



This discussion document is based on consultation with a large number of New Zealand tourism stakeholders and tourism operators. It forms part of the Tourism Data Review that is currently underway and will be used to inform decision making around future tourism data collection and analysis.

This document discusses the on-going topics of interest within the tourism industry and identifies the information gaps relating to these topics. The next stage of the process is to find solutions to address these gaps.

This document proposes a number of recommendations and initiatives to address the information gaps in the current tourism data. It is being released to provide an opportunity for feedback to shape the final recommendations of the review.

The document was produced by the tourism data review project team. It records the views of the people spoken to as part of the review to date and the analysis of the project team. It does not aim to represent the views of the Ministry of Economic Development or of the Government.

Specific feedback on the proposed recommendations and initiatives is required by 19 August 2011. The preferred form of feedback is by email to [eileen.basher@med.govt.nz](mailto:eileen.basher@med.govt.nz).

# Tourism Industry

## Common characteristics

Value of tourism to New Zealand

Health of the tourism industry

Global Competitiveness

Return on investment

Sustainability

<b>Marketing and consumption</b>	
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## Specific characteristics

- Access
- Barriers
- Promotional mix
- Type of visitor
- Country of origin
- Global factors

<b>Products and services</b>	<p>Accommodation</p> <p>Transport</p> <p>Attractions</p> <p>Activities</p> <p>Food and beverage</p> <p>Events</p> <p>Travel Agents &amp; Tour Operators</p>
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- Innovation
- Communication & media
- Information technology
- Productivity
- Labour

<b>Resource availability and access</b>	<p>National Parks</p> <p>Cultural</p> <p>Historical</p> <p>Rural</p> <p>Urban</p> <p>Linkages (air &amp; sea)</p>
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- Resource Management
- Security
- Social cost & benefits
- Environmental protection
- Cultural preservation
- Access

# Tourism Industry - Domain Plan

## Introduction

Tourism is a corner stone industry of the New Zealand economy. It is important that policy decisions that impact on it are based on good evidence and that sufficient data is collected to enable monitoring of the impacts on the tourism industry.

The purpose of preparing this domain plan is to achieve clarity and agreement from stakeholders about the main statistical priorities and the strategy for addressing these over the next five to eight years. The domain plan will give:

- A long-term picture of what is required to improve official statistics
- A coordinated plan for addressing issues
- A cross agency approach to long-term priorities.

This domain plan will inform the review of tourism data that is currently underway. The plan will ensure that the data being collected is fit for purpose over the coming years and will meet future needs.

The United Nations World Tourism Organisation defines tourism as

*Tourism is a social, cultural and economic phenomenon related to the movement of people to places outside their usual place of residence. The activities carried out by a visitor may or may not involve a market transaction, and may be different from or similar to those normally carried out in his/her regular routine of life.*

*A visitor is a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. Tourism refers to the activity of visitors.*

*As a demand-side phenomenon, the economic contribution of tourism is approached as the activities of visitors and their impact on the acquisition of good and services. It is also viewed from the supply side - this is the set of productive activities that cater mainly to visitors for which an important share of their main output is consumed by visitors.*

*There are three basic forms of tourism*

- a) Domestic tourism, which comprises the activities of a resident visitor within the country of reference either a part of a domestic tourism trip or part of an outbound tourism trip.*
- b) Inbound tourism, which comprises the activities of a non-resident visitor within the country of reference on an inbound tourism trip.*
- c) Outbound tourism, which comprises the activities of a resident visitor out-side the country of reference, either as part of an outbound tourism trip or as part of a domestic tourism trip<sup>1</sup>.*

For the purposes of this Domain Plan we will only be considering domestic tourism and inbound tourism (within this document, called "International Visitors"). Outbound tourism is out of the scope of this document.

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<sup>1</sup> Taken from International Recommendations for Tourism Statistics 2008, United Nations World Tourism Organisation.

## Tourism Industry Domain Plan Topics – the perennial issues

The table below summarises the topics relevant to the tourism domain (See Appendix 1 for detailed description of each topic) which have been identified during the review. Each topic represents a series of questions of enduring interest, for which data is needed to answer adequately. The table gives a broad assessment of the relative complexity of each topic from a data and statistical perspective, an assessment of priority of the topic and the urgency to meet the information gap that currently exists in the available data.

	Topic and information need summary	Relative complexity <sup>1</sup>	Priority	Need to address gap <sup>3</sup>
1	Value of tourism <i>What value is tourism adding to New Zealand both directly and indirectly?</i>	Low (direct) High (Indirect)	High	High
2	Growth, innovation, productivity and efficiency <i>Are businesses within the tourism industry world class and well managed? How can they become more productive, innovative and profitable?</i>	Med	Med	Med
3	Value of government interventions <i>What is the optimal level and mix of government investment in the tourism industry to generate the most benefit to New Zealand? Is the mix likely to need to change in the future?</i>	High	High	Med
4	Global competitiveness <i>How can New Zealand become more competitive as a visitor destination? What key features could be enhanced and what barriers reduced or removed?</i>	Med	Med	Low
5	Sustainability of New Zealand tourism <i>How sustainable is tourism in New Zealand and how can it be improved to positively impact on New Zealand as a destination?</i>	Med <sup>2</sup>	Low	Low

### Notes

1. Complexity was seen as depending on the amount of interrelated data that is required to answer the questions in this topic
2. While sustainability was listed as medium complexity it was also recognised that little work had been done (not even a good agreed definition in the tourism context) – so potentially this underestimates how complex this area might be.
3. “Need” was rated based on how urgent it was felt to be to address the deficiencies in the current data. For some topics this would require fixing issues, for others it would require developing new data sets.

## Data sources to inform topics

The table below summarises the current data sources and the topics that they are used to inform. Each of the topics the data sources was rated as 1 for the most useful down to 7 for the least useful. For full details on each of these data sources see Appendix 2.

	Topic 1	Topic 2	Topic 3	Topic 4	Topic 5
<b>Key:-</b> 1-3 core data 4,5 some data 6,7 little to no data	Value of tourism to NZ	Business competitiveness	Return on investment for Govt	Global competitiveness	Sustainability
<b>Tourism specific datasets</b>					
Tourism satellite account - TSA	3	7	2	3	5
International travel and migration/ International arrivals - IVA	1	7	1	1	3
Accommodation survey - CAM	2	4	3	5	3
International visitor survey - IVS	1	6	1	3	3
Domestic travel survey - DTS	3	7	2	5	3
Regional visitor monitor - RVM	5	7	5	5	3
New Zealand tourism forecasts	4	5	3	3	4
Tourism industry monitor - TIM	7	4	5	5	7
Convention activity survey - CAS	4	4	3	5	4
Convention delegates survey – CDS	4	5	3	5	4
Monthly hotels benchmarking	4	3	4	5	4
Visitor experience monitor - VEM	5	7	2	1	4
<b>Other Datasets</b>					
Quarterly earnings survey - QES	7	5	5	5	7
Linked employer, employee data - LEED	7	2	2	4	4
Longitudinal Business Database - LBD	7	1	1	4	4
Productivity	7	2	3	4	4
Household Expenditure Survey - HES	5	7	7	7	7
Exchange Rates	4	4	5	4	5
<b>Other Potential Sources</b>					
Electronic Card data	4	5	2	5	7
UNWTO	7	5	5	3	7

Other sources used include:

Other New Zealand Sources	International Data
Cruise Industry Report	WTO
Conservation booking and use	OECD
Hotel salary survey	IMF
International benchmarking of hotels	Pacific Asia Travel Association (PATA)
SPARC recreational data	World Travel and Tourism Council (WTTC)
ACC - accidents in tourism (workforce and tourists)	
Airlines - loadings, revenue, regions	
Annual Enterprise survey	
Ernst Young weighted cost of capital	
FRST projects and ad hoc data	
TNZ market data	
Holiday Parks data	
Active Considerer data	
SABRE Aviation data (connectivity)	

## Prioritisation of topics

The following table provides the ranking in terms of importance of the topic, data availability and the urgency to fill gaps.

	Topic 1	Topic 2	Topic 3	Topic 4	Topic 5
Ranking where 1 is the highest and 5 is the lowest.	Value of tourism to NZ	Business competitiveness	Return on investment for Govt	Global competitiveness	Sustainability
Importance to know and understand topic	1	3	1	3	5
How well the current data meets the topic	1	4	3	4	5
The priority for improving the data available	1	3	2	4	5

## Addressing the information gaps

All of the topics have gaps in data or known issues with the current data. In the following section issues have been identified which are believed to have the greatest impact on investigating the relevant topics.

