40th Annual Meeting of the Voorburg Group on Services Statistics

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Statistics Netherlands, The Hague, Netherlands

Industry Session

Travel Agency Activities

SPPI ISIC 7911

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OBJECTIVES

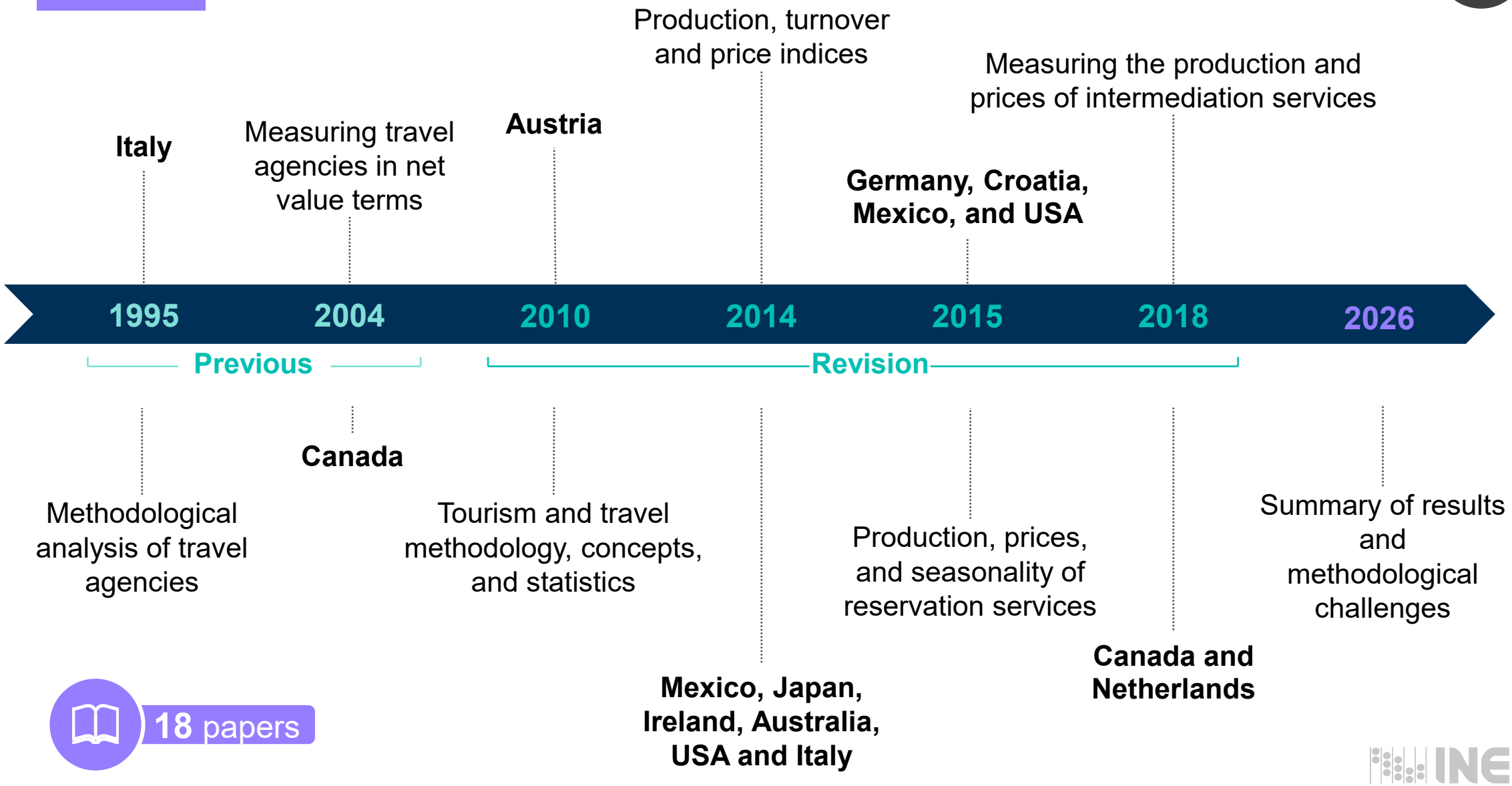
- To summarize the key papers presented at the Voorburg Group on travel agency activities, with an emphasis on their definition and classification, the measurement of output, and the development of price indices

- To identify the industry's main methodological advances and challenges.



