

Peter Laimer

Development of a Tourism Satellite Account for Austria

Steps undertaken

UNWTO Statistics Capacity Building Programme
2008/2009, Regional Seminar
Vienna, 1-2 July 2009


© STATISTICS AUSTRIA


 STATISTICS AUSTRIA
 The Information Manager

We are moving information


www.statistik.at

Official Tourism and Travel Statistics in Austria

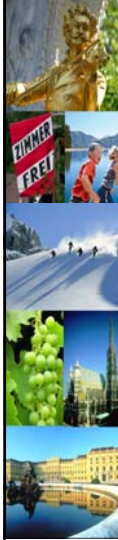


Tourism and Travel Statistics		
Tourism Statistics	Satellite Systems	BoP Travel Item
Monthly arrivals and nights spent (accommodation statistics)	Tourism Satellite Accounts for Austria	Debits (related to incoming tourism)
Yearly capacity statistics (accommodation statistics)	Regional Tourism Satellite Accounts	Credits (related to outgoing tourism)
Quarterly sample surveys	TSA-Employment Module	Net valuation related to credits and debits

2
2 July 2009
www.statistik.at


 STATISTICS AUSTRIA
 The Information Manager

A TSA for Austria - historical overview



- **1970ies:** Tourism has been recognized and could be perceived as an **own sector** in the system of NA.
- **1990:** Considering the increasing economic importance of the residents' expenditure on **leisure**, the tourism sector was extended by the leisure sector.
- **1995:** An open **IO model** was constructed to measure the total impact of tourism in Austria.
- **1990ies:** Several reporting "rounds" took place on **TEA** (reference years 1985, 1990, 1993 and 1996).
- **TSA** gradually **replaced TEA** reporting: based on national accounts a regular Satellite Account was envisaged.

3

2 July 2009

www.statistik.at

A TSA for Austria - historical overview



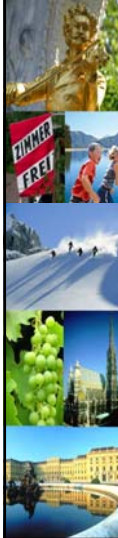
- On a contracting basis with the "Federal Ministry of Economy, Family and Youth", **Statistics Austria** and the "Austrian Institute of Economic Research" (**WIFO**) have developed a TSA for Austria, starting with the reference year 1999 (latest reference year available: 2007).
- Starting with the reference year 2003 estimates related to the "**Employment in Tourism Industries**" (TSA-Table 7) have been introduced.
- **Regional TSA (RTSA):** Developed for the first time for **Vienna** for the reference year **2002** by STAT and WIFO, on behalf of the Vienna Tourist Board (studies for 2003, 2005, 2006 and 2007 available).
- **Further RTSA projects:** Upper Austria (2003, 2004, 2005, 2006, 2007), Lower Austria (2005, 2006, 2007).

4

2 July 2009

www.statistik.at

A TSA for Austria – state of the art



Tourism Satellite Accounting in Austria is

- **commissioned** by the “Federal Ministry of Economy, Family and Youth”,
- done in **cooperation** with WIFO,
- done by the **Tourism Statistics’ section** of Statistics Austria,
- done **every 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.

5

2 July 2009

www.statistik.at

A 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.

6

2 July 2009

www.statistik.at

A 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 physical 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.

7

2 July 2009

www.statistik.at

A TSA for Austria – the starting point



- 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?**

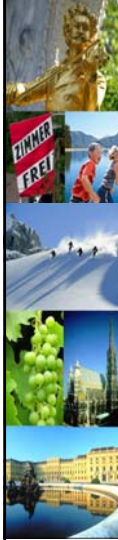


8

2 July 2009

www.statistik.at

A TSA for Austria – the solution



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

9

2 July 2009

www.statistik.at

What should be fulfilled by TSA?



Accurate information is in particular necessary for governments and businesses for effective public policies and efficient business decisions.

Therefore, **TSA should**

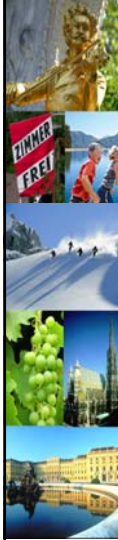
- be produced on a **regular basis**, that is an ongoing process;
- be a reliable **statistical source**, where visitors and producers of services are both observed;
- be **comparable over time** within the same country, comparable among countries, and comparable with other fields of economic activities;
- be **internally consistent** and presented within macro-economic frameworks recognized at the international level.

10

2 July 2009

www.statistik.at

What should be fulfilled by TSA?



- be **consistent with the national accounts**;
- **provide** a set of nationally and internationally **comparable accounts**;
- **represent a modular and flexible framework** able to satisfactorily meet the needs of governments, researchers, statisticians and private sectors;
- **become** a tool to understand and to measure the whole **tourism economic system** and its role in the economies;
- **give** priority to a basic and **simplified common core of variables and tables**.

11

2 July 2009

www.statistik.at

What cannot be fulfilled by TSA?



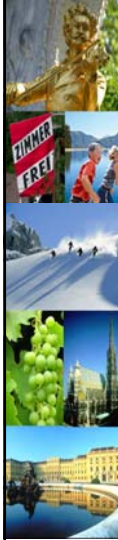
- ...being a **solution** for any tourism statistical problem;
- ...**substituting** the regular tourism and travel statistics;
- ...being a **micro-economic tool**;
- ...providing data on **high disaggregated level**;
- ...considering the **indirect effects**;
- ...considering the **leisure effects**;

12

2 July 2009

www.statistik.at

A TSA for Austria - restrictions



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.

13

2 July 2009

www.statistik.at

A TSA for Austria - restrictions



- **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.

14

2 July 2009

www.statistik.at

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)
- **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.

15

2 July 2009

www.statistik.at

A TSA for Austria - main data sources



- **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 sample 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).

16

2 July 2009

www.statistik.at

A TSA for Austria - remaining problem areas



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).

17

2 July 2009

www.statistik.at

A TSA for Austria - remaining problem areas



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.

18

2 July 2009

www.statistik.at

A TSA for Austria - 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.

Visit us on
www.statistik.at

Further information:

Peter Laimer
Tel.: +43 (0)1 71128 7849
e-mail: peter.laimer@statistik.gv.at

or

Johanna Ostertag
Tel.: +43 (0)1 71128 7737
e-mail: johanna.ostertag@statistik.gv.at