# Industry Data and Expert Analysis (IDEA) Working Group

## Summary record, Meetings 3 and 4

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| **Time:** | 10am – 12noon (AEST) |
| **Dates:** | 21 July 2022 (Thu) and 6 Oct 2022 (Thu) |
| **Location:** | Virtual meetings, via Webex  |
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## Background

The IDEA Working Group was established in March 2022 to identify information gaps and potential solutions as well as funding and distribution models to deliver those solutions. The Working Group’s [terms of reference](https://www.austrade.gov.au/ArticleDocuments/10838/industry-data-and-expert-analysis-working-group-terms-of-reference-2022.docx.aspx) contain six responsibility areas, including to establish a collection of long-term progress indicators for the Australian visitor economy.

The Working Group is comprised of [13 industry, community and government representatives](https://www.austrade.gov.au/about/consultation/thrive-industry-data-and-expert-analysis-working-group/thrive-industry-data-and-expert-analysis-working-group) and a Chair, each appointed by the CEO of the Australian Trade and Investment Commission. The IDEA Working Group has been established for 12 months.

The Working Group’s first meeting was held on 27 April 2022 and its second on 26 May 2022: the [communique for the first meeting](https://www.austrade.gov.au/about/consultation/thrive-industry-data-and-expert-analysis-working-group#:~:text=The%20THRIVE%202030%20Industry%20Data,areas%20in%20Australia's%20visitor%20economy.&text=build%20investor%20confidence.) is available on the THRIVE2030 web pages.

## Meeting content

### Meeting 3

At Meeting 3, the Chair took the first 5 minutes to acknowledge traditional custodians and to reiterate the purpose of the group as outlined in the terms of reference. The Chair noted that Meeting 3 would be focussed on the Working Group’s responsibility to establish long-term progress indicators for the Australian visitor economy.

Prior to Meeting 3, members were requested to familiarise themselves with a report commissioned by Austrade in 2019: *the Griffith Institute for Tourism’s* [*conceptual indicator framework*](https://www.griffith.edu.au/__data/assets/pdf_file/0031/1363396/GIFT-Indicator-Framework-FINAL-Report-18.10.19.pdf) *for Australia’s visitor economy.*

The Chair noted the first half of the meeting would be based on the concept of a blue-sky session and introduced the session facilitators. Griffith University’s Professor Susanne Becken and Associate Professor Sarah Gardiner facilitated the brainstorming session, putting forward several questions to gather information from members as the initial input to formalise a national indicators framework.

The initial group session sought members’ input on the philosophy of the indicators framework and scope and scale of the potential indicators framework.

After the group session, members were divided into two groups and electronically placed into different break-out rooms for smaller group discussions. The smaller group discussions centred on questions relating to priority areas and principles that should apply to the indicators framework. Each group later re-joined the main meeting room and reported back on their discussions.

A further group discussion was held outlining some of the interplay between regional and metropolitan, short-term and long-term, leading and lagging, top-down and bottom-up, and fixed and flexible indicators. The group acknowledged the challenge ahead in setting a one-size-fits-all approach.

The Chair thanked the facilitators and noted to members that the thematic content from the session would be collected and drafted into an initial high-level concept map for consideration at the next meeting (scheduled for 22 Sep).

After a comfort break, the Chair next introduced Griffith University’s Associate Professor Sarah Gardiner to present on the final draft report on the research conducted by Dr Margarida Abreu Novais into recently announced tourism research hubs in various competitor countries.

Dr Gardiner noted that all OECD countries were reviewed: 30 had some form of tourism data or tourism insights access point, and 7 had no identifiable tourism data access point. Of the 30 with accessible tourism data, five countries were identified as having more advanced models: Greece, Japan, New Zealand, Portugal and Spain. The presentation on the draft report covered some of the highlight data uses among the five more advanced countries.

The presentation finished with a list of nine matters to consider and three recommendations:

* Establish a stand-alone data hub
* Consider how to diversity data sources
* Identify potential partners.

The Chair thanked Dr Gardiner for the presentation and commended the final draft report to Working Group members.

Next, Tourism Research Australia Director, Rod Battye, introduced CommBank iQ and invited them to present their final report. CommBank iQ had conducted a project to apply banking data to determine the impact on the visitor economy of the AFL Grand Final in Brisbane in 2020.

