

Dr. PETER LAIMER
Austrian Central Statistical Office (ÖSTAT), Vienna, Austria
Državni zavod za statistiku, Beč, Austrija

TOURISM STATISTICS IN THE EUROPEAN UNION. NEW CHALLENGES AND DEMANDS ON THE OFFICIAL TOURISM STATISTICS IN AUSTRIA.

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Important information concerning Austrian tourism are based on accommodation and overnight stay statistics. Therefore the Commission of the European Union in collaboration with the EU and EFTA has prepared a project of a council Directive in order to develop a harmonized system for tourism statistics and a related information system at the European level. Concerning the implementation of the requirements of EU-Directive on Tourism Statistics, the Austrian official tourism statistics is confronted with some problems which are found more on the organisational level than on the methodological one. This especially concerns the increased periodicity regarding tourism demand surveys.

Key words: Official Austrian tourism statistics- EU- Directive on Tourism Statistics- implementation of the EU-system regarding its requirements

0. PRELIMINARIES

0.1 General remarks

Considering the international importance of tourism, the harmonisation of tourism statistics will still require a great deal of work. The Council Directive on Tourism Statistics¹) (later referred to as "the Directive") and the draft Council Recommendation on Tourism Statistics²) are the two basic documents for the harmonisation on a European level which mean on the one hand changing, new conditions for the official tourism statistics and on the other hand qualitative and quantitative improvements for the tourism statistics users.

¹ Council Directive on the collection of statistical information in the field of Tourism, No 95/57/EC of 23 November 1995, Official Journal of the EC.

² Methodological definitions to be taken into account when collecting statistical information on tourism as requested in the Council Directive, Document S3/97/3; this document will be submitted to the Statistical Programme Committee for approval.

The first part of this document deals with the present tourism surveys conducted by the Austrian Central Statistical Office (ÖSTAT). Especially the tourism supply and demand orientated surveys are presented which represent the major part of the official tourism statistics system.

The second part concentrates on the requirements of the Directive which affect tourism supply and tourism demand as well.

The third part discusses the necessary changes and adjustments of the official tourism statistics to fulfill the demands regarding the requirements on the European level. The main purpose is to provide the differences as well as the similarities between the two systems.

0.2 Economic developments in Austria

Austria, with about 8 mill. inhabitants, is a small country. The economic development has been quite favourable during the last decades. The inflation rate decreased to 2% between 1982 and 1996; real GDP (at 1983 prices) increased by about 3% between 1983 and 1995; real GDP per capita increased by about 25%, from ATS³ 161,000 (1983) to ATS 198,500 (1995) per year while the Austrian population increased by approximately 6% during the same period. By GDP capita (in PPS) 1995, Austria is ranked 8th among the OECD countries. The development of the (still comparably low) unemployment rates was less favourable; they increased by about 4.7 percentage points between 1980 and 1995.

In tourism overnight stays steadily increased between 1980 and 1991, from 118.0 mill. in 1980 to 130.4 mill. in 1991 (+10.5%). Since 1991, however, there has been a decrease to 112.9 mill. overnight stays (-13.4%) in 1996 which is less than at the beginning of the 80's; this negative development is still continuing.

Austria is not only a tourism receiving but also a tourism generating country. This is underlined by the fact that since the mid 80's the (net) travel intensity of the Austrians (share of persons having undertaken at least one trip) remains on a high level: in 1990 it was 44.6%, in 1993, 44.5%. In 1996, it was 48.2% of the overall population and comparing to the years before the share of domestic trips decreased in favour of trips abroad.

Since 1980 the foreign exchange receipts have increased by 77.1% (from ATS 83 bill. in 1980 to ATS 147 bill. in 1995). In times of increasing tourism the net receipts were able to cover the chronic import surplus to a large extent; the coverage ratio increased between 1980 and 1990, from 47.9% to 71.7%. In consequence of the general tourism situation since 1990, a steady decrease of the coverage ratio has to be realized (1994: 36.8%), however.⁴⁾

³ Austrian Schilling

⁴ Republic of Austria 1945 - 1995 and Statistical Yearbook 1996, ÖSTAT.

1. OVERVIEW OF THE OFFICIAL TOURISM STATISTICS IN AUSTRIA

The technical side of tourism Statistics is prepared in a separate Department of the ÖSTAT which is in charge of foreign trade statistics and transportation statistics as well. The overall idea of this competence is "traffic" in a wide sense.

1.1 Tourism supply and use of supply - the traditional tourism statistics

Important information concerning Austrian tourism are based on the accommodation and overnight stay statistics. For this branch of official statistics cooperation with communities is most significant; the data are reported by about 1,500 "reporting communities" (=more than 3,000 overnight stays per year; therefore total: 2,400 communities). The selection of these communities is made by the federal provinces ("Länder"), changes (exclusion, additions) are made in agreement with ÖSTAT. However, within the communities the survey is a full count.

Accommodation capacity surveys are conducted once a year (reference day: 31st of May) for the several months of winter and summer season.

Monthly data on tourist arrivals and overnight stays is reported by type of accommodation and country of origin.

The legal basis for tourism statistics are the "Federal Statistics Act" and the "Tourism Statistics Decree" of the Austrian Federal Ministry of Economic Affairs.

1.1.1 *Some important definitions used*

When conducting statistical surveys, basic notions such as "tourist" and "tourist accommodation" have to be defined.

⇒ **Tourist**

Traveller on vacation (holiday), business, recreation or other purposes, staying no longer than for 2 months at a certain address. Whether accommodation is charged or free of charge is irrelevant. The country of origin is the country of residence which does not necessarily coincide with their nationality.

⇒ **Tourist accommodation**

Lodgings under the managerial responsibility of the owner or another person acting as his/her agent, which are designed to serve for tourist accommodation during limited time. Hotel and similar establishments are categorized by standards (5/4-, 3-, 2/1- "stars").

