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Regional Tourism Satellite Accounts (RTSA) in Austria

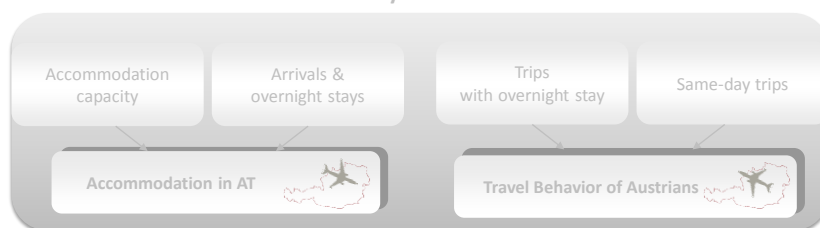
Methods, data sources, use and challenges

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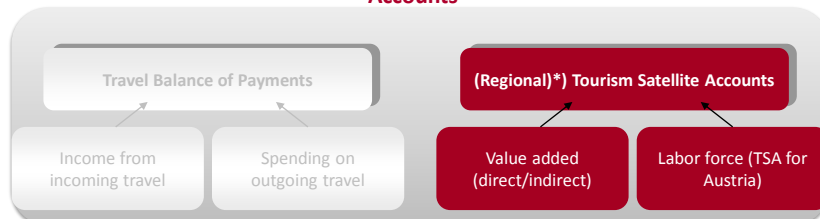
We provide information

Tourism & Travel Statistics at Statistics Austria

Primary Statistics



Accounts



*) Vienna (since reference year 2002), Upper Austria (2003) and Lower Austria (2005).

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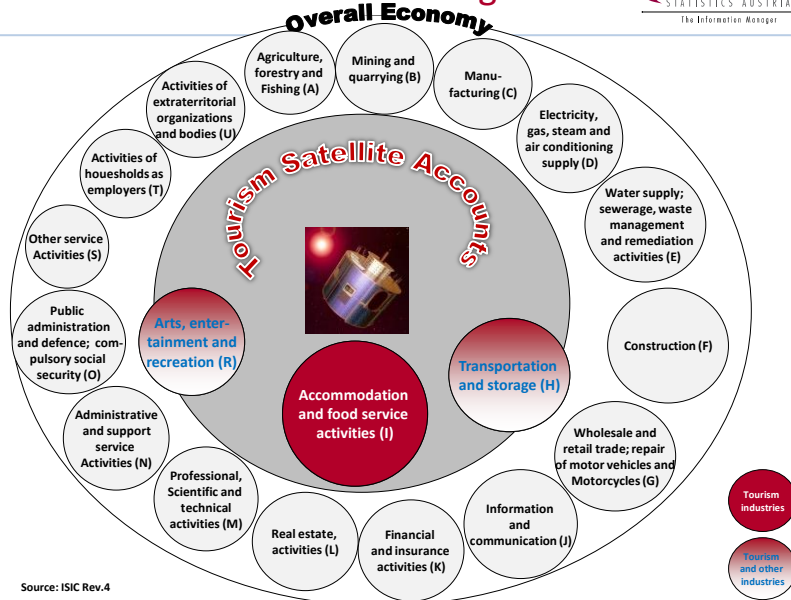
Outline

- (Regional) Tourism Satellite Accounts:
 - what, why & how
 - methodological challenges
- RTSA in Austria:
 - methods used, data sources
 - main results 2008
- RTSA in general:
 - use for research and statistics
 - use for tourism policy
 - future challenges and needs
- Conclusions

What is (Tourism) Satellite Accounting?

- **Extension** to the “System of National Accounts” (SNA) which enables a better understanding of the size and role of an activity which is usually “**hidden**” within such accounts.
- Satellite accounts **provide**
 - **additional information** on particular social concerns of a **functional** or cross-sector (multidisciplinary) nature (e.g. environment, agriculture, tourism);
 - the possibility of using of **complementary or alternative concepts**, including the use of classifications (when needed) and accounting frameworks (e.g. TSA);
 - **further analysis** of specific data by means of relevant indicators and aggregates;
 - **linkage** of **physical** data sources (e.g. flows, employment) and analysis to the **monetary** accounting system.

