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# Tourism Information and Data Hui

Conversation Starter

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OCTOBER 2019

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# Tourism Information and Data Hui

## Conversation Starter

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### The Hui is a milestone in the journey

We are on a journey to improve the tourism information and data system (timeline on page 6). In 2018, the Ministry of Business, Innovation and Employment (MBIE) worked closely with the sector to develop the [Tourism Data Domain Plan](#). That Plan identified a prioritised list of data, insight, and research projects, and work has begun on some of them – by MBIE and industry. We have also faced challenges in providing some existing data, as cost pressures have emerged, or techniques have become less effective.

The Minister of Tourism has therefore called a Hui on tourism information and data. To support the Hui, an informal working group has pulled together this conversation starter and shaped the Hui itself so that the sector (industry, central and local government, and researchers/consultants) can work together to achieve an information and data system that is dynamic, makes the most of its resources, and delivers on the sector's information needs.

Next steps will be informed by the outcomes of the Hui. What we can say is that this is a journey, and the Hui will not be a one-off conversation. We will continue to work together to develop the tourism information and data system, and its components.

Further detail underpinning the working group's discussions can be found on [www.mbie.govt.nz/tourismdatahui](http://www.mbie.govt.nz/tourismdatahui)

### Key questions to consider as we evolve the Tourism Information and Data System

To start the conversation, the informal working group has identified three key questions (see next page).

We looked at the tourism data system both in terms of what it needs to deliver and how it could be set up to create an dynamic system, that can respond to changing needs and opportunities.

The working group is also proposing a more coherent system, with collaborative management across central government, local government, researchers and industry, making the most of the expertise and resources within and around the tourism system.

You may like to note your initial responses to these questions here, or read on to see what the working group has developed.

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How do we build a dynamic system that responds to changing needs and opportunities?

What would a well-functioning system deliver?

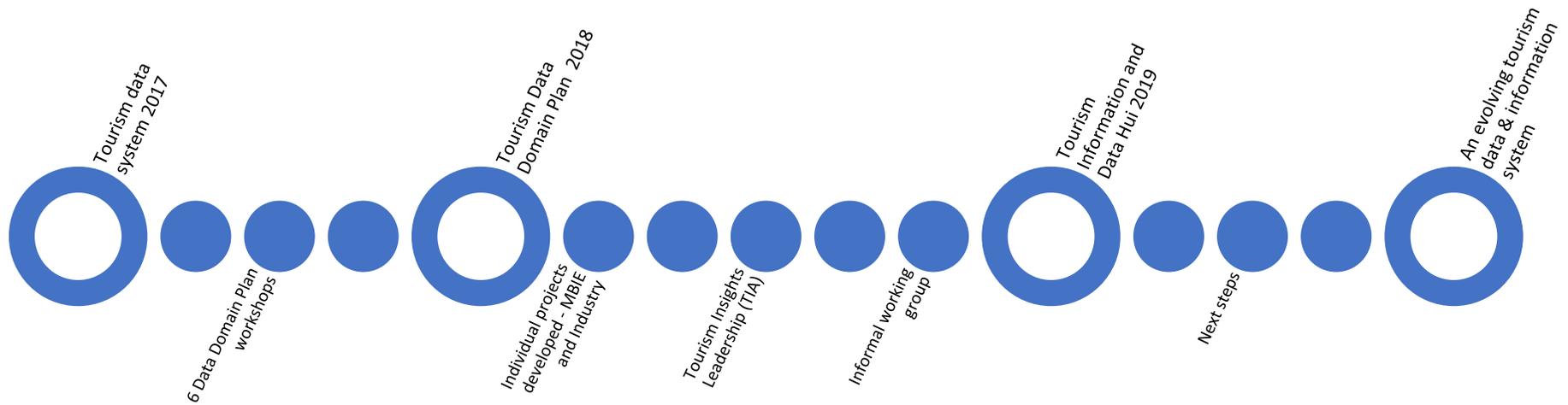
How do we create a coherent system where all the players contribute?