In general tourist accommodations comprise:

- * Establishments owning a special license to permanently accommodate and board tourists. These are hotels and similar establishments (inns, boarding houses, hotel garnis), holiday dwellings, recreation homes of social insurance, other recreation homes, recreation homes for children, youth hostels, mountain huts, camping sites and other accommodation.

- * "Private" accommodations which are accommodations of a size which are managed by a house-hold, up to 10 beds, consisting of private accommodation not on farms, private accommodations on farms (for the latter certain criteria of rural character must be met) and rented houses and flats (private, not-/ on farm).

1.1.2 *Some key figures and indicators regularly calculated*

- ⇒ Tourism intensity: Overnight stays per inhabitant;
- Occupancy rate: Nights spent divided by total numbers of beds multiplied by operation days of a certain period;
- ⇒ Coverage ratio: Travel receipts divided by travel expenditure according to BOP⁵) concepts.

1.1.3 *Monthly data on tourist arrivals and overnight stays*

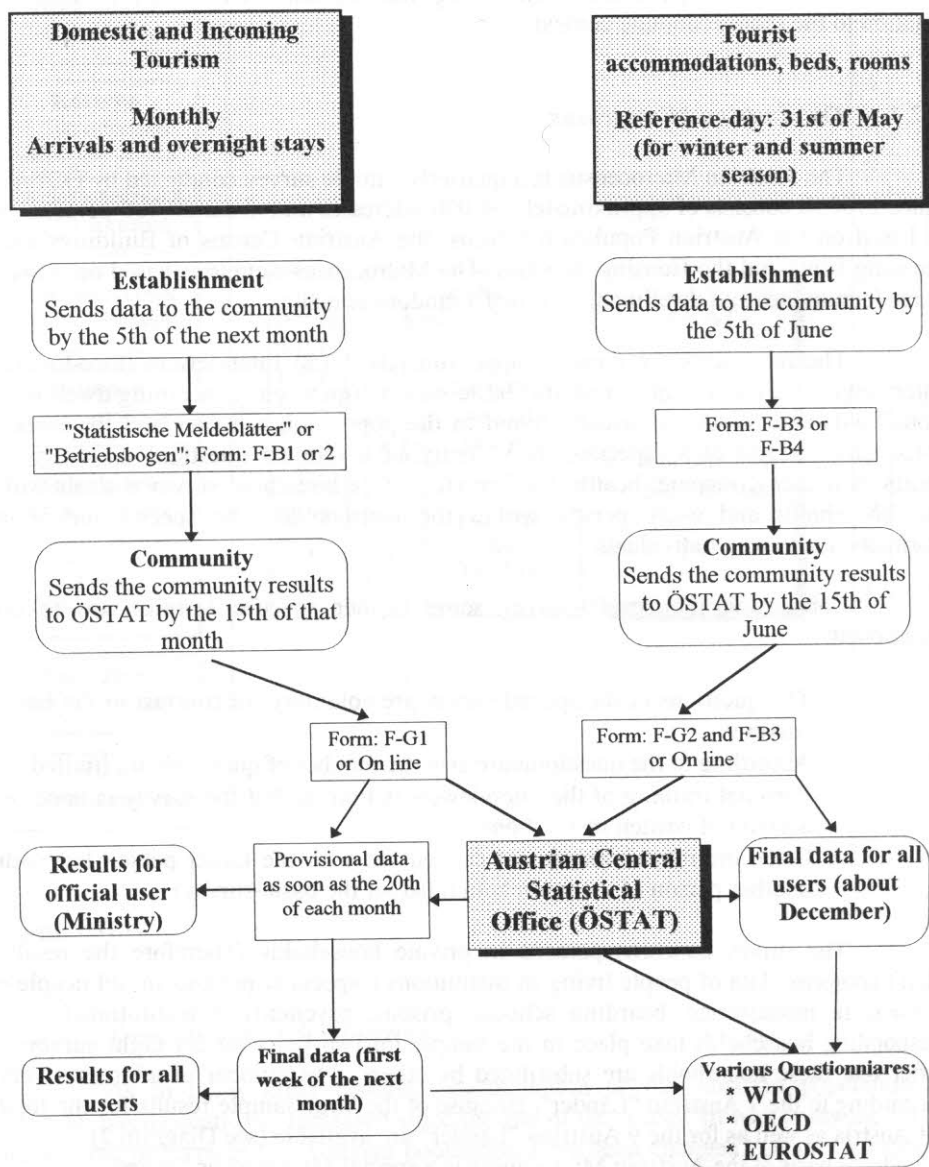
For the monthly data concerning arrivals and overnight stays two questionnaires can be used by the reporting establishments - either the "Statistische Meldeblatt" or the "Betriebsbogen" (form F-B1 in different colours for hotels and similar establishments (5/4-, 3-, 2/1- "stars") and holiday dwellings ("special licensed"); form F-B2 for all other accommodations. These forms with the data on the reference month are sent to the communities by the 5th of each month. The data of the establishments are compiled by the communities to "community results". These summary reports (using the form F-G1 or On line) are sent monthly to ÖSTAT by the 15th of that month. About three weeks later the monthly results are published by ÖSTAT, which are also aggregated by season (winter season: November - April; summer season: May - October), by calendar year and certain other periods (i.e. May to June). A preliminary projected evaluation yields relatively reliable figures as soon as the 20th of the same month (see Diagram 1).

