

20211027 TIUG meeting

00:05

Hello everybody. Welcome to the Tourism Insights Users Group meeting. I'm just waiting for participants,

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so please be patient. I just wasn't envision you. Hello everyone. I am just waiting on participants, so we'll start soon. It'll just be a couple more minutes, people are still connecting.

03:58

Okay. Hello, everybody.

04:02

Thank you for participating in this October edition of the Tourism Insights Users Group meeting. This is I think probably the third or fourth time we've tried it to the online forum and seems to be for the most part of success. We've got a lot of participation in that. So, it's really good to see. I ask everyone, please mute yourself when you're coming in. It is by default. But otherwise we get quite a bit of feedback and it's hard to hear. This forum is for the purposes of... it's an opportunity for the tourism industry, researchers and others to get together and talk about tourism, data and insight and research that's happening. It is an opportunity for MBIE to present on some of the latest developments we've had in from our Tourism Evidence and Insights team here in MBIE, and also the opportunity for the wider group to inform us of what developments that are happening out there. And also the opportunity for us to have some discussions on some of the thorny issues that we run into. Thank you all very much for participating. Before we continue, please note, I am recording this video. We did this last time and put that video up on our Tourism Evidence and Insight Centre. It seems to be successful. So we'll be doing that again. Just be aware that everything will be recorded. We absolutely encourage questions during this thing, however, to make it so that I'm not struggling with other people talking, etc. I ask everyone, please write it in the chat. I'm sure everyone's used to that sort of thing. That's pretty standard protocol these days. But we'll have questions in the chat and I will stop periodically through of the meeting to get those questions answered. I will also stop one or two times during the session and actually invite people to talk. I know some people prefer to have their questions, you know, spoken, so we'll give the opportunity and I will hand it out to the floor once or twice during this meeting for any other questions that people might want to talk about. So please watch for that. Alright, without further ado, let's get kicking off I just want to introduce the new manager of the Tourism Evidence and Insights team, Dr. Amapola Generosa who I will be meeting now, so please take away and above. Good afternoon.

07:09

Good afternoon, everyone. And I really am quite excited to participate in this Tourism Insights Users Group, I'm looking forward to the discussion. And I really appreciate having a platform for people to come together, exchange ideas and not just learn the latest developments in the data space that MBIE is doing, but more so around looking at what further information or data gaps we might need to address in the future. So really looking forward to this conversation and discussion with you. Thank you.

07:46

Thank you. Thank you Amapola. Okay. First on the agenda today is the Tourism Evidence and Insight Centre. It's a website, if you're not familiar with it, that we have, recently, as of I think June, released. MBIE administers it but it provides, hopefully, a centralized hub of data and insight for the tourism sector. I hope that most of you are familiar with it and have used it. But the chief architect of the website, Raphael Aggio, is here, just to let us know about the latest developments that have happened in the tool. And to lead a bit of a discussion here. So I'm going to, without further ado, leave that to Raphael. So, Rapha please.

08:40

Hi, hello everyone. Good afternoon. Let's see if I can share my screen with you. See if you can see this. Let me know when...it's trying to... Yeah, I hope everyone can see that. So, good afternoon, everyone. It's good to be here talking again, and tell you more about the tool and the latest changes that we have made to the tool and the plans that we have for the near future. So, as I'm not sure everyone knows it, hopefully everyone already knows that, but just in case, I will just give you a quick tour through the tool, through the website. The landing page of the website is the Tourist Evidence and Insight Centre. That's the place for the digested information that we call. Here we have more information about the data releases that are frequently related to tourism. We have also the Resources section where we invite you to contribute with presentations, reports, insights, any kind of information that you think could be useful for others. Just let us know and we will put that in the tool. We actually have quite a big amount of articles that we're about to put in the tool in the near future just finding the right time to make them available to you, which means that there is a lot of people already contributing, which is awesome. Thank you very much for everyone. Then we have the search bar for you to search the content you need, and at the bottom we have the way to contact us. We also have further development on that. We are working on the form that used to have here. We had a form for you to submit a request. So we received that in a structured way that we can do further analysis on that. That's in progress as well. We have had really good progress in the last few weeks. It should be online in the next month or so. And then we have the Explorer, which is the place for the raw data where you can interact with the data, collect data, and generate your own insights. Right, so here we have all the multiple views related to the tool, as you might know, already, so you can explore that and see all the different subjects that we have. In relation to the latest developments, we have the latest data sets that we have added to the tool is related to emissions, gas emissions. If you go to the natural resource and management, at national level, you see that now we have tourism industry contribution to emissions versus GDP and employment. And we are really happy with that data set because, that's a data set that comes from StatsNZ. And we're really happy with that because it's not only specific to contributions to emissions, but it gives us a much broader picture of the contribution to tourism, to the whole scenario, to the whole New Zealand. So you can see how it affects the GDP and how it contributes to climate as well, in the same chart. It's first time that we see that, right? StatsNZ have that available on their tool as well. We also have the tourism contribution to greenhouse gas emissions. So this is contributions only from tourism. And the good part of this data set here is that it involves consumed consumption and production based emissions. And as you can see, here, you have that breaking down by domestic and international, and by direct and indirect contribution to tourism. So that's the latest data set that we have, as you can see here, there is some lag in the provision of the data and see that 2019 have two years to provide each data set. And this one is 2017. And we also have this data set that wasn't on the tool before that's the the greenhouse gas emissions from transport. That one is general emission. It is not really specific choice. So there is a caveat here for that. And this is the same contribution from transport, but in relation to percentage of contribution, not actual emission.