## The Tourism Data and Information Journey

Are there other points you would like to note in this journey?

What are some of the actions/projects you or your organization have undertaken, contributed to, or been aware of?

Add them to the journey below



## The opportunities and challenges in the current system

Relevant and reliable data is crucial for good decision-making in the tourism system – for both commercial and public investment. The current data system for tourism is facing a number of opportunities and challenges:

- 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 don't always integrate easily, and/or the sector isn't able to use all the data sets that exist.
- Provision of some sources is being affected by cost increases or other priorities/pressures take over.
- Some data sources are no longer being provided or are more limited, as the products are no longer fit for purpose, due to insufficient levels of detail, falling response rates, and/or some traditional techniques of collecting data become more difficult/haven't adapted to changing environments, etc.
- Tourism businesses may miss opportunities to use tourism data as they may not be aware of what data is available, or how to access it 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 opportunities to make greater use of the data we have – through better access/product, and improving sector data literacy/capability

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Are there other opportunities or challenges in the system that you are working on or would like to discuss?

**Talk to your colleagues and networks about their views and experiences**

## How do we build a dynamic 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.

A conversation starter is set out on page 9.

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**What is your ambition or the vision for the tourism data system?**

**What are the ingredients required for the tourism information and data system?**

**Have we captured them in the conversation starter on page 9?**

**What would the post-Hui steps look like?**

**Talk to your colleagues and networks about their views and ambitions**

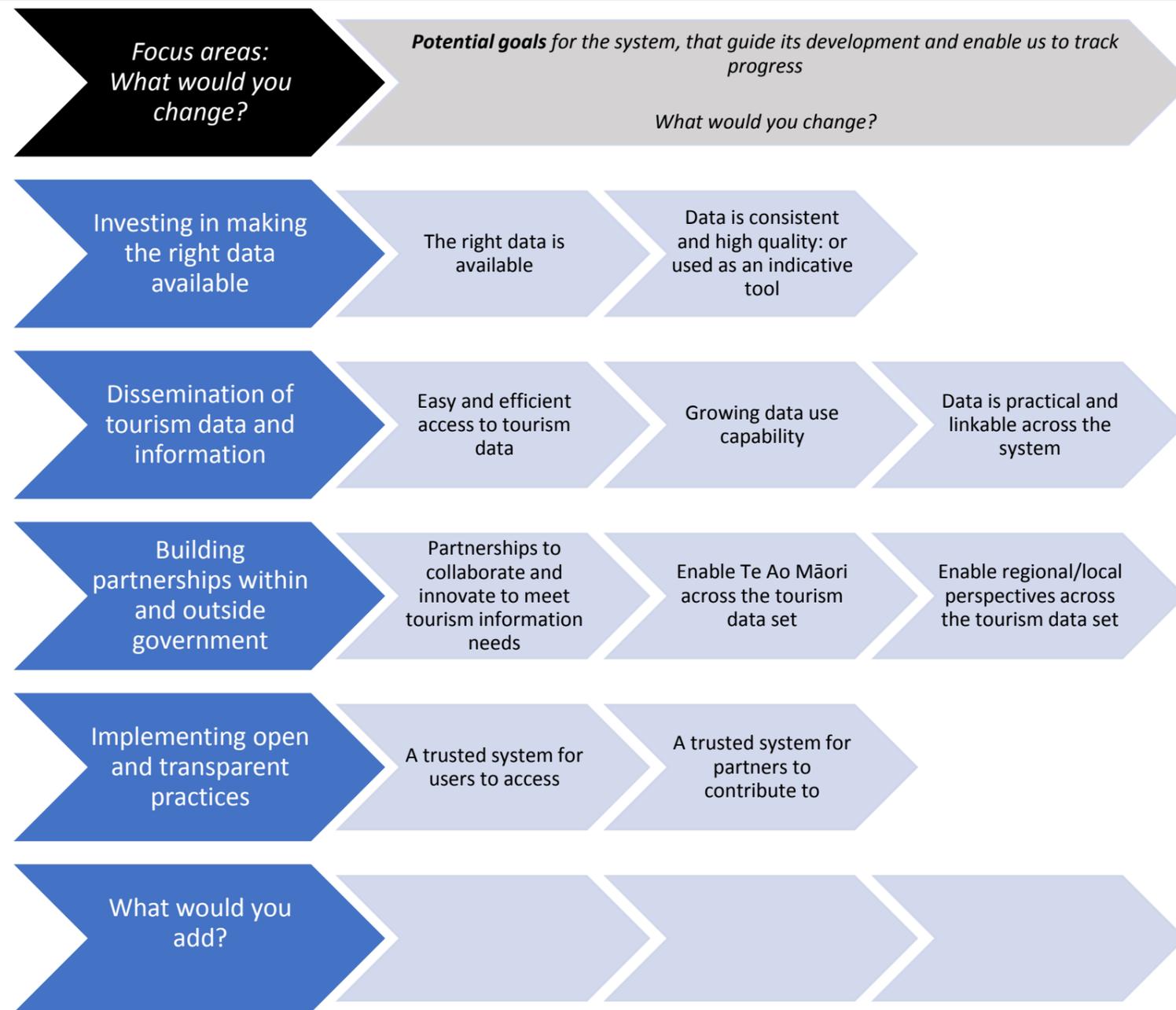
Tourism information and data roadmap/strategy – a conversation starter

