

The Implementation of Tourism Satellite Accounts in the APEC Region: 2009 Survey and Best Practice



**Asia-Pacific
Economic Cooperation**

**APEC TOURISM WORKING GROUP
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Economic Cooperation**

THE IMPLEMENTATION OF TOURISM SATELLITE ACCOUNTS IN THE APEC
REGION: 2009 SURVEY AND BEST PRACTICE

APEC Tourism Working Group

Project 01/2008T

Capacity Building on Tourism Satellite Accounts as a Basis for Promoting
Liberalisation and Facilitation on Tourism Services

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TABLE OF CONTENTS

Chapter 1:	INTRODUCTION	1
	Why do economies need a TSA?	
	Benefits of a TSA	
	Background and description of the Project	
	Structure and Contents of the Handbook	
<hr/>		
Chapter 2:	IMPLEMENTING A TSA	6
	Best practice in TSA implementation	
	Precursors to developing a TSA	
	Initial steps in developing a TSA	
	Planning	
	Implementation	
	Dissemination	
	Applications and extensions	
<hr/>		
Chapter 3:	SURVEY RESULTS	18
<hr/>		
Chapter 4:	OUTLINE OF TSA WORKSHOPS	30
<hr/>		
Appendix I:	SURVEY QUESTIONNAIRE	33
<hr/>		
Appendix II:	GLOSSARY OF TERMS	39
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CHAPTER 1

INTRODUCTION

This chapter provides background on the importance of the TSA and its development internationally. It explains the nature and purpose of the APEC project under which this Handbook was prepared and provides an outline of the structure and content of the Handbook.

This Handbook seeks to highlight the value of a national TSA to build support for tourism within the member economy. It also aims to:

- Provide assistance in the development of tourism policy measures
- Provide some initial guidance on accessing sources of assistance, advice and relevant experience.
- Assist in developing a planning process to implement a national TSA
- Address:
 - process and coordination issues
 - data and resource requirements
 - time frames
 - potential pitfalls and difficulties
- Foreshadow the broad methodological approach to be followed under the Tourism Satellite Account: Recommended Methodological Framework (TSA:RMF 2008).
- Present this information in a readable manner accessible to non-technical policy makers and advisers as well as to statistically trained officers in member economies.


Why do economies need a TSA?

Tourism's contribution to an economy is often not readily apparent because 'tourism' has not been identified as an industry or product in national accounting standards. Internationally, industries are defined on the basis of the main goods and services which they produce while tourism is a demand side activity, usually defined in terms of the activities of a particular type of consumer. Consequently, it has not traditionally been recognised as an industry in official statistics and accurate data relating to tourism as an industry could not be identified and extracted from national accounting statistics.

Implicitly, tourism is included in a government's Systems of National Accounts (SNA). The products consumed by visitors, and produced by suppliers, are all part of the economic activity measured in the SNA. However, while all the products that are produced and consumed in meeting tourism demand are embedded in the SNA, they are not readily identifiable as 'tourism' as they are recorded against many different industries.

The challenge has been to develop standards that would bring together the sub-components of the travel and tourism industry so it can be defined and measured. It needed to be measured in a similar way to the methods used to identify other industries in the SNA. A series of conferences hosted by the World Tourism Organization (UNWTO), in Ottawa (1991), Nice (1999) and Vancouver (2001), together with the pioneering work of economies such as Canada have led to development of a conceptual and methodological framework for the TSA (TSA:RMF). The TSA methodology was endorsed by the OECD, EUROSTAT and the UN Statistical Commission.

Following the Iguazu Conference in October 2005, the UNWTO sought additional clarification regarding TSA compilation. Significant revisions to the TSA: RMF were agreed on. The final conceptual framework known as the TSA:RMF 2008 bridges



the conceptual gaps between the different compilation frameworks, namely the Balance of Payments Manual, the System of National Accounts and the Tourism Satellite Account.

The Tourism Satellite Account (TSA) provides a means of separating and examining both tourism supply and tourism demand within the general framework of the System of National Accounts.

This is perhaps best illustrated by considering the variety of information that can be obtained from the TSA which includes:

- tourism's contribution to the economy of a given economy and its ranking relative to other sectors and in comparison with other economies
- tourism's contribution to an economy's exports and imports
- which industries within an economy benefit from tourism, and to what extent, including industries that are not traditionally associated with tourism
- the amount of product taxes generated as a result of tourism activity
- data related to visitor demand
- the number of jobs generated by visitor demand.

A TSA thus provides valuable information to support a range of government tourism policy decisions, and to support consistent and rigorous tourism research and analysis. An important goal is to use statistics to show political decision-makers the economic value of tourism so that tourism can take its proper place in the public planning process.

Many governments have experienced problems in implementing a TSA, ranging from conceptual and methodological issues, to the availability of data and skills, and the cost and organisation of implementation. While some governments have made substantial progress in implementing the new guidelines, for many this is a gradual or ongoing process. Some have yet to commence on the path, or have commenced and slipped back.

Benefits of a TSA

A wide range of benefits which flow from the establishment of a TSA were identified from the member economy responses to the survey reported in this handbook, case studies which were provided by several member economies, and a review of the UNWTO literature. These include the following:

- **Objective measure**
The TSA provides, for the first time in most economies, an official and objective measure of tourism's economic contribution.
- **New information**
It generally includes additional information which was not previously available to stakeholders.
- **Defines the supply side of tourism**
It provides, for the first time, conceptual and operational definitions of tourism from a supply-side industry production perspective, together with consistent and coherent definitions of tourism commodities, industries and the overall tourism sector.


- **Enhanced profile**
It helps to raise the profile of tourism and increase awareness of its economic importance leading to enhanced government, industry and public awareness, and acceptance regarding the economic contribution of tourism.
- **Credibility**
In most economies, the credibility of TSA-based results is high. This arises from the rigorous conceptual and methodological structure, which has been endorsed by a range of international agencies including the OECD, EUROSTAT and the United Nations Statistical Commission. This credibility is further heightened where the TSA has the authority of being produced by the National Statistical Office (NSO)
- **Tool for advocacy**
The TSA provides industry and government tourism agencies with a powerful tool to advocate for the tourism sector. The experience of most governments has been that, despite initial disappointment that TSA based estimates of tourism's economic contribution are generally lower than the estimates they replace, the vastly increased credibility of the TSA usually greatly offsets this.
- **Centralised source for statistics**
The TSA provides a centralised location for tourism economic statistics and a means of revealing and managing otherwise disparate and frequently contradictory tourism related statistics, as a linked and integrated system of tourism statistics.
- **Pressure for improved data quality**
TSA production requires good quality data, and usually leads to a focus on improving the basic statistics available.
- **Enhances inter-agency relationships**
It requires close working relationships between major stakeholders and can improve relationships and understanding between agencies.
- **Support for policy and planning**
Data from the TSA is used as a reliable and consistent input for a wide range of policy and planning decisions, including relating to infrastructure investment, policymaking, and market development.

Background and description of the project

In 2007, APEC approved a TWG project proposal which sought to survey APEC member economies on their implementation of a TSA, to use the survey to develop best practice lessons, and assist in transferring TSA knowledge to APEC member economies in need of assistance.

As part of this project the APEC Tourism Working Group (TWG) approved the development of this Handbook after recognising the potential value for many APEC member economies in sharing information and experience on implementing the new international TSA standards over the past decade.

Under Phase 1 of the project, consultants were commissioned to develop and conduct a survey of APEC member economies to gauge how far they had progressed in developing and implementing a TSA in accordance with international standards. The project required the consultants to then draw on the survey results to identify both best practice and areas where member economies are in need of further assistance and advice. The results were to be published as a



Handbook and circulated to APEC member economies in hard copy and electronic form with the Handbook serving to assist APEC Member Economies in need of assistance in the development of their own TSA.

Phase 2 of the project involved the design and delivery of up to four in-country workshops for APEC member economies. The workshops aimed to bring together key stakeholders within each economy to discuss their capabilities and issues in relation to TSA development, drawing on the consultant's experience and the Handbook to formulate action plans to assist them in moving towards development and implementation of a national TSA.

A Steering Committee was established in the Australian Department of Resources, Energy and Tourism to oversee the project and supervise the appointment and activity of the project consultants. A consulting team comprising of Mr Ray Spurr and Mr Stan Fleetwood was appointed in July 2009 to carry out the work.

The consultants developed a survey instrument drawing on previous similar surveys, including the APEC TWG surveys used prior to the Nice Conference in 1999 and a more extensive APEC survey in 2001. The survey instrument was designed to allow member economies to identify progress or issues in the implementation of their TSA. In September 2009 the survey was circulated to all APEC member economies. A copy of the Survey instrument is attached at Appendix 1.

Structure and contents of the handbook

This Handbook brings together the results of the APEC TSA Survey sent to all member economies. In doing so it is intended to provide information which will be of assistance to those APEC member economies which have not yet implemented their own TSA, which are part way through the implementation of a TSA, or which have started on this process but where their efforts have stalled or been discontinued.

The handbook seeks to highlight the value of a national TSA in building support for tourism within the member economy and for the development of policy measures, to assist in developing a planning process to implement a national TSA, address processes, coordination issues, data needs, resource requirements, time frames, and potential pitfalls and difficulties, and to foreshadow the broad methodological approach to be followed under TSA:RMF 2008. The Handbook also provides some initial guidance for APEC member economies on accessing sources of assistance, advice and relevant experience. It aims to present this information in a readable manner accessible to non-technical policy makers and advisers as well as to statistically trained officers in member economies.

Case studies and examples appear in text boxes which highlight approaches which have been taken by a number of APEC member economies in developing and implementing a TSA.

The remainder of the Handbook comprises the following components:

Chapter two outlines a set of principles and recommendations for the implementation of a TSA. It draws on key best practise examples which have emerged from a review of international best practice; results from the 2001 and 2009 APEC TWG surveys; follow up with selected member economies; and case studies which were provided by several APEC member economies.