1.1.4 *Data on tourist accommodations*

In addition to the monthly arrival and overnight statistics data on tourist accommodation (number of establishments, beds, rooms) are surveyed. The survey is conducted once a year (reference day: 31st of May) for the winter and summer seasons (for hotel and similar establishments: monthly data). Different forms are used for "special licensed" establishments (F-B3: hotels and similar, holiday dwellings, recreation homes of social insurance, other recreation homes, recreation homes for children, youth hostels, mountain huts, camping sites and other accommodations) and for "private" accommodation (F-B4). The establishments send their forms to the community by 5th of June, and the community transmits the "community-results" (form F-G2 and F-B3 or On line) by about the 15th of June to ÖSTAT. The data concerning tourist accommodations are published in December of the same year.

⁵ Balance of Payments

Diagram 1: Timetable - overnight stay and accommodation statistics



Source: ÖSTAT

1.2 Tourism demand - special tourism statistics in the scope of the Austrian Microcensus

Tourism data on Austrians are also collected within the Austrian Microcensus. This is particularly interesting information, thanks to the apparent relation to the socio economic context.

1.2.1 *The Austrian Microcensus*

The Austrian Microcensus is a quarterly sample survey conducted by ÖSTAT since 1968. It consists of approximately 30.000 addresses and about 60.000 persons. It is based on the Austrian Population Census, the Austrian Census of Buildings and Housing Units and the Housing statistics. The Microcensus sample is based on a two-stage (communes and dwellings) stratified⁶) random selection.

The interviews are done by approximately 1.350 interviewers (face-to-face interviews), and consists of a constant "basic-survey" (questions concerning dwellings, households and persons as usually found in the population censuses and the labour force surveys) and of a "special-survey" (varying additional questions on different topics as housing, income, health, tourism etc.). As a household survey it deals with the households and every person within the households. The special survey is normally addressing individuals.

Concerning the special-survey some further specific features are to be mentioned:

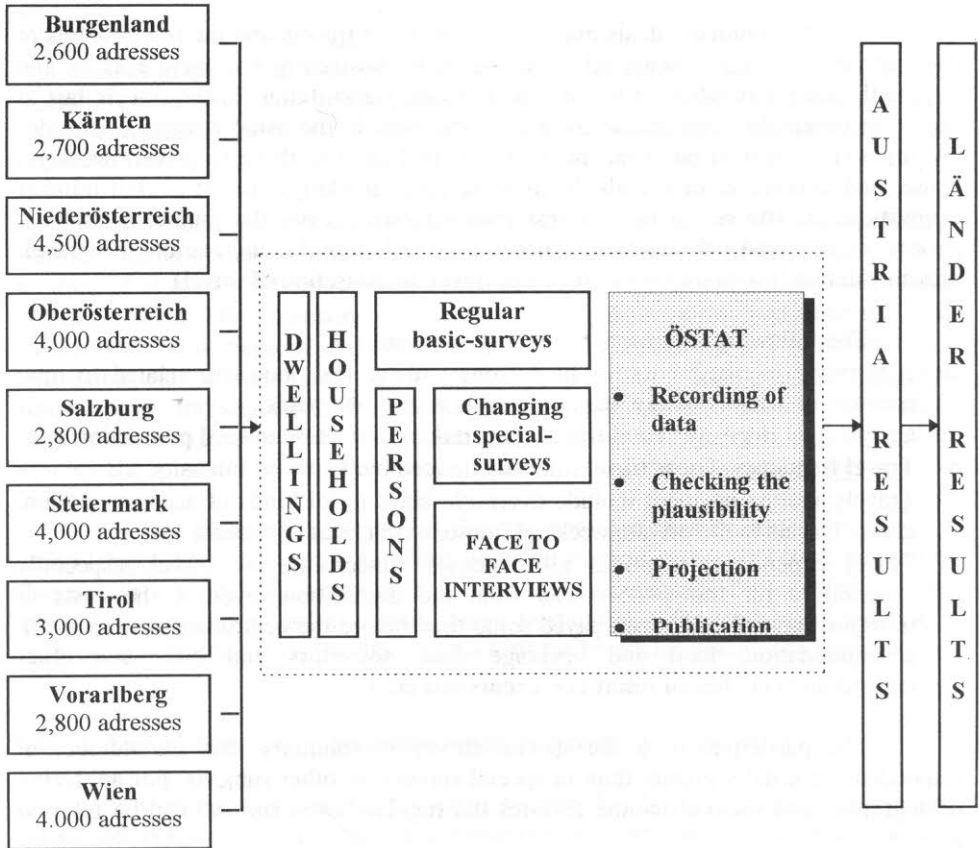
- ⇒ The questions of the special-survey are voluntary (in contrast to the basic survey).
- ⇒ According to the questionnaire size the number of questions are limited.
- ⇒ Personal training of the interviewers is limited, but the survey is done on account of written instructions.
- ⇒ Often the interviews are not carried out with the target person but with another person of the household (also for the basic-survey).

The survey concerns persons in private households. Therefore the results don't comprise data of people living in institutions (especially persons in old people's homes, in monasteries, boarding schools, prisons, psychiatric institutions). The responding households take place in the sample for two years (or for eight surveys); after that these households are substituted by others. The number of addresses vary according to the 9 Austrian "Länder". Because of the large sample results for the total of Austria as well as for the 9 Austrian "Länder" are available (see Diagram 2). The legal basis of the Austrian Microcensus is a special Microcensus Decree.

⁶ Communes: Number of dwellings in communes according to Census of Building and Housing Units.

Dwellings: Austrian Länder (9 categories), kind of dwellings (3 categories), building time (6 categories), use of building (5 categories), living floor space of the dwelling (4 categories), kind of heating (2 categories), persons living in the dwelling (6 categories).

Diagram 2: The Austrian Microcensus



Source: ÖSTAT

1.2.2 Travel habits of the Austrians

As in many other countries participation of the Austrian population in tourism has dramatically increased since the end of the sixties. In which way the travel habits and patterns of the Austrian population have been changed? Or to what extent may socio-economic characteristics influence the travel behaviour? The analysis of these developments and questions can be based on periodical special surveys on holiday trips of the Austrians - "Travel habits of the Austrians in the year ..." - which have been conducted since 1969 in 3-years intervals (most recent: December 1996).

