Tourism and Travel Statistics at Statistics Austria

Methodology, concepts and results

Voorburg Group Meeting
20 – 24 September 2010
Vienna, Statistics Austria

We are moving information

© STATISTICS AUSTRIA

www.statistik.at
Content

(1) Tourism and Travel Statistics within the BoP-system

(2) Tourism and Travel Statistics – the main projects at Statistics Austria

(3) Tourism Satellite Accounts (TSA) for Austria: Methods and concepts

(4) Tourism and Travel Statistics: Selected results

(5) Conclusions
Tourism and Travel Statistics within the BOP-system
Where is „Travel“ within Balance of Payments (BoP)?

Balance of Payments (BoP)

- Current Account
  - Goods
  - Services
  - Income
  - Current Transfers
  - Travel
    - Passenger Transport
- Capital Account
  - Direct Investment
  - Portfolio Investment
  - Financial Derivates
  - Other Investment
  - Official Reserve
- Financial Account

Where is „Travel“ within Balance of Payments (BoP)?
Tourism and Travel Statistics

The main projects at Statistics Austria
Tourism and Travel Statistics at Statistics Austria - an overview

**Surveys**
- Accommodation capacity (yearly)
- Arrivals & overnight stays (monthly)
- Trips with overnight stay (quarterly)
- Same-day trips (quarterly)

Accommodation in Austria
Travel Behavior of Austria

**Accounts**
- Travel Balance of Payments (TBoP)
  - International tourism receipts (quarterly)
  - International tourism expenditure (quarterly)
- Tourism Satellite Accounts (TSA)
  - Value added (yearly)
  - Labour force (yearly)
Integrated System of Tourism and Travel Statistics

Input ...

SNA/ BoP

Bridge tables

TSA

Aggregates

TBoP

Aggregates

T-MONA
(Austrian National Tourist Office)

Nights

Accommodation in Austria

Harmonization questionnaire, nights in unpaid accommodations

Travel Behavior of Austrians

Expenditure structure

Expenditure structure

Nights, country breakdown

Nights, country breakdown

Expenditures, country breakdown

Expenditures, country breakdown

Domestic trips, expenditures

Domestic trips, expenditures

nights in unpaid accommodations

nights in unpaid accommodations
Tourism Satellite Accounts
The general conceptual and methodological framework
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 - what else?

- **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
What is (Tourism) Satellite Accounting?

- Tourism Satellite Account: Tourism statistics is linked with macroeconomic analysis.
- The link between inbound and outbound tourism and the balance of payments is highlighted.
- The respective commodities produced by tourism suppliers and purchased by visitors are included in the core accounts.
- **BUT**: SNA 1993 and ESA 1995 do not distinguish between a shoe purchase by a tourist or by a resident.
- **THEREFORE**: TSA integrates supply side and demand side information figuring out the share of tourism demand related to the total value added.
What is (Tourism) Satellite Accounting?

Overall Economy

Tourism Satellite Accounts

- Agriculture, forestry and fishing
- Wholesale and retail trade; repair of motor vehicles, motorcycles and personal household goods
- Transport, storage and communication
- Hotels and restaurants
- Other service activities
- Financial intermediation
- Public administration and defence, compulsory social insurance
- Real estate, renting and business activities
- Mining and quarrying
- Construction
- Electricity, gas and water supply
- Manufacturing

Voorburg Group Meeting
20 - 24 September 2010
Vienna, Statistics Austria
What cannot be fullfilled 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/induced effects**;
- …considering the **leisure effects**;
- …being in the first stage a **regional** or a **sub-yearly** tool.
Tourism Satellite Accounts for Austria
State of the art and data sources
Tourism Satellite Accounting in Austria is

- **commissioned** by the “Federal Ministry of Economy, Family and Youth”,'n
- 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.
### National Account
- NA yearly main results
- Private household consumption expenditure (yearly)
- Supply-Use-Tables (SUT; yearly)
- Input-Output-Table (5 years)
- Price statistics (CPI)

### Tourism/Travel Statistics
- Accommodation Statistics
- Travel Balance of Payments (TBoP)
- Travel Behavior of the Austrians