Chapter three reviews the stage reached by APEC member economies in implementing a TSA as revealed by their responses to the 2009 APEC TSA survey. These results are compared with those of the previous APEC surveys in 1999 and

2001. Progress in TSA development among member economies over the period is highlighted.

An outline plan for the Workshops, to be held under Phase 2 of the Project, including a suggested structure and content, is included in Chapter 4.

Appendices containing the survey instrument used for the project and a glossary of terms can be found at the end of the document.

Box 1

MALAYSIA: Developing a TSA

The Tourism Satellite Account project in Malaysia began in 2003. It was initially proposed by the Malaysian Ministry of Tourism and was included as part of the mid-term review for the 8th Malaysia Plan (2001 – 2005). A special committee was established to leverage the project. The project was established for planning and monitoring of the tourism sector. An inter-agency planning group meeting on tourism was held in 2003, together with the establishment of the Technical Working Group, followed by the establishment of a TSA Unit in the Department of Statistics, Malaysia (DOSM).

In 2004, the Tourism Satellite Account officially became a new regular project of DOSM, located in the National Accounts Statistics Division (NASD) and the Services Statistics Division (SSD). The SSD plans and implements the surveys related to tourism while NASD is responsible for compilation of the TSA, in line with its responsibility of producing national accounts statistics. To obtain hands on experience, there was a visit to the Australian Bureau of Statistics by officers from DOSM and the main stakeholders for the TSA in Malaysia to further study the implementation of the Tourism Satellite Account.

Compilation of the TSA data started in 2006 with the launch of the Domestic Tourism Survey, surveys of the Home Stay, the Meetings, Incentives, Conferences and Exhibitions, and the Spa industries, together with selected services surveys. These surveys add to the transport, restaurants and accommodation surveys that were already in the annual programme of DOSM. Because budget funding had not been allocated for the new tourism surveys, discussions with stakeholders assisted in the launch of the surveys with initial funding by the Ministry of Tourism. Consolidation of data from various agencies, including the number of visitor arrivals and the demand for accommodation, presented several issues and challenges in the compilation of data for the TSA. Similarly, identifying Malaysia's specific products required visiting the lists of other countries and interaction with the UNWTO and other agencies. There was a need to establish good tourism statistical systems along the way. Thus, technical and steering committees were set up to suggest, align and endorse the data.

The presentation of Malaysia's TSA data for the period 2000-2007 to the Technical Committee and Steering Committee was done in 2008, while TSA data for 2000-2008 was presented in 2009.

CHAPTER 2

IMPLEMENTING A TSA

This chapter outlines a set of principles and recommendations for the implementation of a TSA. It draws on key best practice examples which emerged from a review of international best practice as indicated in UNWTO publications and manuals; results from the 2001 and 2009 APEC TWG surveys (see also Chapter 3); follow up with selected member economies; and case studies provided by several member economies.

Best practice in TSA implementation

The following sets out broad principles, recommendations and best practice advice for developing a Tourism Satellite Account. There is, however, no such thing as a perfect TSA and the process of implementing a TSA needs to be practical and flexible, taking account of the circumstances of individual governments and economies.

Box 2

CANADA: Advice from a pioneer in TSA development

- (1) Establishment of a TSA needs the support in its initial stages of an external champion. In Canada, the TSA came as a recommendation from the National Task Force on Tourism Data in 1989. Canada's TSA is a product of a close relationship between Statistics Canada, who produce it and the Canadian Tourism Commission, who fund and promote it.
- (2) The TSA should be housed in the System of National Accounts in order to maximize its credibility and consistency.
- (3) The TSA is a satellite of the core national accounts.
- (4) It can be used as a tool for managing the System of Tourism Statistics.
- (5) Supply-side data is often more reliable than demand-side data.
- (6) A side effect of a TSA is to make weaknesses in the tourism data more visible.
- (7) As resources and experience permit the implementation of improvements in the TSA there will be a need to make regular conceptual and methodological revisions to the TSA.
- (8) Where possible data revisions should be kept to a minimum. The TSA is based on final Input-Output tables, as opposed to preliminary tables. While this results in more of a lag to publication, it eliminates the need for revisions. Users of tourism statistics (more so than SNA users) are not accustomed to, and are uncomfortable with, the notion that statistics can be revised.
- (9) A TSA cannot do everything. It shows the structure and importance of tourism in an economy at a point in time. It cannot provide current, or highly timely, data if it is to be based on final Input-Output tables. A TSA will not say anything about tourism in the last quarter, about the indirect or induced effects of tourism, about the employees working in tourism industries, about greenhouse gas emissions related to tourism or about government revenues attributable to tourism. Its main purpose is as a benchmark, and to set out the structure of production of tourism commodities by industry.

Precursors to developing a TSA

Successful implementation of a TSA as proposed in the internationally agreed guidelines set out in TSA:RMF requires:

- The existence within the national economy of a well developed and robust System of National Accounts (SNA)
- A high level of technical national accounting expertise and knowledge of underlying statistics and industries
- A strong tourism statistical framework with good tourism data sources, including in relation to visitor expenditures, supported by a good knowledge of the tourism sector
- Technical data collection and production expertise
- Access to all of the relevant data available including administrative and by-product data
- Support from all of the relevant stakeholders: government, bureaucratic, private sector and academic/research agencies
- Understanding and acceptance by all of the stakeholders that the TSA is a complicated exercise which takes time and commitment.

Initial steps in developing a TSA

The following represent a set of considerations and decisions to be addressed when beginning to develop a TSA.

- The TSA needs a champion
This is an individual or organisation prepared to promote and lead the cause of the TSA. This leadership often comes from the tourism ministry or National Tourism Organization (NTO) and sometimes from the National Statistical Office (NSO). In some cases concerted industry pressure has championed the development of a TSA and contributed momentum to it being established. (Box 2)
- Role of the NSO
Engagement of the NSO is usually a key to the success of the TSA. It is the NSO which is the repository of the skills and experience in the production of national accounting statistics, the balance of payments, and national input-output tables required in the development of the TSA. The NSO is normally a, if not the, major collector of the statistics required. There are also great advantages in having the producer of the National Accounts also produce the TSA. This helps ensure that results have the objectivity, credibility and the standing of the national accounts data. Once the objective of establishing the TSA has been firmly adopted by the government, the NSO should preferably take the lead in the TSA project, or at least be seen to be a strong and active supporter of the project. (Box 2, 3 and 8)
- Inter-institutional platform
Member economies and the UNWTO strongly recommend the establishment of an inter-institutional body to facilitate cooperation between the main stakeholders in the TSA. These stakeholders include producers of the statistics and other types of basic tourism information required to develop the TSA (such as the NTO, NSO, central bank, immigration and customs services, academic researchers, and possibly industry associations or leaders, etc.), together with

Box 3

NEW ZEALAND: Role of National Statistical Office

The involvement of the National Statistical Organisation is the key to the TSA being regarded as an official statistic. The statistical body is also likely to have the highest level of statistical expertise available both on tourism and the wider economy in which tourism operates. These agencies are likely to be the most familiar with the “language” of the TSA.

the users of the data and results. This is essential to the active participation and cooperation of the many stakeholders in the collection and production of tourism data which is critical for the successful production of a TSA. The importance of gaining cooperation between all of the stakeholders was reiterated repeatedly in responses to the APEC 2009 survey. (Box 1, 4 and 8)

- Cross-industry consultative group

Several APEC member economies have recommended the establishment of a cross-industry task force when a TSA feasibility study is started in order to build a coalition of interests in support of the TSA project from all sections of the tourism industry.

- Outsourcing the TSA

Some governments use non-government consultants or research centres to produce their TSA, or as partners in producing the TSA. Within APEC this approach has been adopted by Korea and Japan for example. A number of governments have used international bodies to produce their TSA such as the World Travel & Tourism Council's (WTTC). WTTC produced what it referred to as "simulated" TSAs for a wide range of governments during the 1990's and early 2000's including several APEC member economies, most recently including Brunei Darussalam in 2007. The WTTC approach involves modelling to "simulate" data which is not readily available from official sources and adopts concepts, definitions and methods which, while similar to, differ in some respects from the TSA recommended methodology. Since 2009 WTTC has ceased referring to its reports as a TSA and now uses the term "Tourism Impact Study". While the estimates produced by such methods may be helpful in some cases, for example as a preliminary step to later development of a fully developed TSA, they should be regarded as an alternative to a TSA, for use where a government is not currently in a position to produce a TSA, rather than as a TSA itself.

- Drawbacks of outsourcing

Apart from issues of the methods adopted, reliability of estimates, and the likelihood of reduced credibility, other problems which have previously emerged from outsourcing the TSA have included maintaining continuity, consistency, and technical skills. Where the outsourcing has been seen as a preliminary step to eventual production of the TSA within government, transfer of technology from the outsourcing body to government agencies has frequently proved difficult. Interestingly, however, responses to the 2009 survey did not indicate these kinds of concerns among most of the member economies which currently outsource their TSA development. (Box 5)

- Costs

Producing a TSA can be expensive. The 2009 survey results suggested an average cost of between \$US100,000 and \$US200,000 per annum and one to three person years to develop a TSA. It seems likely that these estimates do not always take account of the full initial development period, variously estimated in the survey responses to be 1 to 5 years (see Chapter 3 of this Handbook). In many cases these costs are absorbed within national statistical budgets. In a number of cases, funding is provided from the NTO budget and paid to the NSO. While a number of economies refer to efforts to achieve cost sharing with the private sector, these appear to have been generally unsuccessful. (Box 1 and 16)

Box 4

MALAYSIA: Inter-institutional framework

The Technical Committee is chaired by the Department of Statistics Malaysia and the members are the main stakeholders and data providers internally or externally. The Steering Committee is chaired by the Ministry of Tourism and the members reflect the same agencies as those on the Technical Committee. The compilation of TSA data and technical matters are resolved at Technical Committee level which is chaired by the Department of Statistics, Malaysia.

Box 5

KOREA: Outsourcing production of a TSA

Korea's first TSA, published in 2005 for the year 2004, was produced on a partly outsourced basis with the Ministry of Culture, Sports and Tourism assisted by a consortium of organisations including the Korean Culture and Tourism Institute (KCTI), Kyunghee University, the Bank of Korea, Hanyang university, Gyunggi University, Research A Plus, the Korea Tourism Organisation and the Ministry of Statistics. For its 2008 TSA, the Ministry of Culture, Sports and Tourism is being assisted by KCTI.