The recommendations are those that are deemed to have a high impact on the information available on the topic. In addition to these high-level recommendations a number of other recommendations for addressing gaps were identified – all of these are listed in Appendix 3

## **Topic 1 – Value of tourism to New Zealand**

This topic has three levels of information needs – the national level, regional level and sector level. It is also desirable that some future focused data sources are developed. The data sources primarily used in this area are international travel and migration, the International visitor survey (IVS), the accommodation survey, the Domestic Travel Survey (DTS) and Tourism Satellite Account.

National level – the most urgent need is to address the known gaps in the IVS (airport coverage, airport lounge passengers, cruise and education) as well as to improve its reliability (sample size and methodology) – Recommendation 1 – Re-develop the IVS to improve coverage and reliability

Regional level – this is a particular weakness as regions do not have sufficient data to understand the importance (or not) of tourism for their region. To address this based on current data the IVS, DTS and CAM would need to be developed to improve regional understanding. (Alternative data sources also need to be considered). Recommendation 2 – Develop regional estimates of tourism.

Sector data – Currently not much focus has been given to understanding the value of the different sectors within tourism. To allow this to be done tourism sectors in LEED, LBS and QES would be required. Recommendation 3 - Use the Statistics New Zealand business data to develop understanding of the value of the various tourism sectors. The Accommodation Survey currently underestimates the overnight stays by not including serviced apartments and holiday homes. Recommendation 4 – Review the Accommodation Survey population to ensure it reflects the target population.

The issues around the measurement of the indirect value of tourism have not been addressed in the above recommendations.

## **Topic 2 – Business competitiveness**

The primary data sources for this topic are the Longitudinal business database, Linked employer-employee data, Productivity and New Zealand Hotel Association (NZHA) hotel benchmarking.

Very little work has been done in this area within the tourism sectors. However, work has been done on business competitiveness in the manufacturing sectors. Lessons need to be taken from this work and applied to the tourism sectors.

It is likely that the current data available at Statistics New Zealand will be sufficient to begin with; specific collections may be necessary if detailed studies are to be done in small segments.

To get the most out of any studies done in this area it will be important that industry experts are involved to ensure that the data is interpreted correctly.

Recommendation 5 - Develop an annual business scorecard – showing relative sector value, productivity and efficiencies (labour and capital).

## **Topic 3 – Return on Investment for government**

The primary data currently used for this topic is international travel and migration, International Visitor Survey, Longitudinal Business Database, Tourism Satellite Account,

Domestic Travel Survey, Visitor Experience Monitor, Linked employer-employee data and Electronic card data.

Currently there is no agreed method for determining the return on investment for Government. The difficulty is often not with the direct returns but rather the indirect benefits of tourism. The other major issue is how much of the benefit can be attributed to the investment (what would have happened without the investment). Answering this question is an on-going evaluation priority for the government.

In order to measure a return on investment it will also be necessary to combine information from multiple sources. Therefore consistency between collections is very important.

Recommendation 6 – Develop agreed methodology for determining return on investment, including the handling of both direct and indirect returns.

More data is required on the factors that influence decisions to come to New Zealand and visitor spending choices. This means that investment can be prioritised to impact on these areas.

Recommendation 7 – Develop satisfaction and other decision data across appropriate collections. Ensure that the data is aligned and available as other types of data are.

#### **Topic 4 – Global competitiveness**

New Zealand's competitiveness is not just about cost or what we have to offer visitors but is a combination of those factors as well as how New Zealand is perceived, the level of awareness of New Zealand and multiple other factors.

The primary data sources currently used are International Travel and Migration, Visitor Experience Monitor, Tourism Satellite Account, International Visitor Survey, New Zealand Tourism Forecasts and UNWTO.

More analysis is required of current data, plus supplementing that with country or origin specific data that is able to combine current behaviours with attitudes, satisfaction and awareness of New Zealand

This will require more access and analysis of VEM data in combination with IVA and IVS (Rec 7). Collection of more attitude and perception data is required; this may be able to be obtained from social media.

Recommendation 8 – Investigate the use of social media to monitor and provide feedback on global comparisons and competitiveness.

For this information to be effectively used it is important that the information reaches tourism operators in a form that ensures they can understand the implications for their business.

Recommendation 9 – Improve the communication of the various satisfaction measures to all parts of the tourism industry.

In order to maintain global competitiveness it is important to be looking to the future and making investments to develop the industry going forward. Industry forecasts play an important role in this. The forecasts as they stand are widely used to assist in decision making around investment, strategy and planning, and product development.

Recommendation 10 – Re-develop forecasts to improve methodology to provide best and worst case options, incorporate more international information, more information on emerging markets and access to real time bookings

### Topic 5 - Sustainability

This topic has had the least work done on it out of all the topics and so the current data sets are not considered to contain much in the way of primary data.

Work is required first to define the area of interest and what is required to be measured. The current assessment is that it would be a combination of current data plus resource usage data and potentially some environment/conservation data. The other component of this will be around 'brand image' and perception by visitors – this data is likely to be collected from topic 4.

Recommendation 11 – In conjunction with other countries (Australia and Canada) develop a framework for measuring sustainability in the tourism industry.

### Turning recommendations into a prioritised list

For each of the recommendations a specific set of initiatives have been identified. For some of the recommendations a number of initiatives contribute to addressing the identified gap.

Appendix 3 provides a table of the recommendations and the associated initiatives that could address the recommendations. Also further classifications have been added – Improving Understanding and Improving Communication – these are generic areas that span across multiple recommendations and initiatives.

A priority score has been created by placing a value on each topic related to its priority, (Value = 10, Growth = 8, ROI = 10, Competitiveness = 8, Sustainability = 6, Communication = 4 and Understanding = 4). Each initiative has been rated against the impact on the information for each topic – High = 5, Medium = 3, Low = 1. These have been combined to create a priority score.

$$\text{Priority score} = \text{Topic Value} \times \text{Degree of Impact}$$

Based on this scoring system the following table shows the top 20 initiatives. The full sorted list is available in Appendix 4 and consists of 48 initiatives.

Ranking	Priority Score	Initiatives
1	124	Redevelopment of the IVS including, reducing questionnaire length, modular approach, sample of all arrivals, sample size, mode of collection and potential alternative data (options being developed).
2	108	Develop a set of regional tourism indicators to replace the DTS. This might include such things as domestic electronic data transactions, some form of CAM, collection of tourism activity (eg Rotorua activity monitor) and usage of regional infrastructure (conservation estate data).
3	104	The forecasting methodology needs to be improved to contain, updated/modelled actuals for the previous year, regional breakdown for the previous year, forecast for the next 5 years to include best and worst case scenarios, forecast for next 5 years of top 10 markets, case study of selected emerging markets and information from forward bookings.

Ranking	Priority Score	Initiatives
4	102	In conjunction with Tourism New Zealand investigate providing tables of data to allow more exploration of the data for other purposes. Included in this would be combining IVA and IVS-type data (this may be a subset of questions, or delayed release for commercial reasons or registration required to access this dataset).
5	90	Using the Stats NZ Business stats, identify business groupings that have high contributions to the tourism sector and analyse size and growth rates.
6	88	Work with accommodation sector associations to reduce the respondent load of the CAM and improve its use and reliability. This may include such things as working with property management systems to improve linkage, on-line/electronic forms or submission.
7	84	Remove 'international education' from the IVS and work with Ministry of Education and Stats NZ to have an agreed numbers and value series for this segment.
8	80	Review the data currently generated in the IVA on visitor nights/length of stay, the series that are presented, other options and look to include series in release data to increase attention to it.
9	76	Develop an understanding of the business competitiveness of the various tourism sectors and devise a scorecard to measure performance (sector value, productivity and efficiencies – labour and capital). The likely data sources for this would initially be sourced from Statistics NZ – LBD, LEED and AES.
10	72	Investigate how regions could be better informed by the IVS data, without false impression of accuracy of the data (eg release at Territorial Authority (16 regions) and allow access to lower level by expert users).
11	72	Review CAS reporting and data storage. Now that it is in the third year, a time series and year on year changes need to be incorporated and data made available for expert users as a data set.
12	68	Investigate how to produce a tourism flows model every 3-4 years and what data sources can be used that create minimal respondent load.
13	68	Extend life of CAS survey by 3 – 5 years (needs to run until the National Convention Centre is established and at least two years after).
14	60	Develop a cruise passenger (transit only) series – numbers and value.
15	60	Produce TSA every second year with an annual indicator series.
16	60	In alternative year to producing the TSA undertake studies and projects that will further enhance the TSA. These project should include introducing a constant price series, an evaluation to see if components can be published at regional level eg employment, and increase understanding of where the value from tourism is being increased or changed (regions, sectors etc).
17	60	Investigate how cruise ship data can be included in the arrivals numbers (IVA) at time of publication.
18	60	As the arrivals and departure cards move to different modes of data collection use as an opportunity to improve data collection.
19	54	Improve dissemination of the data including feedback to respondents in the form of a benchmarking or performance report
20	54	Develop methodology and understanding of ROI measurements – especially the indirect and hard-to-measure impacts. Would need to be done with other government agencies.