13:12

This is the

13:13

latest addition that we have in relation to the environment. And then we also have added data in relation to business events data. As you know, might not, not sure. the FreshInfo that produces the accommodation data for MBIE is also producing business event data. They have their own tool producing that, their own dashboard for that as well. But we have added some of the data set here. In the Demand view, we have...now we have international visitor arrivals, as we used to have, spent per day, and now we have National Business Event data. So, you can see that the data has more information here have the link to the FreshInfo website, to their own dashboard, if you want explore some other aspects of that data set. But here we have the number of events, number of delegates and delegates per day. We also have different channel types, like directly, industry training, event management's work. So we have all these different types of data and the different types of measurements that you can explore. And that's the national level data, right? We have added that data also at regional level. Here in the reliance on tourism, at the region's view, region's section we have now...so that we used to have here the expenditure as proportion of regional GDP, you might know already, the rest...that's the place where we have all the MRTE and Tourism Electronic Card Transactions data and we also have at the bottom now, we have the Regional Business Event data. So in this case, we have only the number of events, delegates and delegates per day for all the different regions, 16 regions. And at the bottom here, you have the same data however, as a Sankey plot, so you can see the number of the mass for international people attending events in the different regions. We have it by delegates and by delegates day, and here, you can use those arrows to change the quarter. That's a quarterly data, data set. These are the latest data sets that we have added to the tool, we are working on few others. We also added here a download page. So in the last meetings we have been discussing that, that is, if you wanted to automate your own analysis, you had an issue there, because to download the data actually had to use the button to manually download the data and then apply that data to your own analysis. So people have been asking us to automate that. So to provide a permanent link where people can do their own analysis. If you go now to the download tab, you will be able to see all the different files that we use on the tool. All the data sets that we use in the tool are now available here, automatically. All of them, there's no data set missing here. You can see that there's already a lot of data for you to download. And hopefully in the future, we'll have plenty more. Also, as I said, we have been receiving a lot of articles, a lot of suggestions to add to the TEIC, we are working on that. It requires some time as we need to format everything and then send to the providers to make sure everything's fine. And then there is some back and forth happening. But we are working on that. So you know. We also say in relation to the future developments, we are working as well on the voting button system, which will be placed here on the list of planned measures and status and data sets that we we want to be part of the tool. At the moment, we have all the buttons set, we are just testing the functionality with Google Analytics. So it means that very soon it will be available for you. So you will be able to vote on the data sets that you think we should prioritise, to get it to the tool. It's very close to be finished.

17:47

On top of that, we have been doing quite a lot of work on trying to access or to have access and to share that with everyone about Māori Tourism data. That's a gap in the data system that we have identified quite a long time ago. And we are now doing quite a lot of work, establishing few relationships

and trying to generate some, at least some data sets that can give us some light in relation to Māori tourism data. That takes quite a lot of our time as well. And then there is another point in relation to, more like administrative way, it is in relation to the workflow that we have. So far, since June, we had the website running, we have been testing few things and now the process is much more solid, much more stable. So now we are able to actually see the parts of the process that we can optimise, that can...so it requires less resources from our side and is always also faster, and results in a better service for you. So we are optimising those workflow now. We are also working in a complete detailed documentation of the whole process with the whole tool, which involves a lot of different basis. So hopefully one day we can share that with you. So you can understand the magnitude of what involves to have that tool run for you. And in parallel to that we are also working on the communication strategy, which Mike was going to talk to you soon about that. But just to give you an idea, since June, we had about 10, 11,000 page views. On the tool we have 2200 users. And in average people spent about four minutes in the tool, which a good measures to show that people are actually using a tool but we would like to to improve that usage and make it more accessible to everyone. So Michael, do you wanna say something about the communication strategy?

20:00

Yeah, absolutely, yeah. So, as Rapha says, we do have a good number of people using the tool, though I think we could improve it. So we're still putting this together. But we are planning on using something like social media etc, to try and push the messages out to get more users. Also very keen to be involved in any tourism industry conferences or conventions, and so forth. And to try and advertise the tool through them. So if you have something on the horizon, that you'll be that you'd like us to come and talk to, please get in touch, we're more than happy to do that. You may have also seen if you're a subscriber to our tourism data alerts, that we put out a newsletter in mid October, which sort of outlined largely what Raphael has just presented to us today, just as another vehicle to let you guys know, to let everybody know the developments that are occurring. More than happy to discuss with anyone about any more effective ways we can communicate with you. This seems like the newsletter seemed like a logical approach. So I'd very much like to hear any feedback anyone has on that, if people read it and if they thought it was useful. We don't want to do anything that isn't useful for our users. And we want to try and get to as many people as possible. So if you could, any sort of feedback that you could provide, I think would be really, really helpful. Now Rapha, we have a few questions in the chat. So I'm just going with a few questions now. The first one is from Love Taupo and it says "Are you looking to add Business Event data at RTO level?" We are doing that? Are we not, Rapha? Or is it at the Regional Council level.

21:56

At the moment, we have at regional level, but the idea is that those initial data sets we put was like a trial to see how it works. And then I know that Fresh Info for has some other aspects of the same data set that they have on their dashboard. And we want to implement here as well. So we are going to add almost everything that they have on their side here. So hopefully everything. We are working on that.

22:21

Thank you, Rapha. Another question from Jamie "Is the greenhouse gas emissions data available by RTO?" Unfortunately, not. Correct, Rapha?