Planning

- Feasibility study

UNWTO stresses the importance of a preliminary feasibility study before embarking on developing a TSA. A feasibility study should be carried out on the concept, its applicability, and potential use and benefits of a TSA. The existing statistical infrastructure of a member economy, competition for financial resources, technical expertise and national statistical priorities need to be examined, reviewed and evaluated. (Box 1 and 8)

- A pilot or experimental TSA

UNWTO recommends the initial development of a pilot or experimental TSA as a first step in developing a TSA. The Philippines refers to its TSA as being a "pilot" while both China and Hong Kong, China used the classification "partial TSA" in their responses to the 2009 survey

- Conservative approach and incremental improvements

A number of member economies advocate a gradual step-by-step approach to the development of the TSA. In fact, only a small number of economies have implemented all of the TSA tables. According to the responses to the 2009 survey only two economies have implemented the revisions under TSA:RMF 2008, although others plan to do so in the near future or over time (Box 1, 6 and 15)

- International standards

Most experts recommend that a TSA should be designed to comply as closely as possible with the international standards set out in the TSA:RMF 2008. This ensures a rigorous, objective and credible process where the meanings of the results are transparent and clearly understood. It also increases comparability of TSA estimates across jurisdictions.

- Flexibility

A degree of flexibility in the actual development of the TSA project also appears justified. Particular components of the TSA can be less critical for some economies than others, or they may present more significant data problems to develop. This may lead to a decision to defer inclusion of these components in the early stages of the TSA's development. Examples might include domestic

Box 6

MEXICO: Incremental steps

Developing a TSA is a long project which needs to be approached in steps. It needs a strong tourism statistics framework and a well developed SNA. Variables can then be added step-by-step improving estimation in stages. For example, Mexico has recently included imputation of rentals on second homes in its TSA for the first time. After nearly 10 years of producing its TSA Mexico only added tables on Tourism Gross Capital Formation (Table 8), Collective Consumption by Governments (Table 9), and Non-monetary Indicators (Table 10) in its most recent TSA.

tourism in geographically small economies such as Singapore, where domestic tourism may be of limited significance, or of outbound tourism where data is often unavailable, or the imputation (estimating) of rentals on holiday houses for either of these reasons.

- **Statistical base**

Good basic statistics are critical to ensuring the successful development of a TSA. It is important to carry out a comprehensive stocktake of available data and identify gaps and quality problems early in the planning stage. Then identify what needs to be done, when and by whom, especially if new data collections are necessary. In particular, data will need to be adequate to allow demand side products to be aligned with supply side data. In some cases it will be possible to begin the TSA process using estimates. These decisions will require data collectors and users to work together to address the data problems identified and agree on how they are to be handled. (Box 7 and 15)

- **Realistic objectives**

There is also agreement on the need to be realistic about the member economy's capabilities in terms of existing statistical systems, availability of data, skills and expertise, and funding for the project. During the planning process, it is important to identify the skills in national accounting and in knowledge of underlying tourism statistics and the tourism industry which will be required, and assess their availability. (Box 2, 5, 7 and 8)

- **Consulting with stakeholders**

Close consultations with all stakeholders should take place during the planning stages. This should include not only the producers and the potential users of the TSA, but also the relevant public and private sector organisations, politicians, bureaucrats, managers and technical staff. All of these groups should be taught about what a TSA is and does (and does not do) and they should have a good understanding of the commitment required and the output expected. (Box 1, 4, 8, and 12)

Implementation

The implementation phase of the TSA requires:

- **Integration with the NSO**

The development of efficient systems integrated with the NSO. (Box 2 and 7)

- **Cooperation between agencies**

Close cooperation between data collection agencies and national accountants – a strong understanding of the tourism data and tourism characteristic activities in the member economy is needed. (Box 1, 4, 5, 7, 8, and 16)

- **Coverage**

Decisions need to be made about how extensive the coverage of the TSA should be. Are all of the TSA:RMF tables to be produced? Is sufficient data available to include all components for each table? A step-by-step development process is recommended. Very often it will not be possible to produce some of the RMF tables. Examples of particular tables which have proved difficult for some member economies include those relating to outbound tourism and tourism gross fixed capital formation. In some cases, data on domestic tourism will be

Box 7

AUSTRALIA: Getting the best data

The TSA/RMF needs robust input data; regular benchmarking; efficient compilation systems which are integrated with other System of National Accounts processes; and regular publishing; good quality demand side estimates from visitor surveys with product information that aligns closely with supply side data for data confrontation purposes.

It is important to work closely with agencies or staff that produce supply side (including employment) statistics, as the standard level of industry/product information produced in these statistics is generally not at the detail required to capture tourism related activity.

Developing a TSA requires good knowledge of, and underlying statistics for, economy-specific tourism characteristic activities.

Box 8

PHILIPPINES: Coordination and institution building

The National Statistical Coordination Board (NSCB), in close coordination with the Department of Tourism (DOT), developed and compiled the Philippine Tourism Satellite Account (PTSA). The DOT is tasked to undertake studies and surveys for the continuing analysis of economic conditions and trends relating to tourism and travel. It collaborates with other agencies and research organisations such as the National Statistics Office (NSO), Statistical Research and Training Center (SRTC) and the Asian Institute of Tourism (AIT) in improving and augmenting data gathering activities and estimation methodologies towards compiling more reliable and significant tourism data. Thus, the DOT has collaborated with NSO in conducting the Household Survey on Domestic Visitors in 2005 to generate statistics on domestic visitors.

Inter-agency committees (IAC) are used as tools for coordination and to provide a forum for exchanges of views and expertise. An IAC on the Development of a Satellite Account on Tourism was first created in 1997 and later reconstituted as the IAC on Tourism Statistics (IACTS) to provide direction in the institutionalization of the compilation of a TSA for the Philippines, and guidance and direction in the generation of tourism statistics in the economy.

The IACTS is composed of representatives from government and non-government organizations involved in the production and use of tourism statistics. Aside from the NSCB, DOT and SRTC, other members of the committee include the Bangko Sentral ng Pilipinas (Central Bank), Bureau of Immigration, AIT, Department of Interior and Local Government, National Economic and Development Authority and Civil Aeronautic Board. It also has representatives from industry associations like the Hotel and Restaurant Association of the Philippines, Board of Airline Representatives, Philippine Tour Operators Association and Philippine Travel Agencies Association.

The IACTS has served as vehicle for assessing current and emerging issues and/or concerns encountered in the generation of tourism statistics and compilation of the TSA, and in resolving such issues and/or concerns. One achievement of the committee is the endorsement of the Philippine Tourism Statistical Classification System which was approved by the NSCB Executive Board through NSCB Resolution Number 4, series of 2005. Also, through the IACTS, standard concepts and definitions in tourism for statistical purposes, as well as methodologies for the compilation of PTSA were formulated and approved through NSCB Resolution No. 9, Series of 2008, and NSCB Resolution No. 6, Series of 2009, respectively.

A Technical Working Group on Tourism Statistics assists the IACTS, particularly on technical tasks such as drafting of standard definitions and classifications.

limited or unavailable. It will often be necessary to start out by using what data is available and producing only those tables where sufficient data exists. This can be extended and improved over time. (Box 2, 6 and 15)

- Frequency of updates

Each member economy needs to decide how frequently to update its TSA. Canada uses a two year cycle. Australia produces a benchmark TSA every three years but publishes revised TSA reports annually using updated visitor survey information combined with extrapolated data from the most recent benchmark report. Korea appears to have adopted a three yearly update cycle. Singapore has produced TSAs, for the reference years 1990 (pilot study) and 1995 but has not updated these since. Clearly issues of cost and resources will play a role in this decision. These considerations need to be balanced against how quickly turning points or structural changes are likely to occur in the tourism sector and its place in the overall economy. (Box 9 and 16)

- Locating reference material

The UNWTO publications IRTS 2008¹ and TSA:RMF 2008² should be used as core reference documents for gaining an understanding of the concepts, definitions, methodologies and sources of the required tourism statistics. The UNWTO website also contains a range of other documents which provide more detailed assistance on such topics as data sources, recommended questionnaires, and collection of expenditure data³.

- Capacity building

Developing and maintaining a TSA requires a high level of technical skills, especially in relation to national accounting but also in the collection and interpretation of tourism related data across multiple collection agencies. These skills need to be nurtured and maintained. And the need to integrate national accounting expertise and knowledge and understanding of tourism related data also places a premium on inter agency cooperation and training. Capacity building is also necessary among the users of TSA-based tourism information to recognize and understand the meaning, significance, limitations and applications of the information derived and disseminated from the TSA. (Box 10 and 7)

Box 10

The Philippines: Capacity building

To ensure the generation of quality tourism data, and to be able to improve existing methodologies for compiling the Philippine TSA (PTSA) compilation, there is a need to continuously build the human capacity of the agencies involved in the production of tourism statistics and indicators. The Philippines' Statistical Research and Training Center (SRTC) conducts basic training on collection, generation, compilation and analysis of tourism statistics for national and field personnel of the Department of Tourism (DOT) as well as staff of local government units. SRTC and DOT design and implement training courses specific to the DOT's needs in tourism statistics.

Workshops, seminars, and various forums such as the National Convention on Statistics are also used to draw the cooperation of various stakeholders in generating statistics needed in the compilation of PTSA.

Box 9

CANADA: Frequency of production

It is necessary to find a frequency for producing the TSA that balances the need for the TSA with other priorities. Canada has decided to produce its TSA every two years. From the results of the various TSAs it has found that there is stability in the structure of tourism in Canada. In addition, it produces National Tourism Indicators on a quarterly basis. Both of these allow for the production of a TSA every two years. With a gap of more than two years there may be a risk of missing some turning points or structural changes. By doing it every two years, it frees up resources to work on the various other projects that arise from the Canadian TSA.

