Practical issues in developing a TSA
The New Zealand perspective

July 2011

NZ Tourism structure

<table>
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<tr>
<th>Government</th>
<th>TSG/MED</th>
<th>Tourism NZ</th>
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<tr>
<td>Air New Zealand</td>
<td>Kiwirail</td>
<td>Statistics New Zealand</td>
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<td>Department of Conservation</td>
<td>Customs</td>
<td>Ministry of Agriculture and Forestry</td>
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<td>Immigration</td>
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<td>RTO’s</td>
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<th>Non-Government</th>
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<td>Tourism Industry Association</td>
<td>Private sector</td>
<td>Academic research</td>
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Issues

- Frameworks
- UNWTO standards
- Industry wide approach - holistic view
- Partnerships/ joint ventures
- Independence/credibility
- Government policy
- Funding
- Expertise

Issues

- Access issues
- Commercial sensitivity/security vs enhanced data sources
- Confidentiality
- Adaptability; indirect calculations
- Timeliness
Industry workshop/direction

- IVA International Visitor Arrivals
- IVS International Visitor Survey
- DTS Domestic Travel Survey
- CAM Commercial Accommodation Monitor
- RVM Regional Visitor Monitor
- TSA Tourism Satellite Account
- FORECASTING

Source issues

- DTS reworking; future
- IVS reworking
Impact of GST increase on Tourism

Product = $100 excl GST; Retails for $112.50
At 15% product would retail for $115.00

Measuring this change:
> Percentage point increase = 2.5
> GST revenue increase = $2.50 increase or 20%
> Retail price increase = 2.2%

Note: Not all goods and services consumed by tourists are subject to GST and thus the overall price increase would be slightly lower.

Tourist type impact:

Domestic tourist demand
i. potentially neutral
ii. any alteration to tourist expenditure behaviour could be offset by changes to income tax brackets

International tourist demand
i. difficult to determine
ii. multiple assumptions and influences
Summary

- Conceptual
- Capability
- Co-operation/collaboration
- Timing
- Communication