

Regional Tourism Measurement: Concepts and the New Zealand Experience

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Purpose

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- Set out New Zealand experience of regional tourism measurement
- Consider the conceptual issues involved
 - Making the most of the resources available
 - Developing new data

Core Tourism Dataset

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IVS
International Visitor Survey
Tier 1 Statistic Nielsen

DTS
Domestic Travel Survey
Tier 1 Statistic Nielsen

TSA
Tourism Satellite Account
Tier 1 Statistic SNZ

CAM
Commercial Accom Monitor
Tier 1 Statistic SNZ

Forecasts
New Zealand Tourism Forecasts
Covec

IVA
International Visitor Arrivals
Tier 1 Statistic
SNZ

RVM
Regional Visitor Monitor
Angus and Assoc



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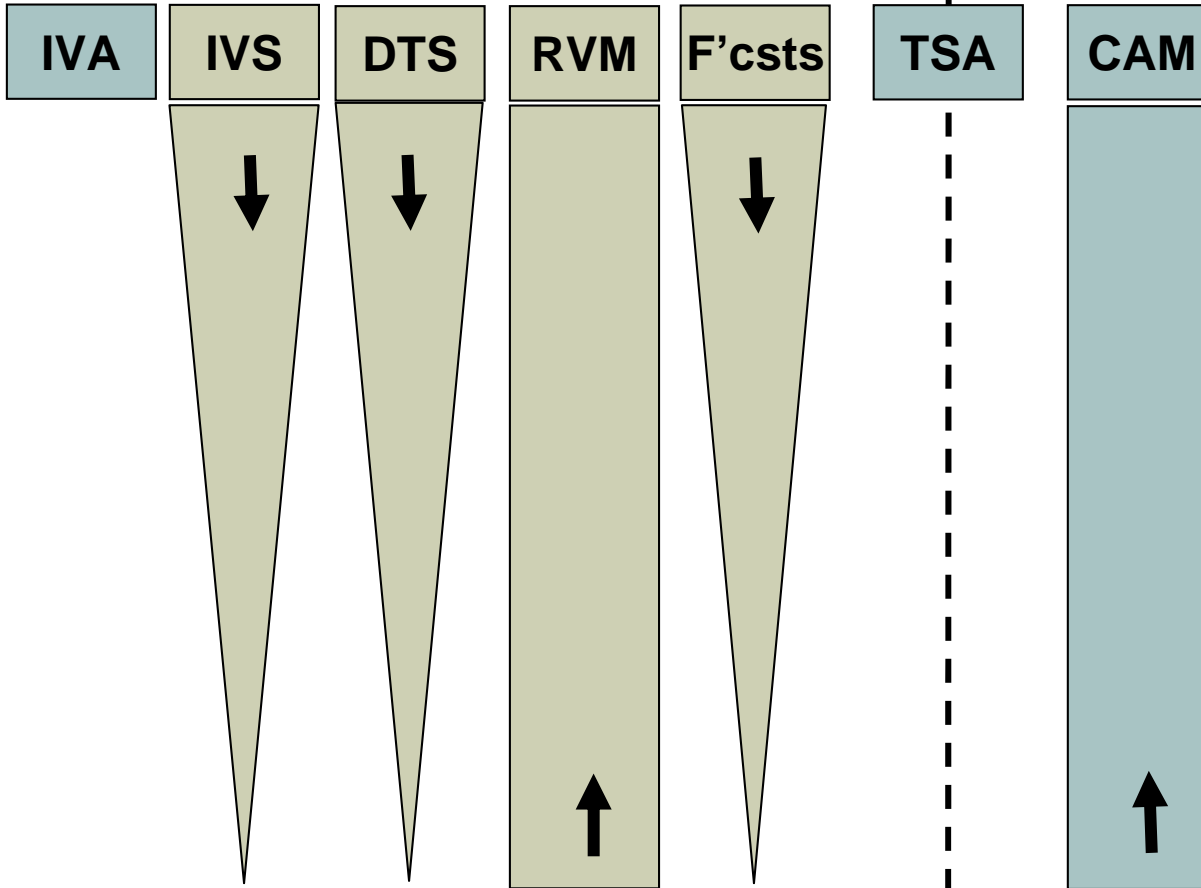
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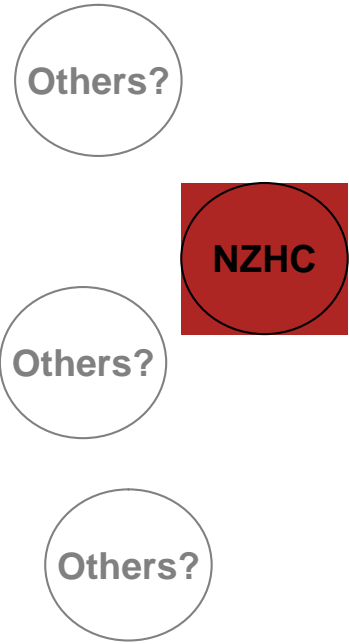
Demand

