



Industry Data and Expert Analysis (IDEA) Working Group

April–October 2022
6-month summary report



Background

The IDEA Working Group was established as part of the implementation governance for the government’s long-term tourism strategy, THRIVE 2030. This 6-month summary report is a requirement of the working group’s terms of reference¹. The terms of reference also require a final report after 12 months, after which the working group will be disbanded.

The IDEA Working Group’s mission is to identify information gaps and potential solutions to data and information deficits in Australia’s visitor economy, and to deliver a set of long-term progress indicators for the visitor economy.

The working group is comprised of 13 industry, community and government representatives and experts and a Chair, each appointed by the CEO of the Australian Trade and Investment Commission.

Table 1: IDEA Working Group members

Name	Position	Organisation
Dr Garth Taylor	Head	Tourism Research Australia
Evan Saunders	Vice President, Global Tourism & Hospitality Sales	Near (formerly UberMedia)
Dr Grace Pan	Strategic Development and Research Director	Tourism & Events Queensland
Denise Ulbrick	Manager, Research, Tourism and Events Strategy and Reform	Department of Jobs, Precincts and Regions (DJPR), Victoria
Rob Dougan	Executive General Manager, Strategy and Research	Tourism Australia
Paul Fleming	Research and Insights Specialist	Tourism Tasmania
Jan Hutton	CEO	Australian Tourism Data Warehouse
Garrick Bryant	Head of Data Strategy	Sydney Airport
Prof. Leo Jago	Professor of Hospitality and Events	Griffith University
Peter Clay	General Manager, Research and Insights	Caravan Industry Association of Australia
Carol Giuseppi	Community member	Former General Manager, Accommodation Association of Australia
Amanda Clark	Program Manager, Physical Environment Accounts and Statistics	Australian Bureau of Statistics (ABS)
Prof. Sally Cripps	Research Director, Analytics & Decision Sciences	Data 61, CSIRO
Adele Labine-Romain	National Tourism, Hospitality Leisure Sector Lead and Partner	Deloitte Access Economics

¹ IDEA Working Group terms of reference, <https://www.austrade.gov.au/ArticleDocuments/10838/industry-data-and-expert-analysis-working-group-terms-of-reference-2022.docx.aspx>

Progress report

As of 6 October 2022, the IDEA Working Group had conducted 4 meetings, and initiated 4 data and research projects.

Prior to the working group’s first meeting, members participated in an anonymous online survey. Through 12 questions, members expressed their views and recommendations on data-related areas. Among other things, members were asked to rank the priority metrics for visitor economy measurements and also new priority data sources for exploration, from which to extract those measurements. As shown in Figure 1, working group members highlighted 5 priority measurement areas through the survey, and Figure 2 shows the 4 highest priority data source areas identified for investigation.