The Microcensus special surveys "Travel habits of the Austrians in the year ..." are one of the most important survey for the official tourism demand statistics. The surveys have been carried out in December (except 1984/85 in June) for the reporting years (November till October) 1968/69, 1971/72, 1974/75, 1977/78, 1980/81, 1984/85, 1986/87, 1989/90, 1992/93 and 1995/96.

The questionnaire deals mainly with the main travels and the travel habits of the Austrians. Main travels are other than those for business/government reasons and for health reasons reimbursed by any social security institution. These travels last at least four overnight stays and at most one year outside the usual residence. Besides overnight stays against payment, main travels include also those to private weekend houses and to relatives or friends. In these surveys, in addition to the overall number of journeys, details of the two longest journeys (since 1996 the four longest) of a person were asked (destination, duration, travel month, motivation of travel, accommodation, travel expenses, means of travel, organisation of travel).

The following features are regularly surveyed:

- ⇒ Net travel intensity: Number of persons with at least one trip related to total population (usually on the basis of travels within one year).
- ⇒ Gross travel intensity: Total travels undertaken in relation to total population.
- ⇒ Travel frequency: Gross travel intensity divided by net travel intensity.
- ⇒ Travels against payment include overnight stays in all kinds of accommodation, except travels to the private weekend house, to relatives or friends.
- ⇒ Travel expenditure includes all expenses concerning the travel, especially expenditure for transport to and from the destination (even if the costs of transport have already been payed some time before the beginning of the travel), accommodation, food and beverage, fuel, souvenirs and gifts and other expenditure (i.e. health resort tax, excursions etc.).

The participation in the special survey is voluntary, but the number of respondents is usually greater than in special surveys on other subjects. For analyzing demographic and socio-economic features the regular "basic survey" can be referred to.

1.2.3 Other Microcensus special-surveys with tourism aspects

In connection with the special-survey "Travel habits of the Austrian in the year ..." additional questions concerning short-stay visits (September 1976, December 1981, June 1985 and December 1987, 1990, 1993), government and business visits (December 1981 and June 1985), same-day visits (September 1976, 1994) and visits for health treatment (December 1978, June 1985, September 1994) have been surveyed.

Short-stay visits are visits, which last at least one but at most three overnight stays outside the usual residence. Short-stay visits, which are done for business reasons but which are paid by the visitor himself, are not included in business and government visits.

In 1985 a distinction between different types of short-time visitors was made (short-stay visits to cities, short-stay visits for sport reasons, short-stay visits for recreation reasons, other short-stay visits). Since 1990, besides the number of the short-stay visits, more detailed information are available on destination countries (Austrian "Länder" or abroad). Travel expenditure has not been taken into account yet.

Government and business visits comprise congresses, conferences, courses, excursions or trainings outside the usual residence with at least one overnight stay. The survey gives information about the duration, the destination and the generating country of the visitor.

The main contents of the special-survey "Same-day visits" (also including some questions concerning visits for health treatment) are same-day visits with a duration of at least six hours and no overnight stay, government and business visits are not included. The interesting point is the number of the persons on same-day visit between the 1st of September 1993 and the 31st of August 1994. The number, the destination and the main reason of the same-day visits were asked by season (autumn, winter, spring and summer). The most important topics are the region of destination, the expenses (transport and during the day), means of transport (in particular: bicycle), the source of information on the destination and the travel companions.

A visit for health treatment is defined as a visit in a health resort and of a period longer than one week only which includes medical care: visits for treatment of illnesses or complaints; visits in a treatment or recreation center after serious operations or illnesses; and also visits under medical care for prevention and health improvement reasons. Also the place of the visit for health treatment was inquired.

1.3 Survey concerning accommodation and restaurant facilities

Within the scope of the Economic Census 1972, 1976, 1983 and 1988 full counts concerning accommodation and restaurant facilities were conducted. The data allow an analysis of the structure of the enterprises/establishments and the employees, and other related census-type characteristics.

The primary survey unit is the establishment. If separate cost accounting does not exist all units covered by the cost accounts are consolidated.

The number of the persons employed, gross output, intermediate consumption, stocks, gross fixed capital formation, consumption of fixed capital, costs of energy, number of guest-rooms, beds and the capacity of sitting places are the most important features.

1.4 Problems concerning Austrian tourism statistics

In comparison with other countries Austrian tourism statistics on overnight stays and arrivals as well as on accommodation seems to meet relatively high quality standards. Nevertheless, certain problems are waiting for solution as follows:

- ⇒ During the last decades consistency and comparability was insufficient between the official tourism statistics and other economic statistics of non-official character. Therefore, closer cooperation between tourism research institutions and the official tourism statistics is required.
- ⇒ As in other countries there are few data on tourism expenditure. "Outbound tourism" is surveyed in a three-year periodicity only within the scope of the Austrian Microcensus. Concerning expenditure this survey only provides data on the total travel expenses which does not show any details on type of expenditure.⁷⁾ Therefore greater attention has to be paid to the expenditure as well as to purposes of visits and the means of transport.
- Surveys on tourism expenditure may also be carried out by other public or private institutes. In Austria two non-official tourism statistics are regularly prepared which provide global data on tourism expenditure: the "GBÖ"⁸⁾ is used to obtain information on guests on vacation in Austria. It is carried out in a three-year periodicity for both summer and winter; the European Travel Monitor (ETM) is an international survey by which data on outbound tourism has been continually collected in all European countries since 1988.
- The data on travel expenditure will become all the more important for purposes of the Tourism Balance of Payments (TBOP) if the European Monetary System will be introduced in the future. At the moment data on TBOP are surveyed as a part of the overall BOP by the Austrian Central Bank. It represents an analysis of the monetary flows due to the final consumption of international tourists. Only the annual, not the monthly TBOP is revised by the amount of Austrian Schilling taken along by foreign workers to their countries and by the amount of buying/selling of Austrian Schilling of/to private persons through banks abroad.
- ⇒ In Austria (but also in many other countries) same-day visits are getting more and more important. At the present state-of-the-arts same-day visits are not sufficiently taken into consideration. However, in September 1994 a Microcensus survey according to "Same-day visits" has been conducted which largely complies with the "Recommendations on Tourism Statistics" by WTO (this was only the second one of this kind after December 1976).
- ⇒ In Austria the first steps of implementation of the new WTO Recommendations have been taken. As in other countries problems will arise concerning the classification of tourism accommodation because in some cases the WTO-Recommendations are not fully compatible with NACE (which is the classification for all EU member countries; especially on the lower digit level).
- ⇒ The problem of Hidden Economy is also existing in the Austrian tourism statistics. But it doesn't seem to seriously influence the quality of data. Therefore, on this topic there does not exist any empirical analysis.

⁷ This particularly applies with a view to "Tourism satellite systems", i.e. OECD-"Tourism Economic Accounts".

⁸ This is the "Austrian Guest Inquiry" conducted by the Austrian National Tourist Board.

2. TOURISM STATISTICS IN THE EUROPEAN UNION (EU)

The Council, the European Parliament and the Economic and Social Committee have stressed that the Community has a major role to play in the development of tourism statistics. The importance of having quick access to up to date data on holiday and business trips was stressed in order to assess the characteristics and the evolution of the main segment of the demand.

The output of a two year work was the preparation of an Council Directive on Tourism Statistics which is based on the Recommendations on Tourism Statistics by the World Tourism Organisation (WTO).

2.1 The basic concepts of tourism - Recommendations by WTO

The most important aims are standardization and comparability as well as finding a common "language" for tourism statistics which is the prerequisite of developing a European system on tourism statistics.

A milestone for the improvement of tourism statistics and their comparability at the international level was the adoption of the Recommendations on Tourism Statistics.⁹⁾ These Recommendations are only conceptual in nature; guidance on "how to do" and hints of implementation for national statistical systems are not involved. In Austria first steps of implementation of the Recommendations have been taken.

As mentioned in the Recommendations tourism comprises "the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes".

In relation to a given country, the following forms of tourism can be distinguished (see Diagram 3):

- Domestic tourism, involving residents of the given country travelling only within this country;
- Inbound tourism, involving non-residents travelling in the given country;
- Outbound tourism, involving residents travelling in another country.

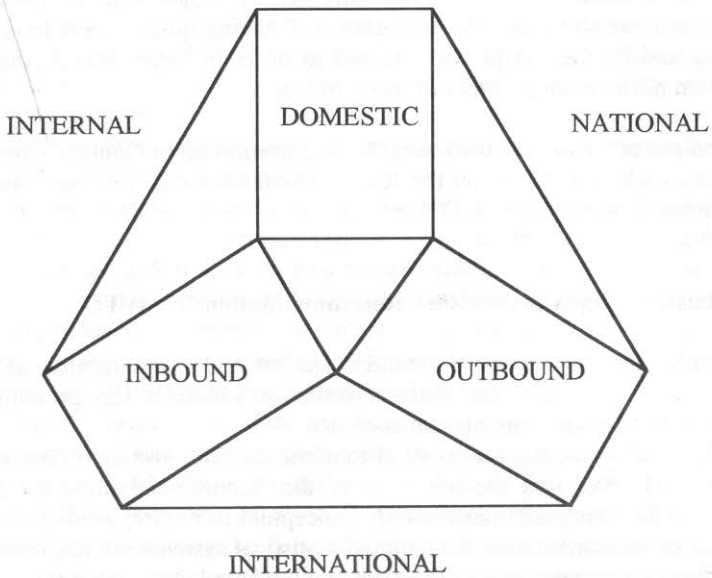
These three basic forms of tourism can be combined in various ways to derive the following categories of tourism:

Internal tourism, which comprises domestic tourism and inbound tourism;
National tourism, which comprises domestic tourism and outbound tourism;
International tourism, which consists of inbound and outbound tourism.

All types of travellers engaged in tourism are described as visitors. Therefore the term "visitor" represents the basic concept for the whole system of tourism statistics (see Diagram 4).

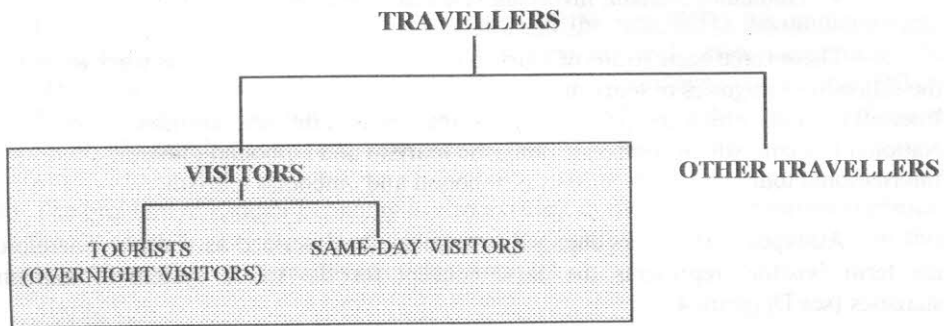
⁹ Follow up to the Ottawa International Conference on Travel and Tourism Statistics in June 1991

Diagram 3: Forms of tourism (from the demand side)



Source: WTO

Diagram 4: Basic tourism units



Source: WTO

2.2 The Council Directive on the collection of statistical information in the field of tourism

The Commission of the European Union with collaboration of the EU and EFTA states has prepared a project of a Council Directive in order to develop a harmonised system for tourism statistics and an information system on a European level.