CommBank iQ team members presented findings of the data project. The data showed, for example, that:

* CBA data could identify transactions from 14,800 of the roughly 29,000 game attendees, and of a further 17,500 people who had visited the precinct around the game venue on the day (transaction data did not contain private data)
* Around 15% of game attendees were interstate travellers (predominantly from SA and Vic) and 35% were intrastate overnight travellers (around 75% of whom were from the Sunshine Coast and the Gold Coast)
* Comparison with the same period in the following year enabled a direct indicator of incremental uplift attributable to the Grand Final
* Total uplift in spend (i.e. consumer expenditure) and visitor numbers could be calculated, and granular data on the categories of spend could be determined from the data
* Categories of visitors could be determined from the transaction data (e.g. families; double income no kids; older singles and couples).

Members asked various questions of the CommBank iQ team, including whether the data could be scaled to a full stadium; whether the impact on individual businesses or business categories could be determined; whether customer cohorts such as the Helix Personas could be applied to the data; and about how long the proposal took to complete. Members also noted that the weather may have to be considered when comparing two periods a year apart.

The Chair thanked the CommBank iQ team.

The Chair outlined the likely agenda for the next meeting, which included a review of an indicators framework concept map.

The next meeting on 22 September would also contain an update on Tourism Research Australia’s data project on mobile phone movement data and related datasets. Members would be asked to consider and share their ideas on datasets that could be explored or readily applied to the purpose of better understanding/representing Australia’s visitor economy.

Lastly, the working group’s terms of reference require a 6-month progress report, which would be provided to members prior to the next meeting for discussion at the meeting.

### Meeting 4

The Chair acknowledged traditional custodians, welcomed members and paid respect to the life of service of Queen Elizabeth II. The Chair reiterated the two foundation workstreams for the IDEA Working Group, namely,

* to investigate and make recommendations on a series of long-term progress indictors – referred to by Austrade as the Longitudinal Indicators for the Visitor Economy (LIVE)
* to identify information gaps and potential solutions, as well as funding and distribution models,

and noted that the majority of Meeting 4 would be dedicated to the latter workstream.

The Chair introduced the meeting’s main topic by placing TRA in its context as Australia’s official statistics provider for the visitor economy. The National Visitor Survey (NVS) has, since 1998, been the central data collection for domestic tourism measurements. In recent times, other datasets and data science approaches have become available, some of which are relevant to visitor economy metrics.

Rod Battye, Complementary Data and Stakeholder Engagement Director, TRA, stepped through relevant data discovery and exploration steps taken by TRA in the past 5-6 years, and TRA’s current activities and likely future direction.

This discussion included a presentation from TRA on various alternative data sources researched and explored over the past 6-8 years. Rod noted that there had been over 22 proof-of-concept projects undertaken by TRA and/or TRA’s funding partners over that time.

TRA has for the past two years, engaged with DSpark, a data analytics firm primarily focussed on mobile phone network data. Rod explained that TRA has developed with DSpark a machine environment that enables visitor definitions to be layered on aggregate movement profiles from the mobile phone movement data. All data used is aggregated and therefore non-identifying.

Rod explained, and demonstrated in charts, that, over time, the mobile phone data demonstrated a close correlation with the historical National Visitor Survey (NVS) data. Two benefits of the mobile phone data were that it could be extracted at a more granular level – the SA2 level was demonstrated in charts – and it could be available just 5 days after the reference period.

DSpark’s CEO Paul Rybicki was introduced to the meeting and explained to members how DSpark operates and the types of infrastructure, transport and event measurement projects it had delivered.

A member asked about the level of accuracy when defining geographical locations. Paul explained that the mobile phone data was even more granular than SA2, down to the SA1 level and, in places, even within shopping malls, sporting stadiums and link areas between roads, depending on mobile phone network infrastructure being in place.

A member asked for an explanation of the measurement of international traveller movements, given that many international travellers will purchase a local SIM on arrival. Paul explained that this was a challenge for DSpark because those local SIM could not be easily attributed to international visitors. However, a significant proportion of international visitor use their own devices set to ‘roam’ when travelling and these devices are able to be included in statistical analyses. Rod added that the International Visitor Survey (IVS) collects data on the proportions of people for each country that use a local SIM or roam while visiting.

A member inquired if DSpark’s work in Singapore to develop the Singapore Tourism Analytics Network had been replicated in other countries. Paul noted that he was not aware of any such other such developments.

A member asked a broader question about the DSpark’s data philosophy, particularly about using the right data to address the data need. Paul noted that, for example, just a few years ago DSpark had no tourism domain knowledge and had only gained its current know-how from engaging with domain specialists like TRA and Tourism and Events Queensland.

Rod summarised the presentations by noting that movement was at the centre of all tourism measurements and that TRA had now demonstrated the capacity of mobile phone data to accurately represent population-level movement within the country. The next step was to work on a robust methodology to align the mobile phone data with the traditional NVS data.

