

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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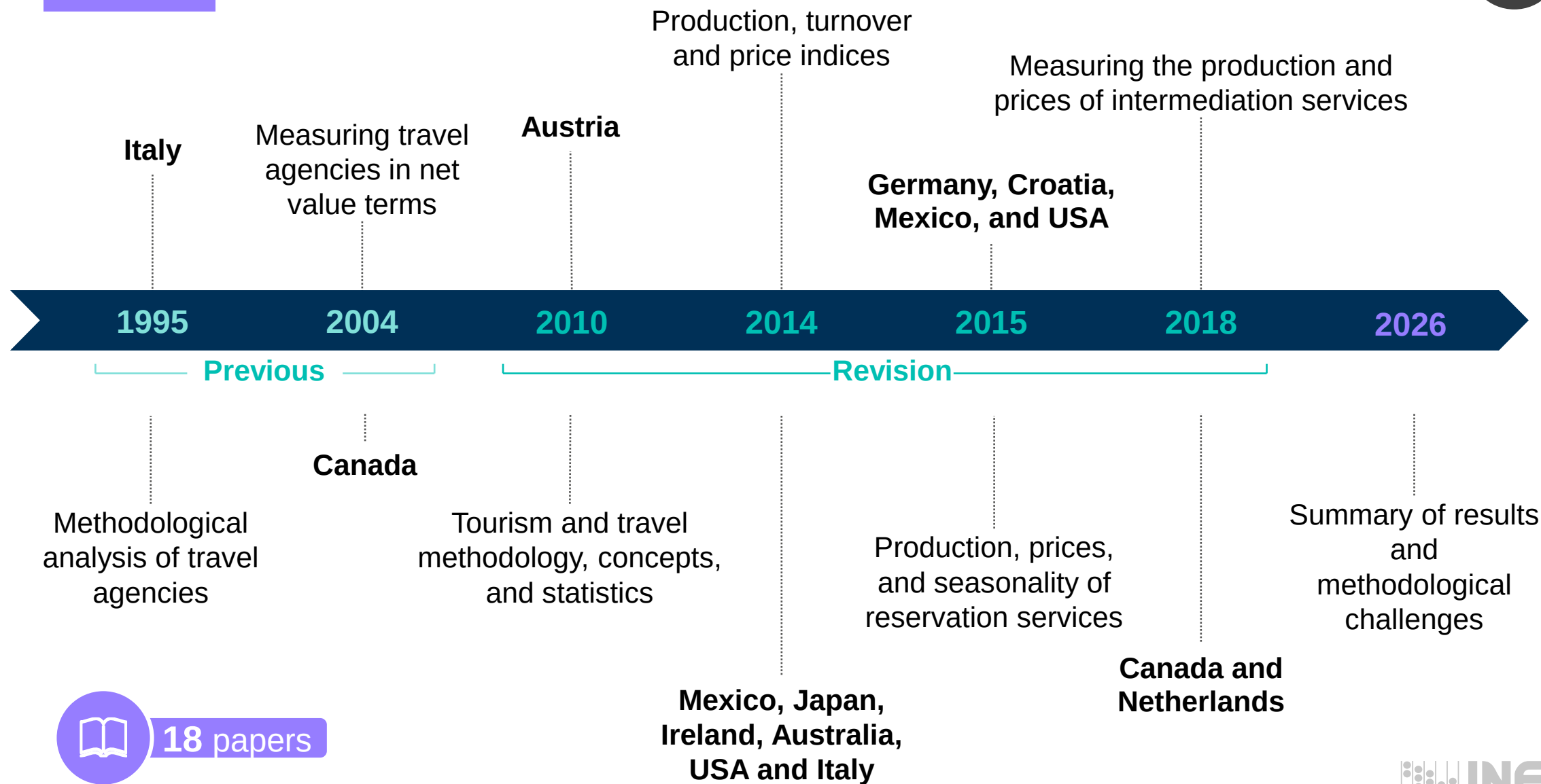
DOCUMENT OBJECTIVE

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, and to identify the industry's main methodological advances and challenges.