This roadmap is a starter for conversation – how would you like to shape it? Does it have all the ingredients for a good system? Would you change or add anything?

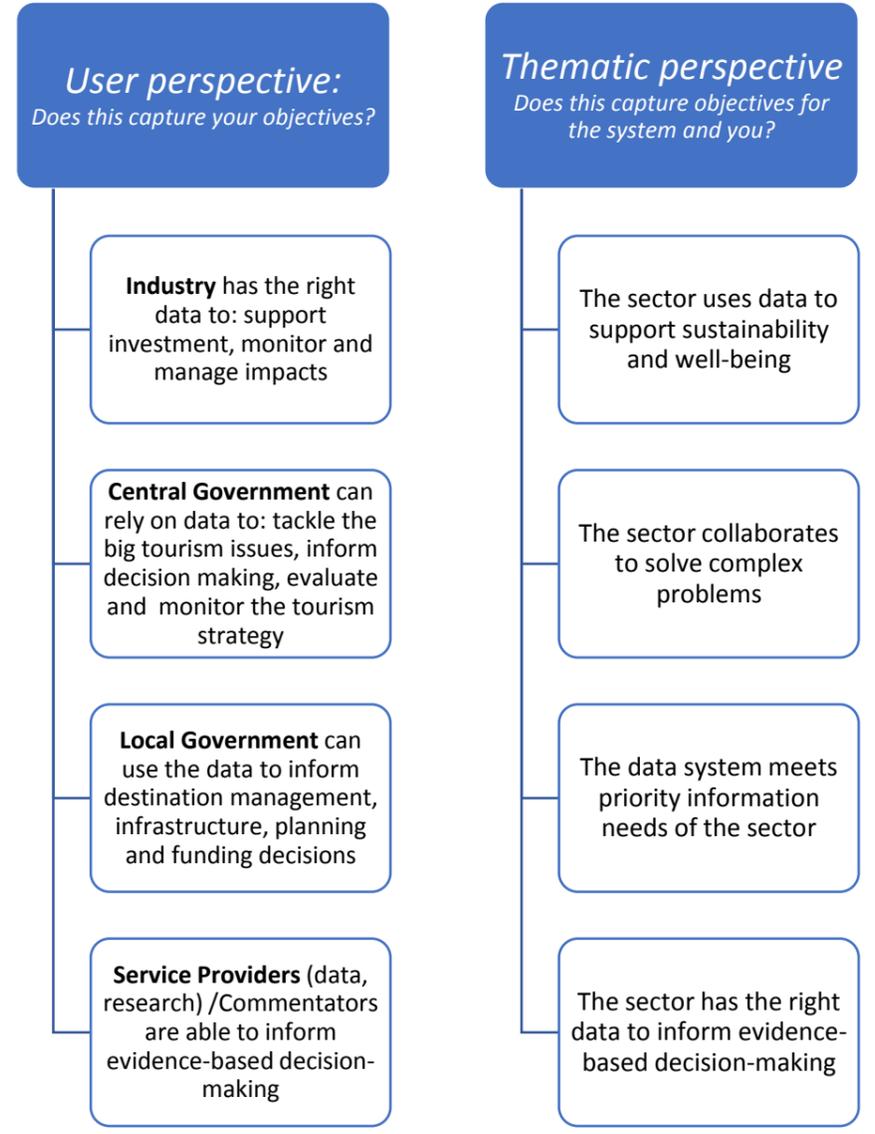
An overarching ambition for tourism information and data, which sets the direction/mandate for governance/leadership/collaboration for example:

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

Would this work for you? Do you have an alternative proposal?



**What objectives/outcomes should the sector adopt?**  
 Which perspective works for you? Would you add or change anything?  
 Note "sector" includes industry, central and local government, and service providers / commentators



## What would a well-functioning system deliver?

### A core set of information to meet sector needs

The working group identified what the needs of the sector are. These are outlined below:

Economic	<ul style="list-style-type: none"> <li>• National and regional/local economic statistics (contribution to Gross Domestic Product (GDP), employment, wages etc)</li> <li>• Tourism business benchmarking (productivity, innovation, wages, etc)</li> <li>• Māori tourism business (identify and benchmark data)</li> </ul>
Environment	<ul style="list-style-type: none"> <li>• Range of indicators including carbon, waste, congestion</li> <li>• Tourism business and visitors' contributions to conservation/environmental action</li> </ul>
Visitors	<ul style="list-style-type: none"> <li>• Volumes, flows, spend, length of stay, satisfaction etc</li> <li>• Preferences (activities, price sensitivity, etc)</li> <li>• By source market (including domestic) and region</li> </ul>
Communities	<ul style="list-style-type: none"> <li>• Regional/Local data on the above categories</li> <li>• Measures of attitudes to visitors/tourism</li> <li>• Measures of actual and perceived impacts of visitors on communities (includes some of the measures above)</li> </ul>

When you consider the above information needs, there are clear gaps in data, as well as quality improvements that would support sector objectives/outcomes. There are four key areas where investment is required.

<b>Key information gaps identified by the working group</b>	
Regional/local insights across most data sets (existing and pending)	There is a significant body of data available on national level statistics, but much of that data is not available at a regional/local level. This is common internationally as well, in fact, the Monthly Regional Tourism Estimates are world leading.
Environmental and social impacts	The positive and negative social and environmental impacts of tourism are not well captured and/or readily available currently. There needs to be a mix of qualitative and quantitative data sources that are consistent over time, and provide both national and local/regional insight. It is important that we have this information in order to measure and improve the sustainability of the sector.
Domestic tourism (visitors)	When compared with data on international visitors, our information on domestic visitors is not adequately captured and/or readily available currently.
Māori tourism (offerings)	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, a unique part of NZ's tourism offering, and tourism offers Māori opportunities to achieve social, economic and cultural objectives.

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**What is your story, as someone using and applying data? What decisions do you need information for?**

**Does this cover the core information needs for the sector? For your organisation? For the organisations and businesses you work with?  
What would you add?**

**What are the challenges in accessing and using this information and/or data?  
Does it exist, is it readily available, is it reliable, is it of sufficient quality/depth?  
What are the views and experiences of your colleagues and the network of businesses and organisations you work with?**

**Do you agree that these are the main gaps in information and data?  
What would you add, why?**

## A package of initiatives to build on the tourism information and data system

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

- Prioritising information gaps (drawing on both the government and industry strategies, and sector information needs)
- The best way to group/implement possible initiatives and;
- The ease and practicality of addressing those gaps.

