Tourism Satellite Accounts in Austria (incl. TSA in EU Member States)

Outline

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  – Use of TSA
  – Concepts and methods
• Tourism Satellite Accounts (TSA) in Austria
  – State of the art
  – Data sources
  – Results
• Tourism Satellite Accounts (TSA) in EU-member states
Tourism Satellite Accounts (TSA) in general

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?

Tourism Satellite Accounting (TSA) is a method for measuring the economic impact of the tourism industry. It is an integrated system that helps in understanding the economic value of tourism by providing more reliable and coherent statistics. TSA helps improve the "visibility" of the economic value of the tourism industry and supports policy decisions.

Why doing TSA?

Tourism, what for?

- Value added effects & Employment

Policy

Improving the "visibility" of the economic value of the tourism industry

Statistics

More reliable and coherent tourism and travel statistics system "Integrated System"
How is TSA done?

Integration of Supply and Use

Supply

„Tourism Industries“?
(Non-visitors take lunch in a restaurant, visitors are buying non-tourism characteristic goods and services, e.g. clothes)

„Tourism and non-tourism consumption“
Share of tourism consumption related to total consumption (tourism and non-tourism)

Every good and service receives a tourism share, which is applied to the corresponding industry (Gross Value Added; GVA)

„Tourism Value Added“ (TVA) per industry, sum results in total TVA which is applied to total GDP

Share of total TVA related to GDP (in %)

Use

„Tourism consumption“?
(Visitors, non-usual environment, main motivation of the trip, expenditure)

„Tourism consumption“

The 10 TSA Tables

1-4 Tourism expenditure/consumption
5 Production
6 Demand meets Supply
7 Employment in tourism industries
8 Tourism Gross Fixed Capital Formation
9 Tourism Collective Consumption
10 Non-monetary indicators
Use of TSA

- Describing the size and the **economic importance** of tourism;
- Providing detailed information on **visitor consumption, including all forms of tourism**;
- Linking economic data and other non-monetary information on tourism;
- Providing a reliable and credible **tool** necessary for both effective **public policies** and efficient **business operations**;
- **Enhance robust information** and indicators on the role tourism is playing and can play in the economy;
- **Bring new recognition and confidence in tourism** as one of the most important sectors of the economy;

Use of TSA (cont.)

- Including **all kind of tourism activities**, same-day visits, overnight visits, visits in rented and non-rented accommodation;
- Give **greater credibility to tourism statistics** and to the indicators analyzing the scale and the significance of tourism as an economic activity;
- Provide a rich and **informed vision** of the “tourism industry” and of its component activities;
- Generate usable, practical **information for companies** and in particular for SMEs;
- Development of **research and innovative methodological approaches**;
- **Allow international comparison** of results by considering all kind of tourism activities;
Use of TSA (cont.)

- Reconciliation/benchmarking tool regarding demand and supply related data, considering the quality of the data used;
- Using/combining different data sources as a prerequisite for receiving a consistent TSA;
- Starting point of the documentation of the meta data related the data used compiling TSA;
- Starting point of cooperation between NSI and NTA, Central Bank, research institutes, and exchange of views with the tourism industry;
- Starting point of general considerations related the tourism statistical system, including the introduction of best estimates, modeling and extrapolation methods;
- Starting of discussion related the quality of the used statistics and rethinking of the used concepts;
- Increasing the public acceptance of tourism statistical data and justifying new/additional research in this field.
TSA in Austria – integrated part of Tourism & Travel Statistics

Primary Statistics
- Accommodation capacity
- Arrivals & overnight stays
- Trips with overnight stay
- Same-day trips

Accounts
- Travel Balance of Payments
- Travel Behavior of Austrians
- (Regional) Tourism-Satellite Accounts
  - Value added
  - Labor force

TSA 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 Austria and “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)
Tourism Satellite Accounting in Austria is

- commissioned by the “Federal Ministry of Economy, Family and Youth”,
- done in cooperation with the Austrian Institute of Economic Research (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.

For more information, see:
TSA for Austria – the main data sources

National Accounts
- National Accounts
- Private Consumption
- Supply Use Tables
- Input-Output Statistics / Survey Enterprises
- Price Statistics

Corporate Statistics
- Area Count
- Structural Business Statistics
- Business Register

Population Statistics
- Census
- Labor Force Survey
- Household Budget Survey

External Data Sources
- Social Security Data - HVSV
- Same-Day Trips by Germans to Austria - DWIF
- TBoP of Partner Countries – Central Banks
- Same-Day Trips by Italians to Austria – UIC
- T-MONA – Austrian National Tourist Office
- CRR – Ministry of Interior
- Mirror Data