# Appendix 1

## Topic 1: Value of tourism to New Zealand

What is the value of the tourism industry to New Zealand, how can more value be derived out of its growth, and how can it deliver more benefits to New Zealanders?

Understanding the value of visitors and how they contribute to the New Zealand economy helps government and industry better understand New Zealand's key markets and assists marketing decisions, product development, policy decision making and interventions designed to grow the value of New Zealand tourism in the most sustainable manner.

The direct value to New Zealand can be estimated from the number and type of visitors, the number of nights they stay and the amount of money they spend as well as where and what they spend it on. This allows the calculation of the impact of tourism on the New Zealand economy at the macro level.

There are also a number of indirect or spill-over benefits from the tourism industry that also need to be considered when estimating the value of tourism to New Zealand. These include regional employment, sharing the cost of infrastructure (roads, rail, air transport, and recreational facilities), support of conservation and heritage sites, trade relations and influencing skilled migrants.

When considering the value of visitors to New Zealand each type of visitor accesses different ranges of products and services. Depending on the combination of these the value of each type of visitor will vary. Understanding this is important to developing tourism returns for New Zealand.

- How much does tourism contribute to the New Zealand economy?
- What is the tourism sector's contribution to New Zealand compared to other sectors?
- What is the value of different visitor types and markets to New Zealand?
- Understanding of interactions between sub-sectors and comparisons to other sectors
  - What is the value and supply chain?
  - Where is money spent?
  - What are the opportunities to increase spending?
- How much "New Zealand tourism" value is either repatriated or captured off-shore?
- Where can most value and growth be extracted from? (Such as changing visitor type, market, seasonality, events.)?
- How does tourism support the economy other than through direct visitor expenditure and how much?
- How do tourism capabilities interrelate to other areas of government interest such as trade and skilled migration?
- Can indirect benefits of tourism to communities be quantified and maximised?
- How do tourism dollars flow around the New Zealand economy?
- What is the value of tourism to New Zealand regions?
- What do visitors do in New Zealand and what are the high-value activities, and who are the high-value visitors?
- What is the value of tourism sub-sectors?.
- What is the value of cultural/ethical tourism, such as Maori, eco-tourism etc
- What are tourism infrastructure needs?
- What is the value of the 'brand' developed for tourism work with for exporting and high tech business and as a primary producer?
- Do tourism relationships encourage trading relationships and what is the impact of FTA's?
- How does tourism impact on regional development and regional employment?

- Are the skills developed in the tourism industry transferable to other industries?
- How does the level of employment impact on the levels of employment in different sectors (Do they soak up excess labour or cause labour to be transferred from other sectors during peaks)?
- Does tourism assist in attracting skilled migrants?
- What is the impact of educational tourism?
- What is total value of tourism in terms of its contribution to significant government-owned infrastructure (eg conservation estate, transport)?
- How much does tourism impact on the New Zealand labour market?

## **Topic 2: Growth, innovation, productivity and efficiency**

In order to have an effective and efficient tourism industry it is important that the firms that make up the industry are high performing and employ world-class practices. That means that they are constantly looking to grow, improve their productivity and innovate to remain competitive.

How productive the tourism sector is and how profitable it is depends on the firms within it. Given New Zealand's limited resources it is important that all sectors improve both their productivity and profitability to generate an increase in the standard of living in New Zealand. It is therefore important to understand how productive the key sectors are within tourism, including accommodation, transport, activities and attractions, cafes and restaurants. Also how efficient is the infrastructure – such as training and education, information and communication technology, local services, media, road and rail – for the industry?

Tourism is not a traditional sector – attention must be given to both the horizontal and vertical linkages within the economy. It is made up of the provision of products and services from a range of sectors for a particular purpose – tourism (both international and domestic). Therefore to understand the productivity and efficiency requires an understanding of a large number of sectors across New Zealand.

- How can higher yields be obtained in the tourism sector?
- How can tourism businesses be more efficient?
- What market segments should we be targeting to derive the best growth and value?
- How important is innovation in the tourism industry?
- Can you increase innovation in tourism industry and its wider adoption?
- How many people are employed in tourism? What skills do they have and where are they located?
- How can we lift tourism productivity?
- What are the barriers to improving productivity?
- What are the salaries, wages and profitability in the various tourism sectors?
- What prevents businesses expanding and/or going offshore?
- How important is the exposure of New Zealand firms to international market competition to drive adoption of new/best practices?
- What is the rate of investment in the tourism industry – capital, labour and R&D?
- What is the profitability and return on investment in tourism compared to other sectors?
- Are tourism institutional arrangements efficient?
- Are firms keeping up with global trends?
- How do tourism firms compare both nationally and internationally on key performance indicators?
- Are firms part of or linked to global supply and value chains?
- Are firms accessing support from non-tourism specific sources e.g. New Zealand Trade and Enterprise for business development, Ministry of Science and Innovation for research and

development funding and support and Department of Labour for employment-related issues?

### **Topic 3: Return on investment for government interventions**

Is the overall level and mix of government spending optimal and are there other mechanisms that could be used to achieve the same or better results?

The government spends over \$100m per year on encouraging tourism. This is split between direct spending on destination marketing, border control, events, and research as well as indirect spending through conservation, transport, culture and heritage (including museums and galleries). Is this money well spent and how much value is derived from the various forms of intervention and would the money be better spent elsewhere?

In order for the government to optimally allocate funding to the various interventions it is important that it is able to determine the return on investment (or the negative of not investing), the potential impact on the type of tourists attracted and the impact that it will have on the growth, profitability and development of the sector.

- What is the ROI for the government on overseas destination marketing?
- What is an acceptable ROI on any investment?
- How do we know whether the tourism sector is making progress?
- Is government intervention in tourism helping or hindering marketing outcomes?
- Is investment in tourism infrastructure adequate?
- What is the impact of domestic tourism on the ROI?
- Are government services for businesses being accessed or made available across the full range of types of tourism businesses?
- Does government intervention (e.g. Tourism New Zealand) shelter New Zealand businesses from international competition and therefore limit competitiveness?
- Can the New Zealand government relationship with Australia and the Pacific Islands be leveraged to increase tourism?
- Does tourism drive investment or does the value of tourism come from capitalising on assets?
- How can the indirect benefits be valued and become part of the calculation of the ROI?
- Where does the government need to invest now in order to be ready for how the market will be in 3-5 years?

### **Topic 4: Global competitiveness**

In order for New Zealand to attract visitors it needs to be competitive compared to other countries. To enhance this competitive edge it is important to understand the factors that make New Zealand competitive and influence the decision to come to New Zealand. To do this the key elements of our tourism product and how they can be improved need to be understood. The role of Maori and New Zealand culture needs to be understood both as part of both the decision-making process and level of satisfaction in the visitor experience.

To do this who and what New Zealand is competing against for a share of the international travel market must be identified. The factors impacting on the decision-making of New Zealand visitors need to be identified. This includes controllable factors (such as perception, quality, and experiences on offer) and factors outside New Zealand's control, such as the price of oil, exchange rates and weather.

It is important to understand what the stages of the decision-making process of the international traveller are and how it is possible to influence the outcomes. This would allow decisions to be made that might positively influence the outcome.

The barriers to visiting New Zealand in terms of making arrangements, travelling and once they are in New Zealand need to be identified and understood in order to decide if they can be reduced, mitigated or removed.

An understanding is needed of the trade-offs between barriers – entry processes and visas and the need to maintain and enhance border security. The current government regulated barriers are potentially capacity barriers within the tourism sector. These include flights into New Zealand, internal transportation, access of locations, level and the quality of service available.

Having attracted visitors to New Zealand are their expectations being met or exceeded by the experience? Potential areas to be looked at include provision and quality of infrastructure, products and services available, education and training of suppliers and quality standards.

