



ORGANISATION MONDIALE DU TOURISME  
WORLD TOURISM ORGANIZATION  
ORGANIZACIÓN MUNDIAL DEL TURISMO  
ВСЕМИРНАЯ ТУРИСТСКАЯ ОРГАНИЗАЦИЯ  
منظمة السياحة العالمية

**COMMITTEE ON STATISTICS  
AND MACROECONOMIC ANALYSIS OF TOURISM**

**Seventh meeting**

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27-28 March 2006

**Document for issue nº 2**

**“Review of UNWTO Statistical Programme for the period 2006/2007 and  
new initiatives”**

1. The UNWTO draws up its budgets and programmes of work on a biannual basis, and needs an average period of approximately one year for their preparation and approval. In the specific case of the current Programme of Work for the period 2006-2007, insofar as it applies to the Statistics Department, there is the paradoxical situation that having been just begun, the commitments acquired by the UNWTO throughout 2005 represent a substantial addition to the initiatives that appear in the Programme<sup>1</sup>.
2. There are various reasons that explain this discrepancy between "official" commitments and "de facto" commitments: greater demand for technical assistance on the part of countries, commitments taken on as a result of the Iguazu Conference, express request on the part of the United Nations Statistics Division to reinforce the development of National Systems of Tourism Statistics (STS) and international comparability of the principal indicators, etc. All of these stem from three different types of factors:
  - the central role in the field of statistics that has been entrusted to the UNWTO following its conversion into a specialized agency of the United Nations (in fact, these responsibilities are unique among those of the Programme of Work that are of a normative nature with regard to participation in the UN System and, consequently, they refer to both member and non-member countries of the UNWTO).
  - the interest in the development of the TSA in a growing number of countries<sup>2</sup> and the demand for greater technical assistance;
  - the proposals submitted at the Committee on Statistics, whose new terms of reference<sup>3</sup> give it a more prominent role vis-à-vis

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<sup>1</sup> See Annex 1: Programme of work 2006-2007.

<sup>2</sup> See Annex 2: TSA development around the world.

<sup>3</sup> See Annex 3: New terms of reference.

the Secretariat, both with regard to the development of the STS and of the TSA, and TSA-related analysis and research.

3. Following the last meeting of the Committee (21-22 March 2005), the Statistics Department sent a memo to the Secretary-general expressing its concern regarding the fact that the Department had been encountering increasing difficulties in carrying out a set of tasks arising from the three factors mentioned above. More specifically, it was pointed out that in addition to all of the activities carried out (technical assistance, participation in the UN System, launch of the TSA project, design of general guidelines for the adaptation of the TSA to sub-national levels, etc.), another new commitment not foreseen in the 2004-2005 programme of work, currently in force, has to be taken into account: carrying out the partial revision of the existing Recommendations on Tourism Statistics (those of 1993 and 2000) in the context of the general revision process affecting the Balance of Payments, SNA93 and household/immigration statistics.
4. Indeed, under the umbrella of the recently created *Inter-Agency Coordination Group on Tourism Statistics* (of which the UNWTO serves as the secretariat, and whose members are the IMF, Eurostat, the OECD, the ILO, The UN Statistics Division and the WTO), the UNWTO has agreed to make all the necessary efforts to try to eliminate the principal conceptual gaps that currently exist among the revised SNA93, the new BPM6, the 1993 Recommendations and the TSA revision itself. A similar commitment has been undertaken by the IMF and the UN Statistics Division, and the IACG on TS has accepted the decision that the UN Statistical Commission at its March 2008 session is to receive for joint approval, in addition to the new revised texts of the Balance of Payments and SNA93, those of the two international standards on tourism statistics (the Recommendations of 1993 and of 2000 relative to the TSA).
5. Starting in May 2005, and via very different paths, the Statistics Department has once again been required to be more ambitious in three specific areas of its programme of work:
  - strengthen the development of national Systems of Tourism Statistics and the international comparability of basic tourism data<sup>4</sup>;
  - cooperation in the development of statistical sustainability indicator in the case of tourism;
  - provide additional guidance on the TSA development.
6. Regarding the second of these areas, the previous session of the Committee on Statistics already explicitly mentioned this request, which UN ECLAC has also endorsed: moreover, in the new Agreement signed between UN ECLAC and the UNWTO on the occasion of the Iguazu Conference, one of the explicitly mentioned commitments is advancing

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<sup>4</sup>This item forms part of the programme of this very meeting of the Committee on Statistics (see document submitted regarding this).

the design of an operational framework for the measurement of sustainable tourism.

7. As for providing additional guidance on the TSA development, sections 4 and 10 of the basic goals identified by the UNWTO at the Iguazu Conference <sup>5</sup>, are very explicit in this regard:

- “Based on the experience of countries that have already gone through the process of establishing a TSA, three circumstances are needed to ensure the successful implementation of a TSA: the existence of a stable inter-institutional network or platform to support cooperation, a certain degree of flexibility regarding the implementation of the international standard approved by the UN Statistical Commission and finally, gradualism in its execution (meaning development through a series of different phases).