The main aims of the Directive are:

- ⇒ Harmonisation of existing tourism statistics of the EU-Member States and establishment a more efficient and comprehensive system of information on tourism supply as well as on the demand side.
- ⇒ Providing public and private users with reliable, comparable and up to date information on tourism supply and demand which may better orient decision makers in the industry as well as in the public sector.
- ⇒ Providing a common framework to maximise the benefits of the various actions which are being carried out at national level and channel current efforts, and thus add value to the work undertaken by the Member States.
- ⇒ Providing reliable results which only a legal basis may ensure. Until now the existing actions of collection at international level (EU, OECD, WTO) have been carried out on a voluntary basis by the participating countries.

The Directive requires data on tourism supply as well as on tourism demand.

2.2.1 *Tourism supply and use of supply*

The Directive covers only a limited part of total tourism accommodation to minimize the additional administrative burden since Member States already collect data from these types of tourist accommodation. The Directive is concerned with the hotel sector (and similar establishments) and other types of collective tourist accommodation (see Diagram 5):

- ⇒ Hotels and similar establishments (included under NACE 55.1¹⁰)
- ⇒ Other collective accommodation (included under NACE 55.2), of which:
 - * Tourist camp sites (included under NACE 55.22)
 - * Holiday dwellings (included under NACE 55.23)
 - * Other collective accommodation (included under NACE 55.21 + "Health establishments")

According to the Directive (supply and use of supply) data on private accommodation are not required.¹¹)

¹⁰ NACE Rev. 1: Nomenclature générale des activités économiques dans les Communautés européennes ("Rev.1": first revised version).

¹¹ Because of the importance for the Austrian tourism (about 25 p.c. of the overall overnight stays per year spent in private accommodation) these data - of course - will still be available.

The Directive requires:¹²⁾

- Yearly data on the capacity for hotels and similar establishments (number of establishments, rooms and beds) and other collective accommodation (number of establishments and beds).
- Yearly data on the arrivals and overnight stays of residents and non-residents in hotels and similar establishments and other collective accommodation (for every month by the country of origin for arrivals and overnight stays of non-residents).
- Monthly data on the arrivals and overnight stays of residents and non-residents in hotels and similar establishments and other collective accommodation as well.
- Monthly data on the net and gross occupancy rate for hotels and similar establishments.

To gain a better idea of the regional tourism potential, data on tourism supply is requested - apart the national level - at NUTS III level for data on supply (infrastructure, capacity) and NUTS II for data on the use of accommodation (guest flows, arrivals and overnight stays).

2.2.2 *Tourism demand*

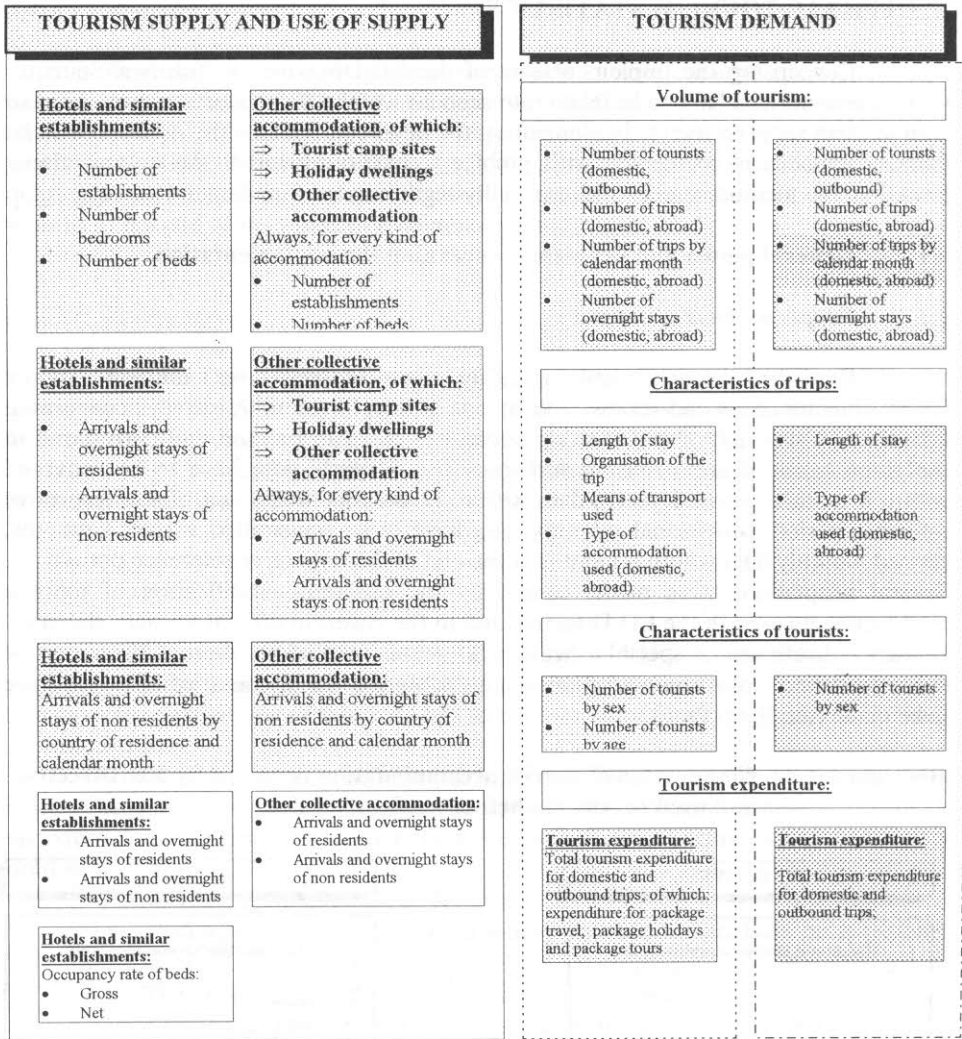
On tourism demand the Directive requires data on domestic and outbound tourism. The system is based on an annual survey of residents and concerns their holidays of at least 4 overnight stays and quarterly surveys concerning holidays and business trips of at least 1 overnight stay.