BACKGROUND

11 countries

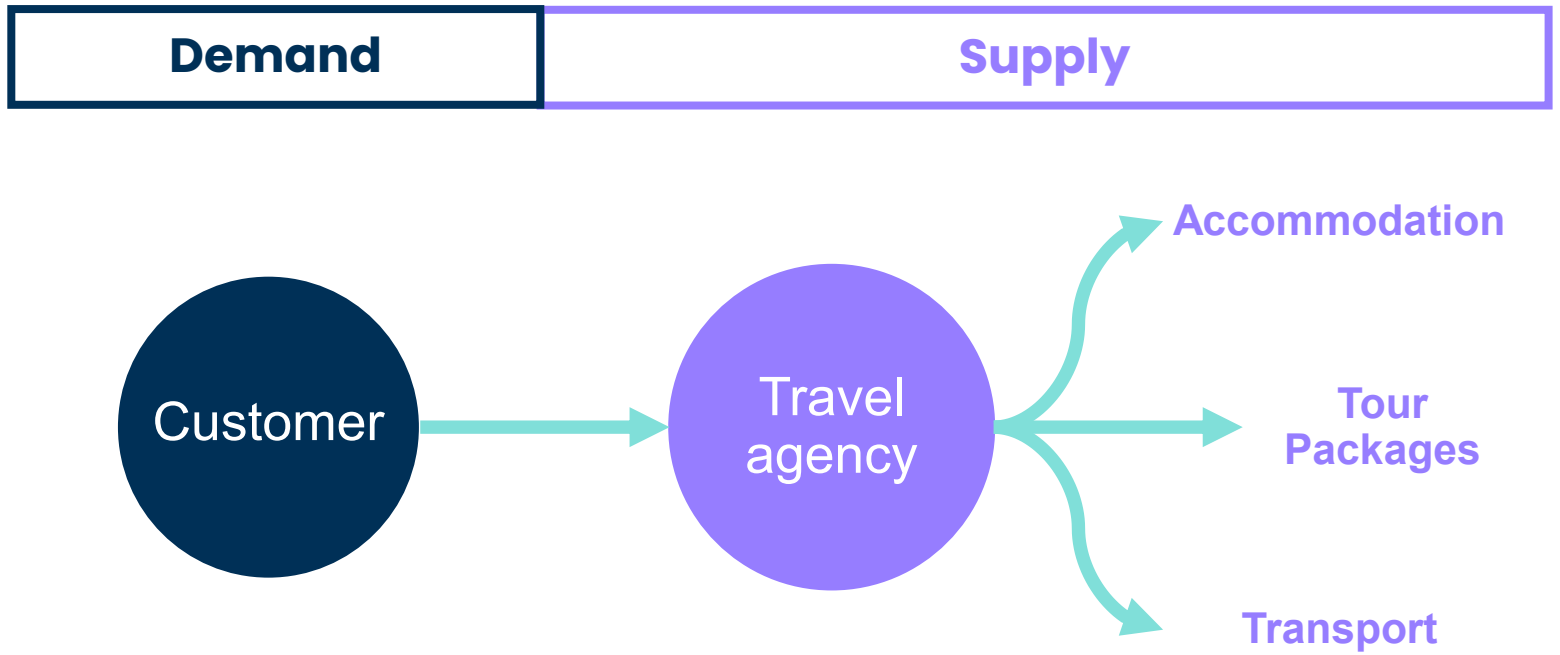


18 papers

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INDUSTRY DEFINITION



- Travel agencies intermediate tourism services but **do not directly** produce transport, accommodation, or package travel services.
- Travel agencies connect customers with **tourism service providers**.

EVOLUTION OF BUSINESS MODELS

The evolution of business models has made it increasingly difficult to distinguish between travel agencies, tour operators, and other reservation services.

Travel agencies	Tour operators	Reservation Services / Digital Platforms
Intermediate and market tourism services.	Organize and combine travel services.	Perform functions that may overlap with those of travel agencies and tour operators.