Figure 1: Top 5 Priority metrics

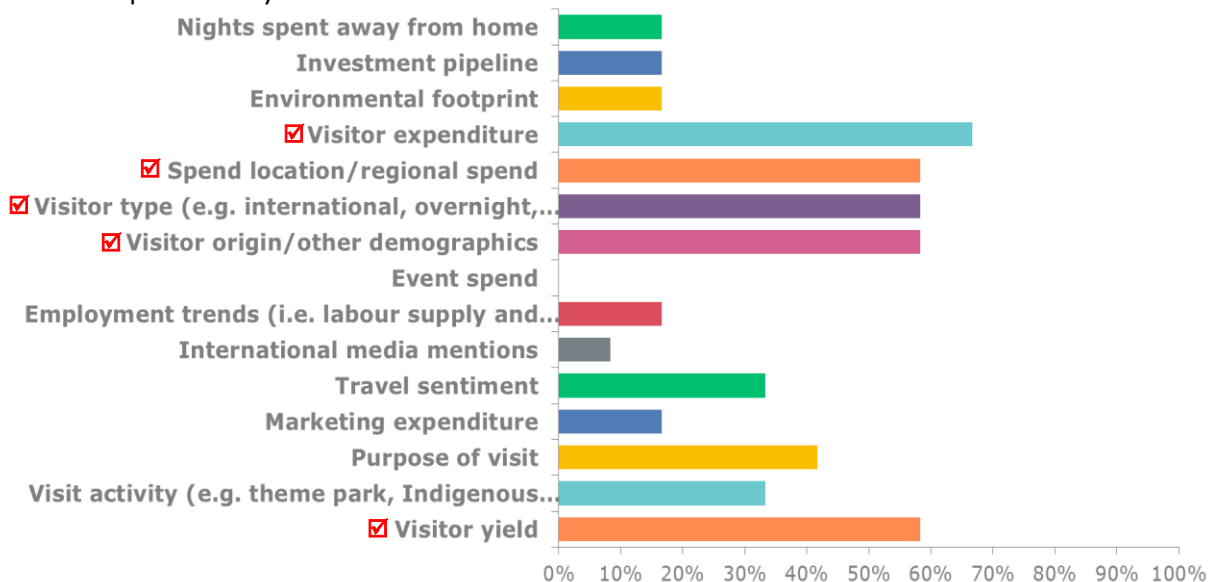
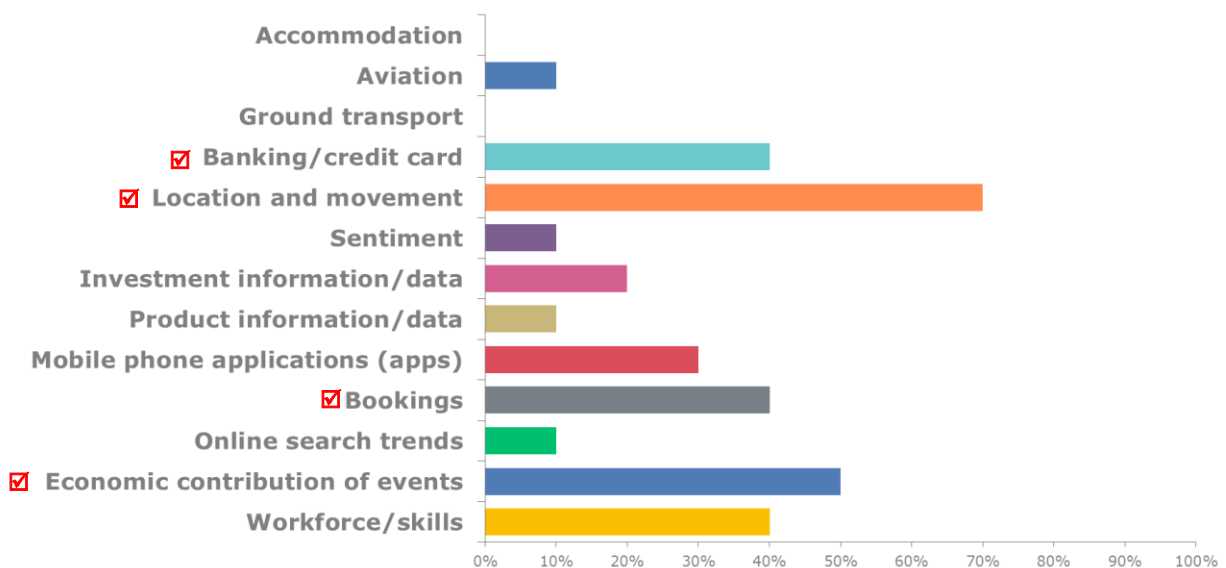


Figure 2: Priority new data sources for investigation



All meetings commenced with an acknowledgement of the traditional custodians together with an outline of the purpose of the group from the terms of reference. The terms of reference contain 6 responsibility areas. The working group identified that one of the responsibility areas, the specific requirement of establishing a framework for long-term progress indicators, would require ongoing attention because of the time-limited nature of the working group.

A summary of the working group's first four meetings is available online from the [THRIVE 2030](#) web pages, in two separate communiques:

- [Communique 1](#) – Meetings 1 and 2
- [Communique 2](#) – Meetings 3 and 4

Attachment A contains the attendance list for those meetings.

Projects

The IDEA Working Group has initiated 4 data and research projects. These projects research or explore complementary data sets and/or data products that, when combined with existing data sources, could potentially support a broader and more insightful interpretation of Australia's visitor economy. Each project is guided by and consistent with the ABS Data Quality Framework.

