



Australian Government

Australian Trade and Investment Commission

# Domestic Tourism Statistics Transformation – What's New?

14 March 2025



# Session Overview

Background

What's new and why change?

Complementary data

- Complementary data research
- Mobility data
- Coverage

Face to face surveying & DoTS methodology

Backcasting

Data availability

Timelines

**Slido QR code for Q&A**

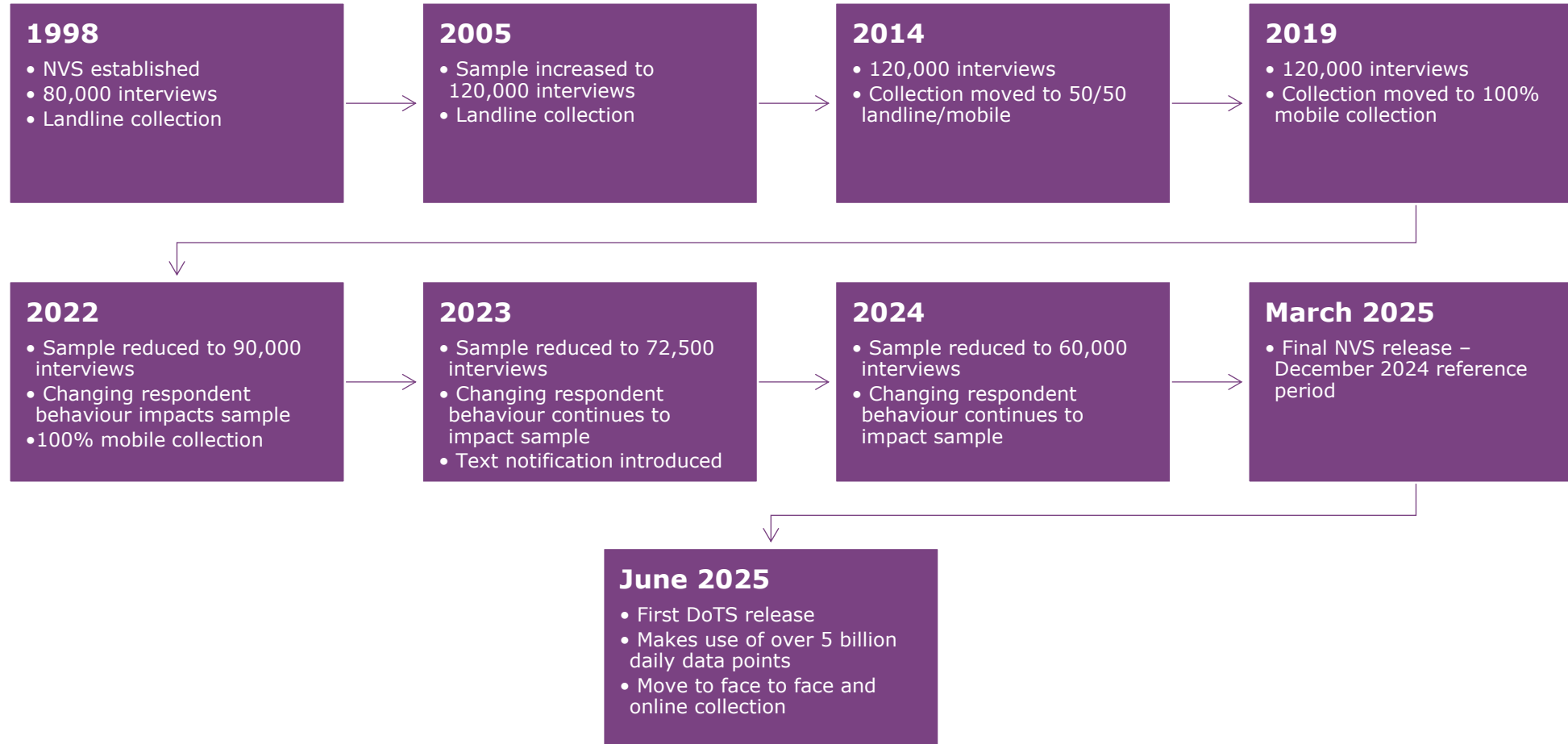


<https://www.slido.com/>  
Join code: #DoTS

**Established nearly 30 years ago, the National Visitor Survey has been the nation's core collection instrument for delivering our official Australian Resident Tourism Statistics.**



# National Visitor Survey History





**What's new and why change?**

# The DoTS solution

Moving from mobile phone data collection to a hybrid solution

New mixed mode survey collection (Face to Face and online interviews)



Weighted survey data to be combined with mobility data

Takes advantage over 5 billion daily data points in mobility data

Reduces survey bias associated with having to recall trips and nights



The new solution will improve the quality and timeliness of the data at different levels of geography

# Why change the collection approach



- Changing respondent behavior
- Falling response rates to mobile collection
- Provide access to more granular usable outputs



- Increasing cost of mobile phone survey collection for any given sample
- NVS sample have been reduced to 60,000 from 120,000 since 2019, but have maintained the same costs



- Make use of the highest quality data sources available
- Introduce a flexible solution (make use of new data as it becomes available)
- Future proof the collection
- Aligns with international tourism statistics standard