The Directive requires:

- Yearly data on leisure, recreational or holiday trips having at least 4 overnight stays away from the usual place of residence (data on the volume of tourism, on the characteristics of the trips, on the profile of the tourists, on tourist expenditure).
- Quarterly data on leisure, recreational or holiday trips having at least 1 overnight stay away from the usual place of residence (data on the volume of tourism, on the characteristics of the trips, on the profile of the tourists, on tourist expenditure).
- Quarterly data on business or professional trips having at least 1 overnight stay (data on the volume of tourism, on the characteristics of the trips, on the profile of the tourists, on tourist expenditure).

¹² "Yearly", "quarterly" and "monthly" refers to the frequency of data transmission to EUROSTAT which also correspond with the reference period of the surveys.

Diagram 5: The Directive on Tourism Statistics and the function of the system



Source: ÖSTAT, EUROSTAT

- ...Holiday trips with at least 4 overnight stays
- ...Holiday and business trips with at least 1 overnight stay
- ...yearly transmitted
- ...quarterly transmitted
- ...monthly transmitted

3. THE IMPLEMENTATION OF THE DIRECTIVE IN THE AUSTRIAN OFFICIAL TOURISM STATISTICS

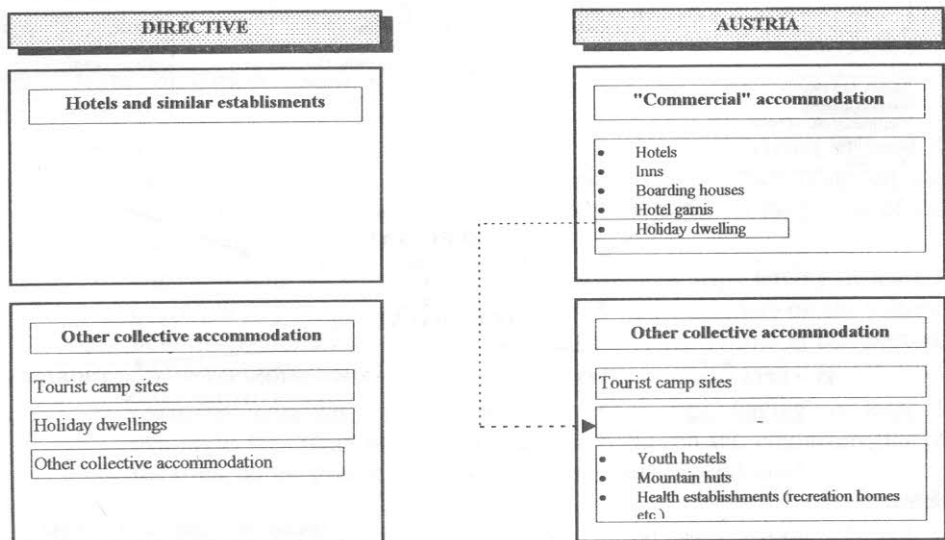
Concerning the implementation of the EU-Directive on Tourism Statistics some considerations have to be taken into account which affects more tourism demand than tourism supply surveys. Implementing the new requirements the Austrian official tourism statistics is confronted with problems concerning rather the organisational level than the methodological one, especially regarding tourism demand surveys.

3.1 General points and problems concerning the implementation

3.1.1 Supply and use of supply

Regarding yearly and monthly data surveys on tourism supply (establishments, beds and rooms) and on use of supply (monthly surveys concerning arrivals and overnight stays) existing survey-systems can be used and correspond to the given terms of data transmission (provisional yearly data have to be conveyed within 6 months, revised yearly data within 12 months at the end of the respective reference period; provisional monthly data have to be transmitted within 3 months, revised monthly data within 6 months at the end of the respective reference period). Several adaptations were made, caused by the different classification of tourism establishments used in the EU-Directive and in the Austrian official tourism statistics. Holiday dwellings ("special licensed") were excluded from "Commercial accommodation"; also some adaptations regarding the list of countries of origin have to be made (see Diagram 6).

Diagram 6: Comparison of tourist accommodation required by EU-Directive and used in Austria before implementation



Source: ÖSTAT, EUROSTAT

3.1.2 *Tourism demand*

Regarding yearly and quarterly surveys on tourism demand adaptations have to be made concerning periodicity and organisation. Concerning data transmission to EUROSTAT provisional yearly data have to be conveyed within 6 months, revised yearly data within 12 months at the end of the respective reference period; provisional quarterly data have to be transmitted within 3 months, revised monthly data within 6 months at the end of the respective reference period.

3.1.2.1 *Yearly surveys*

The EU-Directive requires surveys regarding holiday trips having at least 4 overnight stays which is similar to the Austrian Microcensus special survey "Travel habits of the Austrians in the year ...", which deals mainly with trips having at least 4 overnight stays. According to the Directive the first survey of this kind has to be done for the reference year 1998.

3.1.2.2 *Quarterly surveys*

Besides surveys on long stay holiday trips the EU-Directive requires surveys regarding holiday and business trips having at least 1 overnight stay. According to the Directive the first survey of this kind has to be done for the reference quarter January till March 2000.

These surveys may be effected either within the scope of the Austrian Microcensus as a sub-sample (2,000 persons, as it was done in December 1995) or by an external market research institute. However, a decision on details hasn't been taken until now.