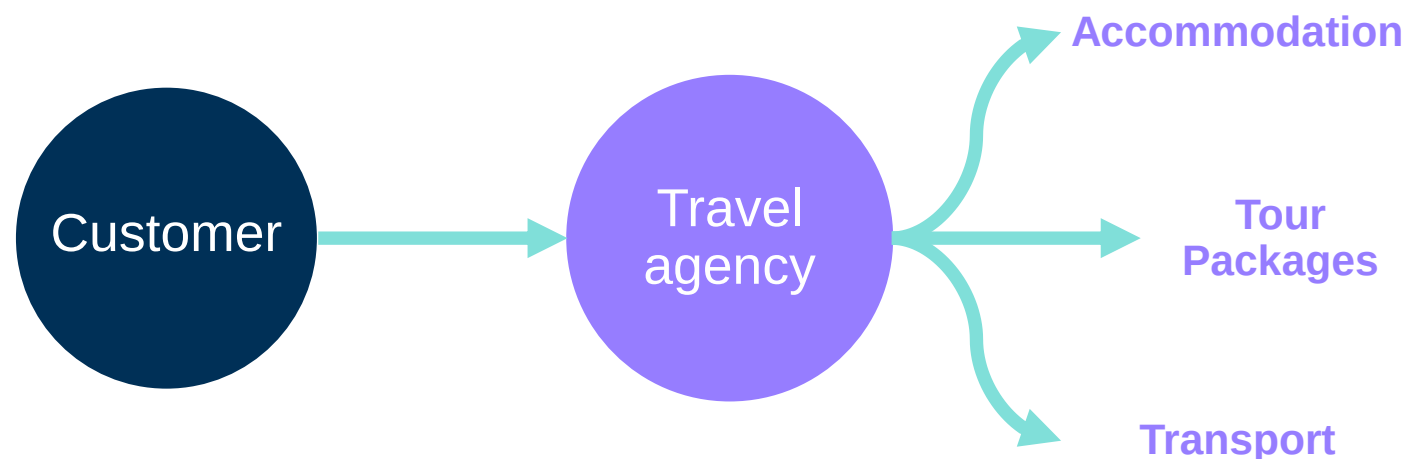


BACKGROUND

11 countries



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**.

ACTIVITY EVOLUTION

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

Travel agencies

Intermediate and market tourism services.



Tour operators

Organize and combine travel services.



Reservation Services / Digital Platforms

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**

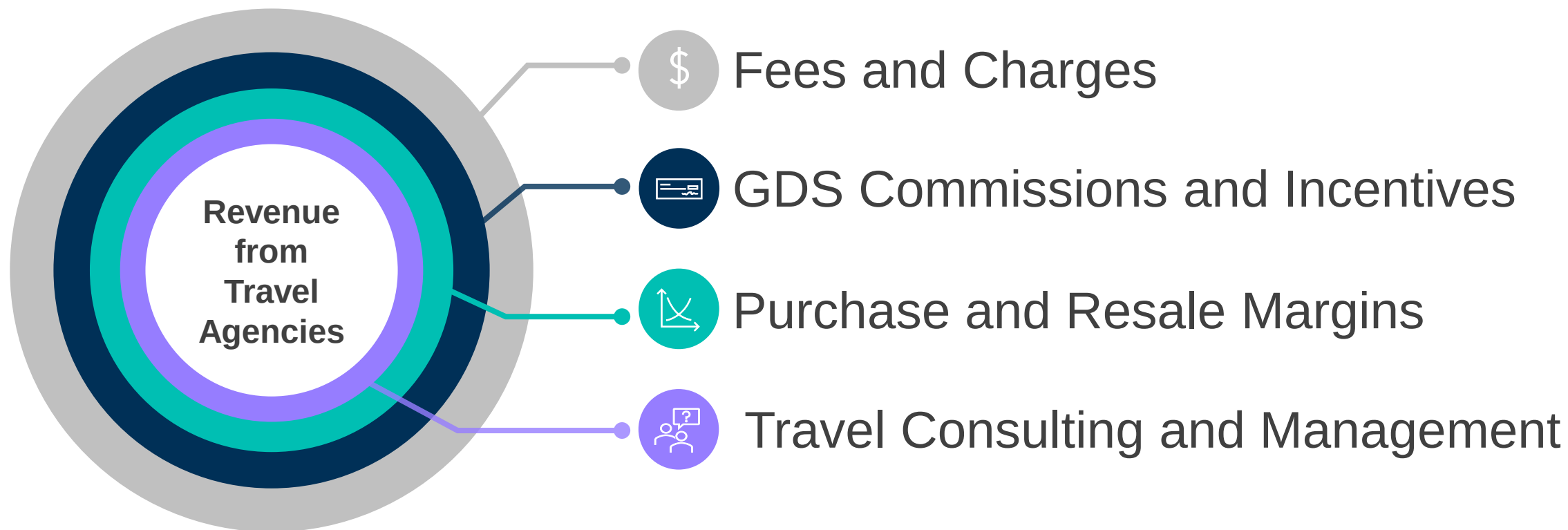
A highly competitive market, characterized by enterprises of different sizes and seasonal demand patterns.

≈ 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



PRODUCT AND COSTUMER COMPOSITION

Example: Canada, 2018^{3/}

Product Composition

Customer Type

Package Tours 35.2%

Airline Tickets 33.8%

Cruises, Transport & Accommodation 15.7%

Other 15.3%

Tour operators

Households and Individuals 76.6%

Businesses 12.8%

Other 10.6%

Travel Agencies

Households and Individuals 61.4%

Businesses 27.6%

Other 11.0%

PRODUCTION MEASUREMENT FRAMEWORK



METHODS FOR MEASURING PRODUCTION



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 CUSTOMER BOUNDARIES

Inconsistencies in classification.

SPPI MEASUREMENT

Objective of SPPI measurement = 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!



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