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. These are divided into groups based on the potential time to implement them (set out on the next page). Many of these projects have been drawn from the [Tourism Data Domain Plan](#).

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

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**Do you support this package? Does this package help address some of the challenges you experience (and may have noted earlier in this document)? Why or why not?**

**What would you add or remove or amend? Why?**

**How would your organisation/networks use/engage/contribute to these initiatives?  
Are there any you or your organisation would like to be particularly involved in?**

<b>Shorter lead-time investments</b>	<b>Regional/local</b>	<b>Environment/ social</b>	<b>Domestic tourism</b>	<b>Māori</b>	<i>Support Yes/No/Maybe</i>
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	

The working group noted that there is strong collaboration in the primary sector.

Collaboration in the primary sector is enabled through industry bodies and legislation.

The [Commodities Levies Act 1990](#) enables sector-wide collaboration by imposing a levy on a specific sector to fund projects that benefit the levy-payers. There are currently around 30 levy orders in place.

The levy is applied at a point in production that minimises administrative costs. Examples include a charge on a key input, at the point of wholesale, per unit of production, or a levy on sales revenue.

The levy usually funds an agency that is governed by the sector (typically, through a board of directors and an AGM).

Funding is used to deliver a wide variety of services that benefit the sector as whole, including research, marketing, and advocacy.

## How do we create a coherent system where all the players contribute?

The tourism sector captures data all along a visitor's journey, as part of business operations, and in the public provision of infrastructure, regulation, and other visitor-related services. [Maps](#) of this data system show where that data is created, and who holds it (using the visitor journey as a perspective).

A more coherent system would leverage all/more of those journey contact points, and enable the data holders to contribute to an overall picture of tourism in New Zealand. In turn, a more comprehensive picture can be created which would provide greater insight for businesses, local government, and central government in decision-making.

To achieve that, we need greater collaboration. The tourism sector has a number of peak bodies that support sector collaboration. Roles vary but include advocacy, some data and research, and collaboration on special projects.

The sector is now seeking to create a stronger tourism data system that will continue to meet the needs of the sector. This requires collaboration covering:

- data-sharing
- resources to source and analyse
- provide accessible data, and/or
- co-funding.

An assessment of the current state, and some options for enhancements are set out on the next page for discussion.

To achieve the ambitions we have heard through the journey to date, we need a sustainable model that can adapt over time, to realise emerging opportunities, changing needs, and steward the system.

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### What is the best way to achieve the ambition for a better tourism information and data system?

**How would/could you, your organization, or your network contribute?  
Do you have examples of success already?**

**The next page looks at the current state of collaboration, and options for improvements. What are your views, your organisation's, and/or the views of the networks of businesses and organisations you work with?**

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How do we create a system where all the players contribute?