1. International Recommendations for Tourism Statistics 2008 (IRTS 2008) www.unwto.org/statistics/irts/irts.htm

2. http://www.unwto.org/statistics/tsa_rmf/tsa_rmf.htm

3. <http://www.unwto.org/statistics/tsa/project.htm>

- Revisions to the international standards: TSA:RMF2008
Revisions incorporated into the TSA recommended methodology in TSA:RMF2008⁴ present significant challenges for member economies in revising their current TSA systems to incorporate the new standards and in dealing with the consequences of the break in series in their TSA data. Two economies, Mexico and New Zealand, reported in their survey response that they had already incorporated the revisions into their standards. Australia indicated that it proposed to do so during 2010 while a number of other economies reported planning to do so in the future. (Box 11 and 16)

Box 11

NEW ZEALAND: Implementing the TSA:RMF 2008 revisions

New Zealand's TSA for the year-ended March 2009 incorporates the new standards introduced by the World Tourism Organization (UNWTO) for the TSA. The most important change relates to the treatment of the margins on goods sold to tourists by retailers, with the new standards only including the margins of the final transaction between the retailer and the tourist as direct value-added. Previously, all of the intermediate margins in the production and retailing of goods were included as direct value-added.

The implication for the New Zealand TSA has been that the direct value-added contribution of tourism has declined substantially (down by around \$1.4 billion in 2009, or from 4.7 per cent of GDP to 3.8 per cent of GDP). However, as New Zealand also provides estimates of indirect effects of tourism on the economy in its TSA (see Box 14) the significance of this change is nullified because the direct value-added activity is simply transferred to indirect value-added, with the total value-added unaffected. Similarly, direct tourism employment fell from 5.8 per cent of total employment to 4.9 per cent, with indirect employment increasing by the corresponding amount.

Given this, the implementation of the UNWTO's new TSA standards in New Zealand has been straightforward and non-controversial. However, this work does highlight the magnitude of the change with direct value-added falling by around 20%, and that there are clear advantages in having indirect value-added as a part of the TSA framework.

Dissemination

- Communicating results
A high priority should be placed on the dissemination and communication of results to stakeholders. This requires gaining stakeholder support and understanding of the project, and educating users which may need to continue over a considerable period. (Box 2, 10, 12 and 19)
- Educating users of the TSA
Prior to dissemination, potential users of the TSA product should be "educated" to understand what the TSA shows and what it does not show.

A process needs to be put in place to manage what will often be inflated expectations about what the TSA will provide.

It is likely that the revisions required under TSA:RMF2008 will lead to a significant decline in estimates of tourism's direct value added from those produced using the previous TSA:RMF methodology. This will present challenges for member economies in their communication with stakeholders who can be expected to find the changes difficult to understand (Box 2, 11 and 12)

- Getting feedback

Member economies should prepare for problems in organisational cooperation, coordination and communication. They should keep in touch with key users and stakeholders throughout the TSA development process to ensure the stakeholders understand the purpose and limitations of the TSA. And they should plan ahead to determine how and when to disseminate results.

- Publication

Most member economies publish their TSA either in printed form and/or on their NSO or NTA website. Some member economies issue press releases and provide technical papers and presentations at workshops or seminars. Sometimes formal stakeholder briefings are held. Of the 2009 survey respondents, only Singapore specifically indicated that its TSA had been produced as an in-house document.

Applications and Extensions

- Foundation for research

The TSA provides a strong foundation for further research. Consistent and robust data estimates increase the reliability and comparability of research outcomes. The use of the TSA structure and its data outputs, enhances the reliability, consistency over time, and comparability of tourism research outcomes from government, industry and other research agencies. (Box 13 and 18)

- More frequent indicators

A number of member economies are currently using their TSA as a foundation or benchmark for producing tourism economic indicators at more frequent intervals. Examples include the production of quarterly estimates of tourism GDP by economies such as Canada and Mexico, and Australia's TIEV index⁵ in estimating the economic value of tourism exports. (Box 9 and 13)

- Support for forecasting

TSA data is used as a platform for forecasting, especially in relation to the future economic value of tourism flows. (Box 13)

- Tourism employment data and analysis

Issues relating to tourism's contribution to job creation are frequently of significant policy importance to governments and can be an important advocacy tool for the tourism sector. A Human Resource Module incorporated into the TSA opens up the possibility of detailed labour force statistics being developed across the tourism sector and the generation of information on tourism labour force productivity. (Box 18)

Box 12

USA: Stakeholder education

"Given that there are competing interests all measuring the impact of travel and tourism on their destination, region or state etc differently, we have found it difficult to get others to embrace the TSA data, especially when the impacts are lower than their own estimates. Moreover, there are a lot of lessons to be learned from attempts to disaggregate national estimates to create "regional accounts" based on incomplete data at the state level."

"The creation of an education program to educate people on these statistical tools is of paramount importance."

4. http://www.unwto.org/statistics/tsa_rmf/tsa_rmf.htm
5. Index of Total Inbound Economic Value

- Regional or state accounts

A very important strand of TSA extension activity lies in developing regional accounts or extensions of the TSA to sub-national level. While data problems present significant barriers to this work, some member economies have developed such extensions including Mexico and Canada. In Australia, an academic research body, the STCRC⁶, has developed a set of tourism regional economic contribution accounts (or regional TSA⁷) for the state of Queensland. (Box 13 and 18)

- Indirect effects

New Zealand provides calculations of indirect economic effects of tourism as an enhancement or add-on to the direct economic effects, as a core component of its TSA, while Australia produces indirect economic effects of tourism as a separate report benchmarked against its TSA data. (Box 13 and 14)

- Encouragement for university research

The existence of consistent and reputable data, and the improved access to statistics on tourism which a TSA provides offers encouragement to further in-depth research on tourism by university researchers who might otherwise prefer other fields of study. This can extend across a wide range of issues and disciplines where economic related data may be of value including on such diverse topics as productivity, yield from tourism marketing, environmental issues and climate change. (Box 13)

- Impact analysis

A TSA can be seen as being like a set of accounting spreadsheets describing tourism data and tourism's economic contribution to an economy at a point in time. It is not a tool for measuring the impact of changes in tourism demand

Box 13

AUSTRALIA: Applications & extensions

1. TSA data are used extensively for government policy making, as a benchmark for forecasting, in advocacy by industry, and for academic and industry research.
2. New applications and extensions are evolving e.g. to produce quarterly estimates of the value tourism exports (TIEV) and to estimate the indirect effects of tourism.
3. State and territory level TSA have been produced by an academic research institute, the Sustainable Tourism Cooperative Research Centre (STCRC). These accounts are benchmarked to the national TSA.
4. The STCRC is also in the process of extending the tourism economic contribution estimates down to regional (sub-state) level using methods and definitions which are consistent with the national TSA.
5. TSA data is being used to develop consistent tourism economic impact models to estimate the impacts of changes in tourism demand, tourism related policies, or the supply of infrastructure.

Box 14

New Zealand: Indirect economic effects

A feature of New Zealand's Tourism Satellite Account is that in addition to measuring the 'value-added' impact of the tourism industry, it incorporates a wider view of the sector and its economic impact.

The New Zealand approach allows the whole contribution of the tourism industry to be understood through the TSA framework. For instance, in TSA 2009 the total tourism expenditure of NZ\$21.7 billion is broken down into its constituent components – direct value-added (\$6.4 billion), indirect value-added (\$8.7 billion), imports used in production of goods sold to tourists (\$5.1 billion) and Goods and Services Tax on purchases by tourists (\$1.6 billion).

Tourism employment also includes the direct and indirect components so the whole impact of tourism demand on employment across the economy can be understood.

The implications of this approach for users of the TSA are important. In particular, it allows people who are not familiar with the technical definitions of economic value-added (the majority of users) to understand both the composition and contribution of the tourism sector. Users who wish to compare tourism with other sectors of the economy can do so by using the direct value-added measures.

This approach is possible due to the underlying strength of New Zealand's System of National Accounts and the various economic and tourism datasets, and the expertise of Statistics New Zealand which prepares the TSA for the Ministry of Tourism.

on the economy as a whole, or of broader economic changes on tourism. These require modelling tools such as computable general equilibrium models which are able to take account of the impacts of a change across the economy generally including the effects of supply side constraints and interactive effects on other industries. A TSA can contribute significantly to the development of such economic impact models by providing the robust and consistent definitions and input data essential to obtaining consistent estimates of outputs from these models. In some member economies research institutes and university researchers are utilising TSA data for this purpose. (Box 13)

- **Cost benefit analysis**

Similarly, the TSA provides valuable data which can be used to support cost benefit analysis, for example in relation to investment in tourism infrastructure.

Box 15

MEXICO: Developing the TSA by incremental steps.

A recent enhancement to Mexico's TSA has involved the development of a robust format for estimating the contribution of the timeshare industry to the Mexican economy for incorporation into Mexico's TSA. This case study illustrates the way in which improvements in the detail and coverage of a TSA are achieved as part of an incremental process over time.

Core data for the study is produced in a report developed by the Tourism Ministry and the Mexican Association of Tourist Developers (AMDETUR) called "Resort Timesharing in Mexico: Industry Size, Market Characteristics, and Economic Impacts".

Among the major outputs from this study are that in Mexico, in 2002, there were a total of 310 timeshare hotels, providing an estimated 30,900 units and using 1,146,000 weeks of timeshare or the equivalent in points.

Timeshare owners reported spending, on average \$377 per year on maintenance activities. The main expenditures are for cleaning, maintenance, repair, administration and security. It is important to understand that owners pay maintenance fees each year, even if the benefits of the service are not taken up.

The total value of time share maintenance activity was calculated, using an average price of \$377 per week (price) and 1,146, 000 timeshare weeks registered (physical), which were multiplied to reach a value of \$432 million in income for time share maintenance. This data is then consolidated with annual weeks sold (physical units) reported by the Ministry of Tourism in its Statistical Compendium of Tourism in Mexico, for all years of the series, as displayed in the table below. Meanwhile, the average price was updated with the annual change in consumer price index of the generic product "houses rental or leasing," to estimate the total annual value of timeshares in Mexico.

As a further development of this project Mexico is working on incorporating a tourism module into Mexico's Household Income and Expenditure Survey.