Supply

National



Regional



Coverage

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Key Variable	Source	Quality
International Arrivals & Departures	IVA	Excellent
Origin, purpose of visit	IVA	Excellent
Spend	IVS, DTS	Good
Nights	CAM, IVS, DTS	Good
Activities	IVS, DTS, RVM	Good
Itineraries	IVS, DTS	Good
Motivation	RVM	Good
Satisfaction	RVM, IVS, DTS	Good
Transport used	IVS, DTS	Good
Accommodation capacity	CAM	Excellent
Accommodation utilisation	CAM	Excellent
Regional information	IVS, DTS, CAM, RVM, Forecasts	Low/Good/ Excellent
Future outlook	Forecasts	Good
GDP, exports, employment	TSA	Excellent

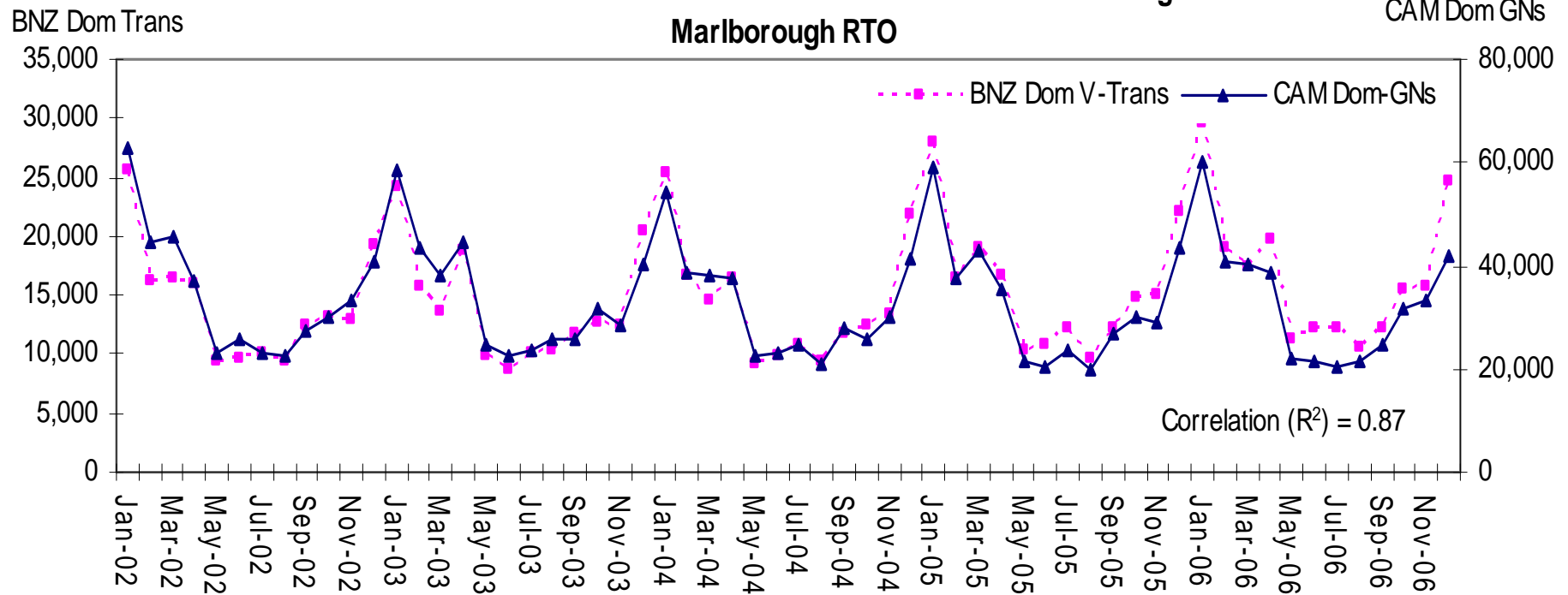
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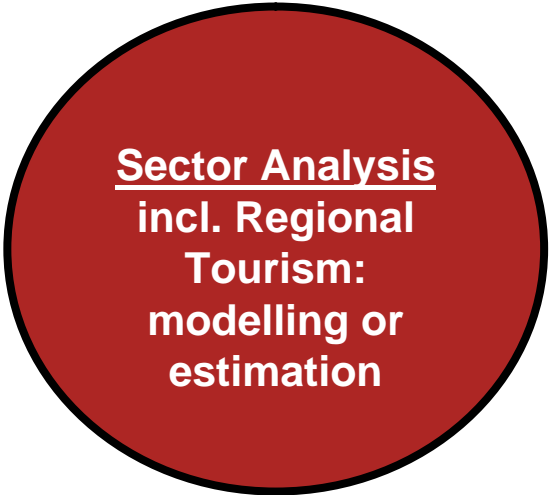
BNZ Domestic Visitor Transactions vs CAM Domestic Guest Nights Marlborough RTO





