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Expectations and limitations of TSA

Some considerations



TSA provides a framework for policy analysis of issues related to tourism economics as well as for model building, tourism growth analysis and productivity measurement; that way it can **be used by the tourism policy** in order to

- analyze tourism from an **economic point** of view (i.e. value added of tourism compared to other sectors) and offer policy makers insights into tourism and its **socio-economic functions** (i.e. related to employment status) and **impacts**;
- indicate the production function of tourism industries and illustrate the **interlinks between the tourism industries and the rest of the economy**; (i.e. transport sector);
- calculate **tourism direct value added** for a given list of industries in a coherent system;
- provide information on the **employment profiles** of the tourism industries and its contribution to the overall labour force of a country;
- find out **what visitors buy** and which industries benefit most from these purchases (i.e. retail sector);
- provide information about the **structure of the main visitors** (e.g. resident/non-resident visitors).



However, the usage of the **TSA is limited and/or not recognized:**

- The increased **analytical and research capacity** of the TSA is not often taken advantage of (incl. on the compilers' side).
- Research institutes consider the data, using it for **continuative economic and tourism policy analyses**; other than that - analyses are rarely made based on TSA results.
- **Fast available and short-term data**, in order to identify monthly and seasonal changes, are not available, so far.
- **Detailed results are not available**; therefore, conclusions at the micro or regionally disaggregated level are hardly possible (apart from regional accounts).
- The **impact of special events** and shocks (e.g. terror attacks, environmental disasters) cannot be currently analysed and forecasted.
- Based on TSA data on **market level are not available** (i.e. doing particular analysis on the most important tourism generating markets).
- Approaches are sometimes made **from various organizations** to quantify the impact on a more detailed level; these calculations are unfortunately sometimes misleading.



Revisions of the TSA-results have to be taken into account:

- In principle, a revision is a **modification of already published** statistical results which have to concern the whole time-series.
- **Scheduled revisions** are those that are standardized according to an a priori fixed publication procedure. Based on a revision schedule, the results released so far are replaced by others. The results, which are replaced by such revisions, are not considered final. Only those results that are published after the last scheduled revision have final status (e.g. due to scheduled revisions NA or BoP).
- **Ad hoc revisions** are those which have not been planned in advance and which have to be done due to the fact that results already identified as final must be changed on the basis of new findings (due changes of data sources, methodological changes, mistakes).



The **following challenges** have to be considered:

- **extrapolation indicators** based on activities might be applied proportionately to commodities, which assumes a parallel development of activities and commodities;
- the **Input-Output data** and **SUT** are mainly available on a less detailed level (mainly on a 2-digit level) as required by TSA methodology;
- classification **compatibility** problems concerning industry/ commodity;
- the activities/services of “**Hotel and Restaurant**” might be (hardly) not distinguished clearly;
- information on the **composition of package tours** might be based on best estimates;
- more recent and more detailed data on **same-day visitors** might be hardly available;
- more detailed output data (sales) on **passenger transport** would be needed/useful.



The **following challenges** have to be considered:

- For non-available data **best estimates** and a **number of assumptions** have to be made (e.g. inbound same-day visitors).
- If most recent data are not available, **appropriate extrapolations** for the actual reference year have to be made (e.g. TSA-Table 5).
- For several tourism industries/services **more disaggregated data** (4-digit-level) might be required.
- At present **several TSAs on provincial level** (RTSA) are already compiled, since satellite systems on local or/and regional level are politically high demanded. Nevertheless, due to **lack of data** (i.e. local SUT) such estimates are mainly not available or may be interpreted **with caution**, only.
- According to TSA-RMF 2008 the TSA takes into account the **direct tourism demand**, only, which includes the expenses done by the visitor (or on behalf) for goods and services before and during a trip (if domestic relevant), which are connected to the trip.

Policy's questions versus TSAs' answers (1)



What is the economic importance of tourism?

but

TSA is conceptionally not considering the different indirect and induced effects of tourism demand triggered by the delivery linkages in the economy.

What is the economic impact of tourism-related policy measures?

but

TSA - as a macroeconomic tool – is too overall; changes due to political measures might not become obvious and respective results might be statistically insignificant.

What is the size and development of the labour market in tourism-related industries?

but

So far, based on TSA there isn't a clear indication of the effects of tourism to several sectors related to employment since the data availability is often weak.

What is the economic, social and environmental ROI in tourism facilities and events?

but

A standardized framework investigating in regard to the multi-dimensional decision problem is statistically not ascertainable through TSA, so far.

Policy's questions versus TSAs' answers (2)



How is tourism being financed?

but

Investment based information is hardly available on national and on regional level, since the funding is often spread over different institutions, nationally, regionally and locally.

How tourism will perform in the near future?

but

There is often a wide gap between the complex requirements imposed on forecasting models and the statistical feasibility.

How many new jobs and additional GDP could be created with more tourism?

but

Estimates might be rather simple, but several assumptions and restrictions have to be considered.

A measure of reduction of seasonality in tourism might be based on TSA?

but

At least sub-yearly or monthly TSAs would be necessary; more investigations in this respect have to be done.

Tourism Satellite Accounts are

- ... providing a comprehensive macro-economic **data base** related to national (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;
- ... 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 policy decisions makers and **and**
- ... **fulfilling partly** the tourism policy needs!



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http://www.statistik.at/web_en/statistics/tourism/tourism_satellite_accounts/index.html

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