22:33

Yeah, correct. The data that StatsNZ... sorry, StatsNZ actually derives those values. And they do at national level. So I don't think they are able to get regional level yet.

22:45

I think it's something that we have to continually push and try and get development on. I agree. That is a big gap. So ideally, if we could do it at RTO level, that would be fantastic. But I think there's a lot of complexity in that.

23:03

That's a common question, right? We know that a lot of the users need or prefer to have the data at RTO level. So every data sets we plan to put in the tool, we always have that in the back of our minds. We are always thinking about the possibility to have that all the other levels possible. But we know that RTO is a special breakdown that a lot of users request. So we have that in mind all the time. If it's not here, most probably is because it's not available at that level. But I just say Mike, we need to make sure that every data set we try to add, we figure out ways that we can add at that level.

23:42

So yeah, sorry about that. But the we do have limitations in many ways of what we can produce. And we are trying our best to produce as much and provide as much data as we possibly can, given the limitations we have in our resource saying and our capacity. So yeah, but if you are aware of a dataset that's available, that you think is worthwhile to fit onto this, onto the website, again, get in touch with us because one of our desires for this website is to put to be a central hub. And that means that someone coming to the site can always find what they're looking for. So if we can fit everything in one umbrella, I think it will make it a lot easier for tourism data users to find what they need. So again, another plead for me. I haven't got any further questions coming through. I do. Okay, someone question from James here "Is there going to be a connection through to the relevant parts of GDP released quarterly, including overnight accommodation, spend levels?" That's actually a really good question, James. I think that is certainly worth exploring, making note Rapha I think that could be something we could put together in the very short term, because the data is available and if it would provide additional helpful insight linking it with GDP, I think that makes a lot of sense. Awesome. Another question from Jamie "do we have a data solution for domestic visitation?" Well, yes, Shane is going to be talking about domestic visitation shortly. Well, it is one of his projects. Internally in MBIE, we are continuing to explore I can't provide you any specific details, unfortunately, yet, we're still in the process of working that through. But yeah, no, we don't have a solution yet. But I think Shane might have something that could work as an interim solution or something. I'll let him talk to that. We've got something from Trent "Ultimately, from a consumer perspective, they might like to know, the average or domestic or international carbon production per day of travel or something like that." Yeah, I agree. That could be a useful data set. The question is whether or not, it's available. So we'll look into that and get back to you, Trent. Thanks for the idea. We've got a question from Nicola "Are there plans to be able to download a range of graphs at one time in one report page or PDF? For example, select what graphs we want, by region and district and boom, download all at one?" I really liked that idea. And I think we've been talking about that for some time in the team with the idea of views that can be specific to regions, I think, and I liked the idea of a customisable report. There's a lot of complexity around these, these things. So I totally foresee this happening in the future. But I think we need to work our ways to get there. Do you have anything to add on that, Rapha? Yeah,

27:26

I think like some other people have been asking about the possibility of having a more like, dashboard like view where they have like multiple charts in the same view where they can do exactly that by just print, and put on their report or share that straight through. The tool, the website was built in a way that it's possible to be done, for sure. It just requires some time to design how the view will look like and which chart it would have. You're going a little bit further than that, which is the ability to actually select which graph you want. And that's quite complex, because each chart may use different space of the screen. So it's not that that easy as it sounds, but the ability to have views that are dedicated to just a few indicators per region or these different areas that you can just bring from that it's possible to do and it's in our backlog. We just need to finalise a bunch of little things before that, but it's on the backlog.

28:33

Cool. Thank you. But yes, I'm not sure. I think that'll be that's an aspirational goal at this stage. We've got another question from from Taupo "Any idea when the next data set for tourism contribution to greenhouse gas emissions will be out. Five year old data is interesting, but good to have more up to date data use." We are hold a little bit by StatsNZ, who were the main developers and producers of this data. So without them delivering this data, we don't have any updates for you. But I take your point five years is a bit out of date. So we will be encouraging our StatsNZ colleagues to release a new dataset. I haven't heard anything from me and that that's their intention to do anytime soon. I think it's been a couple of years since they've actually released that data. So I think it would certainly be in time to do it. But I guess it's all about priorities for them. So that was something we'll bring up in the next relationship meeting we have with StatsNZ.

29:43

Okay, thank you everyone. I think that was a good discussion. The next item...can you unshare your screen, Rapha. Thank you. The next section is Shane and Andrea from Fresh Information limited, who are here to talk to us about the latest results, etc, changes in the accommodation program, and also the visitor data that I alluded to earlier. So, Andrea, please take it away. Unmute yourself if you muted.

30:24

Can you all see my screen? Yep. Wonderful. Thank you. Kia ora, everyone. Today, we have released the September 2021 data for the ADP. So we kind of want to take the opportunity to go through the results, given that they are somewhat surprising, and somewhat unique to the circumstances that we are in at the moment. Yeah, so the ADP has been going on for 16 months now and we are now collecting data.

31:04

Andrea, just you might just want to share a different screen, we're seeing the probably the internal screen rather than right? Yes, it's great. All right. Let's see if I can. It's an irritating thing that yeah, it defaults to that. Are you seeing?

31:27

What I'm gonna do? I'm just gonna share the different screen just one moment. What about now?

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That's it.