Project 1: AFL Grand Final, Brisbane

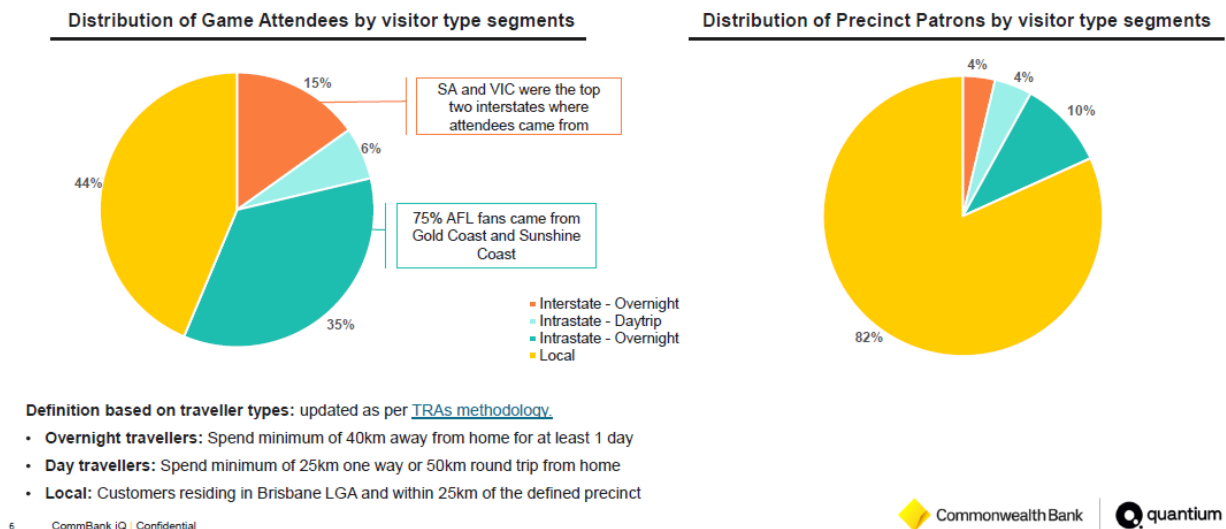
CommBank iQ were engaged to demonstrate their capacity to combine large financial datasets with data science to produce a granular representation of segments of the visitor economy. The practical project selected for this demonstration was to identify visitor economy measurements related to the AFL Grand Final hosted in Brisbane in 2020.

The project concept was initially discussed at Meeting 1, while the more detailed methodology was presented in Meeting 2 and the project outcomes in Meeting 3. The project was able to identify transactions from 14,800 of the roughly 29,000 game attendees and from an additional 17,500 individuals who had visited the precinct around the game venue on the day. (Note that the transaction data used contained no private information.)

The project report showed that around 15% of game attendees were interstate travellers, and 35% were intrastate overnight travellers. It also highlighted a total uplift in consumer expenditure and displayed the potential to use the data to determine categories of visitors (e.g. families; double income no kids; older singles and couples). Figure 3 is an example of the project's outputs.

Figure 3 – Example outcome from Project 1

56% of Game Attendees were visitors from interstate and intrastate, while Precinct Patron visitors represented normal visitor traffic in the Precinct area



The project was initiated to explore the representativeness of the CommBank iQ data representations. Members sought further on data accessibility and affordability and noted that the data would need to be complemented by other data inputs to derive visitor intention or other sentiment factors that might motivate visitation.