	Current state	Options for enhancement	What are your views, your organisation's, and/or the views of the networks of businesses and organisations you work with?
Data collection and provision	Currently data collection and provision occurs via central government (eg. Tourism Satellite Account), peak bodies (eg. Industry Confidence Survey), and commercial platforms (data can be purchased from a range of specialists).	<ul style="list-style-type: none"> <li>• Greater central government role in data collection (Stats NZ/MBIE) and compilation</li> <li>• Increased collaboration between peak bodies and/or commercial providers to create a single set of voluntarily provided data</li> <li>• Central purchase of data</li> <li>• Mandatory data provision</li> </ul>	<p>How could you contribute to data collection and provision?</p> <p>Which options for enhancement would you support? Are there others you are interested in exploring?</p>
Resource	MBIE and Stats NZ are major central resources for data/information. Peak bodies provide some resource, for example the Tourism Sustainability Commitment report. Individual firms and consultants offer some reporting, eg Auckland Airport and Sense Partners developed a sustainable tourism growth monitor. Academics conduct research and publish papers.	<ul style="list-style-type: none"> <li>• Single location for providers to link to/from, hosted by eg Tourism Industry Aotearoa (TIA) or MBIE, to improve ease of access</li> <li>• Co-ordinated voluntary efforts eg interested organisations gather for a few days a year to co-ordinate and share</li> </ul>	<p>How could you share resources?</p> <p>Which options for enhancement would you support? Are there others you are interested in exploring?</p>
Co-funding	Very little sustained co-funding of data currently. Some ad hoc partnerships, for example MBIE and TIA have partnered on some reports.	<ul style="list-style-type: none"> <li>• User-pays or subscription model to access improved data</li> <li>• Peak bodies contribute to a central fund, on behalf of members</li> <li>• Sector levy</li> <li>• International Visitor Conservation and Tourism Levy (IVL)</li> </ul>	<p>What financial contributions would you, your organization, and/or your network be prepared to make?</p> <p>How would you like to make a contribution? Are there limits on what you would be prepared to invest in?</p> <p>What are the challenges with these options? Are there other options you would like to consider?</p> <p>What role is appropriate for the IVL? Would you set limits on the level of funding, or what should be funded by the IVL?</p>
Governance / stewardship	Data governance occurs per data set, not at a system-level Data is governed according to New Zealand legislation and the policies of the entity that collected it Data sharing can be challenging due to discrete data governance arrangements Data coverage is in the hands of many organisations (fragmented)	<ul style="list-style-type: none"> <li>• A system-level governance entity takes a view of the whole tourism information and data system and identifies the data sets necessary for coverage</li> <li>• Data sharing agreements are created to better enable trusted data sharing between agencies and organisations</li> </ul>	<p>How would you, your organization and/or your networks want to be involved in governance/stewardship</p> <p>Are there other options you would like to explore?</p> <p>Or particular things you would like to see as part of a governance entity/mechanism?</p>

Discussions on these points will inform the model for the tourism information and data system. For further discussion on potential forms and functions of governance, see the working paper on [www.mbie.govt.nz/tourismdatahui](http://www.mbie.govt.nz/tourismdatahui).

## How would you like to be involved from here?

The Hui is a significant milestone in our journey towards a stronger tourism information and data system. It will give the sector a clear steer for the next steps. How would you, your organization, your colleagues and your wider networks like to be involved in building that system? Involved in development, part of the delivery, consulted, or kept informed? Are there other parties you want to take particular roles, for example, your peak body or a representative?

The areas of work to progress	Involvement Yourself, your organisation, network, a representative
<p><a href="#">Agreeing with the ambition for the tourism information and data system</a></p> <p>Building on from the direction/feedback provided at the Hui. The ambition/vision/aims for the system will need to be widely supported in order to support collaboration and a system that better meets the sector's information needs.</p> <p>Refer page 9</p>	
<p><a href="#">Delivering an agreed Investment/Action Plan</a></p> <p>The proposal will need to be finalised, and endorsed/agreed.</p> <p>Can you contribute to, or have a particular interest in individual initiatives, and/or the package (resources, data, funding)?</p> <p>Would you officially support the package, as part of any funding/resource applications?</p> <p>Refer page 13</p>	
<p><a href="#">Building an agreed collaborative model</a></p> <p>We hope the Hui will set the direction, and some parameters around a collaborative model for the tourism information and data system. It will need further development in creating the mechanisms, and sponsors/champions to bring it to life.</p> <p>Refer page 15</p>	
<p><a href="#">How will we know the tourism data system is working?</a></p> <p>Finally, to ensure the system continues to deliver and evolve, we may want some regular feedback.</p> <ul style="list-style-type: none"> <li>• Are there some Key Performance Indicators to track?</li> <li>• Would a mix of informal and formal feedback processes be useful?</li> <li>• Are there other ways you would like to review or track delivery?</li> </ul>	