Top-down national collections
e.g. IVS, DTS, IVA (demand)

Administrative data
e.g. electronic card transaction data
Various official statistics series (demand & supply)



Sector data collections
e.g. hotel data (supply)

Bottom-up national collections
e.g. CAM (supply), RVM (demand)

Tourism Flows Model

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- Analysis by road or air
- Intl. or domestic
- Forecasts up to 7 years

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Step 1. Who is Travelling?

Choosing your market segments

The Tourism Flows Model takes information from the Ministry of Tourism's International Visitor Survey and Domestic Travel Survey, and the Tourism Forecast, to build a picture of current and future tourism flows in New Zealand. The TFM allows the behaviour of international and domestic tourists to be segmented based on year, season, region of origin, and mode of transport.

Analysis Criteria

Year: 2006

Season: All

Type: International

Origin: All

Mode: All, Australia, United Kingdom, United States, Japan, China, South Korea, Germany, Rest of World

(Flows)

Flows Analysis

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UK travellers –
widely dispersed

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selection. The thicker the line, the more tourists travel on that route segment. 393 route segments displayed on map.

Show Flow Table

Next: (Per Segment Analysis)

New Analysis

Show Analysis Criteria

Set what happens when you click on the map below:

Click on map to zoom in.

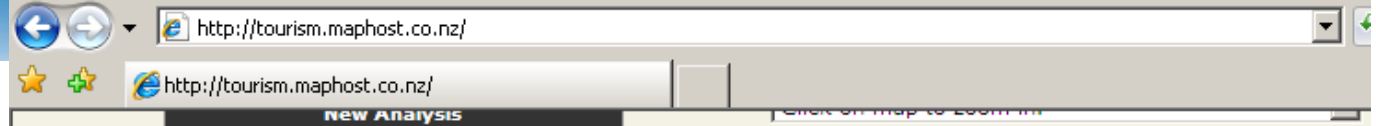
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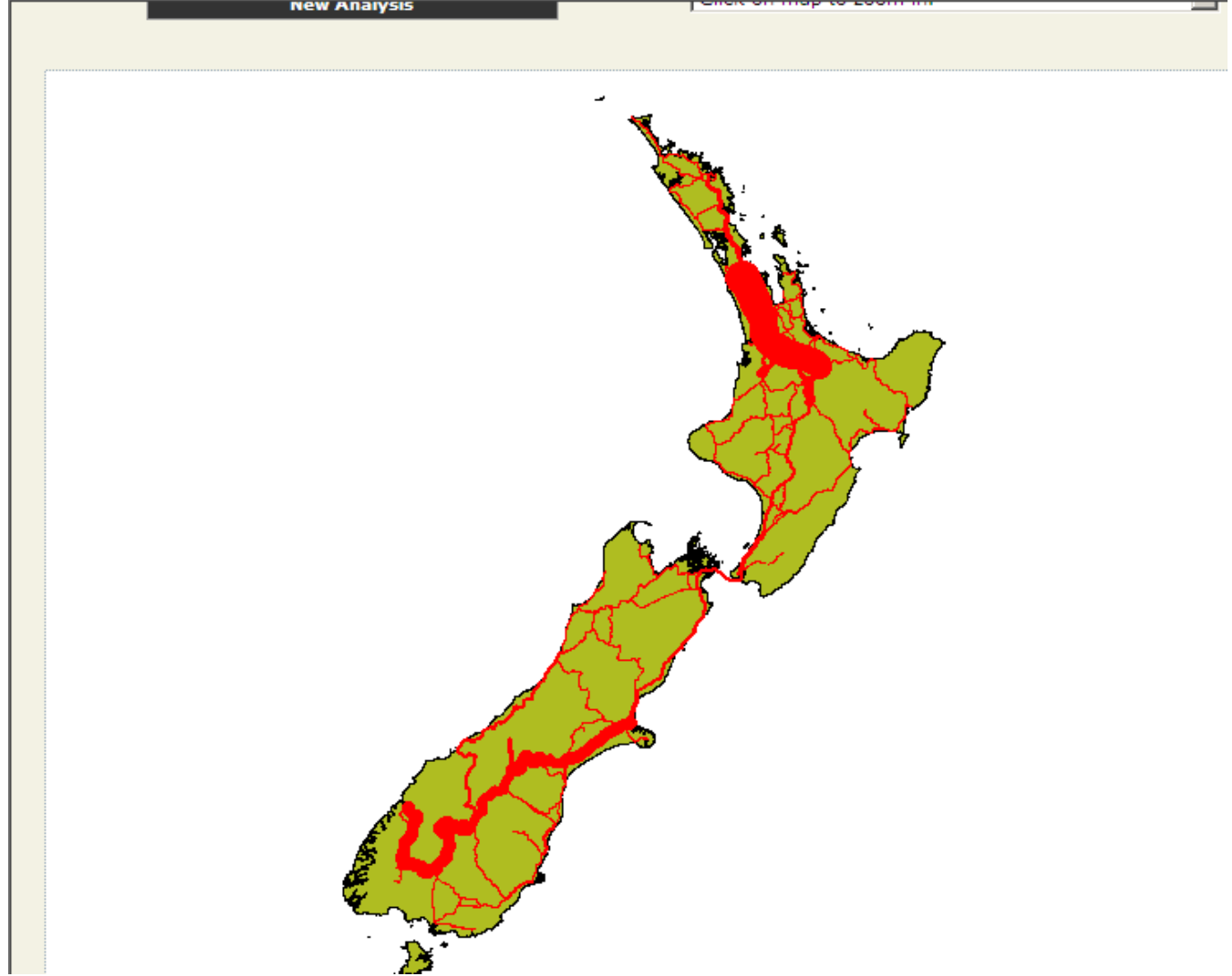
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**Chinese
travellers –
heavily
concentrated**



