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**A Tourism Satellite Account
for Austria**

Methodology and Results

Peter Laimer

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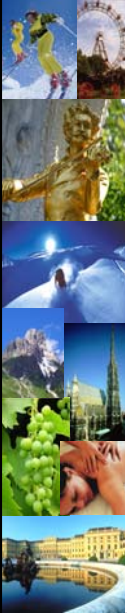

Concepts and methods









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Preliminaries



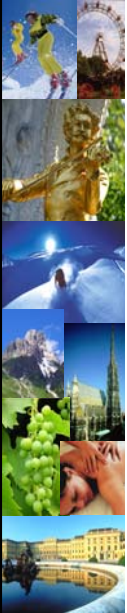
Tourism Satellite Accounting in Austria is

- **commissioned** by the Ministry for Economy and Labour,
- done in **cooperation** with an research institute (WIFO),
- done by the **Tourism Statistics´ section** of Statistics Austria,
- done every **second** year,
- not a perfect system, but **being yearly improved**,
- a **living system**, taking into account any relevant data source,
- **methodologically** based on the UNWTO/EUROSTAT/OECD TSA requirements,
- **not as detailed** as required according to the UN-Manual,
- the **basis** for Regional TSA and the Employment Item.


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TSA for Austria: Simplified - but not simple



Tourism Satellite Accounting in Austria is

- **available** for TSA-Standard-Tables 1, 2, 4, 5, 6, and 7;
- not based on primary data sources, but mainly on **secondary data sources**;
- partly and where necessary or feasible based on **estimates** and **assumptions**;
- only published for **current prices**, not constant prices;
- published taking into account **key results**, only;
- extended by considering **indirect** effects;
- extended by taking into account **leisure** effects.

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TSA for Austria - the starting point






- Tourism is of significant importance for the overall **economy**.
- In contrary to the production-oriented industries the tourism industry is directly concerned with the **tourists' consumption behaviour**.
- However, **tourism** was **not considered** as an own sector in **National Accounts**.
- Detailed **monetary figures** were not available.
- Reporting related to tourism was only concerned with **global monetary** figures and quantitative indicators (arrivals, nights spent, BOP).
- The **common understanding of tourism statistics** primarily referred to arrivals and nights spent, but these are only quantitative indicators measuring tourism from the demand side.

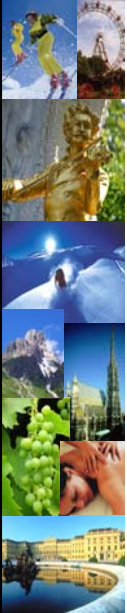
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TSA for Austria – the starting point (continued)





- In order to evaluate the importance of tourism for the **overall economy** the **supply side** related to tourism has to be taken into full account, as well.
- Tourism **effects and influences** a great variety of industries which are **directly** related to tourism (hotels, transport facilities etc.).
- At the same time it has an influence on economic fields which are **not directly related to tourism** (e.g. business services which are not used by tourists but by the industry).
- **What was the solution?**



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Solution

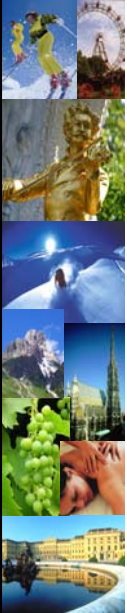
- Development of Tourism Satellite Accounts, integrating **supply** and **demand** side information.
- TSA-reporting becomes **international standard**:
 - (1) **UN-Manual**: Recommended Methodological Framework.
 - (2) **EUROSTAT-Manual**: European Manual on Tourism Satellite Accounts.
 - (3) **OECD-Manual**: Measuring the Role of Tourism in OECD Economies.
- International compatibility related to the economic importance of tourism based on **value added**.



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What is (Tourism) Satellite Accounting?