TIMESHARE TOURISM CONSUMPTION (MAINTENANCE FEES)

Concept	2002	2003	2004	2005	2006	2007
Weeks total accumulated	1 146 000	1 283 092	1 434 633	1 602 930	1 784 752	1 987 770
Weeks sold ^{1/}	127 370	137 092	151 541	168 297	181 822	203 018
National	38 955	36 776	39 726	37 308	43 661	54 124
Foreign	88 415	100 316	111 815	130 989	138 161	148 894
Maintenance fees ^{2/}						
Total x week per year (dollars)	377	398	414	427	441	454
Exchange rate*	9.6606	10.7923	11.2861	10.9184	10.9000	10.9283
Total x week per year (pesos)	3 642	4 295	4 672	4 662	4 807	4 961
Consumer Price Index (B2003)						
0.3.1.75 Room rental house variation	94.8	100.0	103.9	107.1	110.5	113.8
Timeshare tourism consumption	4 173 732 000	5 510 880 140	6 702 605 376	7 472 859 660	8 579 302 864	9 861 326 970
Timeshare tourism consumption (thousands)	4 173 732	5 510 880	6 702 605	7 472 860	8 579 303	9 861 327

^{1/} SECTUR. Statistical Compendium of Tourism of Mexico. Table 8-2.

^{2/} AMDETUR. *Resort Timesharing in Mexico. Industry Size, Market Characteristics and Economic Impacts*. 2002, pp.53.

CHAPTER 3

SURVEY RESULTS

This chapter reviews the status of TSA implementation in APEC member economies based on the results of the 2009 APEC TSA survey. The results are compared with those of the previous APEC surveys in 1999 and 2001. Progress in TSA development among member economies over the period is highlighted.

The results of the survey of TSA implementation in APEC member economies are outlined in this section. Eighteen of 21 APEC member economies completed the survey. Responses were not received from Papua New Guinea; the Russian Federation; and Vietnam. Where appropriate, comparable results from the 2001 APEC TSA survey have been included⁷. A more limited 1999 survey of APEC member economies, carried out prior to the UNWTO Conference on Tourism Statistics in Nice, France in June 1999, collected information on the status of TSA implementation in member economies. Results from this survey have been referred to in the first section below which deals with the responses to Questions 1 - 5 of the 2009 Survey⁸.

Status reached in implementing a TSA (survey questions 1-5)

Eighteen APEC member economies responded to the TSA survey. Based on their survey responses:

- Fourteen economies reported they have already developed a TSA (see Table 1):
 - Australia
 - Brunei Darussalam
 - Canada
 - Chile
 - Hong Kong, China
 - Indonesia
 - Korea
 - Malaysia
 - Mexico
 - New Zealand
 - Peru
 - Singapore
 - Chinese Taipei
 - USA.
- China and Japan are in the process of developing a TSA.
- Hong Kong, China regards the TSA it has developed, as a “partial TSA” as does China with respect to the TSA that it currently has under development.
- A number of other economies, including the Philippines and Singapore describe their TSA in terms which imply that the scope and coverage of their TSA is limited or that the tables produced do not accord with the TSA:RMF standards. Almost all member economies indicate limitations in the extent of their TSA – only four economies, Brunei Darussalam; Indonesia; Mexico; and the Philippines report that they complete all 10 of the TSA:RMF 2008 recommended tables.
- In several cases it seems that even member economies that report that they have implemented a TSA consider it to still be in a stage of development.
- Thailand reported that it had not yet developed a TSA. It seems likely that of the remaining three economies which did not respond to the 2009 survey, Papua New Guinea and Russia have not yet implemented a TSA while it is understood that Vietnam has a TSA which is either fully or partially in place.

7. The Development of TSA in APEC Member Economies, APEC Secretariat, Singapore, 2002

8. See Appendix I for text of 2009 survey instrument

TABLE 1 - Stage Reached in Implementing a TSA (Q 1-5)

Member economy	Implemented	Currently developing	Planning to implement	Partial tsa	Not known
Australia	X				
Brunei Darussalam	X				
Canada	X				
Chile	X				
China		X		X	
Hong Kong, China	X			X	
Indonesia	X				
Japan		X			
Korea	X				
Malaysia	X				
Mexico	X				
New Zealand	X				
Papua New Guinea					X
Peru	X				
Philippines				X	
Russia					X
Singapore	X				
Chinese Taipei	X				
Thailand			X		
USA	X				
Vietnam					X

Comparison with Responses to 1999 and 2001 Surveys

A 1999 survey of APEC member economies, conducted prior to the UNWTO World Conference on Tourism Statistics in Nice, France, indicated that at that time five member economies (Canada; Mexico; New Zealand; Singapore; and USA) had an “operational TSA”. A further five member economies, Australia; Chile; Korea; the Philippines and Thailand, reported they were developing a TSA. The survey indicated that Japan and Peru intended to develop a TSA. None of the remaining member economies indicated in their responses to the 1999 survey that, at that time, they were intending to implement a TSA⁹.

Two years later, a survey of APEC member economies, reported in *Best Practice in Tourism Satellite Account Development in APEC Member Economies*¹⁰, found that the number of economies with some level of TSA already implemented had increased to eight, with the addition of Australia; Chile; and Korea. The USA did not respond to the 2001 survey.

In responding to the 2001 survey five economies (Hong Kong, China; Indonesia; Malaysia; Peru; and Thailand) had reported that they were in the process of developing a TSA. The 2009 survey results indicate that, of these, only Thailand, which in 2001 reported that it was developing its TSA with the assistance of the

9. Unpublished survey by APEC TWG based on a limited range of questions.

10. *Best Practice in Tourism Satellite Account Development in APEC Member Economies*, APEC Secretariat, Singapore, 2002

World Travel & Tourism Council (WTTTC), did not by then have a TSA. Thailand said in 2009 that it was planning to develop a TSA, however.

In responding to the 2001 survey, three member economies reported that they were planning or hoping to develop a TSA in the near future. By 2009, two of these economies, China and Japan, reported that they were in the process of developing a TSA. The third economy, Papua New Guinea, did not respond to the 2009 survey.

Of the remaining four economies which reported in 2001 that they had no plans to develop a TSA, by 2009 two, Brunei Darussalam and Chinese Taipei, reported having implemented a TSA. Russia and Vietnam did not provide a response to the 2009 survey.

Box 16

AUSTRALIA: Implementing a TSA

1. Australia's first official TSA was published in 2000 based on data for the 1997-98 reference year.
2. The TSA was developed as a partnership between agencies with the national government Department of Resources, Energy and Tourism providing funding, the government research agency, Tourism Research Australia (TRA), providing tourism demand statistics, and the Australian Bureau of Statistics (ABS) responsible for production of the TSA tables.
3. Costs were fully funded by government and are estimated to have involved the employment of 7.5 person years to develop the initial TSA.
4. The TSA is published annually based on "benchmark" data which is updated every three years. Intermediate year TSA are based on actual year demand data from TRA travel surveys with other data extrapolated from the most recent benchmark TSA.
5. Ongoing costs are estimated to be A\$750,000 (US\$675,000) for a "benchmark" TSA, which includes 5.5 staff years. This falls considerably in a non-benchmark year to 1.5 staff years.
6. The TSA brings together the main tourism economic statistics into one location.
7. It incorporates the major TSA:RMF tables, including an Employment module, but does not yet incorporate Outbound Consumption by Products and Category of Visitors (Table 3), Tourism Gross Fixed Capital Formation (Table 8) or Collective Consumption by Governments (Table 9).
8. Australia is generally well served by tourism data and by the quality of its SNA. Problems have, however, been encountered in relation to issues of survey size, and in relation to data to enable a breakdown of outbound consumption and on tourism investment (capital formation).
9. Revisions to take account of TSA:RMF2008 are to be introduced during 2010 for the 2008-09 TSA.
10. The first official TSA results for Australia showed a reduction in tourism's contribution to the Australian economy when compared with the much less sophisticated estimates which had been relied upon previously. While this caused initial concern in the tourism industry the TSA has come to be accepted by government and the tourism industry as highly credible and authoritative.

Frequency of TSA updates (Survey Q 6 and 7)

Canada was the first APEC member economy to develop a TSA, completed in 1994 for the reference year 1992. Since then its TSA has been updated every two years with the 2004 reference year released in February 2010. Other member economies which have developed a time series of TSA data dating back to the 1990s include Australia; Mexico; New Zealand, the Philippines; Chinese Taipei; and USA. Korea has completed a TSA for 2004 and 2008 establishing what might be a three year TSA production cycle. Hong Kong, China has produced a “partial” TSA at three year intervals since the reference year 2000. Australia publishes a TSA each year which is based on updated tourism survey data for the reference year but using modelled estimates based on the previous “benchmark” or full TSA data year. A full “benchmark” TSA update is done every three years.

TSA developed within Government or outsourced? (Survey Q 8 and 9)

Of the 17 economies which responded in the 2009 survey that they have developed, or are developing, a TSA, 11 had done so wholly within government. In three cases, the TSA has been partly outsourced and in three more it has been fully outsourced. (Table 2)

TABLE 2 - Development of TSA within Government or Outsourced (Q 8 and 9)

Developed alone	11
Partly outsourced	3
Fully outsourced	3
Outsourced to:	Domestic think tank or research institute (2), economic consultant (1), private/ public consortium (1), industry board (1), WTTC (1)

‘Note: Includes responses from member economies which report already having implemented a full or partial TSA or being in the process of developing one.’

Most member economies with a TSA initially developed it as a joint project between their national tourism administration or organisation (the NTO) and their national statistics office or agency (NSO). In some cases, the national or central bank was also involved. The NTO frequently provided the initiative, and often the funding, for the project. In most cases, the NSO has subsequently become the lead manager for the TSA, although a few economies produce the TSA within their NTO. In several cases, industry organisations were partners (or played a role) in the plan for the establishment of a TSA.

Most of the outsourcing of TSA research work has been to local research organisations or consultants. Chinese Taipei and Japan (for the TSA it is currently developing), are examples of full outsourcing to an economic consultant or think tank. Hong Kong, China; Korea; and Peru utilise assistance from industry boards, research institutes or consultants.