31:43

Sorry about that. So yes, so we are now 16 months of data collection, most of the data is collected automatically or semi automatically. And what we're seeing with results now is that, given that domestic is the, the predominant contributor to visitations and guest nights in the regions, that school holidays are the main factor. So we had July, October, and then the Christmas January break, and then April, or the Easter break for school holidays to kind of dominate the visitations. And the other contributing factor, unfortunately, is the restrictions that are imposed to level three and level four. So we had the drops in guest nights in August 2020 in February 2021, and now from the 17th of August onwards. So this is the trend that we are seeing now. And what has been released today was the September 2021 results, which recorded only 1.04 million guests nights. So that's a 52% drop on the same month last year and same month last year was also a pandemic month, but it was one that was just coming out of restrictions being lifted and had zero COVID cases or near zero COVID cases and there were no restrictions as such. What happened this time is that the reason why the numbers were so low is that while most of the regions were on level 2 from September 7th the hesitancy to travel remain because of the COVID cases, because of the ever changing situation with the levels and most importantly, what happened was the that the lockdown in Auckland created a bog on the largest source market. So without that the visitations around New Zealand suffered greatly. And in fact, when we look at the data of total guest nights by RTO we see that Northland, Rotorua and Taupo was the ones that were most impacted by the lockdown in Auckland with drops over 60% compared to the same month last year. And then again in the summer time as well, all the leisure centre part RTOs such as Queenstown, Kaikoura and the Mackenzie basin also fell by a similar amount, about 60%. When you look at these numbers, also you see Auckland as well as a part even though even with very small numbers and in even with the fact that Auckland was in lockdown for the entire month. So I wanted to create a new chart to kind of explain a little bit. And the reason for that is that so with MIQ is actually still included in the data. And in this month, MIQ actually accounted for more than half of all guest nights in Auckland. So when you reduce, when you subtract that, the number of guest nights in Auckland is actually around 60,000, which is shared across over 300 properties. So that is actually the net number of guest nights in Auckland. So, when you look at that, Canterbury, Christchurch predominantly, was actually the the top market in September 2021. So I kind of wanted to kind of show a little bit of the difference there. So this is number of guest nights. When we look at the occupancy rates, I just wanted to show a little bit of a comparison of what happened this year versus what happened last year. We are now that the top five occupancy rates across the country are in the Waikato, Dunedin, Taranaki, but we're still in the high 20s, low 30s in terms of the average occupancy rates, so everyone is suffering. Well, last year, at this time, we had Wellington in at 50%. And also kind of like the alpine area grew up at 50% as well.

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So still not what we would expect at this time of the year normally, but there were significant better numbers. I also want to mention that sometimes occupancy is utilised as the measure, however, our caution to use it in some aspects, because what we have experienced since COVID, is that an increase in emergency housing and closures for some properties that have reduced supply. And so when you reduce supply, when there is enough demand, he could actually have some pretty good occupancy rates, despite the fact that the market is actually still suffering. And the other thing that I will definitely mourn again against his that when you look at just the total of occupancy rates, you have to consider that some regions have more holiday parks. So they have a much higher capacity, and others have fewer holiday parks. So, those that have holiday parks, they are penalised in terms of sort of does they have fewer holiday holiday parks actually have better occupancy rates just because of the nature of the properties that they have. And the person does, for example is Manawatu, that having mostly motels and hotels, it actually has artificially higher occupancy rates. And lastly, I just wanted to kind of have a

bit of a comment about kind of looking ahead, where we are at, we are tracking the number of active properties by month and the trend is perhaps not as dramatic as people might expect. But we are seeing a steady decline in the number of active properties. And typically in summer, the non current spring the number of active properties then picks up but this might actually probably stabilise and we just need to see what happens with the border and with the restrictions to see if there's enough confidence among operators to actually start. That have been some hotels changing hands. So not the fails that there are a couple of new hotels, especially in Christchurch, that are opened this month. A couple of in Auckland as well and one in Napier that is opening as well. But pretty much what's happening is that there's a bit of a still a holding pattern to see what happens with somehow and with the return of international business in the future. So this is pretty much the picture of where things are at with the ADP.

39:24

Thank you Andrea. There's a question that's come through from a Love Taupo "Sorry, Andrea, did I hear correctly that MIQ is included in the data? I thought it had been removed alongside social housing figures. Appreciate if you'd clarify please."

39:43

Ah yes, I can clarify. It is so. When you look at the metadata or the about section of the ADP it does say that manage isolation and quarantine has always been included but emergency housing or transitional housing is not. And the reason why, so that when the ADP started, we had to remember that MIQ was just beginning and had a belief that there was no expectation for it to continue for as long as it has and also, the MIQ stays are actually short term. So they are 14 days. So that is the reason why so far they have been added. However, we are having conversations, to look into the removal of MIQ from the data.

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And you will let us know, whatever decision is made, once it is made. And we'll make sure that's appropriate to telegraph to everyone. So they're fully aware of what's included in the data and

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what isn't.

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Yes, there are a couple of issues with confidentiality when you remove data because you have to be careful to do so in a way that it doesn't expose anyone's individual information. That's the most important thing to do. But also in terms of narrative. So the overall number of guest nights, of course, would decrease if we did that. So on average, on an average month is about 100. So when we look at number of guest nights here. So on average month 120,000 is the number of guest nights in MIQ in a given month. Imagine lowering all of those bars by about 120,000. So that will be the effect of doing that.

41:51

Great, thank you, Andrea. I don't see any specific questions for you. Shane, did you want to touch on your domestic data?