Points to be considered are as follows:

- A sample of 2.000 persons is hardly suitable for analysis on a regional level.
- The necessity and the practicability of quarterly surveys is often questioned. Due to such high frequency, the data of surveys on the same topic may lose quality.

3.2 **Working programs 1995 and 1996/97**

For application of the EU-Directive on Tourism Statistics and to gain financial support from EUROSTAT pilot surveys concerning holidays having at least 4 overnight stays and holidays and business trips having at least 1 overnight stay (inclusive short-time holidays between 1 and 3 overnight stays) were/are conducted whose aims are:

- Testing the program of the Directive, especially in less experienced fields
- Getting experience on the respective questions concerning the Directive
- Making proposals easier for improvements concerning the Directive

3.2.1 *Working program 1996*

In preparation of the application of Directive and within the determined working program 1995 a pilot survey regarding business and government travel was conducted in December, which involved an external tourism marketing institution and the Austrian Microcensus.

In the scope of the Microcensus the pilot survey comprised all business trips (incl. congresses, seminars, incentive trips etc.) of the employed between September and November 1995. The survey was a sub-program of the Microcensus in December 1995. The sample consisted of about 2,000 employed persons; the results were projected to the total employed population. From the statistical point of view because of the small sample size the results have to be interpreted carefully; especially for more detailed information the number of the "positive" cases (178 persons with at least one business trip) is too small.

From 3.4 Mill. employed individuals 355,000 person made at least one business trip in Austria or abroad which is an intensity of 10.3%. In total 762,000 business trips were undertaken of which 316,000 were abroad. The most trips abroad were done to Germany, to the Netherlands, to the Czech Republic and to Italy. About three quarter of all trips took between one and three overnight stays. Hotels and similar establishments were the most popular accommodations. For all business trips (domestic and abroad) 2.5 billion Austrian Schilling (ATS) were spent.

3.2.2 *Working program 1996/97*

To gain financial support from EUROSTAT for the years 1996/97 a working program in the field of tourism demand statistics was prepared. This comprise surveys concerning holidays with at least 4 overnight stays and holidays and business trips with at least 1 overnight stay (incl. short-stay holidays between 1 and 3 overnight stays).

Concerning long-stay trips (at least 4 overnight-stays) a survey was be done within the scope of the Austrian Microcensus (as a special survey) in December 1996. The prepared questionnaire is fully consistent with the Directive-requirements. The interesting points were the number of the persons doing at least one holiday trip and the number of the trips between the 1st of November 1995 and the 31st of October 1996. In addition information concerning the length of stay, the travel month, the destination, the mean of transport, the organisation of the trip, the kind of accommodation used, the total expenditure as well as the expenditure for package tours and the purpose of the trip was surveyed.

During the reference period, about 3.8 million Austrians, 48.2% of the overall population, made at least one holiday trip. Comparing to 1993 the travel intensity increased by 3.7 percentage-points. The travel intensity of the Viennese (62.5%), civil servants (65.9%), and those 30 to 39 years was highest, whereas the travel-participation of persons from Carinthia (35.8%), of the farmers (19.5%) and those aged of 65 years and more (32.7%) was lowest. In total 5.9 mill. trips were

undertaken, of which 3.7 mill. trips were spent abroad and 2.2 mill. were done in Austria. Comparing to 1993 the share of domestic trips decreased from 45% to 37% in favour of trips abroad.

In 1997 quarterly surveys concerning holiday and business travels with at least 1 overnight stay is conducted in cooperation with an external market research institute.

The surveys are conducted every quarter, involving 3,000 respondents in total Austria. The interviews are done face to face in private homes.

4. CONCLUSION

Summing up the requirements concerning the EU - Directive on Tourism Statistics effect more surveys on the tourism demand than on the tourism-supply side. For Austria the following measures are important:

- Developing the conditions for using the Microcensus as an instrument for the yearly surveys according to the Directive (trips with at least 4 overnight stays).
- Considering the possibilities for surveys regarding holiday and business trips with at least 1 overnight stay (market research institutes).
- Use and inclusion of non-official statistics of demand (i.e. European Travel Monitor)
- Developing of links to other statistics: Balance of Payments, Transports, Prices, National Accounts etc.

The EU-Directive offers a step by step approach for implementing the new requirements, since the Member States - if necessary - have the time to adjust their statistical systems within three (for yearly and monthly data) and five (for quarterly data) transition periods (starting from beginning of 1996). Austria decided to use this option.

The Austrian official tourism statistics is well prepared regarding these new requirements of the European official tourism statistics and the new harmonised tourism data will be subsequently advantageous for all data users following the implementation of the European tourism statistics demands.

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Sažetak

STATISTIKA TURIZMA U EUROPSKOJ UNIJI - NOVI IZAZOVI I ZAHTJEVI SLUŽBENE STATISTIKE TURIZMA U AUSTRIJI

Vrlo značajne informacije koje se tiču austrijskog turizma temelje se na statistici smještaja i noćenja. Iz tog razloga je Komisija Europske Unije u suradnji s EU-om i EFTA-om pripremila projekt savjetodavnog tijela sa svrhom razvoja usaglašenog sustava za statistiku turizma, te odgovarajućeg informacijskog sustava na europskoj razini. Obzirom na implementaciju nekih zahtjeva EU-direktive o statistici u turizmu, Austrijski zavod za službenu statistiku suočen je s nekim problemima koji se javljaju više na organizacijskoj razini, nego na metodološkoj. Ovo se posebice odnosi na povećanu periodičnost anketnih istraživanja turističke potražnje.

Ključne riječi: službena statistika turizma Austrije, direktiva Europske Unije o turističkoj statistici, implementacija sustava Europske Unije prema zahtjevima tržišta