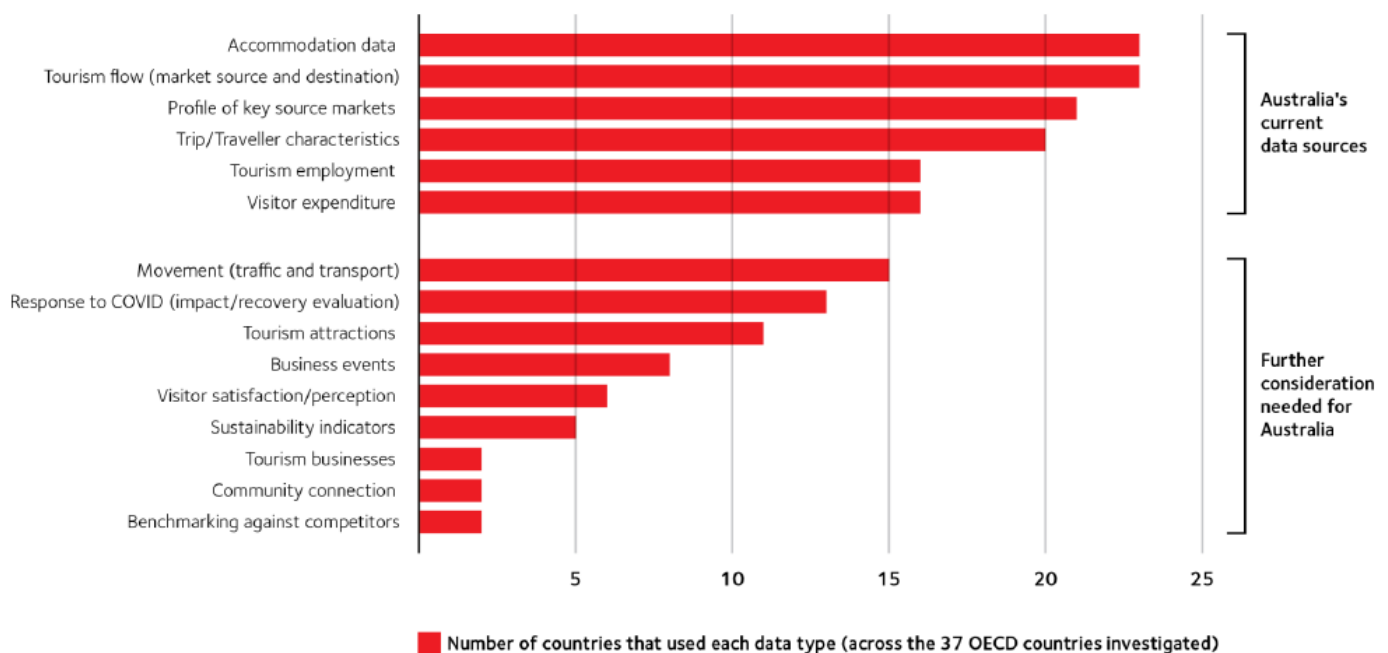
Project 2: International tourism data hubs

An international tourism data hubs research project was initiated in response to the member survey feedback on data developments in competitor countries. The project, initiated after discussion at Meeting 2, explored tourism data hubs in OECD countries and identified that 30 countries had some form of tourism data or tourism insights access point, and 7 had no identifiable tourism data access point. Of the 30 countries with at least some form of tourism data access point, 5 were found to have more advanced models.

Griffith University was engaged to deliver the project. The project report included 9 matters to consider and 3 recommendations alongside a collection of data sources for further consideration.

Figure 4 shows the data metrics represented in the data hubs of other OECD countries and groups them into the most common.

Figure 4 – International tourism data hub metrics



Project 3: Helix Personas

At Meeting 2, the working group investigated a potential method to add value to existing National Visitor Survey (NVS) data by integrating psychographic profiles with NVS data.

The NVS provides tangible estimates of the spend behaviour and other contemporary travel characteristics of Australians, in essence establishing demographic profile data for travellers. Tourism Research Australia undertook to develop a project to align NVS demographic details with a set of psychographic marketing profiles commonly used by Roy Morgan Research known as Helix Personas.

Helix Personas provide psychographic insights based on values, beliefs and attitudes, which are the best predictors of consumer behaviour. The combination of NVS and Helix Personas will interweave values, attitudes and actual travel behaviour in a way that is expected to allow product developers, marketers and investors to more readily segment consumers and more predictively identify consumer trends.

The project aims to make more market-ready industry information available to governments, businesses, tourism representative bodies and regions, and researchers.

There are a total of 54 profiles in the range of Helix Personas: the high-level grouping is shown in Figure 5.

Figure 5 – Helix Personas high-level groupings



TRA committed to initiate a project that would integrate the Helix Personas with the NVS data and report back to subsequent working group meetings on initial outputs.

Project 4: Longitudinal Indicators for the Visitor Economy (LIVE) Framework

The working group is responsible for delivering recommendations on long-term progress indicators for Australia’s visitor economy. The LIVE Framework aims to develop an innovative, diverse, and resilient set of indicators comprised of leading and lagging measures, encompassing social, environmental and economic indicators. This project aims to identify the core metrics and the associated data sources that will enable a holistic perspective of the visitor economy’s performance and will likely be established on principles consistent with the UN Sustainable Development Goals (Figure 6).

During Meeting 3, Griffith University led a blue-sky session to gather information from members for the initial input to a formal indicators framework. A draft conceptual framework was discussed at Meeting 4.

At the next meeting (Meeting 5, December 2022), the working group will meet in-person to progress the development of the framework.