42:02

Yeah, thanks, Michael. Hello, everyone. As Michael said, we've been working on some domestic data for a while. There's, we were probably the most recent source of domestic data as well with the domestic visitor survey, which we didn't punish with AI. But unfortunately, that ceased at the end of 2020. So there is actually no data on domestic at the moment. But we have been working on a data product using mobile phone data, which is actually showing some really good promise. I just wanted to share with you some progress on that. We think we're getting close to a sort of beta version. But if I can, Andrea, can you stop sharing your screen and I'll share mine quickly. There you go. Yep.

43:00

Everyone see that? Is that the wrong screen? It's not got anything on there yet. It's black, but it might be working. Yeah. Now it's...it was there. It was there for a second till you disabled it.

43:15

Okay, yeah, I got a bug message. It's interesting. Let's try this.

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See that now? Yep. Okay,

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So, as I said, this is based on mobile phone data, it's about probably 50,000 phones per month, pinging very frequently and pinging at a very detailed level. So it gives us the we basically treat it like a sample of New Zealand. It's like talking to 50,000 people every day and saying where are you? Where are you? Where are you? It is quite a robust sample and allows us to do origin destination type analysis to say we think this many people who lived in Auckland came to see you in Rotorua in this month, and we're doing monthly frequency stuff. So you'll see on the screen I think we've got Wanaka selected here but you can select any RTO you want. And at the moment our key outputs are account of visitors segmented by day and overnight. Account of visitor days an account of visitor nights so there's visit the days of is a nice little bit different depending on what you're interested in and be able to segment by the origin of those visitors and visitor days visitor nights as well just to understand, you know what your core markets are a little bit around average length of stay per visitor. And, and some interesting stuff that we find interesting and use quite a lot in our own work. Looking at the balance between essentially what you might call a resident days and visitor days to understand the demands on your local infrastructure. Is it predominantly residents that are creating those demands? Or is it visitors? And what is the balance of visitor to resident demands? And that becomes particularly interesting in some of those smaller communities that have large visitor loads, particularly during certain times of the year. So those are just, you know, core measures that we're working on. And we think that they're getting pretty refined now as a few more tweaks to go. But pretty close to bringing that to market. We can also do some benchmarking type stuff. And you can just see, where an RTO seats relative to others on a number of measures. And outside of this core tool, just wanted to demonstrate the granularity of the data and some mapping applications that can be done on a bespoke basis, if required mobility data is really quite cool. And if you get enough of it, you can do quite a lot of stuff. So just wanted to make you aware of that and let you know that it triangulates really well with existing data sources, like the TECT data, and previously the MRTE data. So it all alines up really nicely with existing data sources, and seems to be doing the right thing. So happy to take any questions quickly. If anyone's got any.

46:16

Thank you, Shane. I don't have anything in just yet. But of course, if you have any questions for Shane, I'm more than happy to fill this, send them on to him, or please contact him directly. Oh, hold on. We've got one question. Hey, Shane, when will this tool be available, please?

46:39

Yeah, it's a good question. So it's hardly subject to funding. And so we haven't resolved funding all that. But we're reasonably reluctant to provide it on what we'd like to do is provide it on a sort of bulk basis. So we can open, free and open access for everyone. But we need to certainly have funding to enable it. So that'll be the discussion over the next couple of months, I guess, with various stakeholders to see if we can figure out a way to fund it to the level that we can make it available to everyone. But if that doesn't happen, then I guess we can have individual conversations.

47:19

Thank you very much, Shane. With that, I think we'll move on but before...yeah, so I just want to catch up with some of the questions. Just earlier on, Trent asked "As businesses, organisations RTOs start to certify their carbon, is there a place in the future that we could place that for anonymous accumulation for Aotearoa?" I think that's a wonderful thought. I don't I just I haven't really engaged with that idea. And I don't know if we're in the mental space to do that just yet. But I'm certainly not really anything out. I think it seems like a sensible approach, but probably fairly far into the future. Okay. Alright, then, in the interest of time, let's move on. So, the next section is for the Tourism Electronic Card Transactions release. We have Swati Khurana, who's an analyst here in the team to discuss the TECTs. And for those who are aware. The previous head of this particular project was Jack Warrington. Jack, unfortunately, has left us to go travelling around the country in a van. So, as a result, we don't have his expertise but as Swati has ably and very skilfully come in and taken over the reins of the TECTs for us. So Swati is just going to give us a quick rundown of the latest results so please, Swati.

49:14

Thank you, Mike. Kia ora, everybody. My name is Swati and I'm working as an analyst at MBIE. Today I'll be talking about Tourism Electronic Card Transactions. As many of you are aware TECTs are interim replacement for the Monthly Regional Tourism Estimates which ran from 2016 to 2020. The MRTEs provided us absolute or estimates of tourism expenditure at a detailed regional level. However, because of COVID-19 the MRTE series got disrupted, as the methodology for waiting the measured electronic card transactions spend became unusable. In saying that, we believe TECTs are the best way to provide the spend data to the industry while travel is severely affected by the COVID-19 restrictions. The TECTs measure regional tourism electronic card spend in New Zealand. I'll talk a bit about certain caution that we advise using and integrating the past and future TECTs. We advise users not to add domestic and international market totals together because they represent a different proportion of total tourism spend. We've been trying to communicate this in all our stakeholder alerts as well as our tool or the Sustainable Tourism Explorer which have talked about previously only allows to download the data domestic and international data separately. So we are making sure that this question is communicated well. Also we recommend looking at the trend and the comparison figures instead of the dollar spend figures. This is because the tourism electronic card transaction represents the part of the total tourism spend. It only includes the physical card spend and not the cash, pre purchases or online transactions. Also, as I said, the MRTEs should not be compared directly with the Tourism Electronic Card Transactions because the Tourism Electronic Card Transactions are substantially smaller than those of MRTEs. And the last bit would be maintaining an extra precaution while interpreting the international spend results from the period of April 2020 to April 2021, because this data could be skewed by