- How resilient or responsive is New Zealand tourism to economic and environmental shocks, oil price changes, changing demographics, changing markets and exchange rates?
- Is New Zealand competitive in a global market? Given the small share of the total market what are the niches that New Zealand competes in? Are these niches changing over time?
- What is New Zealand's relative competitiveness?
- What is the role of the Maori and New Zealand culture in our competitive positioning?
- What macro effects impact visitor spend and how?
- What are the benchmarks for New Zealand's performance?
- Quality and standards
  - What regulations and standards are required to meet the changing visitor mix?
  - Does the existing staff training meet the quality standard needed?
- What are the important features of the New Zealand brand – how does it perform compared to competitors?
- Is the tourism product meeting the visitor demand and expectation?
- Are tourism products competitive, adaptable, and innovative and able to meet future needs?
- Who are our competitors and on what aspects?
- Are visitors' preferences or interests changing?
- What are the key trends we need to be preparing for over the next 5, 10, 25 years?
- How efficient are New Zealand's tourism supply/value chains?
- Is New Zealand tourism able to maintain competitiveness in a changing international market?
- Is there sufficient connectivity with the international travel market?
- Are there regulatory barriers impacting visitor experience?
- What is the impact of taxes/charges on the decision to travel?
- Are visitors protected through consumer policy and other legal/official aspects of their experience?
- How accessible is New Zealand?

## **Topic 5: Sustainability of New Zealand tourism**

How sustainable is New Zealand tourism in terms of impact on the environment, competition, use of natural resources, generation of greenhouse gases and alternative uses of resources? Also how sustainable are businesses in terms of ownership, skill supply, cultural and heritage development and changing work practices? How important is this as an element of the New Zealand tourism product and for New Zealand's economic growth? How will this impact on the future of New Zealand tourism?

If tourism is to continue to be a key long-term contributor to the New Zealand economy it is important that it uses resources in a sustainable way and that the consumption provides a better return to New Zealand than other potential uses of these resources.

The use of natural resources needs to be balanced between preservation, conservation and use. Questions include, how much access should be granted to various National Parks, for what purposes should they be used and how to raise awareness of the natural environment while preserving for the future. Decisions made in this area will impact on the ability to provide different experiences to tourist.

As well as the impact on natural resources the more general environmental footprint needs to be considered. How can tourism activities be more environmentally friendly by reducing carbon emissions, energy consumption and rubbish.

- Does New Zealand use natural resources efficiently and effectively?
- What are the environmental effects of tourism in New Zealand?
- How can/should government manage negative impacts of tourism on New Zealand?
- How can we reconcile international tourism growth with impending international environment commitments?
- What is the best sustainable use of New Zealand's natural resources (both economically and environmentally)?
- How can the carbon emissions of the transport industry be reduced or mitigated?
- How can the impact of additional visitors such as energy consumption, rubbish generation, water usage be reduced?
- What is the best value use of our natural resources?
- Given the changing demographics of the labour market, will tourism be sustainable in the future?
- Can tourism attract the capital and other resources it needs when faced with alternative uses for those resources in the future?

## Appendix 2

### Tourism Data sources

#### Purpose

The purpose of this is to provide an overview of the tourism statistics and related data sets that are available from the Tourism Strategy Group, Statistics New Zealand and other external agencies. This will be used to inform the use within policy and research areas identified and as part of the gap analysis to construct options going forward for the various data sets.

**Summary Table** – Direct tourism data – on going collections

Name	Abbr.	Publishing Agency	Contributing parties	Comments
Tourism Satellite Account	TSA	Statistics NZ	Ministry of Economic Development	No data collected as part of this
International Travel and Migration		Statistics NZ	Ministry of Economic Development, Department of Labour, Ministry of Transport	Called International visitor arrivals (IVA) when on tourism website
Accommodation Survey		Statistics NZ	Ministry of Economic Development	Called Commercial Accommodation Monitor (CAM) on tourism website
International Visitors Survey	IVS	Ministry of Economic Development	Covec collect data	
Domestic Travel Survey	DTS	Ministry of Economic Development	OCIS collect data	
Regional Visitor Monitor	RVM	Ministry of Economic Development	Angus & Associates collect data	Finished at the end of the June 2011 quarter
New Zealand Visitor Forecasts		Ministry of Economic Development	Covec produce forecasts	Uses existing data sources and modelling
Tourism Industry Monitor	TIM	Ministry of Economic Development	Covec collect and analyse data	
Convention Activity Survey	CAS	Ministry of Economic Development	CINZ, Regional convention Bureau, plus 10 regions. Covec collect and analyse data	2 more regions joined in July 2011
Convention Delegates Survey	CDA	Ministry of Economic Development	CINZ, Regional convention Bureau, plus 10 regions Covec collect and analyse data	2 more regions joined in July 2011
“Monthly Hotels Benchmarking survey”		New Zealand Hotels Council	Covec collect and analyse data	Industry funded and owned survey
Visitor Experience Monitor	VEM	Tourism New Zealand	TNS Conversa collect and analyse the data	

**Summary Table** – Contains tourism data as a subset – on going collections

Name	Abbr.	Publishing Agency	Comments
Quarterly Earnings and employment Survey	QES	Stats NZ	Employment via ANZSIC
Linked employer, employee data	LEED	Stats NZ	Employment variables by ANZSIC – only high level information published. More detailed information and analysis available via data laboratory
Longitudinal Business Database	LBD	Stats NZ	Access via data lab. Information on all New Zealand businesses – primarily sourced from AES, tax, business frame and other business data sets. Industry analysis would need to be via ANZSIC
Productivity		Stats NZ	Available via sector
Household Expenditure Survey	HES	Stats NZ	Contains spending by NZHEC classification
Exchange Rates		Reserve Bank NZ	
Prices data		Stats NZ	
International data		OECD	
Census		Stats NZ	
Household Labour force Survey	HLFS	Stats NZ	
Cultural Experience Survey 2002		Stats NZ	One off survey conducted in 2002 in conjunction with the Ministry of Cultural Affairs

**Summary Table** – Key published research reports on tourism

Name	Author	Date	Funding/Commissioned by	Data Sources
Measuring the Impacts of Tourism Marketing on Visitor Numbers	Counterbalance Research & Evaluation	March 2011	Ministry of Economic Development	IVA, Economic data, custom IVS & VEM questions, on line tools and metrics
Evaluation of International Tourism Marketing Joint Venture Partnerships 2009/10	Ministry of Economic Development	Dec 2010	Ministry of Economic Development, Tourism New Zealand, Regional Tourism Organisations	International Visitor Arrivals, International Visitor Survey, Commercial Accommodation Monitor, Sabre Airport Data Intelligence (ADI)
New Zealand RTO Benchmark Survey for YE June 2010	Destination Planning/ Covec	Dec 2010	Regional Tourism Organisations , Ministry of Economic Development	RTO data – specific collection
New Zealand Cruise Industry Study	Market Economics Ltd	Sept 2010	Cruise NZ Inc, Ministry of Economic Development, Tourism New Zealand.	Majority of data collected specifically for the study. National numbers from Stats NZ
Domestic Tourism Segmentation Research	Angus & Associates, The Knowledge Warehouse, Tourism	April 2010	Ministry of Tourism	Domestic Travel Survey, International Travel & Migration, Electronic Card transaction data, Regional Visitor Monitor,

Name	Author	Date	Funding/Commissioned by	Data Sources
	Resource Consultants			Tourism Flows Model plus specific Qualitative research
Expenditure by Holiday Park Visitors	Angus & Associates	Feb 2010	Holiday parks Association of NZ	Collected own data
International Convention and Exhibition Centre Feasibility Report	Includes report by Horwath HTL	Sept 2009	Auckland City Council, Ministry of Tourism, Ministry of Economic Development	IVA – purpose of visit, CAS, other data collected for this purpose
Economic Value of Visitors to New Zealand – developing indicators	Tourism Resource consultants	May 2009	Ministry of Tourism	Used IVA, IVS and RBNZ data
The impact of adverse events on New Zealand Tourism	Covec	April 2009	Ministry of Tourism	IVA (from various markets) , GDP of international markets, various international economic indicators, Departure cards, DTS,
Evaluation of the effectiveness of sections of Tourism New Zealand's marketing programme		Oct 2008	Ministry of Economic Development and Ministry of Tourism	Share of voice data, TNS tracking data, RVM, website metrics, IVS and IVA. GDP & exchange rate data
Economic Impact of the Americas Cup	Market economics Ltd	Aug 2008, Oct 2003, Aug 2003, Sep 2002, Oct 2000	New Zealand Trade and Enterprise	Mainly economic data
Yield Research (12 Sector reports plus summary.)	Lincoln University	Nov 2007	Ministry of Tourism and the Tourism Industry Association, with support from Tourism New Zealand	Wide range of data
Exchange Rates and Tourism Relationships in New Zealand	NZIER	July 2007	Ministry of Tourism	Exchange rates, IVA, IVS
Tourism and Recreation in New Zealand's natural environment	Kay Booth & Associates	Mar 2007	Ministry of Tourism	
New Zealand Domestic and Outbound Travel Patterns	Covec	Nov 2006	Ministry of Tourism	DTS, International Travel and Migration, comparison with Australia and UK. Prices data
The Economic Impact of the 2005 DHL Lions Series on New Zealand	Covec	Oct 2005	Ministry of Tourism, Tourism Auckland, Auckland City Council and Tourism Dunedin	Specific data collection using on line data collection,
Maori in Tourism (Three reports covering Barriers &		Dec 2004, Oct	Ministry of Tourism	Census, IVS, DTS, Household labour force survey (HLFS), Business

Name	Author	Date	Funding/Commissioned by	Data Sources
Opportunities, Demand and Measurement of Maori in Tourism)		2004, July 2001		Frame, and Cultural Experience Survey 2002
Waters of National Importance for Tourism	Ministry of Tourism	Aug 2004	Ministry of Tourism	IVS, DTS (activities data) and numbers
Review of Core Tourism Statistics 2002	Ministry of Tourism	Dec 2002		

## Statistics New Zealand information sources

Statistics New Zealand is the National Statistical Office for New Zealand; as such it generates statistics that are of national relevance to New Zealand. Some of these collections have specific application to the tourism sector; others contain data with the tourism sector being a sub population. The sets listed below are the current key data sets for tourism.

