membership changes]().

While a (two-year implementation / business plan) is a priority for the Group, the Group is taking a staged approach to identifying its priorities. In part this is due to the nature of the work required to develop a longer-term plan; but a staged approach also recognises that the outcome of the General Election **could impact on the TDLG's** proposed priorities. A longer-term strategic plan is anticipated to be released for consultation by the end of the financial year. In the interim, for the remainder of 2023 the TDLG will focus on a select number of near-term key initiatives from the Initial Report:

- Investigating Domestic Tourism Measures, including re-establishing a Domestic Tourism Survey (data to be available in 2024)
- Supporting the implementation of a Community Sentiment Survey that meets the whole **sector's** needs (including at a regional level)
- Establishing the data needs of M**ā**ori Tourism Businesses and Communities (including identification of gaps)
- Progressing Regenerative Tourism data needs (including development of a framework and identification of gaps).

The key rationale for progressing this initial work is outlined overleaf. In undertaking this work the TDLG will be considering how both m**a Māori mo te katoa** (what is good for **Māori**, is good for all) and innovation will be incorporated into their work. Additionally, the TDLG are required to identify contributions (financial or otherwise) from the sector in order to achieve a sustainable funding model. Any investment in the above initiatives will be in line with the investment approach that is due to be agreed.

In addition to working on these recommendations from the Initial Report, in the next six months the TDLG will be completing requirements as outlined in the revised [Refreshed TDLG Terms of Reference]() (i.e. developing a data roadmap, a prioritisation framework and investment approach). These tools will enable the development of the strategic business plan, as well as inform work on the tourism data system itself.

A number of engagement / influence-type recommendations listed in the Initial Report are either complete or ongoing (see Appendix 1). Engagement / influence activities (both those listed in the Initial Report, as well as those created from evolving opportunities) will continue throughout the life of the TDLG.

Why are the TDLG focusing on these select near-term initiatives?

Establishing the data needs of Māori Tourism businesses and communities (recommendations 6b)

The TDLG Terms of Reference (TOR) outline the need to ensure that the core principles of Te Tiriti o Waitangi are **incorporated into the Group's** decisions and actions. In order to ensure involvement in decision making (among other Te Tiriti principles) Māori and Tourism will form a pou of the TDLG's work going forward.

While not deliberate, such a focus on Māori is consistent with the [Government Data Investment Plan 2022](#) - iwi-**Māori data needs and aspirations is** one of the six pillars/dimensions. In some instances, there may be opportunities to connect into whole of government priorities enabling economies of scale and efficiencies.

Uncovering the needs and gaps in the data system **for Māori are necessary first steps to inform the** TDL**G's priorities in this space in the future.**

Investigating Domestic Tourism Measures (recommendation 2a, and potentially 3a (regional indicators))

A Domestic Travel Survey has been identified as a gap/need in:

- the [Tourism Data Domain Plan](#)
- the Parliamentary Commissioner for the **Environment's re**port [Pristine, popular… imperilled? The environmental consequences of projected tourism growth](#)
- [Tourism Data Leadership Group Industry Survey](#) **–** sixth most sought-after data.

It's anticipated the data from this, and other non-survey sources will support among other things the:

- [New Zealand Aotearoa Government Tourism Strategy](#); in particular, providing domestic measurement of the exceptional experiences goal
- Regional [Destination Management](#) Plans (e.g. providing insights into domestic visitor characteristics, activities and satisfaction).

Data is also expected to contribute towards the TDLG**'s future work around Māori and Tourism** (e.g., providing insights into domestic use and **satisfaction with Māori experiences), a**s well as Regenerative Tourism ((e.g., self-reported well-being gains of domestic visitors).

Supporting the Implementation of a Community Sentiment Survey (recommendation 2c, and likely 3a (regional indicators))

Within the sector there are current inefficiencies with two survey tools in use:

- Angus and Associates **–** Views on Tourism **–** a proprietary product. A number of RTOs purchase regional data. The tool provides international comparators, but to date it has not covered the breadth of social, **community, environmental, Māori and** cultural measures needed.
- Kantar **–** [Community Sentiment Survey](#) **–** commissioned by TNZ, TIA and DOC. This includes a range of social, community, **environmental, Māori and cultural** measures, but does not provide data for all regions.

Recently TNZ and partners asked the TDLG to provide guidance on a preferred approach going forward.

Tourism Industry Transformation Plan (ITP) publications highlight the need for this data:

- [Draft Tourism Environment Action Plan 2023](#); a key action is the development of measures for regenerative tourism

- [Tourism Adaptation Roadmap — The Aotearoa Circle](#); a key action is the collection of data that supports relevant adaptation indicators on environmental (including Tiwaiwaka principles), economic, social, and cultural wellbeing tailored to the tourism industry.

A Community Sentiment Survey tool will support:

- Regional [Destination Management](#) Plans (e.g. providing insights into community sentiment)
- the [New Zealand Aotearoa Government Tourism Strategy](#); in particular, providing measurement of the perception New **Zealanders' lives are improved** [or not] (by tourism) and tourism supports thriving/sustainable communities
- [Tourism 2025 & Beyond - TIA](#)[1]; providing a community lens on sector sustainability and whether New Zealanders are welcoming hosts and support the tourism activity at their place.

The data from such a survey (e.g., providing insight into community perceptions of the positive and negative effects of tourism across the range of well-beings) will support the wider sector goal of regenerative tourism (another priority for the TDLG).

Progressing Regenerative Tourism Data Needs (links to recommendations 4a – 4d)

One of the most significant initiatives underway in the tourism sector is the Industry Transformation Plan (ITP). A partnership between the tourism **industry, Māori, unions,** workers, and government to transform tourism in Aotearoa to a more regenerative model.

Regenerative tourism ensures that tourism gives back more to people and places than it takes. Tourism must add more than only economic value, it must actively enrich our communities and help protect and restore our environment.[2]

Regenerative tourism i**s a focus of the ITP's** [Tourism Adaptation Roadmap — The Aotearoa Circle](#); and the [Draft Tourism Environment Action Plan 2023](#); it will also feature strongly in the **TDLG's** future work.

While the ITP Environment workstream is still active, it will be both timely and beneficial for the ITP and TDLG workstreams to come together to identify the data needs of the sector, enabling the development of a holistic data framework, the identification of data sources (both old and new), and ultimately sustainable implementation and investment.

Regenerative tourism ensures that tourism gives back more to people and places than it takes

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[1] At the time this document was released the Tourism Industry Association (TIA) were consulting on its new strategy Tourism 2050.

[2] Source: [Transitioning to a regenerative tourism model | Ministry of Business, Innovation & Employment (mbie.govt.nz)](#)

Appendix one: Engagement/influence recommendations – completed or underway

	Recommendation
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.
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.
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.