CLASSIFICATIONS

Economic activity classifications related to travel agencies identified in the **papers reviewed**.

Classification	Version	Country(ies) / Scope	Code / Class	Difference
ISIC	Rev. 4 (2008)	International – United Nations	7911 Travel Agency Activities	International reference classification distinguishing related activities.
NACE	Rev. 2 (2008)	European Union	79.11 Travel Agency Activities	Structure aligned with ISIC.
NAICS	2012	Canada, United States and Mexico	561510 Travel Agencies[1]	Specific classification for travel agencies.
JSIC	Rev. 13 (2013)	Japan	7911 Tour Operators / 7912 Travel Agencies	Separates travel agencies and tour operators.
ANZSIC	2006	Australia and New Zealand	7220 Travel Agency and Tour Arrangement Services	Groups travel agencies and tour arrangement services.

1/ Additional NAICS 2018 classes related to Travel Agencies:
561520 Tour and Package Arrangement Services for Travel Agencies (Tour Operators)
561590 Other Reservation Services

MARKET CONDITIONS

- **Size and Structure**
  A relatively small economic sector, with significant differences across countries.

- **Changing the Business**
  Lower traditional commissions and growth in direct sales and online travel agencies.

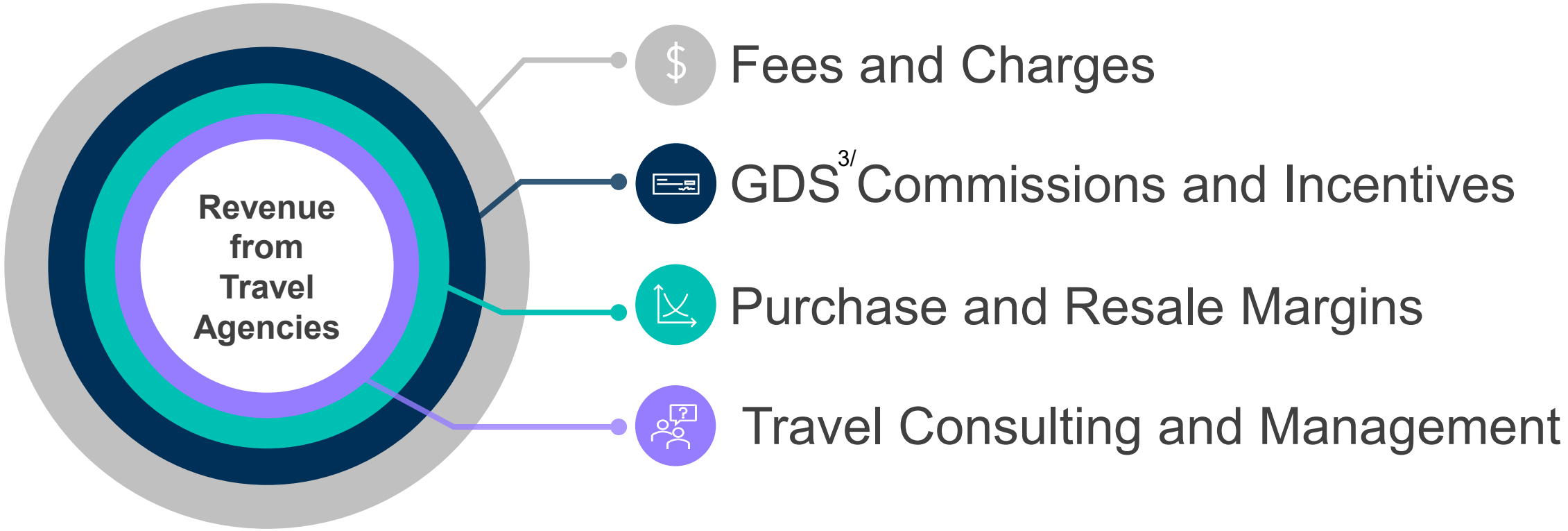
- **Competition and Seasonality**
  A highly competitive market, characterized by enterprises of different sizes and seasonal demand patterns.

≈ 9 % 2/

This was the approximate level of **traditional commissions on airline ticket** sales in Ireland in 1997. By 2007, these commissions had gradually declined and, in some cases, disappeared completely.