### Tourism Satellite Account (TSA)

The Tourism Satellite Account is an internationally recognised framework for deriving the value of the tourism sector to the National Accounts.

Lead Agency	Statistics New Zealand
Objective	To provide information about the contribution of tourism to the economy and analysis of the New Zealand tourism industry.
Dissemination	Website – Commentary and data available on Statistics NZ and Ministry of Tourism Research Programme plus publication available in both hard copy and pdf. (Data on Stats NZ website is also via info share allowing tables to be customised)
	Annual
Key information	Value added of tourism characteristic and tourism-related industries; direct tourism value added; the tourism component (tourism ratio) of the tourism value added; total (direct and indirect) value added generated per dollar of tourist demand; total tourism expenditure; wages and operating surplus resulting from direct tourism demand; tourism expenditure by product type; direct and indirect employment; investment in tourism industries.
Status	On-going survey/statistic. Tier 1 Statistic
Geographic coverage	Whole of New Zealand
Collection type	No direct collection. Data sourced from - Tertiary education data, Domestic travel survey (DTS), International visitor survey (IVS), Accommodation survey, Annual enterprise survey (AES), Retail trade survey, Survey of English language providers, GDP.
Start date	Jun 1998, annually produced since 2004
Funding agencies	Tourism Research and Evaluation Group, MED

International Travel and Migration and International Visitor Arrivals - IVA

Lead Agency	Statistics New Zealand
Objective	To collect immigration and travel related information on everyone crossing New Zealand's border.
Dissemination	<p>Website - Statistics New Zealand and Tourism Research. Available as releases and info share on the Statistics New Zealand website.</p> <p>Available as release and online data base on Tourism research group website.</p> <p>The IVA is published two days after the International travel and migration data and contains additional information on the characteristics of visitor arrivals.</p>
Frequency	Collected continuously major output monthly. Also weekly and annually releases are made.
Key information	<p>International travel and migration - tables on:</p> <ul style="list-style-type: none"> <li>• number of arrivals and departures by passenger type</li> <li>• net migration</li> <li>• seasonally adjusted arrivals and departures</li> <li>• overseas visitor arrivals by country of last permanent residence</li> <li>• New Zealand resident short-term departures by country of main destination</li> <li>• permanent and long-term migration by country of last/next permanent residence</li> <li>• permanent and long-term migration by citizenship</li> </ul> <p>International visitor Arrivals (IVA)</p> <p>The report contains detailed tables and graphs of monthly and annual data, showing the number and characteristics of visitor arrivals. Visitor arrivals are defined as overseas residents arriving in New Zealand for a stay of less than 12 months. Most of the data is presented by country, for a selection of major source countries of visitors to New Zealand</p> <p>Citizenship/nationality; age; sex; occupation; period; class; purpose of travel; length of stay/absence; country of main destination; country of last permanent residence; country of next permanent residence; port of arrival/departure; port of entry and departure; overseas port; New Zealand region; airline carrier; air route; travel mode.</p> <p>IVA Weekly</p> <p>The latest available weekly and four-weekly information is provided for short-term overseas visitor arrivals and short-term New Zealand resident departures. Data are published for the 10 main source and 10 main destination countries, as well as for regions and totals.</p>
Status	On-going survey/statistic. Tier 1 Statistic
Geographic Coverage	Whole of New Zealand – all international ports
Collection Type	Compulsory completion when entering New Zealand via airport or seaport. (Exception is cruise passengers in transit).
Start date	1975, series available from June 1998 on line
Funding agencies	Department of Labour, Statistics New Zealand, Ministry of Transport, Tourism Research and Evaluation Group, MED

Other key users	Statistics NZ – for population estimates and migration information Department of Labour – Ministry of Transport -
Producing agency	Statistics NZ process and release information, data collected by NZ Customs Service

#### Commercial Accommodation Monitor (CAM)

Lead Agency	Tourism Strategy Group, MED
Objective	To collect statistical data on the supply and demand of commercial short-term accommodation (less than one month) - (hotels, motels, backpackers, hostel, and caravan and camping grounds).
Dissemination	Website - Statistics NZ and Ministry of Tourism Research Programme
Frequency	Monthly
Key information	Monthly data on guest nights; occupancy rates (excluding parks/camping grounds); capacity; number of establishments; average stay by accommodation type.  Data can be disaggregated by regional council, territorial authority or regional tourism organisation areas and by accommodation type.
Status	On-going survey/statistic. Removed from Tier 1 list in 2011 version.
Geographic coverage	Whole of New Zealand
Collection type	Compulsory monthly survey for GST registered commercial accommodation with an annual turnover of \$30,000 or greater (Response rate between 75 – 85 %)
Start date	July 1996 – time series available on line
Funding agencies	Tourism Research and Evaluation Group, MED
Producing agency	Statistics New Zealand

### **Tourism Strategy Group, MED**

The Tourism Strategy Group collects processes and disseminates a number of data sets targeted at the Tourism Industry.

#### International Visitor Survey (IVS)

Lead Agency	Tourism Research and Evaluation Group, MED
Objective	To examine itineraries, characteristics, behaviour and expenditure of international visitors to New Zealand.
Dissemination	Website - quarterly release, data available in tables and via online data base.
Frequency	Continuous collection, quarterly release

Key information	Visitor numbers by country; purpose; itinerary; transport type; age groups; activities/attractions; length of stay; countries visited en route; intention to return; key places visited; nights spent by area; accommodation type; expenditure by country; purpose of visit.
Status	On-going survey/statistic. Tier 1 Statistic
Geographic coverage	Selected international in New Zealand - Auckland, Wellington and Christchurch airports
Collection type	Voluntary (sample size 5,000 per year) – face to face interviews conducted at the departure gate.
Start date	Jan 1997 -
Funding agencies	Tourism Research and Evaluation Group, MED and Statistics NZ
Other Key Users	Statistics NZ – information for Balance of Payments and GDP TNZ -
Producing agency	Data collected by Covec and methodology and processing done by Tourism Research and Evaluation group, MED.

#### Domestic Travel Survey (DTS)

Lead Agency	Tourism Research and Evaluation Group, MED
Objective	To examine itineraries, characteristics, behaviour and expenditure of domestic visitors.
Dissemination	Tourism research website – quarterly release and data via online database
Frequency	Continuous Collection, released quarterly
Key information	Expenditure by trip type; reason for visit; number of trips by trip type; transport type; region of origin; number of nights accommodation by type and region.
Status	On-going survey/statistic. Tier 1 Statistic
Geographic coverage	Whole of New Zealand
Collection Type	Voluntary (sample size 15,000 telephone interviews per year using random dialling)
Start date	Jan 1999
Funding agencies	Tourism Research and Evaluation Group, MED
Producing agency	OCIS collects the data and the Tourism Research and Evaluation Group, MED is responsible for methodology and processing the data.

## Regional Visitor Monitor (RVM)

Lead Agency	Tourism Research and Evaluation Group, MED
Objective	To collect information on international and domestic visitors, motivations, expectations, travel planning, patterns of activities, satisfaction and expenditure of visitors to regions.
Dissemination	Website - Tourism Research, release and online database.
Releases	Quarterly. Only national benchmark results are currently publicly available through Ministry of Tourism's website. Each participating RTO holds the results for their region and it is up to them whether or not this information is shared.
Key information	Motivations, expectations, satisfaction, citizenship/nationality; age; sex; purpose of travel; length of stay, activities, expenditure in region.
Status	Pilot, on-going survey/statistic not confirmed yet
Geographic coverage	6 RTO regions in New Zealand (Auckland, Rotorua, Wellington, Christchurch, Dunedin and Queenstown)
Collection Type	Voluntary (sample size 1200 per region per year) – in person selection, completed via an off line e questionnaire at sample site, quota split via male/female and domestic/international.
Start date	Oct 2005, end date June 2011.
Funding agencies	Tourism Research and Evaluation Group, MED plus 6 RTOs
Producing agency	Questionnaire – Silver stripe, Collection - Angus & Associates, processing and release Tourism Research and Evaluation group, MED and RTO's.