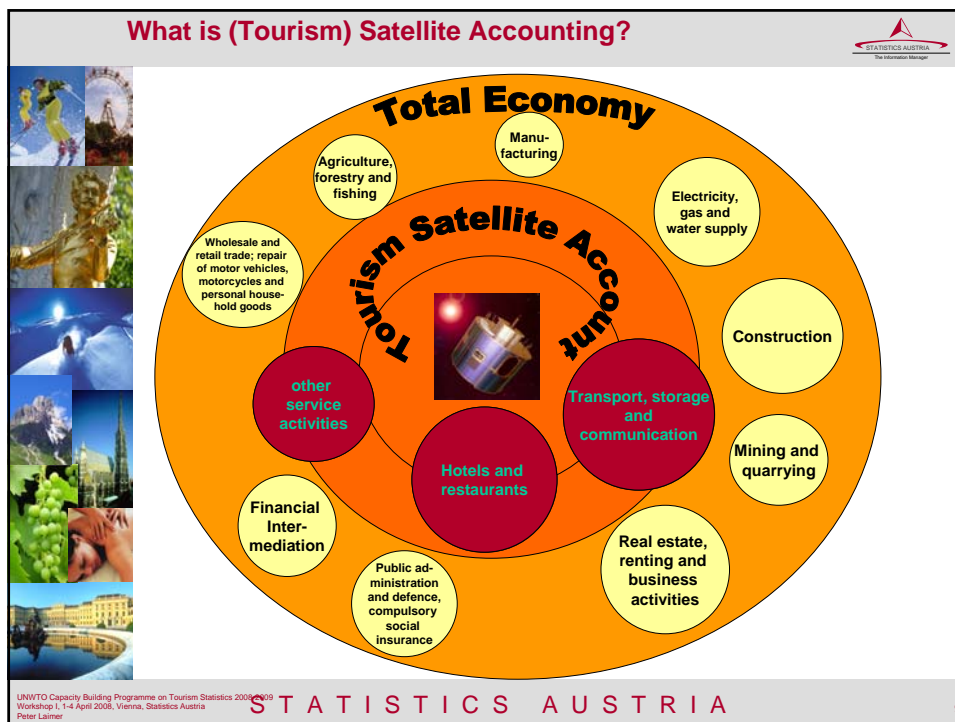
- Satellite Account in general: **Extension** to the “System of National Accounts” (SNA) which enables a better understanding of the size and role of economic activity which is usually “**hidden**” within such accounts.
- The respective commodities produced by tourism suppliers and purchased by visitors are also included in the **core accounts**.
- **But**: SNA does not distinguish between a shoe purchase by a tourist or by a resident.
- TSA **integrates supply side and demand side information** figuring out the share of tourism demand related to the total value added.



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Conceptual Framework and Basic Terms

(1) TSA-concept distinguishes between:

- “Tourism characteristic”,
- “Tourism connected”, and
- “Tourism non-specific” production.

(2) Accordingly tourism consumption comprises:

- “Tourism characteristic” (i.e. accommodation, travel agencies, skiing lifts),
- “Tourism connected” (i.e. canteens), and
- “Tourism non-specific” goods and services (i.e. retail trade, hairdresser).

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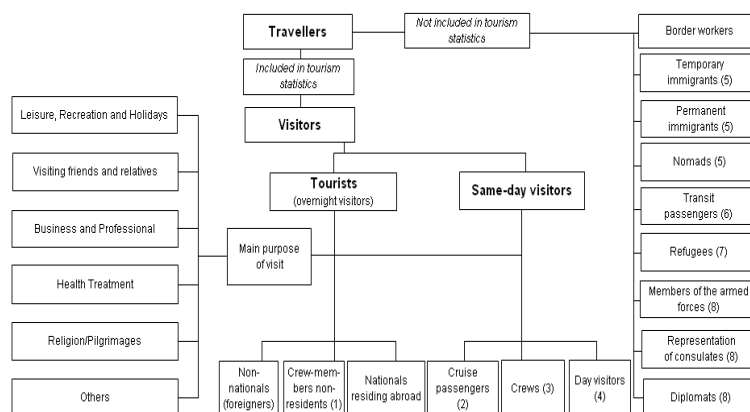
Basic Terms: Visitor




A visitor is defined as

- "... any person traveling to a place other than that of his/her **usual environment** for less than twelve consecutive **months** and whose main purpose of travel is other than the exercise of an activity **remunerated** from within the place visited."
- A visitor may be a **resident** or a **non-resident** of the given country, a same-day visitor or a tourist (the latter is a visitor with at least one overnight stay).
- The country of origin is the **country of residence** which does not necessarily coincide with the tourists' **nationality** (therefore, a tourist being US-citizen but whose permanent residence is in Germany, is considered a German tourist).

Basic Terms: Visitor




Aggregates of Visitor Consumption



Considering the different forms of tourism several aggregates related to visitor consumption may be **distinguished**:

- **Inbound tourism consumption**
(= tourism export);
- **Domestic tourism consumption**
(= revenue of domestic tourism which concerns visitor consumption outside the usual environment; that within the usual environment is related to (non-tourism) leisure expenditure considered in an extended TSA);
- **Outbound tourism consumption**
(= tourism import);
- **Internal tourism consumption**
(= tourism export + revenue of domestic tourism);
- **National tourism consumption**
(= revenue of domestic tourism + tourism import);




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Monetary Flows in the Tourism and Leisure Market



Non-Residents	Residents	
↓	↓	↓
Within Austria	Within Austria	Abroad
↓	↓	↓
Tourism	Tourism Leisure	Tourism
“non-usual environment“	“non-usual environment“ „usual environment“	„non-usual environment“



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Restrictions of TSA



TSA only considers direct tourism demand:

- This concerns **expenditure** made by, or on behalf of, the visitor before, during and after the trip, and which is **related to that trip**.
- The TSA-related tourism definition, with a view to direct physical and economical relations only, **does not consider other indirect** effects caused by intermediate production (i.e. food and beverage industry, building trade, bank services).
- This means comparisons of the national **TVA** based on a TSA approach strictly can only be made with VA of the tourism satellites of other countries or of the satellites of other sectors.

