TSA current measurement and future directions

UNWTO Capability Building Workshop, Manilla
4 – 6 July

Outline

• Current Measurement
  – Data Sources, full benchmark and update processes
• Future directions
  – Establishment collections
  – Conceptual advances
Data sources for a TSA

- **Supply Surveys**
  - Cafes and Restaurants survey
  - Accommodation survey
  - Labour Force survey
  - Recreation surveys of clubs, pubs, gaming
  - Travel agency services survey
  - Economic activity survey

- **Australian System of National Accounts**
  - Supply-use Tables
  - Input-Output Tables
  - Balance of Payments

- **Australian Tourism Satellite Account**

- **Demand Surveys**
  - National visitor survey
  - International visitor survey
  - Household expenditure survey

**Benchmark vs Update years**

- **Benchmark years** – all available data updated (supply and demand): every 3 years
- **Update years** – only consumption data updated (demand): other years
Last Benchmark

• 2008/09 was the last benchmark year. This was a particularly significant update due to a large number of relevant changes:
  • Implementing TSA: RMF 08
  • Implementation of revised economic standards
  • Improved migration statistics

Implementation of TSA: RMF 08

• Key change for Australia concerned changes to retail goods provided to tourists.
• The new direct contact principle clearly states the requirement for a direct relationship between the business and tourism.
Implementation of TSA:RMF 08

- Expenditure of retail goods in Australia consist of:
  1. Retail margin
  2. Margin for downstream activities (wholesale trade, transport)

- Previously 1-3 included as direct supply.
- Now, only 1 is included

Impact

- Downward revision of direct tourism activity
- Tourism share of GVA:
  - Old standard: 3.0% (08/09)
  - New standard: 2.6% (08/09)
- Change needed to be managed!
International Standards

• 08/09 saw the implementation of a number of new international standard within Australia’s Economic Accounts:
  – System of National Accounts 08.
  – New Industry classification
  – Economic sector classification
• No direct impact on tourism

Improved Migration statistics

• Previously a strict ‘12 month rule’ was used to determine
• Australia implemented improvements to migration statistics which make use of linked passenger card information.
  – 12 in 16 month rule
• This has made it easier to identify migrants who may have short trips overseas
Impact on TSA

• This has reduced the number of short term international students within Australia.
• As a result, reduction in tourism education services.

Timing

• Benchmark:
  – Supply and use tables take time to produce.
  06/07 Benchmark year released in June 2010.
  Includes 08/09 update data.

• Update is a lot shorter – 6 months after reference period. 10/11 reference year scheduled for release in December 11
Future work: proposed AIC work plan

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<thead>
<tr>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
<th>Year 6</th>
<th>Year 7</th>
<th>Year 8</th>
<th>Year 9</th>
<th>Year 10</th>
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</thead>
</table>

ANZSIC totals by year
- A Agriculture, Forestry and Fishing
- B Mining
- C Manufacturing
- D Electricity, Gas, Water and Waste Services
- E Construction
- F Wholesale Trade
- G Retail Trade
- H Accommodation and Food Services
- I Transport, Postal and Warehousing
- J Information, Media and Telecommunications
- K Financial and Insurance Services (640)
- L Rental, Hiring and Real Estate Services
- M Professional, Scientific and Technical Services
- N Administrative and Support Services
- O Public Administration and Safety
- P Education and Training
- Q Health Care and Social Assistance
- R Arts and Recreation Services
- S Other Services - Repair and Maintenance (940)
- T Other Services - Other Services (950)
- "Super Sample" TC TC

Satellite work
- Tourism
- Transport
- Not for profit institutions

Other future improvements
- Australia’s TSA program undertakes research to ensure the long term relevance of the TSA to policy makers.
- Australia’s NTA National Long Term Tourism Strategy
- State of the Industry Report (produced by NTA)
Directions

• Improved Labour measurement in the TSA.
  – Input
  – Measures (hours worked, FT/PT)
• Tourism productivity estimates
  – Goal is for alignment with ABS industry productivity estimates