# Scope differences and key changes

24,000 Face-to-Face and 8,000 Online Interviews

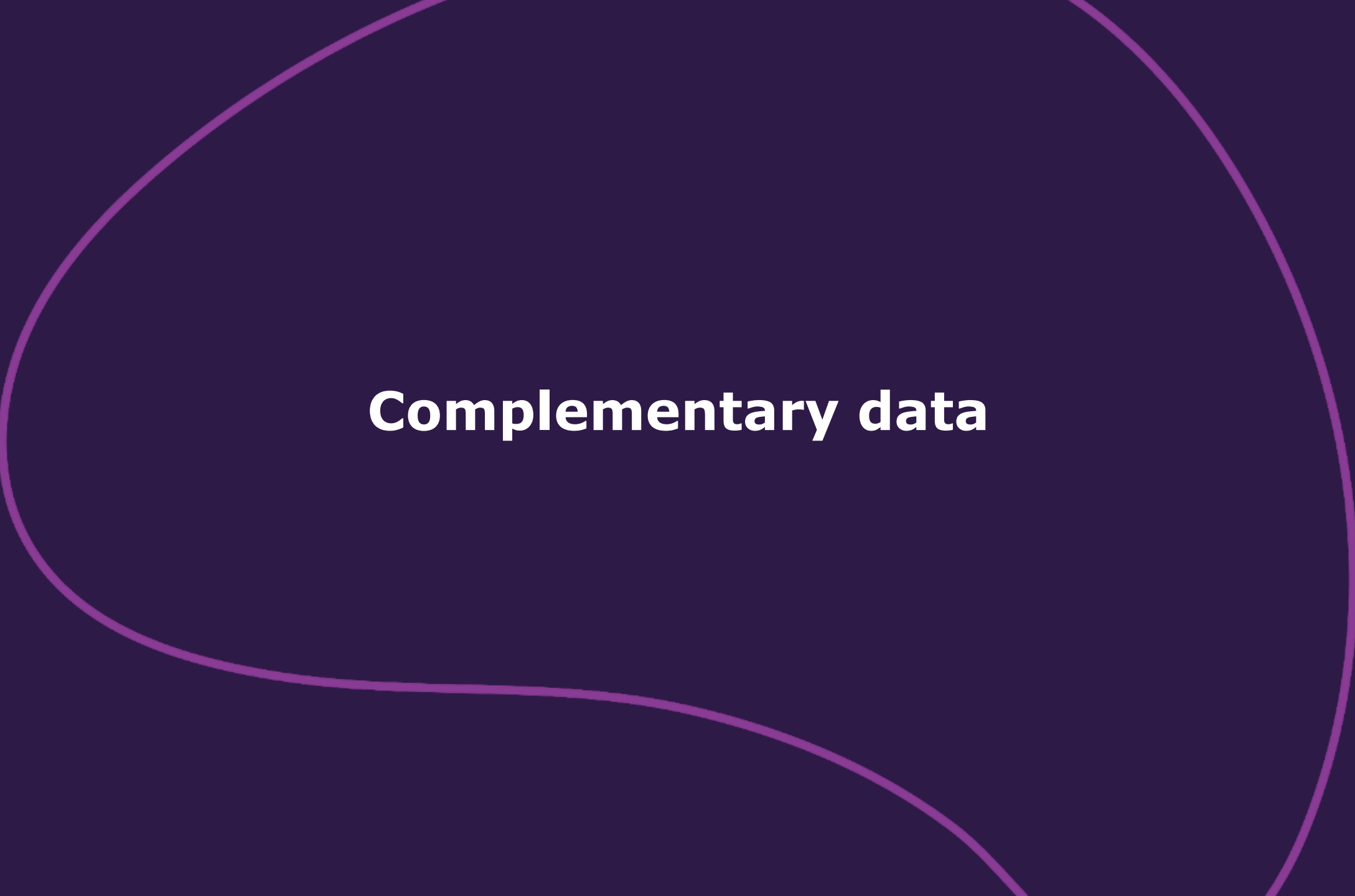
Takes advantage of over 5 billion mobility data points

Updated treatment of fly-in fly-out work to exclude routine travel

Those aged 14 years and over will be interviewed – it was 15 years and over in the NVS

Uses updated Australian Bureau of Statistics (ABS) population estimates for weighting and benchmarking purposes

Extended survey recall periods will apply to domestic day trips (14 days), domestic overnight trips (up to 7 weeks or 51 day), and outbound international trips (4 months or 120 days) to maximise the number of trips collected per respondent



**Complementary data**

# Four major sources of complementary data



TELECOMMUNICATIONS



TRANSACTIONS,  
INCLUDING  
FINANCIAL



SOCIAL MEDIA



BOOKINGS & TICKETING

# Complementary data sources



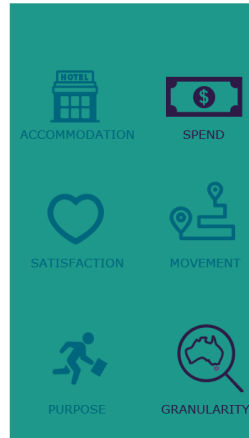
## Transactions

### OPPORTUNITIES

- ✓ Provides insights on spending pattern behaviours
- ✓ Granular
- ✓ Available soon after reference period
- ✓ Better for domestic than international
- ✓ Provides insights on events

### CHALLENGES

- × Tourism not clearly defined
- × Non representative sample
- × Privacy/licensing = limited access
- × Partial coverage of items
- × Relies on card use
- × Items such as purpose of visit, travel party etc. limited



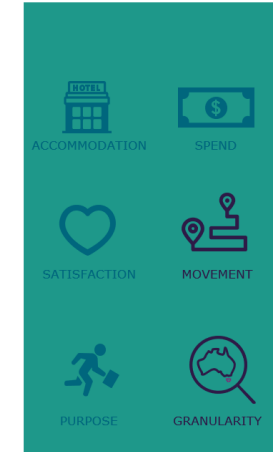
## Telecommunications

### OPPORTUNITIES

- ✓ Best for tracking movement
- ✓ Very granular and real time reporting
- ✓ Good for event measurement
- ✓ Can work with surveys to improve official statistics
- ✓ Tourism definitions mostly covered
- ✓ Travel paths can be clearly highlighted

### CHALLENGES

- × Non representative sample
- × Narrow topic range
- × Better for domestic than international
- × Can be expensive to purchase
- × Limited access and licensing



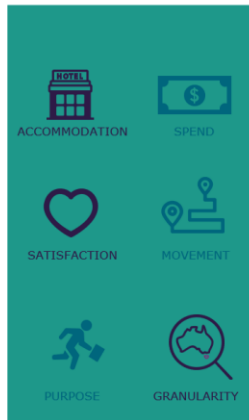
## Social media

### OPPORTUNITIES

- ✓ Near real time insights
- ✓ Good source of sentiment and satisfaction information
- ✓ Early warning and crisis management
- ✓ Easy to monitor and find emerging trends
- ✓ Good for a range of topics accommodation/attractions/food and dining/events

### CHALLENGES

- × Qualitative not quantitative
- × Non representative sample
- × Unstructured volumes of text, images, video and sound
- × BOTS and self interest groups can impact accuracy
- × Application Programming Interfaces (API) are constantly changing
- × Works best when customised for each customer



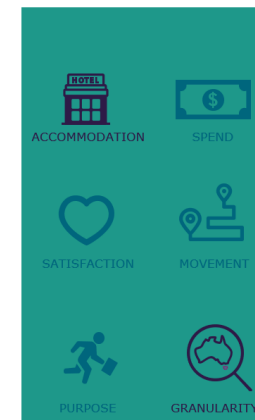
## Bookings and ticketing

### OPPORTUNITIES

- ✓ Near real time reporting
- ✓ Bookings can be forward looking
- ✓ Reports at granular levels of geography incl. locations/ events
- ✓ High level of automation possible
- ✓ Time series available

### CHALLENGES

- × Tourism not clearly defined
- × Messy, as it comes from disparate sources
- × Can be expensive and access is limited
- × Only partially covers key variables
- × Limited reporting items