returning New Zealanders using their overseas cards. Although we recommend certain precautions and cautions using the TECT data, we still believe that this is the best way to provide users and stakeholders with the highest quality information since travel is affected by COVID-19. Moving on to the latest data for the TECTs. The domestic TECT spending for the year ended August 2021 was up by 27% from August 2020 and 17% from the pre COVID levels in year ended August 2019. We also saw the international TECT spend down by 64% as compared to year ended August 2020 and down by 72% as compared to the pre COVID levels. That said, August generally shows a lesser tourism spend because of the winter season and the domestic TECT spend for the month of August 2021 showed the impact of Alert level 4 being in place nationally from 18th for August 2021. And as you can see it was down by 19% from the same month previous year and down by 21% as for the same month in 2019. It was approximately half as compared to the previous month in 2021.

54:01

All regions saw strong and annual growth. They all witnessed double digit increase in the year ended August 2021. However, they showed double digit decline because of the Alert levels, except Auckland. Auckland saw an increase by 21% in this month. Because last year in August, Auckland was on Alert level 3 for most of the period. That data, as we have mentioned before in this meeting last time, is available on our website Tourism Evidence and Insight Centre, which Rapha showed talked about previously and the data could be visualised, interacted and downloaded from not only the website but also that is this cool feature which Rapha talked about, the bulk download page. The methodology and pivot tables are still found on the MBIE website. And the stakeholder alert that we release monthly is also shown as an article on our website, the TEIC website with a description to where to find the data. That's all. Thank you. I'll pass over to Michael for future vision of TECTs and Michael Stechman for next steps or Marketview data.

55:35

So, Swati sort of outlined some of the issues that we have with the TECTs and I know you as tourism data users are experiencing some frustration. And certainly we absolutely acknowledge that the Tourism Electronic Card Transaction data is not, you know, the complete package that we were able to provide as part of the Monthly Regional Tourism Estimates. So look, we're well aware that there are limitations. And I think we've discussed in this call before that, you know, our view was to try and put something that could be of use to the industry, and that provide, provide at least a partial of that need, with the eye that we would be looking to in the future when things settle down to replace it with something more fit for purpose. So I really do appreciate everyone's understanding and be bearing with us over this time. We know there's no ideal situation. But yes, so the Tourism Electronic Card Transactions are very partial. The Monthly Regional Tourism Estimates we'd had back in the past, we were able to estimate total regional tourism spend for the use of other accompanying datasets such as the International Visitor Survey and the Tourism Satellite Account that we could use to wait up the data to estimate total spent. And it worked, because things were very regular. In the sense there was always, a clear pattern of up and down over the year that we could see over time, which made us made it very much easier to model and estimate missing data. So in this uncertain time, when we had a complete shift, complete change in the sector, it is much, much harder to do that modelling work. So when we're looking at the future of the TECTs, realistically, it's not going to be two or three, it's going to be two or three years before the very least before we could start seeing this patterns recover to the point where we could actually do some decent modelling estimation. So in the meantime, really, the only way that I can see is that we can improve the quality of our tourism electronic data is to try and fill those holes. And what are the big holes? The big holes are the pre purchase expenditure information that we know

we only we don't get too much as far because we're because the electronic card data is only bricks and mortar transactions in businesses and shops and so forth. So that's one area that we'll be looking at. And also I guess cash, but I guess that cash is a less important thing to us because over time, I think the COVID-19 situation we've seen a real shrink in the use of cash. And I think that will continue over time. So I can't absolutely promise anything at this stage. But just be aware that is the areas that we are looking into. I know that Michael Stachment from Marketview who's really been at our side this whole time trying to help us solve these particularly thorny issues. So we've been working closely with Michael and he's got a few things you'd like to say about latest developments on the Marketview side. So take it away Michael.

59:17

Cheers, Michael and cheers, Swati. Hi to everyone. And yeah, some of you guys. I believe you are muted Michael. I can't hear anything.

59:32

Can you hear me now?

59:36

Cool. Thanks, guys. The rookie mistake on my behalf.

59:39

Sorry, Michael. Can't hear you. Can you hear me now? I believe it's my fault. My technical problem. I do apologise. It's just me.

59:55

I'm sorry. I'm

59:55

saying I'm saying one thumbs up one thumbs down. Thumbs up.

1:00:01

Perfect. Cheers, guys.

1:00:06

Um, where was I? So most of you will know that our data for a long time consisted of firstly, Paymark, and also Bank of New Zealand, and our relationship with the Bank of New Zealand ended late last year. Since then we've been working away at securing another data source to complement Paymark. And we're making some really, really positive inroads on that front with multiple data providers actually. In these new times, there's a lot more kind of risk and compliance, things to tick off, both at our end as well as at other kind of major organizations in New Zealand, kind of gone are the days of the unregulated and kind of more cavalier attitude towards micro data. But we are very much inching closer to an agreement with one of these data providers. And we expect to make an announcement on one of those, certainly before Christmas, and hopefully in the next month or so. So there's something to very much look forward to. And we'll just give the data that much more kind of robustness and validity. In addition to that, we're also undertaking a project to look into our international card spend, and just see what we can do around differentiating between kind of cards that we think are genuine international visitors, and those that are active, but that could be other people using it, whether that be you know, a

resident coming home and making one or two purchases, or long stay residents or long stay students or whatever. But yeah, it's all go at our end. And yeah, like to have some positive developments to report over the next little while.