## New Zealand Tourism Forecasts

Lead Agency	Tourism Research and Evaluation Group, MED
Objective	To forecast national and regional tourism activity by international and domestic visitors.
Dissemination	Tourism research website, booklet, pivot tables
Frequency	Annually
Key information	National forecasts for inbound arrivals, nights and expenditure for 28 markets, domestic trips, nights and expenditure, short-term departures to the 10 largest outbound markets. Regional forecasts of international and domestic visits, nights and expenditure for 29 RTOs by purpose of travel.
Status	On-going statistic
Geographic coverage	Whole of New Zealand
Collection Type	Data is modelled using IVA, IVS and DTS, and then moderated by using a panel of industry experts.

Start date	1999
Funding agencies	Tourism Research and Evaluation group, MED
Producing agency	Covec Ltd contracted by the Tourism Research and Evaluation Group, MED

#### Tourism Industry Monitor

Lead Agency	Tourism Research and Evaluation Group, MED
Objective	To provide individual tourism businesses with regular, up-to-date information on the performance of the tourism sector, including the outlook for the next three months.
Dissemination	Tourism Research website – release (no data sets). Report to businesses that complete the survey.
Frequency	Started monthly now quarterly.
Key information	Change in demand and profitability for previous period, expectations for next period, factors limiting performance, business confidence. Some splits by region and accommodation type.
Status	Subject to change
Geographic coverage	New Zealand wide
Collection Type	Voluntary - internet based survey to known tourist providers including accommodations, hospitality, transport operators, attraction and activity providers and booking/wholesale agencies.
Start date	March 2009
Funding agencies	Tourism Research and Evaluation Group, MED
Producing agency	Covec – collection and processing, Tourism Research and Evaluation Group publish summary.

#### Convention Activity Survey

Lead Agency	Tourism Research and Evaluation Group, MED
Objective	To monitor and benchmarks the performance of professional conferencing and meeting venues in New Zealand
Dissemination	Tourism Research website – release (no data sets). Benchmarking report to businesses that complete the survey.
Frequency	Quarterly.
Key information	Number of events hosted - single and multiday, number of delegates, region, type of event, customer type, origin of delegates (domestic,

	Australian and other)
Status	Part of Convention Research Program
Geographic coverage	10 regions - Auckland, Rotorua, Hawkes Bay, Taupo. Manawatu, Wellington, Nelson, Canterbury, Dunedin and Queenstown.
Collection Type	Voluntary - internet based survey to venues known to host meetings, incentives, conferences and exhibitions.
Start date	July 2009
Funding agencies	Tourism Research and Evaluation Group, MED holds the contract with Covec.  Other agencies – Conventions and Incentives New Zealand (CINZ) and ten Convention Bureaux New Zealand (Auckland, Rotorua, Hawkes Bay, Taupo, Manawatu, Wellington, Nelson, Canterbury, Dunedin and Queenstown.
Producing agency	Covec – collection and processing, Tourism Research and Evaluation Group publish summary.

#### Convention Delegates Survey

Lead Agency	Tourism Research and Evaluation Group, MED
Objective	Collect expenditure data from multi-day delegates.
Dissemination	Tourism Research website – release (no data sets).
Frequency	Annual.
Key information	Number of nights, customer type, type of event, origin of delegates (domestic, international, spend by activity type, )
Status	Part of Convention Research Program
Geographic coverage	Delegates from 10 regions - Auckland, Rotorua, Hawkes Bay, Taupo. Manawatu, Wellington, Nelson, Canterbury, Dunedin and Queenstown.
Collection Type	Voluntary - internet based survey to delegates known to have attended a meeting, incentive, conference or exhibition identified in the CAS.
Start date	July 2009
Funding agencies	Tourism Research and Evaluation Group, MED holds the contract with Covec  Other agencies – Conventions and Incentives New Zealand (CINZ) and ten Convention Bureaux New Zealand (Auckland, Rotorua, Hawkes Bay, Taupo. Manawatu, Wellington, Nelson, Canterbury, Dunedin and Queenstown.
Producing agency	Covec – collection and processing, Tourism Research and Evaluation Group publish summary.

## Other Tourism sector specific collections

### Covec

Covec is a privately owned company that specialises (amongst other things) in tourism and events using core skills of economics, research, forecasting and public policy. They are a supplier for the Tourism Research and Evaluation group on a number of surveys.

In this capacity they do work for a number of organisations and produce the following information.

#### New Zealand Hotel Council

Lead Agency	New Zealand Hotel Council
Objective	To monitor and benchmark the performance of NZHC members in terms of capacity, occupancy rates, average daily rate and market share by sector and demographic (by share of guest nights)
Dissemination	Available to NZHC hotel members and corporate subscribers. Available on NZHCstats.co.nz website (members login required)
Frequency	Monthly collection of previous month's occupancy, average daily rates, revpar and market sector data. Data released monthly on nzhcstats.co.nz website (member login required)  Annual collection of Operating data including – Revenue, expenditure, Staff numbers, Market demographics public release (released annually on nzhc.org.nz website (member login required) and also presented annually to the eight NZHC regions.
Key information	Monthly data on guest nights; occupancy rates, capacity; number of establishments and room rates. Other benchmarking data is collected which is fed back to the hotels as benchmarking reports. All NZHC reports are available to NZHC Hotel and Corporate members via the two NZHC websites. NZHC data is available to non-members however these are charged at commercial rates.
Status	All monthly NZHC hotel member data is automatically fed into the Commercial Accommodation Monitor.
Geographic coverage	8 regions (Auckland, Rotorua, Central Park (Taupo, Tongariro, Napier and GIs borne), Wellington, Nelson/Marlborough, Christchurch, Dunedin and Queenstown.
Collection Type	Voluntary - internet based survey to hotel members of the NZHC...
Start date	July 2000
Funding agencies	New Zealand Hotel Council
Producing agency	Covec – collection and processing,

## Tourism New Zealand

As the marketing agency for New Zealand, Tourism New Zealand runs surveys to monitor its campaigns.

### Visitor Experience Monitor

Lead Agency	Tourism New Zealand
Objective	To monitor the visitor experiences of international visitors to New Zealand to provide information to develop products and services that better meet their expectations.
Dissemination	Quarterly to Tourism New Zealand and annually on via the internet
Frequency	On-going collection, quarterly report to TNZ
Key information	The visitor experience monitored by seven areas: accommodation; food and beverage; internal transport; activities; i-SITE visitor centres; environment; and safety.
Status	On-going, content currently under review.
Geographic coverage	The research surveys visitors from seven key markets - Australia, the UK, US, Japan, South Korea, China and Germany.
Collection Type	On line survey – email addresses collected from international departure and at various tourism activities
Start date	
Funding agencies	Tourism New Zealand
Producing agency	TNS Conversa

