

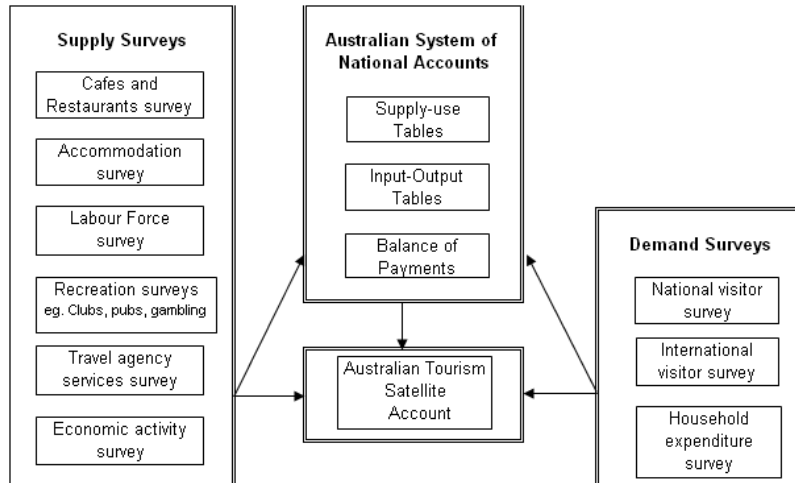
TSA current measurement and future directions

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



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)
 3. Basic price of good (output for manufacturing).
- 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.
 - Balance of Payments and International Investment Position sixth edition.
 - 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 workplan

	10 year programme									
	Year 1 2012-2013*	Year 2 2013-2014*	Year 3 2014-2015*	Year 4 2015-2016*	Year 5 2016-2017*	Year 6 2017-2018*	Year 7 2018-2019*	Year 8 2019-2020*	Year 9 2020-2021*	Year 10 2021-2022*
ANZSIC totals by year										
A Agriculture, Forestry and Fishing					RP					RP
B Mining										RP
C Manufacturing	RP	RP	RP	RP	RP	RP	RP	RP	RP	RP
D Electricity, Gas, Water and Waste Services	CS	CS	CS	CS	CS	CS	CS	CS	CS	CS
E Construction	RP							RP		
F Wholesale Trade										
G Retail Trade		RP	RP	RP		RP				RP
H Accommodation and Food Services		RP						RP		
I Transport, Postal and Warehousing	CS	CS	CS	CS	UFNC	CS	CS	CS	CS	UFNC
J Information, Media and Telecommunications		RP		UFNC		UFNC		RP		UFNC
K Financial and Insurance Services (640)					RP					
L Rental, Hiring and Real Estate Services		RP					RP			
M Professional, Scientific and Technical Services						RP				
N Administrative and Support Services										
O Public Administration and Safety										
P Education and Training						RP				
Q Health Care and Social Assistance				RP						
R Arts and Recreation Services				RP						
S Other Services - Repair and Maintenance (840)				RP						
S Other Services - Other Services (950)				RP						
*Super Sample			TC					TC		
Satellite work										
Tourism	UFNC	UFNC	UFNC	UFNC	UFNC	UFNC	UFNC	UFNC	UFNC	UFNC
Transport	UFNC	UFNC	UFNC	UFNC	UFNC	UFNC	UFNC	UFNC	UFNC	UFNC
Not for profit institutions				UFNC						

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