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Restrictions of TSA (continued)



- **Indirect effects** of tourism related to the overall economy can be calculated based on an **Input-Output** analysis.
- **Comparisons** with the **GDP** of the overall economy are problematic, since in GDP calculations indirect demand effects are considered, too.
- According to the TSA concept **business trips** are considered as final demand which affects TVA results:
 - In the overall economy "**intermediate demand**" - in particular business trips of residents - is considered a intermediate consumption;
 - visitor consumption related to business trips has to be **deduced** from domestic tourism consumption.

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A TSA for Austria - main data sources



➤ National Income Statistics:

- gross and net output (value added) by industries
- indirect taxes and subsidies
- imports
- private household consumption expenditure (PHCE)

➤ Input Output Statistics 1990, 1995 and 2000 (supply and use of products in the respective industries)

➤ Supply-Use-Tables 2003

➤ Balance of Payment (BOP), in particular the **travel balance** comprising information on expenditure of non-resident tourists within the country of reference and that of resident tourists traveling abroad.

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A TSA for Austria - main data sources_(continued)



➤ **T-Mona**, guest inquiry, providing quantitative (in particular tourism consumption) and qualitative information about domestic and inbound tourism within Austria by seasons;

➤ **Statistics on same-day visitors**, data on inbound (German study, BOP) and on domestic same-day visitors (quarterly household surveys);

➤ **Statistics on health cures**, in particular based on "Social Security Statistics";

➤ **Statistics on second homes** (population census);

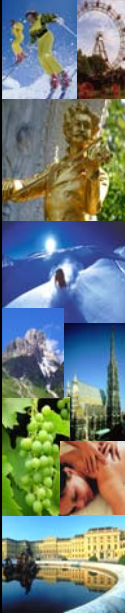
➤ **Structural Business Statistics** (enterprises);

➤ **Mirror Statistics** (EU-partner countries).

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Remaining problem areas

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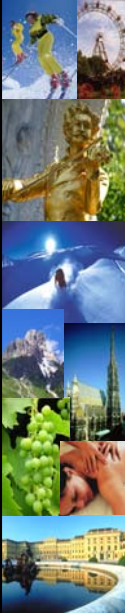
Analysis on a **deeper** disaggregated level has to be done with certain **caution**, since

- **extrapolation indicators** based on activities were applied proportionately to commodities, which assumes a parallel development of activities and commodities;
- the most recent **I/O data** is available for the reference year 1990, 1995 and 2000, respectively;
- **classification** compatibility problems concerning industry/ commodity;
- **non-resident** data is hardly available;
- information on the composition of **package tours** is hardly available (improved through TBoP).

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Remaining problem areas (continued)

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Analysis on a **deeper** disaggregated level has to be done with certain **caution**, since

- with regard to **package tours of non-resident** visitors domestic organizers were not considered as providers;
- the services "**Hotel**" and "**Restaurant**" cannot be distinguished clearly;
- more detailed output data (sales) on **passenger transport** is not available so far;
- more recent and more detailed data on domestic and inbound consumption expenditure of **same-day visitors** is hardly available.

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Sequence of Indicators



(1) TSA-view:

- Calculation of “**Tourism ratios**“, which is the **share** of tourism demand on supply by product.
- **Tourism ratio** is applied to the Gross Value Added (GVA) of the “symmetrically“ corresponding **industry**; based on this the **direct “Tourism Value Added”** (TVA) of each industry can be estimated.
- **Total TVA** of the respective industries is related to overall GDP, resulting in the **share of tourism in total GDP**.

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A Sequence of Indicators (continued)



(2) TSA-extensions:

- Calculating the contribution of tourism to GDP, pure TSA results without intermediate consumption (such as business trips) must be taken into account and **adjusted considering indirect effects** triggered by tourism demand.
- The consideration of resident's **expenditures for leisure activities** in the usual environment (=hidden component of the total residents' domestic expenditures) is an important additional fact to describe the size of the leisure and tourism industry as a whole.