Brunei Darussalam used an international body, the World Travel and Tourism Council (WTTC), to produce its TSA in 2007. A number of other member economies have previously commissioned or used WTTC assistance (e.g. the Philippines and Indonesia) to read ‘Indonesia and the Philippines). WTTC has also developed TSA reports on Australia; China; Hong Kong, China; Japan; and the USA. WTTC characterised its methodology as a “simulated” TSA to

highlight its use of simulated or modelled data and estimates where survey data was unavailable. The WTTC simulated accounts involved some conceptual and methodological differences from the standard TSA:RMF framework. In 2009 it ceased using the terminology “TSA” to describe its reports which are now referred to as reports on “Travel and Tourism Impact.”¹¹.

A number of member economies refer to having received technical assistance from the UNWTO and/or other international research bodies. In some cases technical assistance has been provided bilaterally, for example by the Australian Bureau of Statistics, and the Canadian Tourism Commission and Statistics Canada.

Future outsourcing intentions (Survey Q 9a)

Of the three economies which reported fully outsourcing their TSA, only one, Chinese Taipei, indicated that it has decided to do so for future TSA reports. Of those economies which reported partly outsourcing their TSA, Korea is continuing with partial outsourcing for its TSA for reference year 2008.

Time taken to develop first TSA (Survey Q 10)

Seven member economies responded to the questions in the 2009 survey on how long it took to develop their TSA. Of these, three economies said that it took them one year or less to develop and publish their first TSA, two economies said two years, one economy three years, and one economy reported that the development of their TSA took six years. (Table 3)

TABLE 3 - Length of Time to Develop TSA (Q 10)

6 Months - 1 Year	1 – 2 Years	3 Years	6 years	Not stated
3	2	1	1	11

These development periods compare with a similar average reported time period of two years from the 2001 survey.

It seems likely that the responses to this question did not always include all of the time spent in preparatory work, including in gaining support for developing the TSA and establishment of an institutional framework. Looking at the 2001 survey results, it appears that developing Australia’s TSA took three years, including the time spent designing it and collecting additional data. Canada reported a ten year time frame, from its first pre-feasibility study to completion of its first TSA, but noted that much of the elapsed time (six years) involved preparation of the organisational, planning and budgeting prerequisites and approvals.

Cost of TSA development (Survey Q 11)

In all there were ten responses to Question 11, some replying only to the cost, or to the person years, component of the question. Eight economies either indicated that the information was not available or did not respond. This relatively low response rate may have been because these costs were absorbed within government agency budgets and could not be readily estimated, or it may be that the survey respondents were not familiar with the relevant budget or resource information.

11. http://www.wttc.org/eng/Tourism_Research/

Of the economies that did respond, several appear to have interpreted the question as referring to the recurring cost of producing a current TSA rather than the development cost for the initial TSA, as was originally intended by the question. The initial cost would have included the original investment in developing the TSA which, for many member economies, occurred some years ago and may no longer be readily available.

The responses received showed large variations from one member economy to another, in terms of both the financial cost of developing the TSA, and of the number of staff months or years required. They ranged from US\$50,000 for Indonesia to US\$140,000 for New Zealand, US\$300,000 for the US, US\$400,000 for Canada and US\$675,000 for Australia. In the case of Australia this figure refers to the cost in a benchmark TSA year – a benchmark TSA is produced only every three years and the cost for interim years, for which some of the data is extrapolated from the previous benchmarks, is significantly less.

In relation to staff resources, the average requirement was slightly higher than the average of two to three person years revealed in the 2001 survey. Still, the failure by many economies to provide an estimate introduces considerable uncertainty. Australia reported an average of 2.8 person years (1.5 for non-benchmark and 5.5 for benchmark years, this figure including resources for collecting additional supply side data). Canada reported an average of four person years, USA two, and the Philippines 0.8 person years. Malaysia indicated that its TSA development involved ten staff over two years inclusive of the preparation of additional data inputs for the TSA, while Singapore reported that its TSA development involved five staff over two years.

Need for additional data collections (Survey Q 12)

Significant costs can be incurred where new or additional data collections are required, in order to implement a TSA, or where substantial modifications are introduced to existing surveys.


In the 2001 survey, 11 of the 13 economies which reported that they had already implemented, or were in the process of developing, a TSA said that they had to undertake additional data collections. In relation to demand side data collections, eight economies indicated that they had undertaken additional data collections and three that they had partially done so.

In the 2009 survey, eight member economies reported having undertaken new, additional or enhanced demand side collections. For supply side collections, seven economies reported having undertaken additional collections. (Table 4)

TABLE 4 - New or Additional Data Collections implemented (Q 12)

	Yes	No	Not Specified
Demand Side	8	5	4
Supply side	7	5	5

Note: refers only to responses from member economies that have already implemented, or are in the process of developing, a TSA



Additions to demand side collections have mainly involved improvements to consumer surveys, including in relation to travel expenditures. Malaysia reported that it has consulted with destination countries to gather data on its outbound traveller expenditures.

Among the supply side additions or enhancements reported was the collection of data on tourism investment.

TSA an ongoing or one-off project (Survey Q 13)

Twelve economies reported in their responses to the 2009 survey that they had developed their TSA with the intention of making it an ongoing project. Two economies said their TSA was a “one-off” project, Brunei Darussalam and Singapore (Singapore produced a “pilot TSA” for 1990 as well as its 1995 TSA). Japan said that no final decision had been made regarding future production of TSAs.

It’s worth noting that in their responses to the 2001 survey, all of the economies said that their TSA was an ongoing project except for Korea and Chile. By the time of the 2009 survey both regarded their TSA as ongoing.

Compliance with TSA: RMF standards (Survey Q 14)

Almost all member economies which have already implemented a TSA, or are in the process of doing so, say that their TSA is at least broadly compliant with the international standards as defined in the TSA:RMF. Brunei Darussalam indicated that its TSA, produced by WTTC, was not compliant. The Philippines described their TSA as compliant ‘subject to some limitations’.

Responses to this question involve a qualitative judgement as to how successfully a TSA can be considered to comply with the international standards. This is impossible to assess on the basis of the survey responses alone. For example, a number of economies clearly regard their TSA as still a partial one, or as being in the process of ongoing development. Japan; Hong Kong, China; and the Philippines refer specifically to limitations in their TSA. In a broader sense, no economy claims to fully implement the TSA:RMF standards in their entirety. Almost all economies experience varying levels of problems with the quality or availability of tourism data, and most consider that they are engaged in an incremental or ongoing process of developing their TSA (see also below).

Intention to introduce revisions in response to new TSA:RMF2008 guidelines (Survey Q14 continued)

Almost all of the economies which responded to the 2009 survey intend to revise their TSA to take account of the changes set out in TSA:RMF 2008. Mexico and New Zealand reported that they have already done so. Chinese Taipei said that it is evaluating the data problems involved and a similar situation can be inferred from the responses of a number of other economies which highlighted difficulties presented by the revisions. The USA and Singapore indicated that they were not proposing to make revisions (Singapore is not currently planning to produce a new TSA).

Uses and benefits of TSA (Survey Q 15)

TABLE 5 - What uses and benefits are you getting from your TSA? (Q 15)

	Number of Responses
Foundation/benchmark for range of indicators of tourism performance including economic contribution, employment etc	8
Policy support	8
Enhancing tourism statistics, knowledge, support for research,	3
Strengthens System of Accounts	2
Enhanced awareness, industry recognition, advocacy	1
Framework/benchmark for developing regional TSAs and analysis	1
Benchmarking for extensions such as forecasting, impact models & cost benefit	1

Note: Responses from member economies that have already implemented a TSA. Multiple responses possible.

Member economies cited a number of uses and benefits of the TSA. The key benefits from a TSA which were identified in the survey responses were as follows:

- As a performance indicator. The TSA provides benchmark data for a range of indicators of tourism performance including: tourism's economic contribution, employment, productivity and profitability. It includes measures which can be used for tracking industry dynamics over time
- A TSA provides support for policy making and tourism planning
- Using TSA data can raise awareness and recognition about the contribution of tourism to the national economy, notably to GDP and employment. This in itself helps legitimise and give credibility to the tourism industry in the minds of politicians and the general public. It also serves as a medium for public information
- The information extracted from a TSA provides a base from which to solicit and justify funding for tourism development and marketing. A significant example is the very large increase in federal funding for tourism marketing and promotion which followed the publication of the first Canadian TSA results
- A TSA enhances the level of knowledge of tourism and its place in the economy, and supports, and contributes to, increased research
- TSA data provides a basis for extensions to the TSA and applications such as:
 - the employment/labour force module
 - estimation of indirect effects and tax revenues
 - quarterly performance indicators
 - forecasting
 - development of economic impact models for tourism and data for cost benefit analysis; and
 - the building of sub-national, state or region level TSA/estimation of tourism's economic contribution at the sub-national level.

Box 17

The Philippines: Uses & benefits of the TSA

Uses & benefits of the TSA

Formulation of policies and programs relevant to tourism.

A tool for assessing tourism in comparison with other industries or economic activities.

An important input into consideration of the budget allocation to the tourism sector.

- The TSA incorporates a core definition of tourism as a composite industry. It defines what sectors are part of the tourism related industries and how they can be recognised and segmented. This can help to build a sense of industry identity.

Two benefits (or uses) of the TSA received the strongest support in response to the 2009 survey. Firstly, the importance of the TSA as an indicator of tourism industry performance. This was cited by eight out of the ten member economies which responded to this question. Secondly, the same number of member economies identified support for government policy making and planning as a key benefit from the TSA. (Table 5)

Enhancing awareness or recognition of tourism's economic importance ranked second in the 2001 survey results. This was less prominent in the 2009 survey responses. This perhaps reflects the greater role played by NSO staff, who are perhaps more involved with the technical applications of the TSA, in responding to the 2009 survey. In the 2001 survey NTO staff, who might be expected to be more attuned to the policy uses of the TSA, appear to have played a greater role in the preparation of their economy's response to the survey.