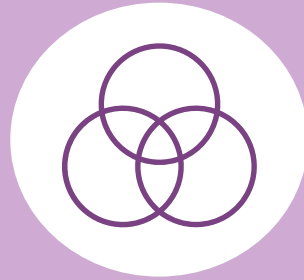
# Mobility Data

Mobility data, the measure of domestic visitor movement, provides insights into domestic visitors' trends and behaviours for the tourism industry in Australia



## Mobile phone data

Satellite pings  
App data



## Big data

Over 5 billion data  
points per day



## De-identified and aggregated data

Overnight trips  
Daytrips  
Nights away



## Important and major component

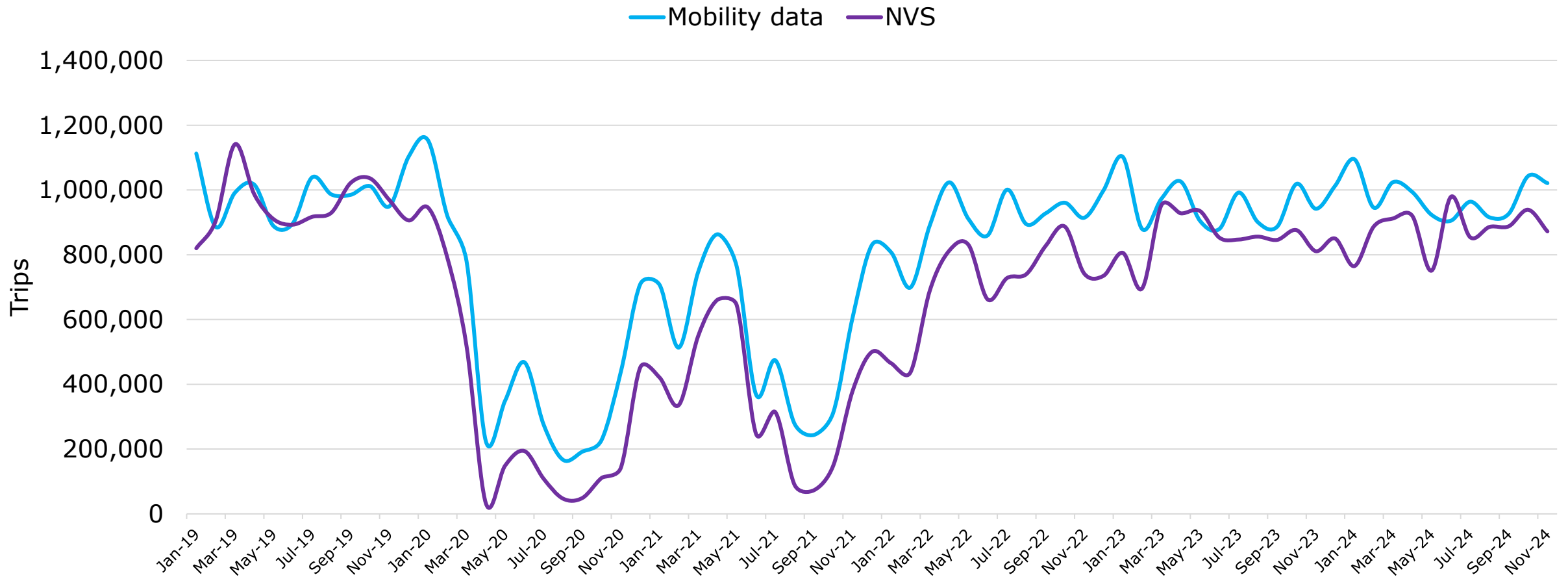
into Domestic  
Tourism Statistics  
(DoTS)

# Coverage comparison

| <b>September month 2024</b> | <b>NVS sample</b> | <b>Est Mobility sample (have travelled)</b> |
|-----------------------------|-------------------|---------------------------------------------|
| New South Wales             | 509               | Over 500,000                                |
| Victoria                    | 386               | Over 380,000                                |
| Queensland                  | 458               | Over 380,000                                |
| South Australia             | 146               | Over 100,000                                |
| Western Australia           | 244               | Over 130,000                                |
| Tasmania                    | 56                | Over 30,000                                 |
| Northern Territory          | 43                | Over 16,000                                 |
| ACT                         | 53                | Over 40,000                                 |
| Total                       | 1,815             | Over 1,300,000                              |

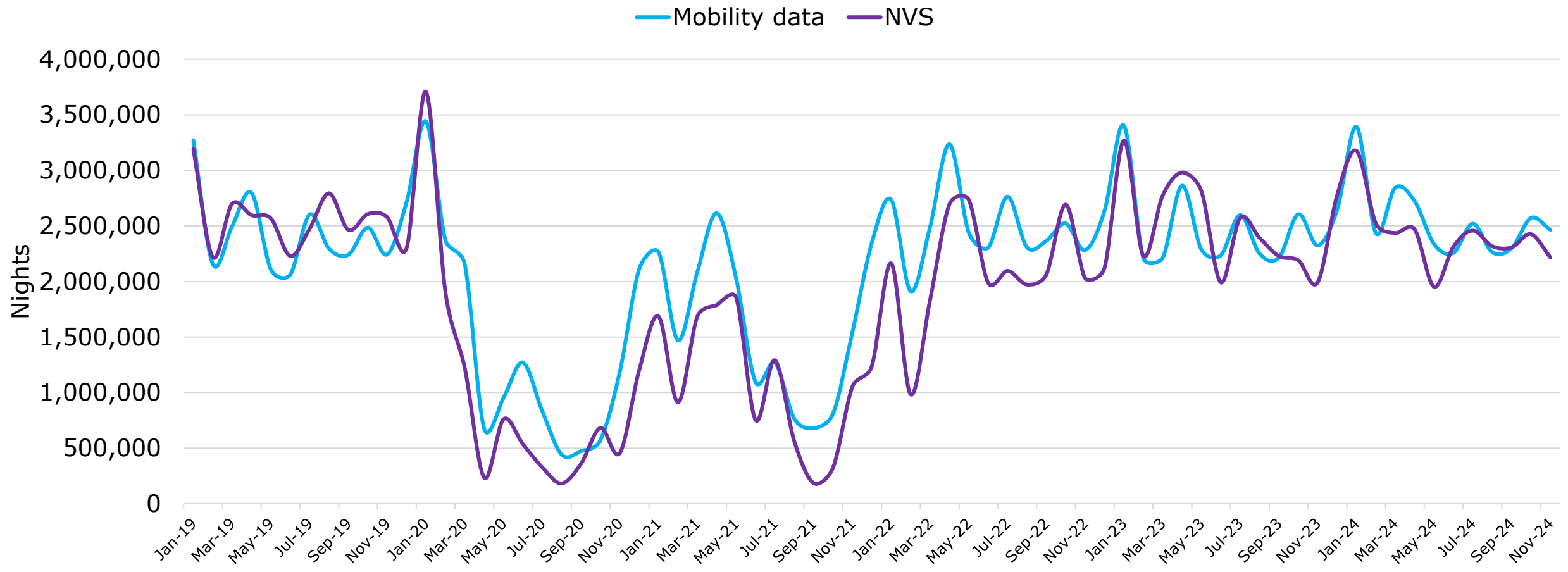
# Melbourne Tourism Region Domestic Overnight Trips by Month