There is no unique way of organizing the elaboration process and each country should establish its own path, taking into consideration the peculiarities of tourism in the country (in terms of the present and the foreseeable future), its statistical infrastructure and development and potential resources (both human and financial).

UNWTO should design general guidelines for TSA development with the aim of helping countries define and develop their own national projects. To this end, it is essential that the UNWTO identify good practices and to draw up a basic set of typical national situations in order to be able to develop a prototype outline of priorities and sequential procedures for each situation.

- “The success of the TSA Project as it was designed and promoted by the UNWTO and the significant development of national Systems of Tourism Statistics in many countries during the recent years would not have been achieved without the political determination of many NTAs and CSOs to make progress in this area. It is absolutely necessary to strengthen this power and it is urgent to define an ambitious technical assistance program which would enhance the effectiveness of our workshops, pay special attention to the training of staff participating in the process, open new avenues of co-operation with the academic and economic research fields and make it possible to achieve the main targets for WTO Agenda 2010<sup>6</sup> concerning statistical information.

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<sup>5</sup> See Annex 4 “The Iguazu conference: UNWTO findings and evaluation”.

<sup>6</sup> The document “WTO Agenda 2010”, submitted to WTO’s General Assembly (Dakar, Senegal, 28 November – 2 December 2005) identifies the following expected results and performance indicators regarding statistics:

- two-thirds of members countries using United Nations tourism statistics standards;
- two-thirds of the countries of the world regularly providing statistical data for the *Compendium of Tourism Statistics*;
- one-third of member countries having a TSA compliant with United Nations standards;
- one-third of member countries publishing significant data on employment in tourism, within the framework of WTO/ILO cooperation;
- one-third of member countries engaged in improving knowledge of the “travel” item of the balance of payments, within the framework of WTO/IMF cooperation.

With the experience gained in the 22 workshops held between 2000 and 2004, the UNWTO is in a position to complete the technical material that was generated in the last years. A key initiative here is the design of a *Manual for the development of a TSA*, to be updated regularly and addressed both to compilers and users (especially to those active in the academic and research fields).

8. Based on the above, the Secretariat has undertaken to develop a significant number of initiatives in addition to those that appear in the Programme of Work 2006-2007: the great majority of these initiatives are to be presented over the course of 2008. For their execution, the Secretariat is aware of the need to increase the funds allocated in the current 2006-2007 Budget and therefore, complementary ways of financing have to be explored.
9. These initiatives have to do with the following objectives:
  - Strengthening national STSs:
    - design of new technical assistance projects for countries (seeking closer participation of NTAs, CBs, and NSOs);
    - design of multi-year technical assistance projects for selected sets of countries;
    - design of a statistical audit for NTAs (which can be carried out by the NTA's own technicians and officials);
    - update of general guidelines already published regarding "Tourism as an international traded service" and ILO doc.
  - Provide guidance on TSA development :
    - preparation of the Manual for the development of the TSA (whose design and structure cater to a different type of user: those who have responsibilities for the elaboration of the TSA, university students and academics, and also associations and large enterprises in the tourism industries)
  - Design of general guidelines for extensions of TSA conceptual framework:
    - update of the document "Adapting the National Tourism Satellite Account (TSA) project to sub-national levels".
  - Improve the efficiency of technical assistance initiatives:
    - design an online system with the aim of monitoring and evaluating the different technical assistance initiatives carried out.
  - Looking for sustainability of TSA efforts:
    - design software for the automation of the tables prepared in the initial experimental TSA exercise.

- Define areas of participation within the UN System:
  - compilation guidance for the "travel" item in the new Balance of Payments Manual: this is a commitment that was undertaken with the IMF and the *Task Force on Statistics of International Trade in Services* whose execution is pending only the completion of the revision process of the Balance of Payments Manual, SNA93 and tourism statistics international standards.
- Extend TSA related analysis and research :
  - compilation guidance on the measurement of specific areas of the Meetings and Time-share industries;
  - expand the scope of statistical exploitation of administrative records to include credit card data;
  - participate in a technical cooperation network to advance the design of an operational framework for the statistical measurement of sustainable tourism;
  - general guidelines for business tendency surveys in the case of selected tourism industries;
  - design of a monitoring system for analysis based on a set of tourism related macroeconomic indicators.

Questions / points for discussion by the Committee:

- Are there any initiatives not mentioned that should be given greater priority than those discussed here?
- How can the Committee cooperate with the UNWTO for the purpose of identifying examples of good practices in relation with these initiatives?