Dissemination/communication to stakeholders (Survey Q 15 continued)

The most frequently used means of disseminating TSA results to different stakeholders has been through publication in hard copy and/or posting on a web site. It appears from the responses to the 2009 survey that almost all economies make their TSA, or data derived from it, publicly available. Only Singapore referred to its TSA as essentially an in-house document. A number of economies use press releases, technical papers or conference presentations to communicate their TSA results. The Philippines mentioned the use of technical papers, seminars and workshops to communicate with stakeholders. Malaysia said that encouragement of feedback from stakeholders is an important part of its dissemination activities. (Box 18)

Issues with the dissemination and communication of TSA results are regularly discussed by UNWTO and other fora as a continuing areas of weakness in TSA management by governments. Anecdotal evidence suggests that many APEC member economies share this concern and see communicating the results of their TSA as an area on which they would like to improve their performance.

Box 18

Canada: Extensions & additions

The TSA can be extended by adding modules to fulfil particular information needs:

- Canada has developed National Tourism Indicators for timely quarterly estimates of tourism;
- Canada's TSA also includes a Human Resource Module to provide more detailed information on jobs, hours and earnings;
- Provincial and Territorial Tourism Satellite Accounts to provide regional statistics on tourism.
- The Module on Government Revenues Attributable to Tourism to provide details on various sources of tourism tax revenues to various levels of government.

Box 18

The Philippines: Dissemination and communication

Communicated through international and national conferences, through technical papers, and through press release in the National Statistical Coordination Board website www.nscb.gov.ph

Difficulties in developing TSA (Survey Q 34 & 35)

TABLE 6 - Main difficulties experienced in TSA development Survey (Q 34 & 35)

	Yes	No
Outsourcing	3	11
Data	13	2
Cost	7	7
Planning	0	13
Skills	7	7
Staff Turnover	7	6
Co-operation	7	7
Other	5	3

Note: Based on responses from member economies that have already implemented a TSA. Multiple and nil responses possible.

The following were among the difficulties cited by member economies that have already implemented a TSA (see Table 6):

- Availability or adequacy of data

In responses to both the 2001 and 2009 surveys, data issues tended to dominate the list of difficulties cited by member economies with respect to implementing TSA. Almost all respondents to the 2009 survey identified data as a major area of difficulty. Since tourism activity is included under several different industries, the data requirements for estimating tourism economic statistics in the national accounts are more complex than for many other industries. The largest area of concern was with demand side data, especially information on visitor consumption by product. Other data problems identified related to the lack of reliable data on expenditure by outbound visitors (outbound consumption), data on tourism investment (fixed capital formation), the treatment and measuring of collective consumption such as expenditure by government bodies in support of the tourism industry, and the paucity of data on local and regional level tourism expenditures.

- Shortage of technical skills and staff turnover

Technical skills continue to present difficulties for some member economies although where the TSA is managed within the NSO this appears to have diminished somewhat since the 2001 survey. The risk from loss of skills and knowledge as a result of staff turnover remains a concern for some economies.

- Cost

Seven member economies identified cost as a major difficulty in implementing their TSA. This was slightly down from the 2001 result, perhaps reflecting the more established position of the TSA in many member economies by 2009. However, some economies referred to recurring budget threats to the level of funding for the TSA.

- Difficulties in planning and development

This issue attracted less attention in responses to the 2009 survey than it had in 2001. Member economies responding in 2001 would have had to carry out much of the planning for their TSA development prior to international agreement having been reached in 1999-2000 on the original TSA:RMF standards. By the time of the 2009 survey, many member economies had also acquired considerable experience in TSA production and NSOs, with their greater level of experience in developing statistical frameworks, had become more heavily engaged and committed to the production of the TSA.

- Lack of cooperation

The level of cooperation among stakeholders is a key issue in the capacity to develop and implement a TSA. In operational terms this applies to cooperation between the NTO and the key government statistical and data collection agencies. As the TSA has become more established among member economies, this issue has diminished in importance. However, for member economies at an early stage in developing their TSA it remains a central issue. Three economies highlighted difficulties in engaging with the private sector, either in relation to cost sharing or, in one case, because of industry criticism of TSA outcomes. (Box 12)

- Outsourcing difficulties

Only a few member economies, and a much smaller number than in 2001, identified outsourcing as a significant difficulty in 2009. Brunei Darussalam referred to problems experienced through failure to ensure that the methodology being adopted by its agent was endorsed by UNWTO. The potential for difficulties in relation to the confidentiality of NSO data if outsourcing was used was mentioned by an economy which does not currently outsource its TSA. However, several of the economies which continue to outsource their TSA to research agencies, think tanks and industry bodies did not express particular concerns about their experiences.

- Other difficulties

Other difficulties referred to in the 2009 survey included: incorporation of the revised TSA:RMF 2008 standards, difficulties relating to consumer surveys, level of agency commitment and funding, and difficulties encountered in localising (to local and regional level) the TSA concepts and calculations. These were not elaborated on in the survey responses.

- Dissemination and education

An ongoing concern, which is also referred to earlier in this handbook, relates to difficulties in effectively communicating the TSA results to industry stakeholders and in educating stakeholders to understand the concepts involved and how the data can be interpreted and used.

- Member economies yet to implement a TSA

The sample size for member economies which have not yet implemented a TSA, or which are currently developing one, was extremely small (three member economies), and especially so in relation to the question on anticipated difficulties (Question 35 of the 2009 survey). Thailand was the only one of these economies to comment noting that it expected all of the issues listed in the questionnaire (see list in Table 6) to present difficulties for them. Clearly it is not easy for member economies to foresee which particular issues will present the greatest difficulties for them before being well advanced in the development of their TSA.

Types of APEC support which would assist member economies (Survey Q 36)

TABLE 7 - Different forms of support that APEC might provide to member economies (Q 36)

	Most Useful	Quite Useful	Least Useful
APEC to organise briefing seminars	6	3	1 or 2
APEC to organise sub-regional TSA development seminars	6	1 or 2	2 or 3
Written guidelines on implementing the TSA	8		3 or 4
Other	1		1

Note: Responses from APEC member economies that have already implemented, or are in the process of developing, a TSA.

Eleven economies responded to Question 36. The responses displayed a surprising level of support for each of the identified ways in which APEC might provide assistance to member economies for TSA development. The reason for such strong support for assistance from APEC remains unclear given that most member economies reported having already implemented a TSA. Possibly it suggests that many member economies see a need for continuing technical assistance in the ongoing development of their TSA and in relation to the implementation of TSA:RMF 2008. (Table 7)

CHAPTER 4

OUTLINE PLAN FOR WORKSHOPS

This chapter provides an outline structure and content plan for the Workshops proposed under Phase 2 of the project.

Phase 2 of the APEC TWG project envisaged holding a series of up to four individual economy Workshops to be hosted by interested member economies. Approval to proceed with Phase 2 of the project was given by the APEC Secretariat in December 2009.

The Workshops are to be designed to assist the member economy to move towards development and implementation of a national TSA and to draw up a work program and timetable for doing so. In particular the Workshops would be designed to assist individuals and organisations in the member economy who might be involved in initiating development of the TSA, planning and developing its establishment, providing data and information, participating in the statistical measurement and related research process, interpreting and using the TSA results, or simply providing support for the initiative and development of the TSA.

This suggests the need for participation by representatives from the following agencies and organisations:

- (1) policy, planning and statistics/research areas of the National Tourism Administration;
- (2) representatives from the National Statistical Office, both from the areas responsible for the collection of tourism related statistics and for the National Accounts;
- (3) relevant representatives from the Central Bank, or whichever body in the member economy is responsible for producing Balance of Payments data;
- (4) relevant representatives from the immigration or customs services, or other agency responsible for border security procedures which would be a source of data on international arrivals and departures;
- (5) representatives of any other bodies which are involved in collecting tourism statistics; and
- (6) representatives of potential users of the TSA information, including from industry (eg. peak industry associations), research organisations and university researchers working on tourism economics.

The primary purpose of the Workshops is to assist the selected economies to understand what is involved in developing and producing a Tourism Satellite Account, and to help them to draw up a work program and timetable for producing their first TSA. The workshops can also be directed to assisting member economies which have already implemented a TSA but which need assistance in developing it further, or which have previously implemented a TSA which has since lapsed.

The following is an outline agenda for a Workshop based on a two day time frame.

PROPOSED AGENDA FOR INDIVIDUAL ECONOMY WORKSHOPS

DAY 1

9.30 – 10.00 **Introductions and Background**

10.00 – 11.00 **Session 1: *What is a TSA? What does it do and not do?***

This session is a “lay” person’s guide to what a TSA is and what it does and does not do. It is non-technical and will aim to “demystify” the TSA. It is targeted at managers and executives who may need to make decisions in relation to the development of a TSA or not. It is aimed at public servants in the National Tourism Administration (NTA), the National Statistical Office (NSO) and any other government agencies relevant to the supply or use of tourism data. This would include the Immigration Department (as a source of arrival and departure statistics) and the Central Bank (as a source of Balance of Payments data). It will also be useful for private sector organisations, such as tourism industry associations and for academic researchers in the field of tourism.

11.00 – 11.30 **Tea break**

11.30 – 13.00 **Session 2: *An Overview of the new tourism statistics and TSA international standards***

This is a more technical presentation of the main issues in the International Recommendations on Tourism Statistics 2008 (IRTS 2008) and the Tourism Satellite Account: Recommended Methodological Framework 2008 (TSA: RMF 2008). This will draw the attention of the technical personnel from the NTA and the NSO (and any other relevant bodies) to the main concepts and definitions in the new standards.

13.00 – 14.00 **Lunch**

14.00 – 15.30 **Session 3: *Demand side data: Domestic tourism***

This session will involve, first, a presentation by the host economy on the present state of the economy’s Domestic tourism statistics.

This will be followed by open discussions between the Consultant and officers of those departments responsible for tourism statistics and the TSA. This discussion will include definitions and recommended methodologies.

The major aim of this session will be to help the economy further understand how their current data compares with the new international standards and what needs to be done to bring those data into line with the standards required for a TSA.