**Appendix 3 - Table of Recommendations and associated potential initiatives**

Recommendation	Primary topic	Initiatives	Impact on Topic			Generic Improvements		Priority Score				
			Value	Growth etc	ROI	Competitiveness	Sustainability		Communication	Understanding		
1	Redevelop the IVS to improve coverage and reliability at both the National and Regional levels	Value	Redevelopment of the IVS including - reducing questionnaire length, modular approach, sample all arrivals, sample size, mode of collection, potential alternative data (options being developed)	High		High	Med				124	
			Remove 'international education' from the IVS and work with Ministry of Education and Stats NZ to have an agreed numbers and value series for this segment	med		med	med					84
			Develop a Cruise passenger (transit only) series – numbers and value	med		med						60
			Investigate how regions could be better informed by the IVS data, without false impression of accuracy of the data (eg release at Territorial Authority (16 regions) and allow access to lower level by expert users)	med		med				med		72
2	Develop regional estimates of tourism.	Value	Develop a set of regional tourism indicators to replace the DTS this might include such things as domestic electronic data transactions, some form of CAM, collection of tourism activity (eg Rotorua activity monitor), usage of regional infrastructure (conservation estate data)	High	low	high					108	
			Retain the DTS in current form until the Regional Indicator series is established and TSA methodology is revised. (Approx. 2-3 years)	low		low						20
3	Use the Statistics NZ Business data to develop understanding of the value of the various Tourism sectors	Value	Using the Stats NZ Business stats, identify business groupings that have high contributions to the Tourism sector and analyse size and growth rates	High	high						90	
4	Review the Accommodation Survey population to ensure it reflects the target population and improve its reliability	Value	Work with Accommodation sector associations to reduce the respondent load of the CAM and improve its use and reliability. This may include such things as working with Property management systems to improve linkage, on-line/electronic forms or submission	High	low	med						88
			One options around the Accommodation survey to investigate is to expanding to the other Accommodation associations? – Motels, Lodges, Holiday Parks etc as it provides members with valuable benchmarking information.	med		low						40
			Investigate alternative classifications of properties – split corporate and pub hotels, lodges and add serviced apartments.	med						low		34
			Improve dissemination of the data including feedback to respondents in the form of a benchmarking or performance report	med					med	med		54
			Improve presentation of the information eg graphically and geographically	low					med	med		34
Make a subset of the Hotel Association benchmarking survey available as a dataset	low					low	low		18			
5	Develop an annual business scorecard – showing relative sector value, productivity, efficiencies (labour and capital).	Growth	Develop an understanding of the business competitiveness of the various Tourism sectors and devise a scorecard to measure performance (sector value, productivity and efficiencies – labour and capital). The likely data sources for this would initially be sourced from Statistics NZ – LBD, LEED and AES			High	med			med	76	
6	Develop agreed methodology for determining return on investment (ROI), including the handling of both direct and indirect returns.	ROI	Develop methodology and understanding of ROI measurements – especially the indirect and hard to measure impacts. Would need to be done with other Government agencies.				High			low	54	
7	Develop satisfaction and other decision data across appropriate collections. Ensure that the data is aligned and available as other types of data are.	Competitiveness	Improve communication with industry on the data that the VEM contains, including links from Tourism Research website to TNZ and a subset of data available on Tourism Research website.				High			med	52	
			In conjunction with Tourism New Zealand investigate providing tables of data to allow more exploration of the data for other purposes. Included in this would be combining with IVA and IVS type data (may be a subset of questions, or delayed release for commercial reasons or registration required to access this dataset).			High	High			med	102	
			Work with Tourism New Zealand to clearly identify the objectives of the VEM and how to communicate it. Consider combination with the IVS, as well as best mechanism for measuring satisfaction and delivery of product development information.				med		med		36	
			Investigate /develop models of how to measure ability to or achievement of influencing travel decisions – both on coming to NZ and activity once in NZ. Use this to decide on what (if any) of this type of data to collect.				med			med	36	
8	Investigate the use of social media to monitor and provide feedback on global comparisons and competitiveness.	Competitiveness	Investigate in conjunction with Tourism New Zealand and RTOs the potential to mine information from social media to supplement directly collected attitude and perception data.				High				40	
			Investigate new technologies to see if data can be used to provide real time indicators of tourism activity eg mobile phone tracking, GPS, social media, down loading patterns				med				24	
9	Improve the communication of the various satisfaction measures to all parts of the tourism industry.	Competitiveness	Investigate how the currently collected satisfaction information, and the potential new sources can be feedback to the tourism operators in a targeted and meaningful way.				High		med		52	
10	Redevelop forecasts to improve methodology to provide best and worst case options, incorporate more international information, more information on emerging markets and access to real time bookings.	Competitiveness	The forecasting methodology needs to be improved to contain - updated/modelled actuals for the previous year, regional breakdown for the previous year, forecast for the next 5 years to include best and worst case scenarios, forecast for next 5 years of top 10 markets, case study of selected emerging market, incorporate information from forward bookings.	med		med	High		low		104	
			year, TSA uses end March year, IVS/DTS use end June year.				low		low		12	
			Any publication should be explicit about the modelling done and the assumptions used (exchange rate, price of fuel, economic conditions etc.).				med			low		28
			Investigate feasibility of doing two year forecasts every six months.				med					24

Recommendation	Primary topic	Initiatives	Impact on Topic					Generic Improvements		Priority Score			
			Value	Growth etc	ROI	Competitiveness	Sustainability	Communication	Understanding				
11	In conjunction with other countries (Australia and Canada) develop a framework for measuring sustainability in the tourism industry.	Sustainability						High		med	42		
12	Create a centre of information for the tourism data that is recognised and carries or links to the information that users require - including forward plans, strategy as well as data sources	Communication	Develop an overarching programme structure with clear roles for various participants, to allow people to understand how things fit together but also to generate a transparent long term plan.						High		20		
			On the MED Tourism website develop an overall tourism information page – that is make this the first place that people come and have links to other areas eg international data link to UNWTO, TNZ, associations etc.					High	High		40		
			Develop a Tourism Group Communication strategy to raise the profile of the Tourism information being produced and the awareness of what is available.					High			20		
			Develop and implement a dissemination model to target the key user groups. Three segments have been identified in the initial consultation are quick facts users, users seeking modifiable tables/data, expert users (may be by subscription or remote access tools).					High	High		40		
			relationships between data sets and variables to be identified.						med	12			
13	Clarify and improve understanding around the information of total sector performance.	Value	Investigate the development of an annual tourism report that incorporates information from all the sectors. (need to get agreement on year – currently TAS uses March and Forecasts uses calendar).						med	med	24		
			Produce TSA every second year with an annual indicator series.	med		med						60	
			In alternative year to producing the TSA undertake studies and projects that will further enhance the TSA. These project should include introducing a constant price series, evaluate if components can be published at regional level eg employment, and increase understanding of where the value from Tourism is being increased or changed (regions, sectors etc).	med		med							60
14	Create clear communication around the International Visitors and Migration survey.	Value	Review the data currently generated in the IVA on visitor nights/length of stay, the series that are presented, what are other options and look to include series in release data to increase attention to it.	med			med				High	80	
			Investigate how cruise ship data can be included in the arrivals numbers (IVA) at time of publication.	med			med						60
			Review the risk of having data on multiple websites - Tourism Research, Stats NZ and TNZ.						med				12
			As the arrivals and departure cards move to different modes of data collection use as an opportunity to improve data collection.	med			med						60
15	Information on Tourism flows is required on a 3-5 year basis.	ROI	Investigate how to produce a tourism flows model every 3-4 years, what data sources can be used that create minimal respondent load.	med	med		low	low			68		
16	Continue collection of Convention data as supplementary to the IVS.	ROI	Extend life of CAS the survey by 3 – 5 years (needs to run until the National Convention Centre is established and at least 2 years after).	med	low	med					68		
			Review CAS reporting and data storage – now that it is in the third year, a time series and year on year changes need to be incorporated and data made available for expert users as a data set.	med	low	med				low		72	
			Investigate potential to collect convention type data.(Not sure if there is a standard classification).	low						low		14	
17	Maintain continuity of forward focused collections and develop new ones if possible.	Value	Commit to maintaining running the Tourism Industry Monitor at least quarterly with principles of quick turnaround, working with associations, direct response to respondents.	med						med	42		
			Investigate if forward looking indicators can be developed to help forward planning of tourism industry.	med						low		34	
18	Develop mechanism for benchmarking of performance of regions.	Competitiveness	Investigate setting up a benchmarked way of monitoring satisfaction that can be compared to other regions. In Australia they do this via the Destination Visitor Survey (eg <a href="http://www.ret.gov.au/tourism/tra/regional/survey/Pages/default.aspx">http://www.ret.gov.au/tourism/tra/regional/survey/Pages/default.aspx</a> ). That is providing a Benchmarked way of regions monitoring their performance and satisfaction levels every 2 – 5 years Coffs coast example( <a href="http://www.ret.gov.au/tourism/Documents/tra/Regional%20tourism%20profiles/NSW/VPS_Coffs_Coast_FINAL.pdf">http://www.ret.gov.au/tourism/Documents/tra/Regional%20tourism%20profiles/NSW/VPS_Coffs_Coast_FINAL.pdf</a> )				med	low		low	34		
20	Increase analysis of existing data.	Understanding	Develop a schedule of updating visitor profiles - by country of origin, by activity type etc (resource internally or contract out).						med	med	24		
			Develop emerging market reports that combine information from VEM, IVA, IVS and forecasting to focus on one or two new emerging markets each year.			low	low			med		30	

**Topic value**

Value	10
Growth	8
ROI	10
Competitiveness	8
Sustainability	6
Communication	4
Understanding	4