Tourism & Travel Statistics STAT
- Accommodation Statistics
- Sample Surveys on National Tourism
- Travel Balance of Payment

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Economic importance of tourism in Austria 2000 - 2011

<table>
<thead>
<tr>
<th>Year</th>
<th>Direct tourism value added</th>
<th>Direct tourism value added as % of GDP</th>
<th>Indirect tourism value added</th>
<th>Indirect tourism value added as % of GDP</th>
<th>Total tourism value added</th>
<th>Total tourism value added as % of GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>16.165</td>
<td>4.91</td>
<td>2.95</td>
<td>0.81</td>
<td>19.116</td>
<td>5.71</td>
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<td>2001</td>
<td>16.765</td>
<td>5.07</td>
<td>3.35</td>
<td>0.93</td>
<td>20.116</td>
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<td>2002</td>
<td>17.439</td>
<td>5.15</td>
<td>3.66</td>
<td>0.99</td>
<td>21.095</td>
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<td>2003</td>
<td>17.757</td>
<td>5.17</td>
<td>3.79</td>
<td>1.01</td>
<td>21.560</td>
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<td>2004</td>
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<td>19.525</td>
<td>5.47</td>
<td>4.18</td>
<td>1.10</td>
<td>23.613</td>
<td>6.81</td>
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<td>2006</td>
<td>20.624</td>
<td>5.64</td>
<td>4.30</td>
<td>1.14</td>
<td>24.924</td>
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<td>2007</td>
<td>21.618</td>
<td>5.81</td>
<td>4.43</td>
<td>1.18</td>
<td>26.031</td>
<td>7.23</td>
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<td>2008</td>
<td>23.627</td>
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<td>4.59</td>
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<td>28.227</td>
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<td>2009</td>
<td>22.104</td>
<td>5.91</td>
<td>4.46</td>
<td>1.19</td>
<td>26.510</td>
<td>7.24</td>
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<td>2010</td>
<td>23.270</td>
<td>6.17</td>
<td>4.58</td>
<td>1.22</td>
<td>27.858</td>
<td>7.49</td>
</tr>
</tbody>
</table>

Source: Statistics Austria, Tourism Satellite Accounts for Austria. WTO: World Travel & Tourism Council.
Tourism in the national economy: Tourism consumption 2000 - 2011*)


Tourism in the national economy: Tourism as % of GDP 2000 - 2011*)

Economic effects of tourism and leisure activities

- Direct VA according to Tourism activities: 15.6 bn €, 5.2% share on GDP
- Indirect VA according to Tourism activities: 6.7 bn €, 2.2% share on GDP
- Direct and indirect VA according to Leisure activities: 21.8 bn €, 7.2% share on GDP

**Economy:**
- 2011: Total VA 44.1 bn €, 14.6% share on GDP*

**Employment:**
- About one fifth of the Austrian FTE

* Excl. business trips; 2011: forecast.
The general objective of the Eurostat TSA-project 2008-2009 was to assess the implementation of TSA in the Member States. The project focused on:

- the methodologies applied;
- the comprehensiveness of the results achieved;
- on fostering the exchange of experience;
- on offering technical assistance to those countries being less advanced in this exercise.

Achievements and conclusions of the project:

- Most Member States have now started the implementation of TSA
- Clear information on the situation in each of the Member States
- Better convergence of the work done
- Assessment of the comparability of the results

For more information:

- Eurostat:

Basic methodological Manuals:

- European Implementation Manual on TSA
- OECD:

Four reports have been published:

- Volume 1: Report on the implementation of TSA in the 27 EU Member States
- Volume 2: Comparison of methodology and empirical results
- Volume 3: Practical guide for the compilation of TSA
- Volume 4: Possibilities to obtain more up-to-date TSA key figures
TSA in EU-countries: Current work

  
  
  - Article 5 (Pilot studies): The Commission shall draw up a programme for pilot studies which may be carried out by Member States on a voluntary basis in order to prepare the development, production and dissemination of harmonised tables for tourism satellite accounts and to assess the benefits in relation to the cost of the compilation.

- Voluntary transmission of TSA data since 2010 by EU and EFTA member states to Eurostat

- The European Commission promotes the use of TSAs by the EU Member States in order to improve the understanding of European tourism.
  
  http://ec.europa.eu/enterprise/sectors/tourism/cooperation/tourism-satellite-account/index_en.htm

TSA in EU-countries: Results

Comparison of inbound /domestic tourism consumption within the Member States of the EU (in mn Euro)

TSA in EU-countries: Results

Share of tourism value added (TVA) in gross value added (GVA) within the Member States of the EU (in %)

*) For France and Sweden results for TGDP are displayed. Reference years are different according to countries (2000-2007).

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