1:02:28

Thank you very much, Michael, and apologies for keeping on accidentally interrupting you without an unnecessarily. I'm sure there's other ways to do that. Anyway. Thank you, Michael. Now, is there any questions anyone has either Swati or Michael myself on the TECTs? If not, I'm going to keep on pushing on with the agenda. We have around half an hour left. And I just wanted to update you with some of the development projects that we had having here inside of MBIE and also at the Stats New Zealand. So Chris Howard is the Senior Analyst in our team who's responsible for the tourism data Co-governance Project, which I'm sure you've heard of earlier this year. So I'd like to...his head a few stores, but I'd like for him to give you an update of where things are at. Chris. My sound

1:03:43

on. All right. Thank you, Amanda. Hey, everybody, Chris here. So yeah, this will be a sort of quick update. But a positive one on the Co-governance Project. That yeah is a few years in the making since the tourism data hui in 2019, which was disrupted for obvious reasons. And then, yeah, this latest outbreak has sort of disrupted things, the progress on this project. But just recently, we've had some positive news and following if you're aware, there was a public or industry consultation on the Co-governance group's terms of reference, which were developed based on a workshop and several rounds of feedback back in March and April this year with our working group. And those terms of reference were reviewed and put to the Minister of Tourism, Stuart Nash, for review and there's been some key points in the formation and establishment of the governance group that needed to be worked out internally in MBIE, as well as over in parliament in Stuart Nash's department. So the good news is the last briefing we sent to him, which went to him the day just before this latest lockdown and outbreak and then promptly got put in a pile at the bottom of his priorities. But we've just finally had the briefing signed off, which answered some key questions we had around the funding of the group, which for those of you who were on the scene, two years ago, at the data Hui, the idea of Co-governance was also co funding of the government and the industry partnering in all aspects, including funding. Things have obviously changed over the past couple years. And now, as its evolved, MBIE is largely footing the bill for the establishment of the group, which will also entail the development of new tourism datasets and research projects. And so this has been part of the delay of getting the group established was working out the funding, which is going to come from the tourism appropriation at MBIE, which covers the cost of our team and commissioning research projects that we've even seen here today. And the Co-governance group is going to be reviewing those and also working towards new projects and developing better insights, all of which requires funding coming from our tourism appropriation as well as the IVL pool, the International Visitor Levy, of which there was a sum set aside for data and Co-governance projects. And that needed to be reviewed by Minister Nash because the decision was made under the previous minister. And anyway, long story short, all is approved, and we're moving to the next phase for the Co-governance group, which is appointments. And so in a few weeks, we are going to be posting several things on our website, and you, who I assume are on our stakeholder alert lists, will get a notification. And that post will include a write up of the consultation that took place back in late June, this year, the updated draft of the terms of reference for the group, an analysis of the consultation process, and then the next steps, which is going to be a call for expressions of interest for members of the group. So please keep an eye out for that. And if you're interested in possibly being on a member of the code governance group, really keep an eye out for that and consider putting in an

expression of interest. And our hope is to start this process now and in the coming weeks and work towards appointments by later this year. And probably the group being up and running early in 2022. So that's, that's where CO governance is at. Let me know if you have any, any questions I can try to answer. Nice.

1:09:00

Thank you. Thank you very much, Chris, for that. Yeah, let us know if this... Oh, we've got a question coming through "Co-governance group and social sustainability, how is community level data and community representation featuring in terms of the focus of this group?" This feels like a question from Carolyn, am I right? I am right. Can we fill that one, Chris?

1:09:35

Sure, sure. I'll try. Yeah, the aim with the group is and one of the ideas we have is to really sink the TEIC which you got a demo from Raphael earlier on. And of course, the TEIC is centered around the government tourism strategy which you includes the five domains of environment, communities, visitors, and so on. And so yeah, the idea is to take that holistic systems perspective and put emphasis not only on on the economic aspects of tourism, or even just the environmental aspects, but yeah, the communities are going to be a big focus. And yeah, it'll be, though it'll be in a way up to the group, in the name of this is a co-governance group, made up of it, ideally, is going to be made up of diverse actors from different parts of the tourism system. And so they will have the TEIC at their disposal to gain insights from but it'll be up to them to decide what the direction of tourism data collection and research I, you know, think it'll, they'll factor in communities. And the group will be led by co chairs, who will sort of facilitate and make sure that nothing gets overlooked ideally. Thanks for the question.

1:11:30

Okay, we have another couple of questions. Who will monitor this?

1:11:46

Right, yeah, well, ultimately, this will, MBIE will monitor this. And I suppose the minister himself will want updates and briefings on the progress made and directions of the group. The funding, as I said, is, is coming from the tourism appropriation to MBIE, and the IVL funding. So MBIE will have a strong connection to this. I did forget to mention, another thing that's happening is we're currently hiring a secretariat to help sort of organise and orchestrate the group. But yeah, the group will be working closely with MBIE, which will be both a sort of a funding and a kind of hosting and support function.

