Regional Tourism Satellite Accounts (RTSA) in Austria

Methods, data sources, use and challenges

Tourism & Travel Statistics at Statistics Austria

Primary Statistics

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

- Accommodation in AT
- Travel Behavior of Austrians

Accounts

- Travel Balance of Payments
- Income from incoming travel
- Spending on outgoing travel
- (Regional*) Tourism Satellite Accounts
  - Value added (direct/indirect)
  - Labor force (TSA for Austria)

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

Tourism Satellite Accounting (TSA) is a statistical tool used to measure the impact of the tourism industry on the national economy. It separately accounts for tourism and non-tourism industries, allowing for a clearer understanding of the economic contributions of tourism. TSA helps in identifying the sectors that benefit most from tourism, which can be crucial for policy-making and resource allocation.

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

Share of tourism consumption related to total consumption (tourism and non-tourism)
(Regional) Tourism Satellite Accounts (RTSA)
in Austria - Factsheet

What is calculated

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

Why is it calculated

<table>
<thead>
<tr>
<th>Legal basis</th>
<th>x</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract</td>
<td>National TSA: Federal Ministry for Economy, Family and Youth (BMWFJ) Regional TSA: Tourism Boards of Lower Austria, Upper Austria, Vienna</td>
</tr>
</tbody>
</table>

How is it calculated

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

(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).
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).
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 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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