High correlation between data sources, ensuring reliability



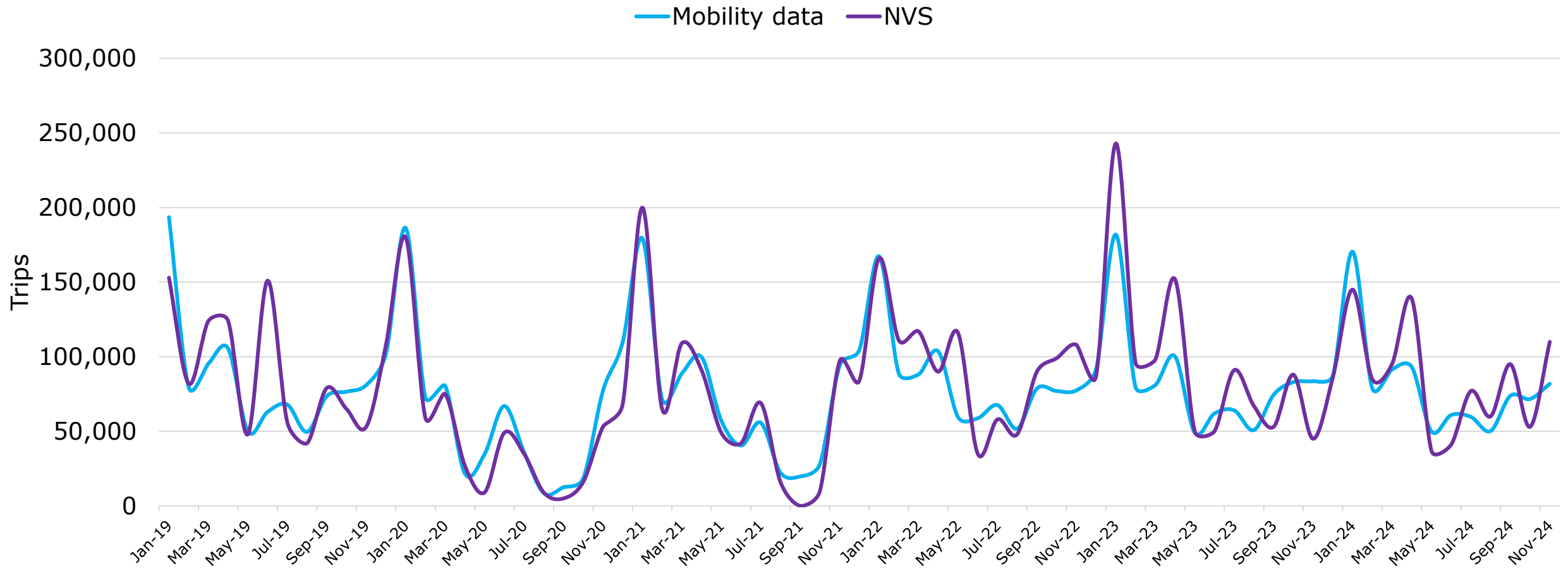
# Melbourne Tourism Region Nights Away by Month

The correlation can also be seen when looking at nights



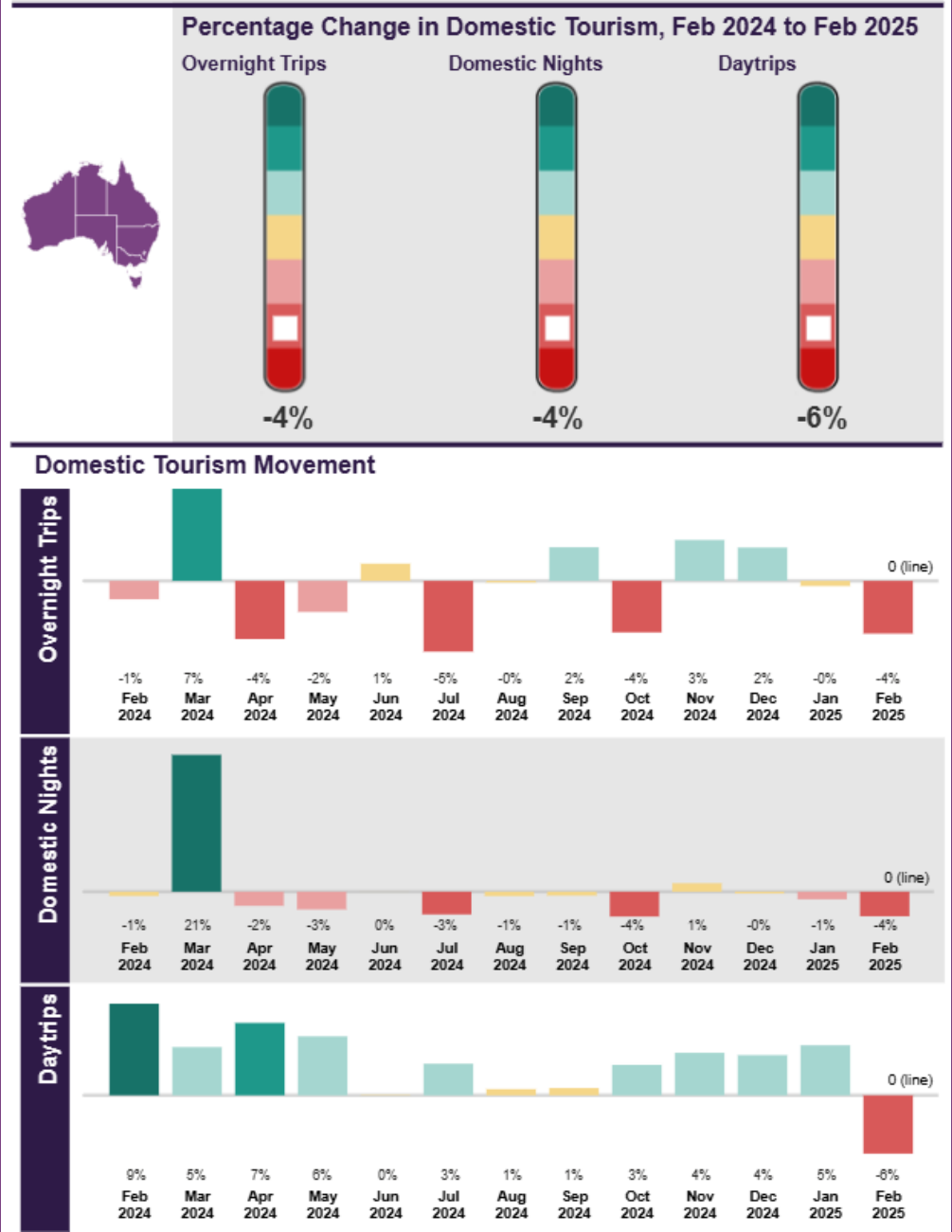
# Phillip Island Tourism Region Trips by Month