**Impact Value**

High	5
Medium	3
Low	1

**Priority = Sum of (Topic Value x Impact Value)**

## Appendix 4 - Initiatives sorted by priority score

Ranking	Priority Score	Initiatives	Value	Growth etc	ROI	Competitiveness	Sustainability	Communication	Understanding
1	124	Redevelopment of the IVS including - reducing questionnaire length, modular approach, sample all arrivals, sample size, mode of collection, potential alternative data (options being developed)	High	0	High	Med	0	0	0
2	108	Develop a set of regional tourism indicators to replace the DTS this might include such things as domestic electronic data transactions, some form of CAM, collection of tourism activity (eg Rotorua activity monitor), usage of regional infrastructure (conservation estate data)	High	low	high	0	0	0	0
3	104	The forecasting methodology needs to be improved to contain - updated/modelled actuals for the previous year, regional breakdown for the previous year, forecast for the next 5 years to include best and worst case scenarios, forecast for next 5 years of top 10 markets, case study of selected emerging market, incorporate information from forward bookings.	med	0	med	High	0	low	0
4	102	In conjunction with Tourism New Zealand investigate providing tables of data to allow more exploration of the data for other purposes. Included in this would be combining with IVA and IVS type data (may be a subset of questions, or delayed release for commercial reasons or registration required to access this dataset).	0	0	High	High	0	0	med
5	90	Using the Stats NZ Business stats, identify business groupings that have high contributions to the Tourism sector and analyse size and growth rates	High	high	0	0	0	0	0
6	88	Work with Accommodation sector associations to reduce the respondent load of the CAM and improve its use and reliability. This may include such things as working with Property management systems to improve linkage, on-line/electronic forms or submission	High	low	med	0	0	0	0
7	84	Remove 'international education' from the IVS and work with Ministry of Education and Stats NZ to have an agreed numbers and value series for this segment	med	0	med	med	0	0	0
8	80	Review the data currently generated in the IVA on visitor nights/length of stay, the series that are presented, what are other options and look to include series in release data to increase attention to it.	med	0	med	0	0	0	High
9	76	Develop an understanding of the business competitiveness of the various Tourism sectors and devise a scorecard to measure performance (sector value, productivity and efficiencies – labour and capital). The likely data sources for this would initially be sourced from Statistics NZ – LBD, LEED and AES	0	High	0	med	0	0	med
10	72	Investigate how regions could be better informed by the IVS data, without false impression of accuracy of the data (eg release at Territorial Authority (16 regions) and allow access to lower level by expert users)	med	0	med	0	0	0	med
11	72	Review CAS reporting and data storage – now that it is in the third year, a time series and year on year changes need to be incorporated and data made available for expert users as a data set.	med	low	med	0	0	0	low
12	68	Investigate how to produce a tourism flows model every 3-4 years, what data sources can be used that create minimal respondent load.	med	med	0	low	low	0	0
13	68	Extend life of CAS the survey by 3 – 5 years (needs to run until the National Convention Centre is established and at least 2 years after).	med	low	med	0	0	0	0
14	60	Develop a Cruise passenger (transit only) series – numbers and value	med	0	med	0	0	0	0
15	60	Produce TSA every second year with an annual indicator series.	med	0	med	0	0	0	0
16	60	In alternative year to producing the TSA undertake studies and projects that will further enhance the TSA. These project should include introducing a constant price series, evaluate if components can be published at regional level eg employment, and increase understanding of where the value from Tourism is being increased or changed (regions, sectors etc).	med	0	med	0	0	0	0
17	60	Investigate how cruise ship data can be included in the arrivals numbers (IVA) at time of publication.	med	0	med	0	0	0	0
18	60	As the arrivals and departure cards move to different modes of data collection use as an opportunity to improve data collection.	med	0	med	0	0	0	0
19	54	Improve dissemination of the data including feedback to respondents in the form of a benchmarking or performance report	med	0	0	0	0	med	med
20	54	Develop methodology and understanding of ROI measurements – especially the indirect and hard to measure impacts. Would need to be done with other Government agencies.	0	0	High	0	0	0	low
21	52	Improve communication with industry on the data that the VEM contains, including links from Tourism Research website to TNZ and a subset of data available on Tourism Research website.	0	0	0	High	0	0	med
22	52	Investigate how the currently collected satisfaction information, and the potential new sources can be feedback to the tourism operators in a targeted and meaningful way.	0	0	0	High	0	med	0

23	42	Research what sustainability means in terms of tourism and what data and information is required to monitor. Should be done in conjunction with international Tourism Agencies eg Australia, OECD, UNWTO, APEC etc) as thinking on this needs to be global in nature.	0	0	0	0	High	0	med
24	42	Commit to maintaining running the Tourism Industry Monitor at least quarterly with principles of quick turnaround, working with associations, direct response to respondents.	med	0	0	0	0	0	med
25	40	One options around the Accommodation survey to investigate is to expanding to the other Accommodation associations? – Motels, Lodges, Holiday Parks etc as it provides members with valuable benchmarking information.	med	0	low	0	0	0	0
26	40	Investigate in conjunction with Tourism New Zealand and RTOs the potential to mine information from social media to supplement directly collected attitude and perception data.	0	0	0	High	0	0	0
27	40	On the MED Tourism website develop an overall tourism information page – that is make this the first place that people come and have links to other areas eg international data link to UNWTO, TNZ, associations etc.	0	0	0	0	0	High	High
28	40	Develop and implement a dissemination model to target the key user groups. Three segments have been identified in the initial consultation are quick facts users, users seeking modifiable tables/data, expert users (may be by subscription or remote access tools).	0	0	0	0	0	High	High
29	36	Work with Tourism New Zealand to clearly identify the objectives of the VEM and how to communicate it. Consider combination with the IVS, as well as best mechanism for measuring satisfaction and delivery of product development information.	0	0	0	med	0	med	0
30	36	Investigate /develop models of how to measure ability to or achievement of influencing travel decisions – both on coming to NZ and activity once in NZ. Use this to decide on what (if any) of this type of data to collect.	0	0	0	med	0	0	med
31	34	Investigate alternative classifications of properties – split corporate and pub hotels, lodges and add serviced apartments.	med	0	0	0	0	0	low
32	34	Improve presentation of the information eg graphically and geographically	low	0	0	0	0	med	med
33	34	Investigate if forward looking indicators can be developed to help forward planning of tourism industry.	med	0	0	0	0	0	low
34	34	Investigate setting up a benchmarked way of monitoring satisfaction that can be compared to other regions. In Australia they do this via the Destination Visitor Survey (eg <a href="http://www.ret.gov.au/tourism/tra/regional/survey/Pages/default.aspx">http://www.ret.gov.au/tourism/tra/regional/survey/Pages/default.aspx</a> ). That is providing a Benchmarked way of regions monitoring their performance and satisfaction levels every 2 – 5 years Coffs coast example( <a href="http://www.ret.gov.au/tourism/Documents/tra/Regional%20tourism%20profiles/NSW/VPS_Coffs_Coast_FINAL.pdf">http://www.ret.gov.au/tourism/Documents/tra/Regional%20tourism%20profiles/NSW/VPS_Coffs_Coast_FINAL.pdf</a> )	0	0	0	med	low	0	low
35	30	Develop emerging market reports that combine information from VEM, IVA, IVS and forecasting to focus on one or two new emerging markets each year.	0	0	low	low	0	0	med
36	28	Any publication should be explicit about the modelling done and the assumptions used (exchange rate, price of fuel, economic conditions etc.).	0	0	0	med	0	0	low
37	24	Investigate new technologies to see if data can be used to provide real time indicators of tourism activity eg mobile phone tracking, GPS, social media, down loading patterns etc	0	0	0	med	0	0	0
38	24	Investigate feasibility of doing two year forecasts every six months.	0	0	0	med	0	0	0
39	24	Investigate the development of an annual tourism report that incorporates information from all the sectors. (need to get agreement on year – currently TAS uses March and Forecasts uses calendar).	0	0	0	0	0	med	med
40	24	Develop a schedule of updating visitor profiles - by country of origin, by activity type etc (resource internally or contract out).	0	0	0	0	0	med	med
41	20	Retain the DTS in current form until the Regional Indicator series is established and TSA methodology is revised. (Approx. 2-3 years)	low	0	low	0	0	0	0
42	20	Develop an overarching programme structure with clear roles for various participants, to allow people to understand how things fit together but also to generate a transparent long term plan.	0	0	0	0	0	High	0
43	20	Develop a Tourism Group Communication strategy to raise the profile of the Tourism information being produced and the awareness of what is available.	0	0	0	0	0	High	0
44	18	Make a subset of the Hotel Association benchmarking survey available as a dataset	low	0	0	0	0	low	low
45	14	Investigate potential to collect convention type data.(Not sure if there is a standard classification).	low	0	0	0	0	0	low
46	12	Alignment of tourism year – Forecasts currently use calendar year, TSA uses end March year, IVS/DTS use end June year.	0	0	0	low	0	low	0
47	12	Develop a data structure and dictionary that allows the relationships between data sets and variables to be identified.	0	0	0	0	0	0	med
48	12	Review the risk of having data on multiple websites - Tourism Research, Stats NZ and TNZ.	0	0	0	0	0	med	0