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UNWTO/DG GROW
TSA-Workshop
Agenda Item 6

Brussels, 29/30 November 2017

TSA governance at national level

Austrian experiences
Outline

- Governance of tourism (statistics) in Austria
- TSA for Austria – state of the art
- TSA implementation – issues of governance
- Conclusions
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, Governance for the tourism sector and its measurement).
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
- **Tourism associations**
  - as stakeholders under private law
  - Austrian Hotel Association, Association of Austrian Travel Agents and Tour Operators
  - Austrian Federal Economic Chamber, Federal Chamber of Labor
  - Austrian Federal Chancellery

**Federal state level**

- **Parliaments**
- **Departments of federal state governments**
- **Economic chambers, chambers of labor**
  - Tourism organizations
- **Municipalities (regions)**
  - Local and regional tourism organizations

S: BMWFW; Statistics Austria
Tourism statistics at Statistics Austria

Primary Statistics

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

Accounts

- Travel Balance of Payments
- (Regional) Tourism Satellite Accounts*
  - Value added (direct/indirect)
  - Labor force (TSA for Austria, only)

Accommodation in AT

Travel Behavior of Austrians

Income from incoming travel

Spending on outgoing travel

*) Austria (since reference year 2000), Vienna (since reference year 2002), Upper Austria (2003) and Lower Austria (2005).
Relevant legislative/methodological basis for tourism and travel statistics

**National:**
- Federal Constitutional Law, art. 15
- Provincial tourism laws
- Federal Statistics Act 2000
- Decree related to Tourism Statistics 2002
- Decree related to Tourism Demand Statistics 2003
- Registration Act 1991

**International:**
- EU/EUROSTAT:
  - Regulation on Tourism Statistics 2011
  - Commission Implementing Regulation 2011
  - Methodological Manual for Tourism Statistics
  - European Implementation Manual on TSA 2001
- UNWTO
  - International Recommendations for Tourism Statistics 2008 (IRTS 2008)
  - Compilation Guide related to IRTS 2008
- Other:
  - TSA: Recommended Methodological Framework 2008 (TSA-RMF 2008; UN, UNWTO, Eurostat, OECD)
  - Regulation on Balance of Payments 2005 (EU)
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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 (0.5 FTE);
- mostly done **every** year;
- not a perfect 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/products);
- 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:
  
  
  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.
Tourism & Travel Statistics

Main results 2016

- **Accommodation in Austria**
  - Monthly arrivals & overnight stays
  - Yearly accommodation capacity

- **Travel Behaviour of Austrians**
  - Trips with overnight stay
  - Same-day trips

- **Tourism Balances of Payments**
  - Income from incoming travel
  - Spending on outgoing travel

- **Tourism Satellite Accounts**
  - Value added (direct)
  - Labour force (direct)

- **Without passenger transport**
  - Income: 17.44 bn. Euro
  - Spending: 8.59 Mrd.

- **Value added**
  - Direct: 19.67 bn. Euro
  - 5.6% of GDP

- **Labour force**
  - Direct: 337,000 employees
  - Full-Time- Equivalents: 293,000
  - About 8% of total economy

*) Results 2015

- **Tourism & Travel Statistics**
  - 41.46 mill. arrivals
  - 140.88 mill. overnight stays
  - 1.11 mill. beds
  - 64,000 establishments
  - 19.7 mill. private trips
  - 3.9 mill. business trips
  - About 2.2 mill. same-day visits abroad
  - About 2.2 mill. same-day visits abroad
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Economic measurement of tourism/leisure 1970-2000

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 BMWFW¹) Statistics Austria and Wifo²) have developed a TSA for Austria based on TSA-RMF 2001 (direct & indirect effects)

Since the reference year 2003 estimates related the tourism labour have been 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

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. http://www.en.bmwfw.gv.at/Seiten/default.aspx

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. 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)

Tourism Satellite Accounts

- Tourism Statistics
- National Account
- Business Statistics
- Population Statistics
- Other internal data
- Travel habits
Compiling TSA – external partners/institutions

- Contract partner: WIFO (Wirtschaftsforschungsinstitut)
- Client by contract: BMWiFw (Bundesministerium für Wirtschaft und Finanzen)
- Other institutions: Austrian Central Bank, Austrian Tourism Board
- Data flows:
  - From WIWO to TSA
  - From TSA to Other institutions
  - From Other institutions to TSA
  - From TSA to Austrian Central Bank
  - From Austrian Central Bank to TSA
  - From TSA to Austrian Tourism Board
  - From Austrian Tourism Board to TSA
  - From TSA to T-Mona
  - From T-Mona to TSA

www.statistik.at
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-Tables 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:** 1st coordination meeting STAT/Wifo (direct effects), fine-tuning

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

**November:** 2nd coordination meeting STAT/Wifo related to final report

**December:** Submission of the final report to BMWFW, publication of key figures in the following year (1st quarter)

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

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<th>National Accounts</th>
<th>External Data Sources</th>
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<td>National Accounts (NA)</td>
<td>Social Security Data (HVSV)</td>
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<tr>
<td>Private Consumption</td>
<td>Same-day trips by Germans to Austria (DWIF)</td>
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<td>Supply-Use-Tables (SUT)</td>
<td>TBoP of Partner Countries – Central Banks</td>
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<td>Input-Output (IO) Statistics</td>
<td>Same-Day Trips by Italians to Austria</td>
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<td>Price Statistics</td>
<td>T-Mona – Austrian Tourism Board</td>
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<td>Mirror data</td>
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<th>Business Statistics</th>
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<tr>
<td>Structural Business Statistics (SBS)</td>
<td>Accommodation Statistics</td>
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<td>Business Register (BR)</td>
<td>Sample surveys on travel habits</td>
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<td>Short Term Statistics (STS)</td>
<td>Travel Balance of Payment (TBoP)</td>
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<tr>
<th>Population Statistics</th>
<th>Data sources ...</th>
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<tr>
<td>Census</td>
<td>... are continuously being extended!</td>
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<tr>
<td>Labor Force Survey (LFS)</td>
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<td>Household Budget Survey (HBS)</td>
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<td>Cultural Statistics</td>
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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.
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