1:12:47

Thank you. Thank you, Chris. All right. In the interest of time, we'll keep on moving along. So the next point is the International Visitor Survey. I'm sure that many of you are interested about where this project is. We've certainly had a bit of a rough ride with the International Visitors Survey this year. With our intention to actually launch it when we had the Australian bubble, which we successfully managed to do we use using this questionnaire that was originally developed and reviewed in I think, late 2019, we then ran a we managed to get a pilot study operating and got some questionnaires put out to interviewers, in over the course of the bubble about a month's worth of their bubble, we started to get we got about I don't know 150 or so responses from that initial pilot, but then we had to close it down again, once the Australian bubble closed. So now we have a bit more time up our sleeves. We're going to do, well a bit more context. You guys met. Everyone may be aware of this, StatsNZ is using a modelling approach to estimate the balance of payments, international travel credits section of the

balance of payments, which is quite an important part of the of the national, well, the full picture of of national accounts, etc. So so they were using electronic card transaction data as the basis of that model as a replacement for the International Visitor Survey that could no longer be run. So that seemed to be going fine. And really the information we'd received was that the International Visitor Survey would then be used more of a secondary data source to support the function of this new electronic card data method. However, you may have seen the last few months StatsNZ did an internal review and determined that the electronic card transactions were no longer fit for purpose or were not fit for purpose. And that's partly to do with some of the issues that we raised in the tourism electronic card transactions release. Such as the I think, a high proportion of potential New Zealanders using international cards being collected as international visitor expenditure. As a result of this decision from StatsNZ, the International Visitor Survey, again, is high profile on the agenda, which means that we are working to the point where we can then start administering the survey again at airports. We want to make sure that everything is up and running to that point. So despite us being public servants in the government, we do not have insight and exactly when the borders will open again, and sadly. So people should stop asking me that question. However, we want to make sure that everything is good to go, the StatsNZ have identified this is a priority. So delivering a significant amount of resources to get this the International Visitors Survey up and running. So we are going to be working in partnership with them to try and relaunch the survey if and when or when I shouldn't say if should I when the when the when the country is back, available for international visitation. So that is, so it's I guess a little bit too early in the process to specify the specific details about this project. We're working through them as we speak, but I can say is we have a very capable Senior Analyst, Mary Adams, who is going to be leading the project for us on our end, which is which is really great to see. Mary, do you want to say hi.

1:17:13

Hi, everyone. I'm three days in this new job. Say it's really nice to be here. I've just come over from another part of the MBIE Research branch. I've been working on economic development space for the last couple of years. So hello.

1:17:31

Thank you, Mary. Sorry for throwing you on to that. But there you go. Yeah, so as I say, it's early days for Mary but he will be picking up this project and running with it. So anticipate some more information from us down the track as we as we get this, this process up and running. And lastly, in terms of the development projects, I did want to highlight the Tourism Satellite Account. I know many of you have identified it as a very, very important measure for the tourism sector and StatsNZ and I have been having some discussions around the approach this year and making sure that it's going to be launched as per usual in December. So I believe Bernie is here from StatsNZ who's give us a quick update of where things are at with the TSA.

1:18:33

Tena koutou katoa everyone can hear me Amanda can give me a thumbs up if you can hear me your goods.

Firstly, yes, the Tourism Satellite Account is down to be released on the 10th of December. And that will be for the year ended March 2021. For those of you not necessarily familiar with what the Satellite Account is, it's giving you an overview of tourism's economic contribution and employment. So we're looking at things like overall spend, exports, value added and employment metrics. Two main things I'll state without getting too technical is we have had some data challenges. Specifically in the

household space, which is the largest component of domestic tourism. We have used historically BNZ card data around 600,000 as a sample from Marketview to calculate that particular component of domestic tourism expenditure. That has changed in terms of a data supply arrangement, and therefore we only have 10 months of the year ended March 2021. So we've got our brains together with our state's methods folk and working with Marketview and we've come up with a way to ensure that we have a full 12 months complement. And we've modelled those last two months from a territorial authority basis up to a national total. So there'll be no issue in terms of producing an estimate on the household and domestic expenditure front. On the international front, as Michael's alluded to, there's been some challenges in that space. And that's specific to the latest year, so nothing to do with prior years in terms of the IVS. And I think the data that's been released by us recently indicates that in terms of export earnings, previously tourism's around 17,5 billion a year, it looks as though it's going to be in the vicinity of two and a half to \$3 billion based on the published data a moment. So you will have a Satellite Account, we will be making it available at 10:45am on the 10th of December, if you've got any questions, now's your opportunity, or you can engage with me offline.

1:20:51

Thank you very much, Bernie. I'm sure everyone finds it very reassuring that we will have the TSA to hang our hat on this year. So I did have a question that came through on the IVS, International Visitor survey. "Will you include questions around pre purchased spend and the relaunch of the IVS?" Interestingly enough, Carolyn, we actually had a question in that, in the previous version of the International Visitor Survey, and that was one thing that helped us triangulate the Monthly Regional Tourism Estimates back in the day. So I imagine we will be considering that as part of this review. Alright, so it's 10 minutes to and as the opportunity for other business for the group. So we've been doing a bit of talking, so if anyone would like to, I'm going to open the floor. So if anyone has any questions, or any comments that they'd like to make, I'm going to give the opportunity to do so now.

1:22:19

Well, we don't have any specific comments or questions that have come through so on that note them we will finish about 10 minutes early. So I really appreciate everyone's participation in this group. And if you would like to contribute to this group in any way, please contact us we would love for more industry participation. So thank you very much all. Have a great day.