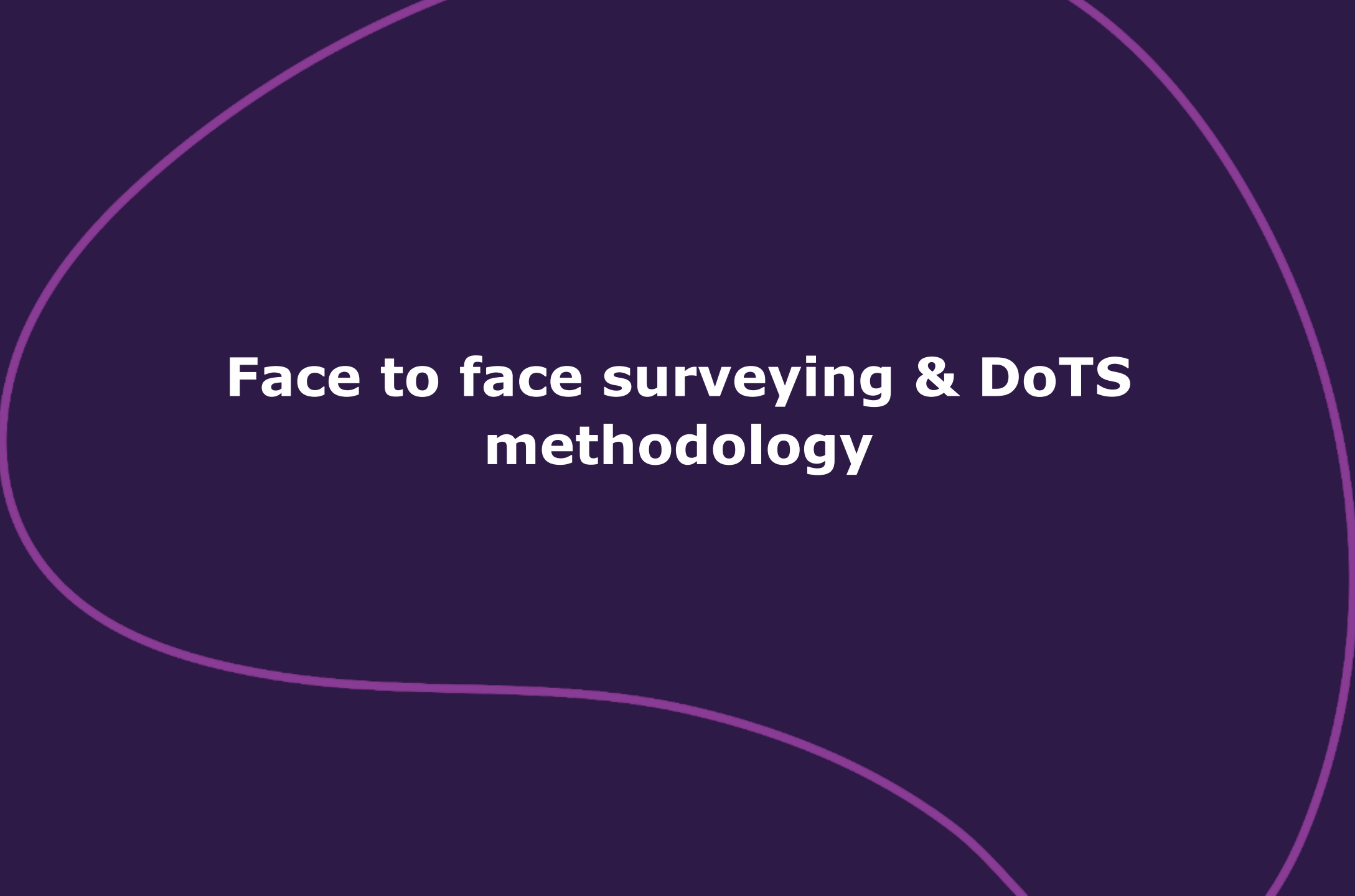
Correlation still holds when looking at smaller areas for trips