What is Tourism Satellite Accounting?



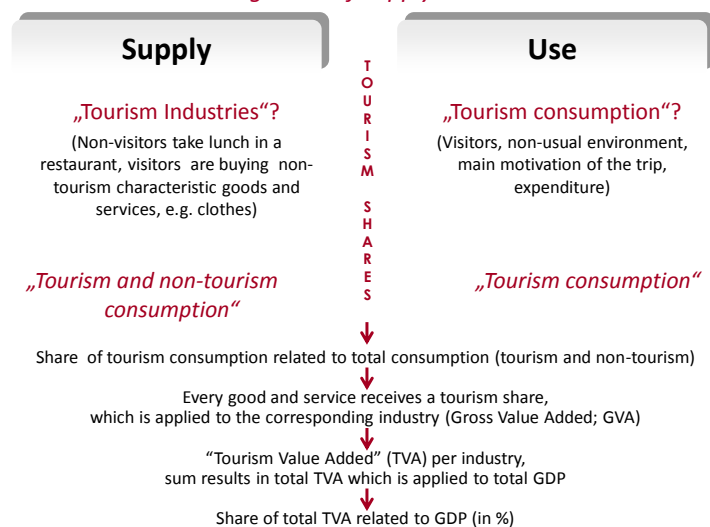
Source: ISIC Rev.4

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How is (R)TSA done?

Integration of Supply and Use



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(Regional) Tourism Satellite Accounts (RTSA) in Austria - Factsheet



What is calculated

Aim	(Monetary) information about tourism as an economic phenomenon; by integrating the supply and demand side
Subject	Tourism's contribution to national and regional value added of overall Austria, "Lower Austria", "Upper Austria" and "Vienna"
Coverage	Visitor consumption (domestic, inbound, domestic part of outbound trips), direct and indirect tourism and leisure effects

Why is it calculated

Legal basis	x
Contract	National TSA: Federal Ministry for Economy, Family and Youth (BMWFJ) Regional TSA: Tourism Boards of Lower Austria, Upper Austria, Vienna

How is it calculated

Type of statistics	Accounts (synthetic product: model estimation based on existing data)
Method	National TSA: Recommended Methodological Framework (UNWTO, OECD, EUROSTAT, 2008); Regional TSA: Recommendations are not available (but country experiences and best practices)

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(Austrian) RTSA - remaining challenges



(R)TSA in general cannot be considered as a tool

- for the **micro-economic** and business level;
- providing data on very **disaggregated** level (regionally and structurally);
- **substituting** regular tourism and travel statistics;
- taking into account the **indirect/induced effects**.

RTSA in particular faces the following challenges:

- treatment of "**Local Kind of Activity Units**" (e.g. transport, tour operators);
- "**Residency**" versus "**domestic**" (e.g. Austrian residents, who are non-residents in an Austrian region);
- lack of reliable data on **regional level** (e.g. same-day visitor, SUT, IO-data);
- **missing internationally agreed methodological** standards (but: country experiences and best practices).

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Austrian RTSA – methodology, data sources



Methodology:

- national TSA as the starting point (e.g. main results);
- generally based on UN TSA requirements (e.g. accounts);
- considering assumptions and best estimates (e.g. regional distribution);
- generally, yearly improved and extended (e.g. new models, data).

Main data sources:

- Structural Business Statistics (SBS; regional break downs);
- accommodation statistics, regional information (mainly physical data);
- “Tourism Monitor Austria” (T-Mona), qualitative and quantitative data (e.g. expenditure);
- other sources based on official statistics and regional research (e.g. population census, same-day visits).