Figure 6 – Graphical representation of the UN Sustainable Development Goals



Update to members: Telecommunications data

At Meeting 1, TRA presented to the working group a high-level concept related to the potential for telecommunications data to measure population movement. This concept was more deeply explored in Meeting 4, when DSpark, a data analytics firm primarily focused on mobile phone network data, presented to the working group together with TRA.

DSpark has been engaged with TRA for 2 years to develop mobile phone network movement data for use in tourism. This data is showing potential for use in domestic tourism statistics with both overnight and day trips now showing alignment with NVS definitions.

Two benefits of the data are that tourism estimates could be provided at a more granular level and could be available in as little as five days after the reference period. TRA explained that there is some potential for the DSpark data outputs to complement national surveys to improve official statistics, and for event measurement.

Challenges were highlighted in relation to the measurement of international travel and further detailed investigation is required in this segment of the visitor economy.

Next steps

The terms of reference for the IDEA Working Group requires this 6-month report as a summary of the working group's progress, and a further 12-month report with the group's final advice. The 12-month report will contain a summary of results from various projects undertaken by the group, consultations held, matters considered and recommendations for future development.

Between the 6-month report and the 12-month report, the working group will focus on establishing an initial set of long-term progress indicators for Australia's visitor economy and broadly consulting on those proposed indicators with government, the research community and industry experts. The proposed indicators will seek to represent, through data, Australia's visitor economy performance over time, across national and regional levels. Longitudinal metrics will support long-term industry decision, such as needed for product development and investment decisions, and will also act as a guide for the implementation of the THRIVE 2030 strategy.

The working group will consult with various specialists and practitioners on enhancements to existing data, or new datasets, that could be used to inform decision making by visitor economy businesses, investors, and government policy makers. These consultations will be used to inform the working group's final report.

The 12-month report is due to be completed in April 2023 and the working group disbanded in the same month.

Images

Cover images (left to right)

Title: Indigenous experiences, Western Australia
Courtesy of James Fisher & Tourism Australia

Title: Sunshine Coast kayak
Courtesy of Spinal Life Australia

Title: Voyages Indigenous Tourism Australia – Mossman Gorge Centre, Queensland
Courtesy of Tourism Australia

Title: Centre Place, Melbourne Laneways, Victoria
Courtesy of Visit Victoria

Title: Learning about Cathedral gorge from Bec Scampi with Kingfisher Tours, Kimberley, Western Australia
Courtesy of Kingfisher Tours

Graphics

Figure 6:

Title: [The SDGs wedding cake](#)
Courtesy of Stockholm Resilience Centre

Meetings 1-4 attendance record

Name	Position	Organisation	Meeting number			
			1	2	3	4
Dr Garth Taylor	Head	Tourism Research Australia	✓	✓	✓	✓
Evan Saunders	Vice President, Global Tourism & Hospitality Sales	Near (formerly UberMedia)	✓	✓	*	✓
Dr Grace Pan	Strategic Development and Research Director	Tourism & Events Queensland	✓	✓^	✓	✓
Denise Ulbrick	Manager, Research, Tourism and Events Strategy and Reform	Department of Jobs, Precincts and Regions (DJPR), Victoria	✓	✓	✓	✓
Rob Dougan	Executive General Manager, Strategy and Research	Tourism Australia	✓	✓	✓	✓
Paul Fleming	Research and Insights Specialist	Tourism Tasmania	✓	*	✓	✓
Jan Hutton	CEO	Australian Tourism Data Warehouse	✓	✓	*	✓
Garrick Bryant	Head of Data Strategy	Sydney Airport	✓	✓	✓	✓
Prof. Leo Jago	Professor of Hospitality and Events	Griffith University	✓	✓	✓	✓
Peter Clay	General Manager, Research and Insights	Caravan Industry Association of Australia	✓	✓	✓	✓
Carol Giuseppi	Community member	Former General Manager, Accommodation Association of Australia	✓	✓	✓	✓
Amanda Clark	Program Manager, Physical Environment Accounts and Statistics	Australian Bureau of Statistics (ABS)	✓	✓	*	✓
Professor Sally Cripps	Research Director of Analytics & Decision Sciences	Data 61, CSIRO	*	✓	✓	✓
Adele Labine-Romain	National Tourism, Hospitality Leisure Sector Lead and Partner	Deloitte Access Economics	✓	✓	✓	✓

* Apology received

^ Proxy sought and approved