# TRA Mobility Data Dashboard

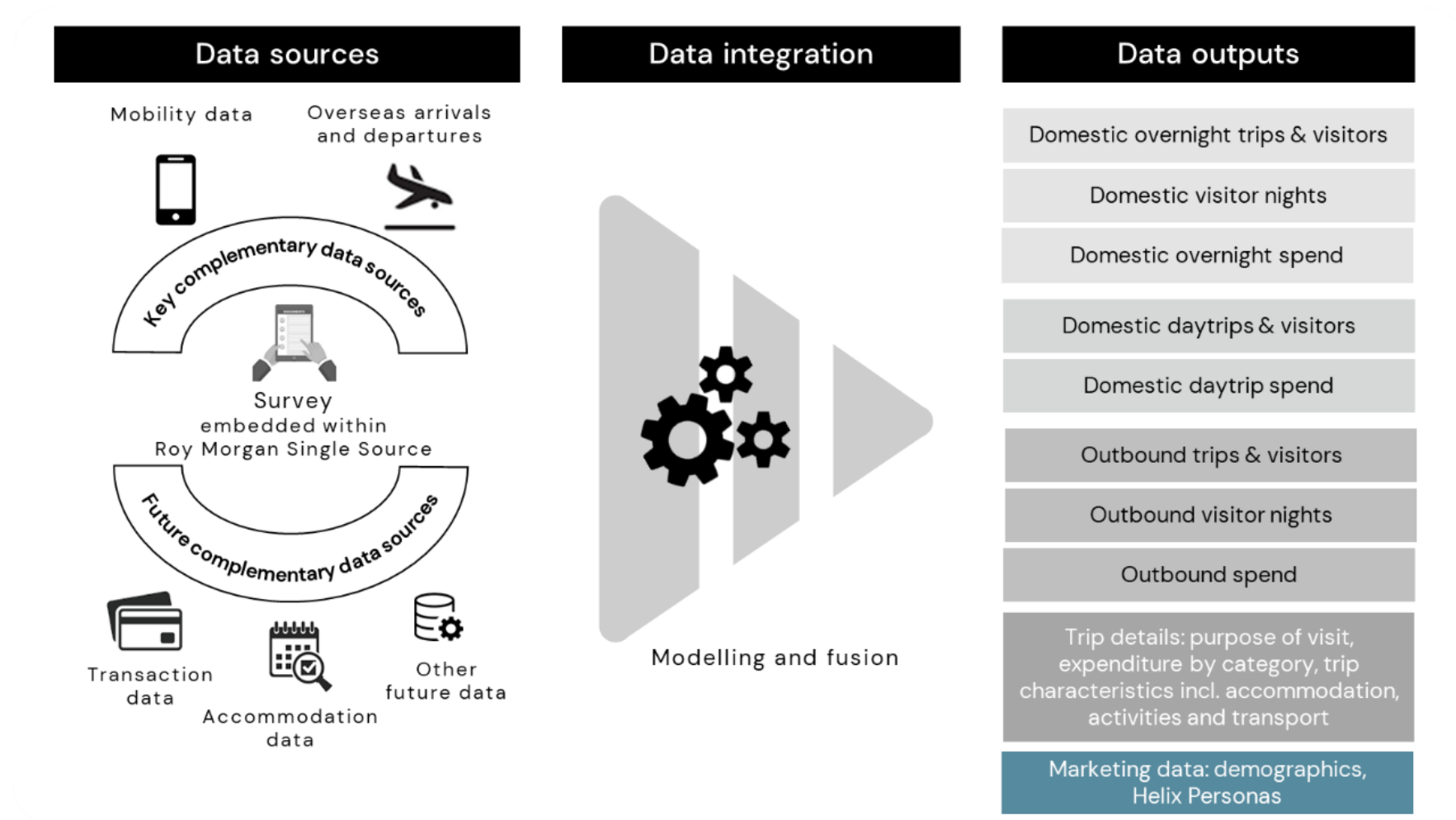
- <https://www.tra.gov.au/en/domestic/domestic-mobility-data>



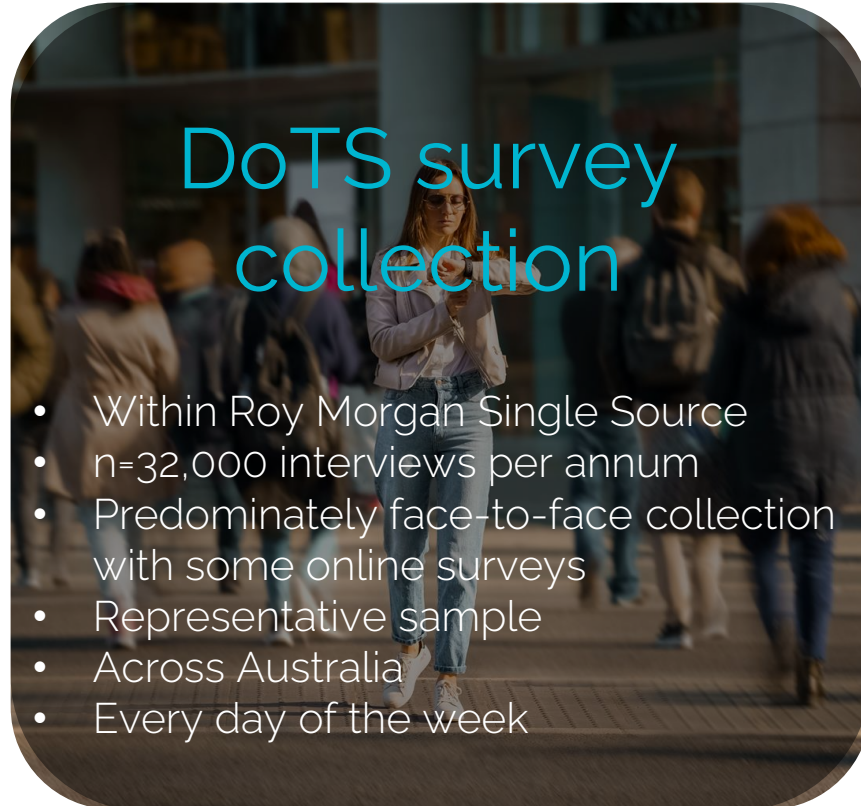


# **Face to face surveying & DoTS methodology**

# The DoTS process



# DoTS survey collection



- Within Roy Morgan Single Source
- n=32,000 interviews per annum
- Predominately face-to-face collection with some online surveys
- Representative sample
- Across Australia
- Every day of the week

## Key benefits:

- Representative sample
- Higher response rates due to interviewer building rapport at the door
- Better quality data as better engagement, interviewer can pick up non-verbal cues & the opportunity for show-cards
- Provides the demographic information & behavioural insights about why people travel

# What is Roy Morgan Single Source?



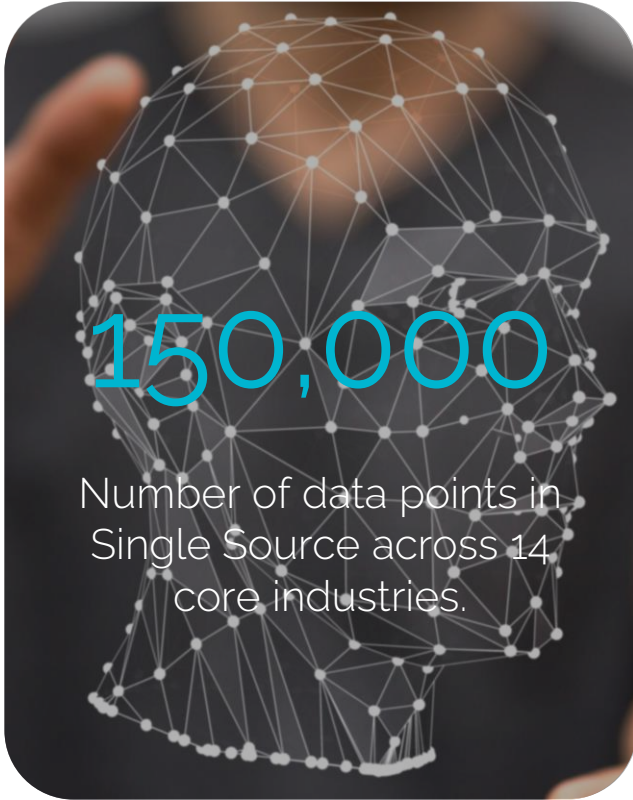
65,000

Number of people surveyed annually. Survey conducted continuously throughout the year.



