TSA for Austria: Governance and compilation process

Steps and experiences

Peter Laimer
Directorate Spatial Statistics

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Outline

- Governance of tourism (statistics) in Austria
- TSA for Austria – state of the art
- TSA implementation – issues of governance
- Conclusions
Governance in general 1)

Definitions:
- Governance consists of the various mechanisms, processes, relationships and institutions through which citizens and groups articulate their interests, exercise their legal rights, recognize their obligations and reconcile their differences. A system of governance is the formal and organizational institutional structure for the process by which the modern State takes and is bound by decisions (UNDP, 1997).
- Governance is how a society uses and oversees political authority in managing its resources for economic and social development; how it considers the role of public authorities in establishing the environment in which economic agents operate and in determining how benefits are distributed; and the nature of the relationship between the government and the governed (OECD, 1995).

Dimensions:
1) Economic governance: a market-based, competitive and non-discriminatory economic order conducive to economic growth;
2) Political governance: participatory, democratic, legitimate, pluralistic and accessible political institutions;
3) Administrative governance: efficient, transparent, independent and accountable public administration; and
4) Systems governance: social institutions that protect cultural and religious values, help to protect freedom and security and promote equal opportunity for the exercise of personal capacities.

Governance in the tourism sector: a process of conducting coordinated activities among public, private and social actors in the “tourism system” to create synergies (see UNWTO, 2013, para 3.13).
Governance of tourism (statistics) in Austria

**Federal level**

- **Parliament**
  - Parliamentary Committee for Tourism (National Council)

- **Federal Ministry of Science, Research and Economy**
  - Section Tourism and Historic Objects
  - Austrian National Tourist Office, Austrian Hotel and Tourism Bank, Austrian Economic Service

- **Social partners**
  - inter alia as stakeholders
  - Austrian Federal Economic Chamber, Federal Chamber of Labor

- **Tourism associations**
  - as stakeholders under private law
  - Austrian Hotel Association, Association of Austrian Travel Agents and Tour Operators
  - Austrian Federal Chancellery

**Federal state level**

- **Parliaments**
  - Departments of federal state governments
  - Tourism organizations

- **Economic chambers, chambers of labor**
  - Local and regional tourism organizations

- **Municipalities (regions)**

S: BMWFW; Statistics Austria
Relevant legislative/methodological basis for tourism and travel statistics

**National:**
- Federal Constitutional Law, art. 15
- Provincial tourism laws
- Federal Statistics Act 2000
- Decree on Tourism Statistics 2002
- Registration Act 1991

**International:**
- Regulation on Tourism Statistics 2011 (EU)
- Commission Implementing Regulation 2011 (EU)
- Methodological Manual for Tourism Statistics 2012 (Eurostat)
- International Recommendations for Tourism Statistics 2008 (IRTS 2008; UNWTO)
- TSA: Recommended Methodological Framework 2008 (TSA-RMF 2008; UN, UNWTO, Eurostat, OECD)
- European Implementation Manual on TSA 2001 (Eurostat)
- Regulation on Balance of Payments 2005 (EU)
Outline

➢ Governance of tourism (statistics) in Austria
➢ TSA for Austria – state of the art
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➢ Conclusions
What is (Tourism) Satellite Accounting?

- **SNA 2008** (besides environmental accounting and health satellite accounts (and unpaid household activity)) and **ESA 2010** (see Table 22.1, para 22.06) are proposing to draw up Tourism Satellite Accounts (SNA 2008, para 29.89-29.101; ESA 2010, para 22.123-22.129), for the analysis of the role of tourism in the national economy, since

  **SNA 2008 and ESA 2010 do not distinguish between a shoe purchased by a visitor or by a resident.**

- **THEREFORE:**
  - Tourism Satellite Account (TSA) **integrates supply side and demand side information** figuring out the share of tourism demand related to the total value added.
  - TSA links tourism statistics with **macroeconomic analysis**.
  - TSA highlights the link between domestic, inbound and outbound (domestic part) tourism and the **balance of payments**.
  - The respective commodities produced by tourism suppliers and purchased by visitors are included in the **core accounts/tables of TSA**.
What is Tourism Satellite Accounting?