The Chair thanked Rod and Paul for their presentations and also acknowledged DSpark’s Adrian Ellison and Lan Cibei, who had also joined the meeting.

After a comfort break, the Chair introduced the next session as an opportunity for members to view various contemporary measurements and data indicators from the visitor economy. This would help to familiarise members with different elements of the visitor economy that may need to be monitored as part of the long-term progress indicators.

At the outset, the Chair noted that the domestic tourism sector had been performing strongly and asked Working Group member Paul Fleming, Tourism Tasmania, to give a brief overview of recent tourism metrics and trends for Tasmania.

Paul noted that it had been a particularly strong return of domestic visitation to Tasmania – measured by expenditure, 2022 was already Tasmania’s strongest tourism year. Paul updated members on various statistics.

The Chair thanked Paul then noted that workforce constraints continued to be among the main concerns for the national visitor economy. To give a contemporary sense of that constraint, TRA presented some of the data slides from the Tourism Jobs Summit hosted by the Minister for Trade and Tourism on 30 August 2022 ahead of the National Jobs and Skills Summit.

As in the wider economy, labour and skills deficits are having a dampening impact on tourism recovery. The presentation showed that the education segment had lost the largest number of filled jobs, and that COVID-19 had impacted full-time and female jobs more than part-time or male jobs. It also showed that a large segment of the tourism workforce, namely the accommodation and food services segment, was around twice as likely as the rest of the workforce to be under the age of 29 and around twice as likely to be unqualified. A long-term deterioration in hospitality vocational education was also demonstrated.

A member noted that workforce constraints were constraining both the economic performance of the sector (e.g. restaurants only opening certain nights because of staff/skill unavailability) and the experience that visitors were receiving (i.e. lower level of servicing is likely to be dissatisfying).

The Chair commended these data inputs to members as a way of progressing or developing their considerations of long-term progress indicators. The Chair then introduced a ‘conceptual framework’ co-developed with Griffith University as a step towards the Longitudinal Indicators for the Visitor Economy (LIVE) framework. The conceptual framework was informed by the blue-sky session with IDEA Working Group members on 21 July 2022, and a further blue-sky session and subsequent consultations with other parties.

The Chair noted that a substantive discussion on the LIVE framework was scheduled for the longer in-person meeting of the working group on 8 December 2022. The Chair also raised a suggestion by one of the members that a smaller working party be formed from volunteering members to develop, with TRA, the facilitation plan for the 8 December meeting. The Chair asked members to consider volunteering for the facilitation working party and to let the IDEA Working Group Secretariat know within one week.

A member noted that delivering a firm foundation for the LIVE framework was an important outcome and that, while all views needed to be taken into account, the time-constrained nature of the working group meant that the 8 December meeting needed to be facilitated in a way that produced an outcome.

The Chair outlined, in summary, the likely steps after the 8 December meeting, namely:

* taking the consensus framework produced from the meeting and consulting across policy and industry areas to seek input and or general agreement
* bringing a revised framework to the Working Group’s scheduled
2 February 2023 meeting for further deliberation
* developing the framework into a proposal for the inclusion in the Working Group’s 12-month report to government (Feb/March)
* settling the final version of the 12-month report in the Working Group’s scheduled, and final, 4 April 2023 meeting.

The Chair next asked TRA to provide an update on the Helix Personas project. This project proposes an enhancement to the NVS by integrating psychographic profiles, potentially useful for marketing, product development, and investment decision-making purposes. TRA advised members that the project administration (i.e. formal agreement terms; project planning) had been completed. The project would be operationalised over the remainder of the calendar year and initial outputs will be presented to the 2 February 2023 meeting.

A member inquired about the mixed use of the terms ‘alternative data’ and ‘complementary data’ and inquired if settling on terminology might be preferred. The Chair acknowledged the dilemma and explained the use of the different terms as currently used at TRA:

* complementary data – refers to data sources (e.g. new datasets, data types) that are proposed to be used to enhance existing or traditional data sources (e.g. NVS/IVS). These new datasets will complement the current data product range rather than establish a new product range. For example, the Helix Personas project is complementary to the existing NVS data collection
* alternative data – refers to the new datasets and data types that establish new data products, which may include new surveys. It is almost certain that many of the LIVE framework indicators, when agreed, will require the application of alternative data.

In conclusion, the Chair summarised the meeting outcomes and reminded members to ensure they schedule their diaries to be able to attend the in-person IDEA Working Group meeting in Melbourne on 8 December.