21 million

Largest independent survey representing 21 million Australians aged 14+ consumption & media habits.



150,000

Number of data points in Single Source across 14 core industries.

# Incorporating mobility data



## Fused with mobility data

- Enabling a view of visitor volumes for more destinations
- Adjusted to match population
- Modelled visitor spend and characteristics

### Key benefits:

- More data points for more destinations at night and trip level
- Does not rely upon respondent recall

# Combined to create the DoTS dataset

## Creating the DoTS dataset

- We create targets for trips, nights & spend for each tourism region
- The survey data is assigned to a universe file of 100k Australians per month based on their geo-demographic profile to meet the targets
- We deliver one data file with all key metrics and survey data

## Delivering to users:

- Accurate trips, nights and spend metrics across tourism regions
- Allows for detailed profiling by demographics as well as marketing segmentation tools such as Roy Morgan Helix Personas
- There is the opportunity for deeper data from our Single Source survey such as intention to travel, attitudes & activities outside of travel and detailed media consumption



**Sample results from parallel  
run**

# Demographic Comparison

| Demographics                    | DoTS P2 | NVS - SQ24 | ABS | DoTS to ABS diff | NVS to ABS diff |
|---------------------------------|---------|------------|-----|------------------|-----------------|
| Gender                          |         |            |     |                  |                 |
| Male                            | 48%     | 54%        | 49% | -1%              | 4%              |
| Female                          | 52%     | 46%        | 51% | 1%               | -4%             |
| Age group                       |         |            |     |                  |                 |
| 15-24                           | 14%     | 14%        | 15% | -1%              | -1%             |
| 25-34                           | 17%     | 17%        | 18% | -1%              | -1%             |
| 35-44                           | 16%     | 16%        | 17% | -1%              | -1%             |
| 45-54                           | 13%     | 16%        | 15% | -2%              | 1%              |
| 55+                             | 40%     | 38%        | 35% | 5%               | 3%              |
| Residence                       |         |            |     |                  |                 |
| New South Wales                 | 32%     | 27%        | 31% | 0%               | -4%             |
| Victoria                        | 26%     | 23%        | 26% | 1%               | -3%             |
| Queensland                      | 20%     | 20%        | 21% | -1%              | 0%              |
| South Australia                 | 7%      | 8%         | 7%  | 0%               | 2%              |
| Western Australia               | 10%     | 13%        | 11% | -1%              | 2%              |
| Tasmania                        | 2%      | 4%         | 2%  | 0%               | 2%              |
| Northern Territory              | 1%      | 2%         | 1%  | 0%               | 1%              |
| Australian Capital Territory    | 1%      | 2%         | 2%  | 0%               | 0%              |
| Employment status*              |         |            |     |                  |                 |
| Working full time               | 40%     | 44%        | 40% | 0%               | 4%              |
| Working part time               | 19%     | 19%        | 20% | -1%              | -1%             |
| Unemployed and looking for work | 6%      | 4%         | 3%  | 4%               | 1%              |
| Not in labour force             | 31%     | 30%        | 33% | -2%              | -4%             |

\*NVS and ABS employment statistics have been adjusted to capture 14 year olds.

# **Backcasting**

# Backcasting



Trips and nights will be backcast using the mobility data movements



Testing has shown using mobility data as an indicator to push back the new levels will produce reliable estimates at the national and state level



A backcast series will be released in **June 2025**



Spend is significantly more complex due the differences in collection mode between the NVS and DoTS.

- Backcast spend is calculated from average spend per night applied to the previously derived nights