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The TFM allows analysis of traffic by origin of visitor on a particular road, now, and up to 7 years into the future.

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Step 3 - Detailed Route Segment Analysis

When you click on a Route Segment on the map, the table below will show summary data for that Route Segment.

Note that one segment is part of a bigger trip; i.e. one trip is composed of many individual route segments.

You can change the summary parameter here.

[Download Data Table \(CSV\)](#)

Origin	Tourist Numbers
Australia	169000
China	45000
Germany	33000
Japan	89000
Rest of World	206000
South Korea	6000
United Kingdom	136000
United States	86000

All numbers are subject to sample error, the smaller the tourist number the higher the sample error

[Back to Flow Map Page](#)

[New Analysis](#)

[Show Analysis Criteria](#)

Set what happens when you click on the map below:

TFM Location Analysis

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Regional Analysis

- Numbers
- Nights
- Spend
- Purpose of visit

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table below will show summary data for that Area.

Show Analysis Criteria
Set what happens when you click on the map below:
Click on map to zoom in.

You can change the summary parameter here.

Northland RTO Traveller Origin

Origin	Number of nights
Australia	492785
Rest of World	421507
United Kingdom	344924
United States	260463
Germany	162094
Japan	46370
China	36662
South Korea	16101

All numbers are subject to sample error, the smaller the tourist number the higher the sample error

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CAM Review

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In real terms

- The essential quality of the CAM remains – real data at fine regional breakdowns
- Not weighted data, so not subject to error margins
- KPI quality

TMT's Research Programme

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- NZTS 2015 – data quality improvement clearly signaled, incl. IVS/DTS and regional/sector data
- TMT Research Programme evaluation underway – reporting in February
- IVS and DTS management changes are proposed

All of these steps will lead to better data, but are long term developments

What do we recommend

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- 1st Tier: CAM for KPI analysis
- 2nd Tier: Regional Forecasts, IVS, DTS for characteristics analysis

Also,

- Other data being looked at, eg BNZ data regional breakdowns – considerable potential with stable series
- Enhanced modeling of regional data, eg drawing on all available data – IVS, DTS, CAM, bank data, and others

Other work

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- Yield research released today at ITOC
- Tourism Flows Model – web version
- TMT research website - redevelopment

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Questions and Discussion...