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Tourism development in Austria 2007



Arrivals and nights spent 2000 - 2007

Year	Arrivals		Nights spent		Duration of stay in days
	absolute (in 1 000)	+/- in %	absolute (in 1 000)	+/- in %	
2000	26 378	+3.6	113 686	+0.8	4.3
2001	26 894	+2.0	115 111	+1.3	4.3
2002	27 360	+1.7	116 804	+1.5	4.3
2003	28 134	+2.8	117 967	+1.0	4.2
2004	28 466	+1.2	117 251	-0.6	4.1
2005	29 337	+3.1	119 242	+1.7	4.1
2006	30 143	+2.7	119 403	+0.1	4.0
2007	31 130	+3.3	121 404	+1.7	3.9

Change of nights spent by Austrian provinces 2006 - 2007

Province	Nights spent	
	absolute (in 1.000)	+/- in %
Burgenland	2 700	+4.8
Carinthia	12 795	+4.0
Lower Austria	6 330	+4.3
Upper Austria	6 712	+1.6
Salzburg	23 444	+0.7
Styria	10 043	+3.0
Tirol	41 806	+0.2
Vorarlberg	7 923	+2.3
Vienna	9 655	+3.3
Austria	121 404	+1.7

Change of nights spent by country of origin 2006 - 2007

Country of origin	Nights spent	
	absolute (in 1.000)	+/- in %
Belgium	2 494	+2.9
Germany	48 147	-1.3
France	1 701	-3.0
United Kingdom	3 931	+3.8
Italy	3 053	-3.2
Netherlands	9 089	+3.7
Switzerland	3 702	+3.4
USA	1 459	-2.6

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Visitor consumption expenditure 2000 – 2007 (direct effects)



Tourism Demand	2000	2001	2002	2003	2004	2005	2006	2007
	Final				Rev.	Prel.	Forecasts	
	In Mn. €							
Non-residents, of which ¹⁾	12 361	13 397	13 907	14 548	14 822	15 428	15 968	16 543
Tourists	11 104	11 957	12 358	13 047	13 799	13 807	14 282	14 789
Same-day visitors	1 257	1 440	1 549	1 501	1 523	1 621	1 686	1 754
Residents, of which	10 344	10 965	11 308	11 983	12 263	12 879	13 458	13 996
Holiday trips	8 188	8 672	8 958	9 612	9 653	9 947	10 380	10 779
Tourists ²⁾	4 844	5 259	5 436	6 044	6 073	6 185	6 426	6 648
Same-day visitors	3 344	3 413	3 521	3 568	3 580	3 765	3 953	4 131
Business trips	2 156	2 293	2 350	2 371	2 610	2 932	3 079	3 217
Tourists	835	917	931	1 008	1 152	1 401	1 463	1 521
Same-day visitors	1 321	1 376	1 419	1 363	1 458	1 531	1 616	1 696
Residents in second and weekend homes	822	856	882	888	854	922	955	991
Total ³⁾	23 527	25 218	26 097	27 419	27 939	29 228	30 381	31 531

Source: Statistics Austria, WIFO. - 1) Holiday and business trips including expenditure for transport. - 2) Including expenditure for health cures. - 3) Including holiday and business trips, and trips to relatives and friends.

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The economic importance of the tourism and leisure industry 2000 - 2007 (direct and indirect effects)



TSA-extensions: Direct and indirect value added	2000	2001	2002	2003	2004	2005	2006	2007
	Final				Rev.	Prel.	Forecasts	
	in Mn. €							
Tourism ^{b)}	17 524	18 799	19 472	20 539	20 770	21 563	22 388	23 217
Leisure consumption ^{b)}	16 036	16 391	16 906	17 221	18 341	18 963	19 645	20 392
Tourism and Leisure Industry ^{b)}	33 560	35 189	36 378	37 760	39 111	40 526	42 033	43 609
	Change related to the previous year in %							
Tourism ^{b)}	.	+7.3	+3.6	+5.5	+1.1	+3.8	+3.8	+3.7
Leisure consumption ^{b)}	.	+2.2	+3.1	+1.9	+6.5	+3.7	+3.6	+3.8
Tourism and Leisure Industry ^{b)}	.	+4.9	+3.4	+3.8	+3.6	+3.6	+3.7	+3.7
	Contribution to GDP in %							
Tourism ^{b)}	8.3	8.7	8.8	9.1	8.8	8.8	8.7	8.7
Leisure consumption ^{b)}	7.6	7.6	7.7	7.6	7.8	7.7	7.7	7.6
Tourism and Leisure Industry ^{b)}	16.0	16.3	16.5	16.7	16.6	16.5	16.4	16.3

Source: Statistics Austria, WIFO. - 1) Excluding business trips. - 2) Leisure activities within residents' usual environment.

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Conclusions



TSA in Austria is

- **part** of the Austrian tourism statistical system;
- **revised** every second year according to the most recent reference year;
- accepted as an **instrument** of **political** interest as a decision basis;
- used as a statistical tool for **forecasting** in the field of tourism;
- the basis for doing **regional** TSA (RTSA);
- the basis for doing estimations on the **employment** effects.

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Thank you for your attention!



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