# What we are currently focused on backcasting

National trips, nights, spend and expenditure item



State level trips, nights and spend

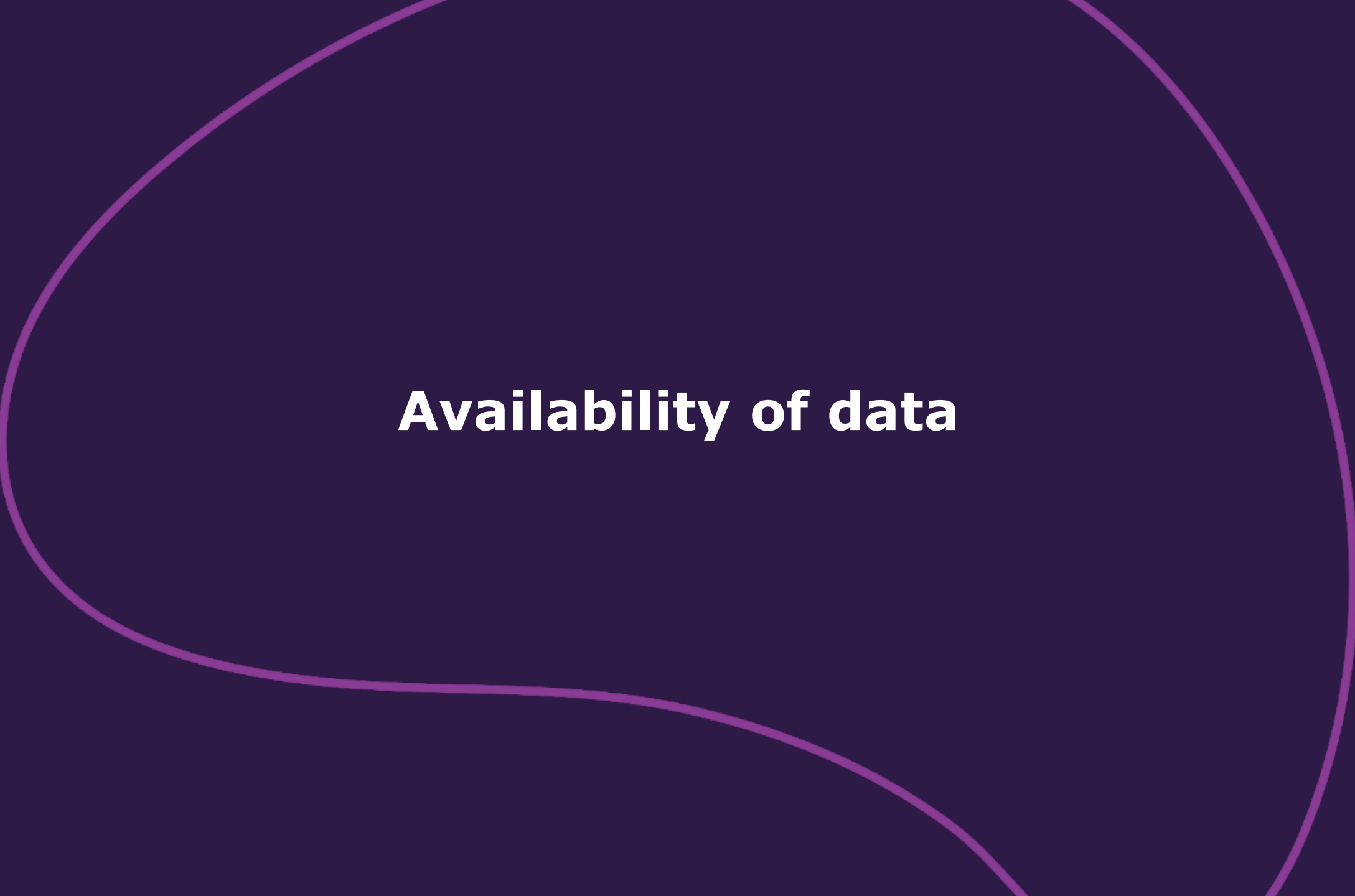


Reviewing the feasibility to produce inter/intrastate breakdowns at state and national levels



Demographic and behavioral insights e.g. accommodation, activities etc will not be backcast.





**Availability of data**

# Availability of data

## Data Variables

- The same survey variables will be collected and made available via our publication and current tools (TRA online).
  - Variable name changes are expected results in a need to rebuild TRA online tables

## Geographies

- Quarterly Tourism Region data will be released via the TRA website for the first time
- High quality trips and nights metrics for approximately 430 LGAs will be available via subscription.
- TRA is reviewing opportunities to update the 2019 LGA profiles (produced based on 4-year averages) to 2024 (this would leverage 2 years of data 2023 and 2024).
  - SA2 level modelled data will not be available

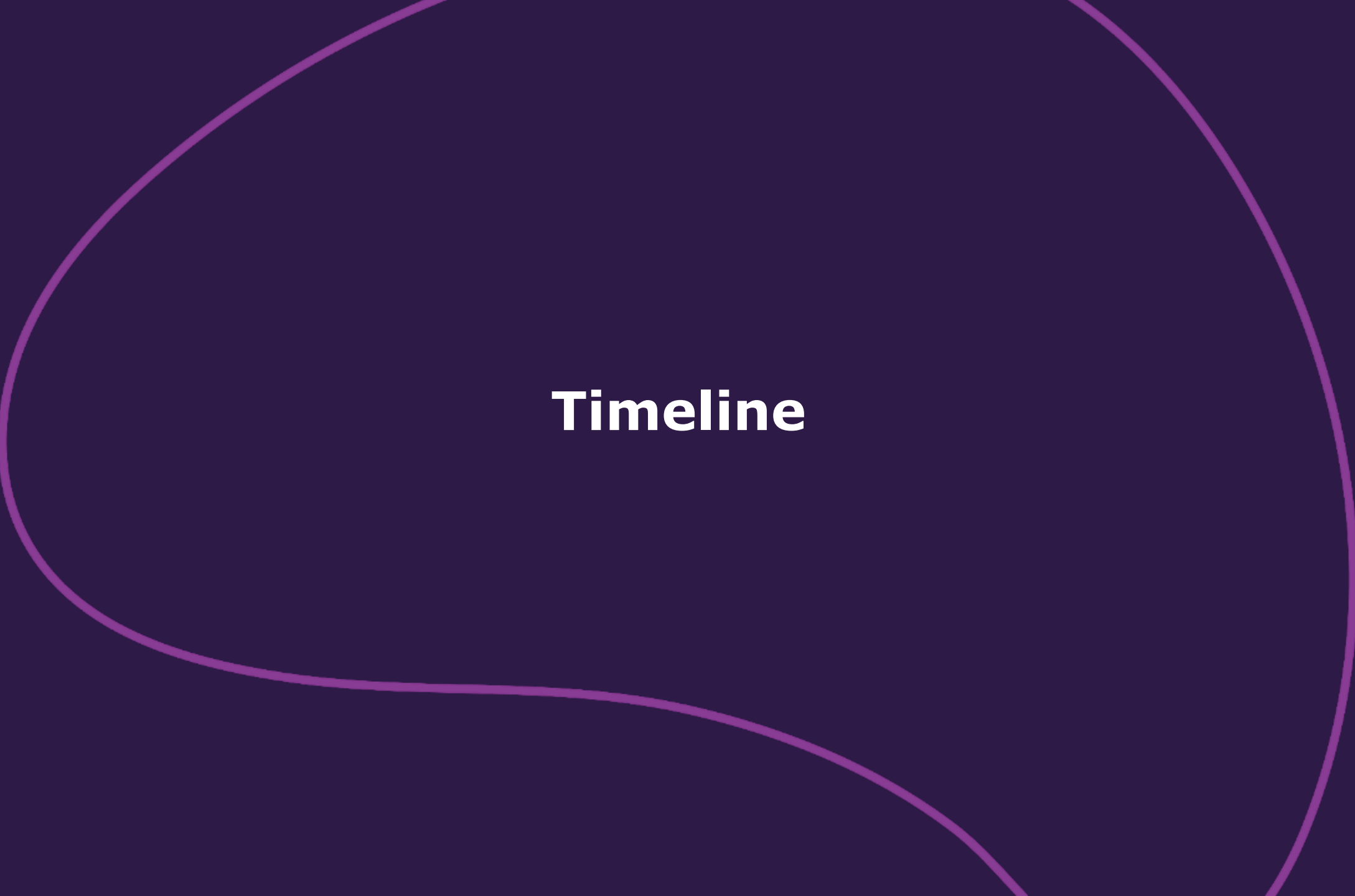
# Where can you access DoTS data?



**TRA.gov.au**



**Subscription to TRA  
online**



# **Timeline**

# Releases to users

## First public release: **25 June 2025**

- March quarter 2025 reference period
- Overnight data for National, State, Tourism Region and (LGA via TRA online)

## Second public release: **24 September 2025**

- June quarter 2025 reference period
- Overnight data for National, State, Tourism Region and (LGA via TRA online)
- Daytrip data for National, State, Tourism Region and (LGA via TRA online)
- Daytrip data will include the March reference period
- March quarter 2025 data for Outbound trips (lagged by a quarter, same as NVS)

Quarterly releases from there onwards.



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# Questions



<https://www.slido.com/>

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# Thank you



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