Development of a Tourism Satellite Account for Austria

Steps undertaken

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Official Tourism and Travel Statistics in Austria

Tourism and Travel Statistics

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


- **TSA** gradually replaced TEA reporting: based on national accounts a regular Satellite Account was envisaged.

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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).

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.

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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.
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.

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?
A TSA for Austria – the solution

- Development of Tourism Satellite Accounts, integrating supply and demand side information.
- TSA-reporting becomes international standard:
- International compatibility related to the economic importance of tourism based on value added.

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.
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.

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;
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.

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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 deducted from domestic tourism consumption.
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.

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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).
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).

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.
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.

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