How we started to change

- **Review of Ministry of Tourism**
  - Merge fully with Ministry of Economic Development
  - Research and evaluation more focused on policy questions
  - More emphasis on tourism as one part of overall approach to economic development

- **Review of core tourism dataset**
  - One of the actions from the restructure
  - Tasked to identify needs and solutions including new data, improved data, or reprioritised resources
The “tourism domain plan”

- First key product from tourism data review
- One of a number in the official statistics system
  - Others include energy, knowledge and skills, environment…
  - Statistics New Zealand approach
- Based on enduring needs for ongoing data collection

To produce the domain plan

- Identified “perennial issues”
  - Value of tourism
  - Growth, innovation, productivity, efficiency
  - Value of government interventions
  - Global competitiveness
  - Sustainability
- Under each, identified 10+ common questions
Needs analysis

• Matched data to perennial issues
  • What data currently used?
  • What gaps or weaknesses are there?
  • How well can we answer the recurring questions?
  • Who needs to know, what, and why?

• Rated the issues’ information gaps
  • Size of need
  • Complexity
  • Priority

What needs more understanding?

• Value of tourism
  • Both regional and national
  • More fine grained detail needed
  • Different markets
  • Different types of visitor

• Value of interventions
  • Both regional and national

• Health of businesses
• A five year programme agreed
What are some challenges?

- Cost of new surveys
  - or increasing samples for existing surveys
- Pressure for more timeliness
  - Particularly to feed into current policy questions
- Landline phone response rates
- Pressure to reduce respondent burden

Priorities in the first few years

- International Visitors Survey
  - (see separate presentation)
- Regional indicators
  - Leading to ceasing the Domestic Travel Survey
  - And rationalising the accommodation survey
- Scenario-based forecasting
- Improved data management
- Conventions research
Regional indicators

• Big demand:
  • KPIs for regional tourism organisations
  • Strategic planning
  • Infrastructure and other central government planning
  • Political interest in regional economic development

• Current problems with data:
  • Timeliness
  • Uncertainty / sampling error
  • Instability year on year (estimates are based on modelling from our various sources)

2011 has seen a remarkable north-south split in the New Zealand tourism industry – but we lack means of showing it other than the accommodation survey
Electronic transactions

• Strengths
  • 60% of transactions in New Zealand by card
  • Avoid recall and sample size problems
  • Give information by industry code
  • Timely and cheap (compared to surveys)
  • Rich geographical location information
  • Escape growing non-response to landline surveys

• Challenges and issues
  • Different coverage by market (for international use)
  • Indicators of change rather than absolute level
  • Unfamiliar to many stakeholders

Closely matches known data…

Charts deleted for copyright reasons
Much finer regional detail

Domestic

International

Charts deleted for copyright reasons

And timely on market changes

Charts deleted for copyright reasons
Why get rid of the DTS?

• The Domestic Travel Survey has many problems
  • Expensive
  • Landline-dependent
  • Cannot afford sample size to provide timely, regional, or market segmentation information

• We think it won’t be missed
  • Not needed for calculation of the TSA
  • New sources of data will be better on timeliness, regional, and segmentation

Business indicators (mid 2013)

• Use existing data eg
  • Business Operations Survey
  • Linked Employer – Employee Database
  • Quarterly earnings
  • Leverage from the TSA

• Produce timely, cheap indicators
  • Including the various sectors within “tourism”
  • Issue is identifying “tourism” within industry codes

• Feed into policy questions
  • productivity and economic growth
Some common themes

• Seek alternatives to surveys
• Leverage national statistics office
• Stronger economic focus
  • And strengthen the link to live policy questions
• Address challenges to traditional data collection
  • landline response rates
  • difficulties with airport surveys
  • response burden from accommodation census