2/ Keating, Joseph. 2014. Turnover and Output Measurement for Travel Agency Activities.

SPECIFIC FEATURES OF THE **SERVICE**

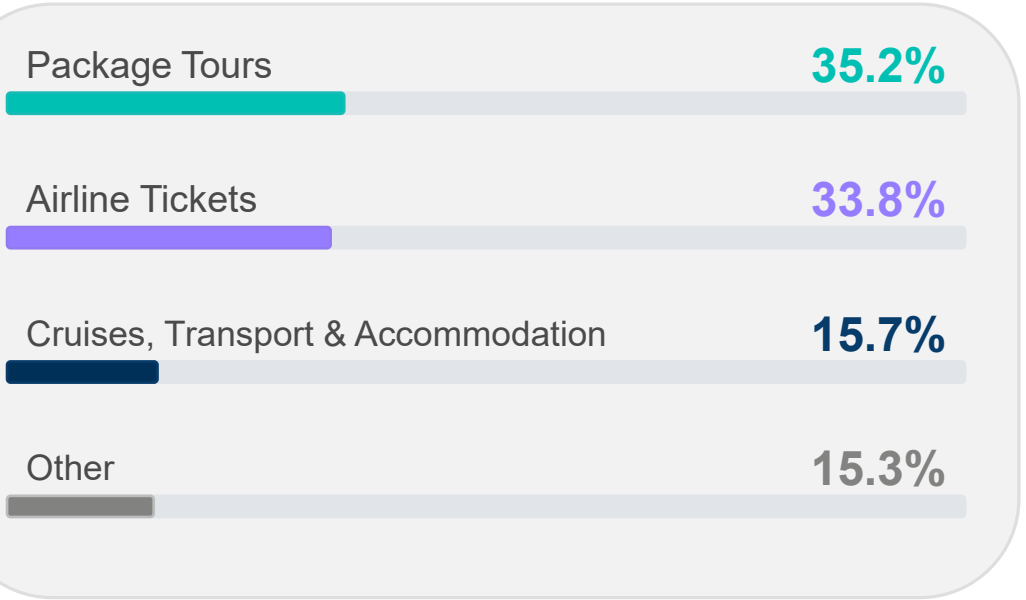


3/ SDG: Global Distribution Systems .