Tourism Satellite Accounts

Overall Economy

Activities of extraterritorial organizations and bodies (U)
Activities of households as employers (T)
Public administration and defence; compulsory social security (O)
Administrative and support service Activities (N)
Professional, Scientific and technical activities (M)
Real estate, activities (L)
Financial and insurance activities (K)
Information and communication (J)
Transport and storage (H)
Wholesale and retail trade; repair of motor vehicles and Motorcycles (G)
Water supply; sewerage, waste management and remediation activities (E)
Electricity, gas, steam and air conditioning supply (D)
Financial and insurance activities (K)
Electricity, gas, steam and air conditioning supply (D)
Mining and quarrying (B)
Agriculture, forestry and Fishing (A)

Tourism industries

Tourism and other industries

Source: ISIC Rev.4
Tourism & Travel Statistics at Statistics Austria (STAT)

Primary Statistics

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

Accounts

- Travel Behavior of Austrians
- Accommodation in AT
- Travel Balance of Payments

Tourism-Satellite Accounts

- Value added
- Labor force

Income from incoming travel
Spending on outgoing travel
A TSA for Austria – state of the art (1)

The “Tourism Satellite Account” for Austria is

- **commissioned** by the “Federal Ministry of Science, Research and Economy”;
- **done in cooperation** Statistics Austria (STAT) and “Austrian Institute for Economic Research” (Wifo):
  - STAT responsible for basic TSA according to TSA RMF 2008 (direct effects);
  - Wifo responsible for the calculation of indirect tourism effects; furthermore, direct and indirect leisure (within usual environment) effects, forecasting current and following year;
- **done by the Tourism Statistics’ section** of Statistics Austria (1/2 person);
- **done every year**, so far (BMWFW announced every 2nd year, starting with 2014);
- **not a perfect system**, but a “living” system, **yearly improved** and considering any relevant, additional and new data sources;
- **not as detailed** as required according to the TSA-RMF 2008 (e.g. country specific industry);
- **the basis** for Regional TSA (RTSA) and for estimation of tourism labour (TSA-
  Table 7).
The “Tourism Satellite Account” for Austria is
- available for **TSA-Standard-Tables** 1 (inbound), 2 (domestic), 4 (internal), 5 (production), 6 (supply) and 7 (employment), only;
- is based on **existing data sources** – **new surveys** due to TSA have **not** been introduced, therefore;
- partly and where necessary or feasible based on **estimates** and **assumptions**;
- only published for **current prices**, not constant prices;
- **published** by taking into account key results:
  
  http://www.statistik.at/web_en/statistics/tourism/tourism_satellite_accounts/index.html,
  
  original TSA-Standard-Tables for internal use, only;
- extended by considering
  - **indirect tourism effects** (which is not considered by TSA-RMF 2008);
  - **direct and indirect leisure effects** (activities of persons within their usual environment are not covered; see Annex 6, TSA-RMF 2008);
  - **forecasts** regarding the current and the following year.
Integrated System of Tourism & Travel Statistics

TSA

Domestic trips, expenditures, nights in unpaid accommodations

Nights

Expenditure structure

Harmonization questionnaire, nights in unpaid accommodations

T-MONA
(Austrian National Tourist Office)

Accommodation in Austria

Travel Behavior of Austrians

SNA/ BoP

Bridge tables

Aggregates

Input ...

TBoP

Expenses, country breakdown

Nights, country breakdown

Expenditure structure
Tourism & Travel Statistics

Main results 2013

- 36.8 mill. arrivals
- 132.6 mill. overnight stays
- 1.1 mill. beds
- 64 000 establishments
- 18.2 mill. private trips
- 4.2 mill. business trips
- about 70 mill. same-day visits
- 15.1 bn. Euro
- 7.7 Mrd.
- 32.2 bn. Euro total expenditure
- 17.2 bn. Euro tourism value added
- 5.5% of GDP
- 326 300 employed*
- 262 000 Full-Time-Equivalents*
- 7.3% of total economy*

*) Results 2012

Without passenger transport:

- 15.1 bn. Euro
- 7.7 Mrd.

Without passenger transport:

- 32.2 bn. Euro total expenditure
- 17.2 bn. Euro tourism value added
- 5.5% of GDP

* Results 2012

www.statistik.at
Governance of tourism (statistics) in Austria
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Conclusions
1970ies: Tourism has been recognized and could be perceived as an “own sector” in the system of NA.

1990ies: Considering the increasing economic importance of the residents’ expenditure on leisure sector.

1995: An IO model was constructed to measure the total impact of tourism in Austria.


Until 2000: TSA was gradually replacing TEA reporting by adjusting methodology used.