### Business Statistics
- Economic Census 1995
- Structural Business Statistics (yearly)
- Business Register

### Population Statistics
- Population Census
- Labour Force Survey
- Household Budget Survey

### External data sources
- Social Insurance Statistics
- Data related same-day visits of Germans to Austria
- TBoP data from several countries (credit)
- Data related same-day visits of Italians to Austria
- Austrian Tourism Board (T-MONA)
- Central Population Register
- Mirror data of several partner countries
Tourism and Travel Statistics

Selected results
Inbound and domestic tourism 2009/10*)

- **Calender year 2009**

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Non-residents</th>
<th>Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nights spent in Mn. (+/- in %)</td>
<td>124.31 (-1.9%)</td>
<td>89.86 (-3.2%)</td>
<td>34.44 (+1.7%)</td>
</tr>
<tr>
<td>Arrivals (in Mn.)</td>
<td>32.32 (-0.9%)</td>
<td>21.36 (-2.6%)</td>
<td>10.96 (+2.6%)</td>
</tr>
</tbody>
</table>

- **Summer season 2009 (May - October)**

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Non-residents</th>
<th>Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nights spent in Mn. (+/- in %)</td>
<td>61.67 (-1.2%)</td>
<td>41.80 (-2.6%)</td>
<td>19.87 (+2.0%)</td>
</tr>
<tr>
<td>Arrivals (in Mn.)</td>
<td>17.25 (-0.5%)</td>
<td>10.88 (-2.7%)</td>
<td>6.37 (+3.6%)</td>
</tr>
</tbody>
</table>

- **Winter season 2009/10 (November 2009 - April 2010)**

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Non-residents</th>
<th>Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nights spent in Mn. (+/- in %)</td>
<td>62.67 (-0.4%)</td>
<td>47.83 (-1.1%)</td>
<td>14.84 (+2.1%)</td>
</tr>
<tr>
<td>Arrivals (in Mn.)</td>
<td>15.37 (+1.6%)</td>
<td>10.62 (+0.6%)</td>
<td>4.75 (+4.0%)</td>
</tr>
</tbody>
</table>

*) Source: Statistics Austria; accommodation statistics (commercial and private rental establishments).
Internal tourism by seasons 1959 - 2009*)

*Source: Statistics Austria; accommodation statistics (commercial and private rental establishments).
Travel behavior of the Austrians: Travel intensity*) 1969 - 2009 (in %)

*) Source: Statistics Austria; quarterly (yearly) sample surveys (CATI) of the Austrian population aged 15 years and over. Share of persons on overall population with at least one holiday trips with at least 4 overnight stays.

1969: 27.5%
2006: 62.8%
2009: 59.3%
Travel behavior by the Austrians: Holiday trips by destination in summer 2009 (in %)

- **Austria**: 47.8%
- **Italy**: 12.0%
- **Croatia**: 7.8%
- **Germany**: 6.0%
- **Greece**: 3.8%
- **Turkey**: 2.6%
- **Spain**: 2.3%
- **Hungary**: 2.3%
- **Trips outside Europe**: 3.2%
- **Other**: 12.2%

*) Source: Statistics Austria; quarterly sample surveys (CATI) of the Austrian population aged 15 years and over. Holiday trips with at least 4 overnight stays.
Tourism in the national economy: Tourism consumption 2000 - 2010*)


2008: 16 512 mn.
2010: 15 360 mn.
2010: 14 018 mn.
Economic effects of tourism and leisure activities

- Direct VA according to **Tourism activities**: 13.8 bn €, 4.9% share on GDP
- Indirect VA according to **Tourism activities**: 7.8 bn €, 2.8% share on GDP
- Direct and indirect VA according to **Leisure activities**: 20.8 bn €, 7.4% share on GDP

2008: Total VA = 42.4 bn €, 15.1% share on GDP

*) excl. business trips.
Travel Balance of Payments: Credits and debits 1999 - 2009*)

Conclusions
Tourism and Travel Statistics in Austria is

- **part** of the official Austrian statistical system,
- **done** on a monthly, quarterly and yearly basis,
- **an integrated** and to a great extent **harmonised** system,
- accepted as an **instrument** of political interest and used as a decision basis to justify and to initiate tourism investments,
- used as a statistical basis for **forecasting** in the field of tourism,
- not a perfect but a **living system** ready for current improvements,
- and
- **a statistical challenge** which requires every day afresh to say...
Never ever give up!