15.30 – 16.00 **Tea break**

16.00 – 17.30 **Session 4: *Demand side data: Outbound tourism***

This session will involve, first, a presentation by the host economy on the present state of the economy’s Outbound tourism statistics.

This will be followed by open discussions between the Consultant and officers of those departments responsible for tourism statistics and the TSA. This discussion will include definitions and recommended methodologies.

The major aim of this session will be to help the economy further understand how their current data compares with the new international standards and what needs to be done to bring those data into line with the standards required for a TSA.

DAY 2

9.00 – 10.30

Session 5: Demand side data: Inbound tourism

This session will involve, first, a presentation by the host economy on the present state of the economy's Inbound tourism statistics.

This will be followed by open discussions between the Consultant and officers of those departments responsible for tourism statistics and the TSA. This discussion will include definitions and recommended methodologies.

The major aim of this session will be to help the economy further understand how their current data compares with the new international standards and what needs to be done to bring those data into line with the standards required for a TSA.

10.30 – 11.00

Tea break

11.00 – 12.30

Session 6: Supply side data: Industry data

This session will involve, first, a presentation by the host economy on the present state of the economy's Supply side tourism statistics.

This will be followed by open discussions between the Consultant and officers of those departments responsible for tourism statistics and the TSA. The major aim of this session will be to help the economy further understand how their current data compares with the new international standards and what needs to be done to bring those data into line with the standards required for a TSA.

12.30 – 13.00

Session 7: Accommodation activity statistics

This session will discuss the economy's Accommodation activity statistics. It will also include a presentation by the Consultant on the UNWTO's Accommodation Survey Kit.

13.00 – 14.00

Lunch

14.00 – 15.30

Session 8: Work Program and Timetable for the development of a TSA.

Drawing on the discussions in the earlier Sessions, this Session will attempt to devise a Work Program and Timetable for a TSA which is practical and achievable.

15.30

Close of Workshop

APPENDIX I

APEC 2009 TSA SURVEY

APEC TWG Project TWG 01/2008

Capacity Building on Tourism Satellite Accounts as a basis for Promoting Liberalisation and Facilitation
on Tourism Services

APEC Tourism Satellite Account Survey

1.	Name of Member				
	Economy:				
			Yes	No	Partially/
				Possibly	
2.	Has your Member Economy already implemented a TSA?				
	(if yes or partially go directly to Question 6)				
3.	Is your Member Economy currently developing a TSA				
	(if yes or partially go directly to Question 16)				
4.	Is your Member Economy planning to develop a TSA in the foreseeable future?				
	(if yes or possibly go directly to Question 25)				
			No plans to	Currently	
	implement a TSA		undecided		
5.	If your Member Economy is not considering implementing a TSA in the foreseeable future please indicate why you have decided against doing so or if you are simply undecided.				
	(then go to Question 33)				
IF YOUR MEMBER ECONOMY HAS ALREADY IMPLEMENTED A TSA:					
6.	In which year/years did you publish your first and subsequent TSAs?				
7.	To which refence year(s) did the TSA relate?				
			Alone	Partly	Fully
		outsourced		out-sourced	
8.	Did you develop the TSA within the government of your member economy or was it partly or fully outsourced?				
9.	If outsourced, who assisted you? eg WTTC, UNWTO, domestic or foreign consultant, aid or statistical agency from another country, university or other research body?				
10.	How long did it take to develop and publish your (first) TSA?				
	(US\$ equivalent	Cost	Resources		
		eg staff months			
11.	Can you indicate the cost in cash and/or resources of developing your TSA?				
		Demand side	Supply side		
12.	Did you undertake new/additional data collections in order to compile the TSA? (please indicate broad nature of additional data collection.)				
		On going	One-off	Not yet determined	

13.	Is your TSA ongoing or was it a one-off project?			
		Yes	No	
14	Does your TSA conform broadly to the international standard as defined in the UN, UNWTO, OECD, EUROSTAT Methodological Framework for TSA?			
If yes, do you intend to introduce revisions to your methodology in response to the changes under RMF:TSA 2007?				
15.	What kind of use and benefits are you getting from your TSA and how are they communicated to stakeholders? (Please answer on a separate sheet if additional space required)			
Now go to Question 34.				
IF YOUR MEMBER ECONOMY IS CURRENTLY DEVELOPING A TSA:				
16.	In which year do you plan to publish the results?			
17.	On which reference year/years will your TSA be reporting?			
		Alone	Partly	Fully
		outsourced	out-sourced	
18.	Is the TSA you are producing being developed solely within the government of your Member Economy, or is it being partly or fully outsourced?			
19.	If outsourced, who is assisting with the development of the TSA? eg WTTC, local or foreign consultant, UNWTO, aid or statistical agency from another country, university or other research body?			
		Demand Side	Supply Side	
20.	Will you be undertaking new or additional data collections in order to compile your TSA? Please indicate broad nature of collections proposed.			
21.	How long do you expect it to take from the commencement of work on your TSA to publication of the TSA results?			
		Cost	Resources	
	(US\$ equivalent)	eg staff months		
22.	Can you estimate the cost in cash or			

	resources of developing your TSA?		
		Yes	No
23.	Will your TSA broadly comply with the international standard as defined in the UN/WTO/Eurostat/OECD Recommended Methodological Framework for TSAs?		
		Ongoing	One-off
24.	Will the TSA you are developing be ongoing or a one-off project?		
Now go to question 34.			
IF YOUR MEMBER ECONOMY IS PLANNING TO IMPLEMENT A TSA IN THE FUTURE:			
		Partial or Pilot TSA	Full TSA
25	Is your TSA intended to be a pilot or interim TSA before producing a full TSA or is it to be a largely final TSA?		
26	In which year/years do you expect to publish the TSA you are planning to develop?		
27	On which reference year/years do you expect the TSA to report?		
		Alone	Out-sourced Undecided
28	Will you develop the TSA solely within the government of your Member Economy or will it be partly or fully outsourced?		
29	If it is outsourced, who will assist you? eg WTTC, local or foreign consultant, UNWTO, aid or statistical agency from a foreign country, university or other research body?		
	(US\$ equivalent)	Cost eg staff months	Resources
30	Do you have an estimate of the cost in cash or resources that will be involved in developing your TSA?		
		Ongoing	One-off Unsure
31	Will your planned TSA be an ongoing one, or a one-off project?		
32	Is your TSA intended to largely comply with the international standard as defined in the UN/UNWTO/OECD/EUROSTAT Recommended Methodological Framework for TSAs?		
If yes, do you intend to incorporate the latest changes to the methodology under RMF:TSA 2007?			

Now go to Question 34.			
FOR COUNTRIES WITHOUT A TSA AT PRESENT:			
33	If your Member Economy does not currently have a TSA, does it use an alternative instrument to estimate the contribution of tourism to your economy? (Please give details - use a separate sheet if additional space is required)		
Now go to Question 35			
34	If your Economy has already implemented, or is developing a TSA, what were/are the main difficulties with the method of approach adopted?		
	Examples of Problems:	Yes/No	Please describe:
	Outsourcing difficulties?		
	Lack of data?		
	Cost? Anticipated or otherwise		
	Inadequate planning?		
	Availability of skills?		
	Staff turnover?		
	Lack of co-operation from within government or from the private sector?		
	Other?		
35	If your Member Economy does not have a TSA, and you would like to develop one, what do you expect the main hurdles to be?		
	Examples of anticipated problems:	Yes/No	Any comments?
	Cost?		
	Lack of data?		
	Skill shortages?		
	Technology transfer		
	Lack of co-operation from other government agencies or from the private sector		
	Other		
36	What kind of support would you appreciate from APEC to assist your country in setting up a TSA? (Please rank in terms of usefulness, 1 being most useful and 3 being least useful)		
		1	2
			3
	APEC to organise TSA briefing seminars		

END OF QUESTIONNAIRE			
Thank your assistance in completing this questionnaire. Would you please indicate the name of one or more contacts in your Member Economy who could be consulted to follow up on any of the issues that have been raised.			
Name	Government Agency	E-mail address	Telephone No. including country and area codes
Please return this survey by email to Ray Spurr at:		r.spurr@unsw.edu.au	
and/or by fax to:		61-2-9663 1985	
Marked:		For Attention: Ray Spurr	
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APPENDIX II

GLOSSARY OF TERMS

ABS	Australian Bureau of Statistics
AMDETUR	Mexican Association of Tourist Developers
APEC	Asia Pacific Economic Cooperation
CTC	Canadian Tourism Commission
CTSA	Canadian Tourism Satellite Account
DOSM	Department of Statistics Malaysia
DOT	Department of Tourism, the Philippines
ENIGH	Mexican Household Income and Expenditure Survey
EUROSTAT	Statistical Office of the European Communities
GDP	Gross Domestic Product
IACTS	Inter-agency Committee on Tourism Statistics, the Philippines
IRTS	International Recommendations for Tourism Statistics
KNTO	Korea National Tourism Organization
KCTI	Korean Culture and Tourism Institute
KTRI	Korean Tourism Research Institute
MICE	Meetings, Incentives, Conferences and Exhibitions sector
NASD	National Accounts Statistics Division, Department of Statistics Malaysia
NSCB	National Statistical Coordination Board, the Philippines
NSO	National Statistics Office or agency
NTO	National Tourism Office or administration
OECD	Organisation for Economic Co-operation and Development
PTSA	Philippine Tourism Satellite Account
SNA	System of National Accounts
SSD	Services Statistics Division, Department of Statistics, Malaysia
STCRC	Sustainable Tourism Cooperative Research Centre, Australia
SRTC	Statistical Research Training Centre, the Philippines
TIEV	Total Inbound Economic Value, Australia
TRA	Tourism Research Australia
TSA	Tourism Satellite Account
The TSA	Tourism Satellite Account (as defined in the TSA: Recommended Methodological Framework developed by the UNWTO, OECD and Eurostat and approved by the UNSC)
TSA:RMF	As above
TWG	(APEC) Tourism Working Group
UN	United Nations
UNSC	United Nations Statistical Commission
UNWTO	United Nations World Tourism Organization
WTTC	World Travel & Tourism Council





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