Austrian RTSA – main results 2008



Aggregates	Austria	Lower Austria		Upper Austria		Vienna	
	in bn. Euro	in bn. Euro	Share according to total Austria (%)	in bn. Euro	Share according to total Austria (%)	in bn. Euro	Share according to total Austria (%)
Visitor Consumption expenditure							
Total	30.35	2.78	9.1	3.18	10.5	3.67	12.1
Non-resident visitors	16.51	0.91	5.5	0.80	4.9	1.65	10.0
Overnight tourists	13.71	0.33	2.4	0.40	2.9	1.22	8.9
Same-day visitors	2.80	0.58	20.7	0.40	14.4	0.43	15.4
Resident visitors	13.74	1.83	13.3	2.37	17.2	2.00	14.6
Overnight tourists	8.64	0.78	9.0	0.88	10.2	1.77	20.2
Same-day visitors	5.10	1.05	20.6	1.49	29.2	0.23	4.5
Second homes	0.10	0.04	40.0	0.01	10.0	0.02	20.0
Tourism Value Added							
Total	21.62	2.54	10.7	2.94	12.4	3.55	15.0
Direct	15.05	1.19	7.9	1.30	9.4	1.24	8.2
Indirect	6.57	1.35	20.5	1.64	25.0	2.31	35.2
<i>Share to GDP (%)</i>	7.7	5.8	.	6.3	.	4.7	.

RTSA – use for research and statistics



- a basis for **impact models** and other analytical economic models of tourism (e.g. indirect/induced effects);
- **reconciliation/benchmarking** tool regarding demand and supply related data;
- starting point for providing **meta data** related the methods and data used compiling RTSA;
- **starting point (or deepen) of cooperation** between NSI and NTA, Central Bank, research institutes, and exchange of views with the tourism industry and identifying synergies;
- launching of **general considerations** related to the tourism&travel statistical system, including the introduction of best estimates, modeling and extrapolation methods (e.g. regarding to package tours);
- **increasing the public acceptance** of tourism statistical data and justifying new/additional research in this field.

RTSA - main uses for tourism policy



- analyzing tourism from an **economic** point of view and illustrating the **interlinks** between the tourism industry and the economy;
- **offering insights** into tourism and its socio-economic functions and impacts;
- benchmarking the **success of regional tourism policies** and fulfilling the needs for tourism policy decision makers;
- representing a solid basis for **policy relevant issues** on the regional level (e.g. supporting investment) and determining the contribution of tourism to regional value added;
- supporting the **increase of tourism share** in regard to the regional GDP;
- serving as a basis to justify and distribute **subsidies** in tourism.

(Austrian) RTSA – challenges and future needs



- Fast available and short-term data, in order to **identify monthly and seasonal changes**, are often not available so far.
- RTSA data are **not sufficiently detailed** to make appropriate statements.
- Due to the lack of short-term data **short-term impacts** of special events and shocks can hardly be forecasted.
- RTSA-results for main **tourism markets** are not available.
- **Cooperation** with stakeholders and research has to be extended identifying synergies in regard to data and estimates.
- **Extension** of RTSA should be considered, e.g. in regard to indirect effects.
- In regard to **employment effects** on regional level further investigations have to be done.

Conclusions



Regional Tourism Satellite Accounts are

- ... providing a comprehensive **data base** related to regional tourism and to the importance in regard to other economic sectors;
 - ... - as an integrating system - **improving and strengthening the reliability** of the Tourism & Travel statistics;
 - ... accepted as an instrument of **political relevance**;
 - ... still „**underestimated**“ related their analytical possibilities;
 - ... **not perfect**, but - if feasible - yearly improved;
 - ... **based on physical and monetary data**, estimates and assumptions supported by country experiences and best estimates;
 - ... still being a topic to be **further investigated**;
 - ... **not cheap** but with a high benefit for regional decisions makers;
 - ... **still waiting** for an internationally agreed methodological guidelines;
- and**
- ... **fulfilling partly** the regional tourism political needs!

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