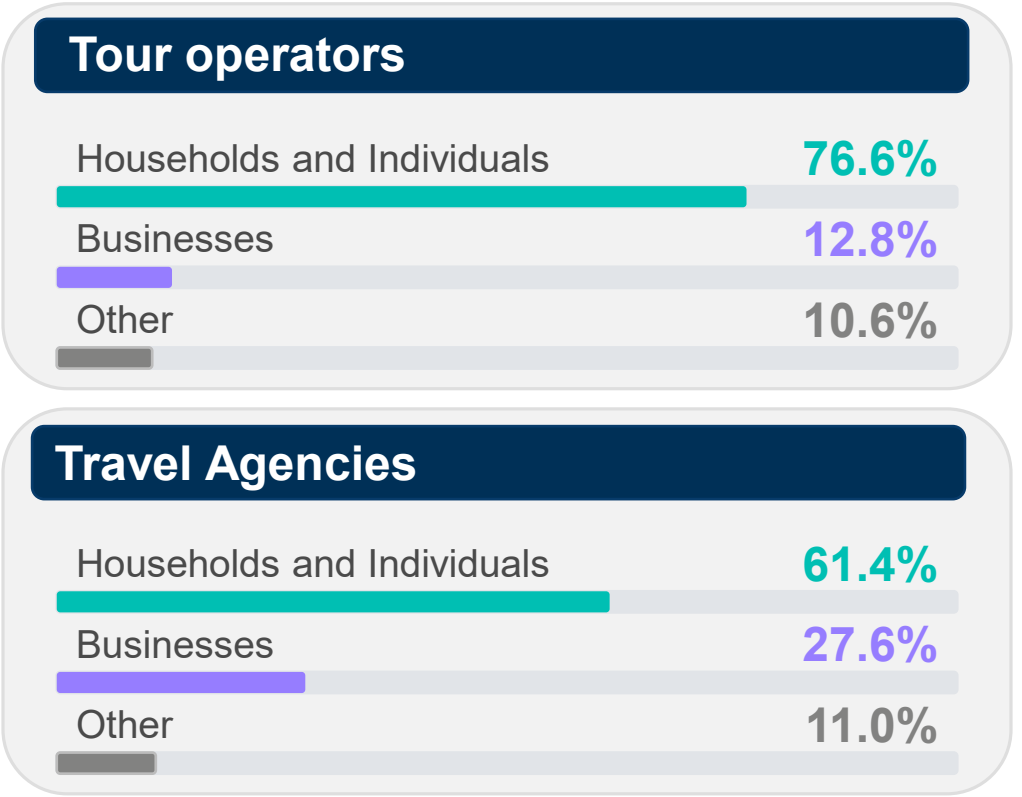
PRODUCT AND COSTUMER COMPOSITION

Example: Canada, 2018[4/]

Product Composition



Customer Type



4/ Statistics Canada. 2018. Output Measurement of Travel Arrangement and Reservation Services.

PRODUCTION MEASUREMENT FRAMEWORK

DATA SOURCES

- Economic Censuses
- Administrative Records
- Periodic Surveys

OBSERVATION UNIT

- Enterprise
- Establishment
- Both

PRODUCTION CONCEPT

- Gross Revenue
- Net Revenue

METHODS FOR MEASURING PRODUCTION

Integration of Information Sources

Combines censuses, surveys and administrative records.

Data Cleaning and Adjustment

Reviews data and adjusts gross values to net values when appropriate.

Product-Level Breakdown

Identifies key revenue-generating services to improve measurement.

PRODUCTION MEASUREMENT CHALLENGES

MIX OF GROSS AND NET REVENUE Differences in measurement criteria.	**RISK OF BIAS** Potential measurement biases.	**LACK OF PRODUCT DETAIL** Insufficient product-level detail.
MISLEADING COMPARISONS Limited comparability of results.	**DIVERSITY OF BUSINESS MODELS** Heterogeneity across business models.	**ACTIVITY AND TYPE OF CUSTOMER BOUNDARIES** Inconsistencies in classification.

SPPI MEASUREMENT

Objective of SPPI measurement = to measure the remuneration earned by travel agencies for providing intermediation services.

Which prices should be considered?

- Booking and service fees
- Commissions
- Change fees
- Purchase and resale margins
- Consulting and support fees

✗ Trip Price

Flight + Hotel + Package

✓ Price of intermediation

Fee + Commission + Margin

COMPARABILITY BETWEEN **PRODUCTION AND PRICES**

Production and SPPI should measure the same economic concept: intermediary remuneration.

High comparability: Revenue and SPPI measure intermediation remuneration.

Low comparability: Gross revenue is compared with net intermediation prices.

Best basis for comparison: Short-term indicators of business performance.

CURRENT STATUS OF MEASUREMENT AND SPPI METHODS

	MEASUREMENT CHALLENGE	APPLICABLE METHOD
1	Fixed-fee charges	Direct transaction pricing
2	Commission based on trip value	Percentage commission
3	Buy-resell model (OTA)	Average margin / unit value
4	Complex or seasonal services	Price imputation

CONCLUSIONS AND **FUTURE** CHALLENGES

MAIN CONCLUSIONS

1. Metrics should prioritize net revenue or margins, complemented by gross revenue
2. The absence of a specific PPI limits the accuracy of volume estimates.

INTERNATIONAL DEVELOPMENTS

1. Progress in the integration of data sources.
2. Distinction between gross and net measurement.
3. Measurement of digital intermediaries and SPPI.

Changes in the travel agencies call for updates to our statistical measurement framework.

TODAY'S SESSIONS

Maja Dozet **Croatia**	Croatia’s experience in the development of a SPPI for travel agencies, with a focus on measuring commissions, fees, margins, and the main methodological challenges involved.
Eveli Sokman **Estonia**	Methodology used to measure price changes in travel agencies, tour operators, and reservation services, including data sources and index development.
Beata Cebula **Poland**	SPPI methodology for travel agencies (ISIC 7911), focusing on price collection methods, index compilation, and the main measurement challenges.

THANK YOU!

CONOCIENDO MÉXICO

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