¹) Tourism Economic Accounts.
Development of TSA in Austria since 2001

On behalf of BMWFW\textsuperscript{1}) Statistics Austria and Wifo\textsuperscript{2}) have developed a TSA for Austria based on **TSA-RMF 2001** (direct & indirect effects)

Since the reference year 2003 estimates related the **tourism labour** were introduced (direct & indirect effects)

Since the reference year 2002 **Regional TSAs** are done for Vienna, followed by Upper Austria and Lower Austria on behalf of the respective Tourism Boards (excl. employment effects)

Starting with reference year 2013/2014: Applying the requirements of **TSA-RMF 2008**

\textsuperscript{1)} The “Federal Ministry of Science, Research and Economy” (BMWFW) creates the best possible framework for enterprises and represents at international levels the interests of Austria as a business location. Besides science, research, external trade, enterprise and energy the BMWFW strives to create a first-class framework for the Austrian tourism industry, since Austria's tourist industry is a major economic factor. [BMFW](http://www.en.bmwfw.gv.at/Seiten/default.aspx)

\textsuperscript{2)} The “Austrian Institute of Economic Research” (WIFO) is Austria’s leading institute for application-focused empirical economic research. Founded in 1927 by Friedrich August Hayek and Ludwig Mises, WIFO analyses and forecasts economic developments in Austria and abroad. WIFO is a non-profit organisation that carries on its scientific work independently of politics and business. [WIFO](http://www.wifo.ac.at/en)
Compiling TSA – internal partners/data

- National Accounts
- Supply Use Tables
- Private consumption
- Structural Business Statistics (SBS)
- Short Term Statistics (STS)
Compiling TSA – external partners/institutions

- Contract partner: WIFO
- Client by contract: BMWFW
- Other institutions:
- Austrian Central Bank
- Austrian Tourism Board
- T-Mona
- TBoP
Compiling TSA - time table

**May-August:** Continuous data collection related to respective reference year (apart from NA)

**May-August:** Compilation of demand related to TSA-Table 1, 2 and 4

**End of September:** NA data are available, and considered for TSA-Tables 5 and 6

**October:** Compilation of TSA-Table 7 (tourism labour)

**November:** 1\textsuperscript{st} coordination meeting STAT/Wifo (direct effects), fine-tuning

**November:** Wifo-estimates related indirect tourism and direct/indirect leisure effects, including forecasts

**November:** 2\textsuperscript{nd} coordination meeting STAT/Wifo related to final report

**December:** Submission of the final report to BMWFW, publication of key figures

(\url{http://www.statistik.at/web_en/statistics/tourism/tourism_satellite_accounts/index.html})
## Tourism-Satellite Accounts – Overview data sources

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**Data sources ...**

... are continuously being extended!
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Conclusions

- ... cooperation with external research institutions and/or the academics is recommended;
- ... compilation within **tourism statistics department** is useful;
- ... in particular **close cooperation** with NA, SBS and LFS is needed;
- ... **meetings and discussion** of the results with **external** institutions (e.g. Central Bank) is supportive;
- ... done on a **yearly basis**, at least in the beginning phase is recommended;
- ... **“living” system, yearly improved** and considering any relevant, additional and new data source;
- ... **maybe not as detailed** as required according to the TSA-RMF 2008, but key items have to be available;
- ... the **basis** for Regional TSA (RTSA), for estimation of tourism labour (TSA-Table 7), forecasting, etc.;
- ... a **detailed documentation** of the methodology used (=meta data) for compiling TSA is highly recommended.
TSA for Austria: Governance and compilation process

Steps and experiences

Please address queries to:
Peter Laimer

Contact information:
Guglgasse 13, 1110 Vienna
phone: +43 (1) 71128-7849
fax: +43 (1) 4934300
peter.laimer@statistik.gv.at
### About me

**Peter Laimer, PhD**

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<tr>
<th>Education</th>
<th>Professional Experience</th>
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<tr>
<td>Geography (University Vienna)</td>
<td>Vice Director, Directorate Spatial Statistics, Statistics Austria</td>
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<tr>
<td>Advanced studies related Tourism- and Export-Industry (University Economics Vienna)</td>
<td>Head of Division “Tourism, Motor vehicles, road safety”</td>
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<tr>
<th>International</th>
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<tr>
<td></td>
<td>Member of the Bureau of the OECD Tourism Committee</td>
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<td>Member of the “International Association of Scientific Experts in Tourism” (AIEST)</td>
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