## **Annex 1**

### **Programme of work 2006-2007**

#### **STATISTICS AND ECONOMIC MEASUREMENT OF TOURISM**

##### **INTRODUCTION**

1. UNWTO collects, analyzes, publishes, standardizes and improves tourism statistics, and promotes the integration of these statistics within the sphere of the United Nations system.
2. UNWTO's statistical programme focuses on:
  1. Setting and promotion of tourism statistics international standards;
  2. Participation in the revision of other related international standards;
  3. Collecting and publishing statistics;
  4. Securing international comparability of tourism statistics;
  5. Design of standardized methodologies for statistical data collection;
  6. Other complementary projects for improving tourism macroeconomic analysis.
3. Priorities for UNWTO general programme of work for 2006-2007 are the first four above-listed initiatives.

##### **MISSION**

To support the analysis of tourism consumption and the design and implementation of policies developed by different stakeholders in the tourism industry and to ensure that this analysis is based on a sufficient number of credible data associated with tourism activities of visitors and with the industries that produce the goods and services required by them.

##### **OUTCOMES**

1. Setting and promotion of tourism statistics international standards.
2. Participation in the revision of other related international standards.
3. Collecting and publishing statistics.
4. Securing international comparability of tourism statistics.

## Outcome 1: Setting and promotion of tourism statistics international standards

<u>Key result areas</u>	<u>Activities</u>	<u>Outputs</u>	<u>Proposed performance measurment indicators</u>
1.1 Promoting worldwide implementation of international standards in tourism statistics	<p>Provide technical assistance to Member States for the development of tourism statistics:</p> <ul style="list-style-type: none"> <li>- Promoting the improvement of measurement tools for international arrivals/ departures of visitors to/from national borders</li> <li>- Promoting the development of border surveys for measuring tourism expenditure of international visitors</li> <li>- Development of new indicators for measuring tourism activity impacts</li> <li>- Activities on technical assistance through UN Regional Commissions</li> </ul>	<p>Report on UNWTO's "Research on international experiences related to the measurement of flows of visitors at national borders"</p> <p>To develop an independent information source on this basic variable for the analysis and design of tourism policies</p> <p>Enlarge the content of indicators provided at present by Member and non-Member states</p>	<ul style="list-style-type: none"> <li>- Initiatives carried out by countries related with each of these activities</li> <li>- Number of joint initiatives with other Organizations and Agencies of the UN system</li> </ul>
	<p>Promote the development of the Tourism Satellite Account (TSA):</p> <ul style="list-style-type: none"> <li>- Sub-regional workshops on tourism statistics and</li> </ul>	<p>Main UNWTO's project for the development of national STS</p>	<ul style="list-style-type: none"> <li>- Number of assistants to the workshops</li> <li>- Evaluations received to the content and development of the</li> </ul>

	<p>Tourism Satellite Account (TSA)</p> <ul style="list-style-type: none"> <li>- Identifying steps towards the implementation of the TSA (technical documents)</li> <li>- Activities on the development of the Work Programme through IIOO of the UN system, as well as with the ILO, OECD and Eurostat.</li> </ul>	<p>and TSA</p> <p>Enhance the technical capabilities of the professionals involved in different Organizations (NTA, CSO, CB and others) in those areas of statistical work</p> <p>Provide basic inputs for technical assistance initiatives at a national level</p> <p>Provide the necessary support for Sub-regional Workshops on Tourism Statistics and the development of a TSA</p>	workshops
1.2 Adapting the TSA conceptual framework: the regional perspective	Preparation of guidelines for extensions of the TSA methodological framework: the regional perspective	Adapt the conceptual framework of TSA to other territorial references (at the supra and infranational levels)	
1.3 Keeping relevant the present conceptual framework of tourism statistics	Follow-up of work programme decided by the Inter-agency coordination group on tourism statistics	Development of a UN agreed programme on tourism statistics	



Outcome 2: Participation in the revision of other related international standards				
2.2	Compilation guidance in travel for the manual on statistics of international trade in services (MSITS)	Activities relating to cooperation with International and National Organizations through the UN Task Force on Statistics of International Trade in Services	<p>Coordination with the other Organizations and Agencies of the UN System</p> <p>Cooperation with certain international organizations (UNSD, ILO, UNCTAD, OECD and Eurostat) in conducting joint projects</p>	
2.2	Revision of the System of National Accounts (SNA93) and Balance of Payments Manual (BPM5)	Activities relating to cooperation including UNWTO Committee on Statistics and Macroeconomic Analysis of Tourism, as well as the Inter-Agency coordination group on tourism statistics	Support the work of the Committee in connection with mutual exchange, methodological advice and definition of broad action guidelines for UNWTO statistical activities	

Outcome 3: Collecting and publishing statistics			
3.1 Statistical reports	<ul style="list-style-type: none"> <li>-Yearbook of Tourism Statistics</li> <li>-Compendium of Tourism Statistics</li> </ul>	Update of the contents and presentation of the Compendium	<p>Quality, timeliness and third party endorsement of data:</p> <ul style="list-style-type: none"> <li>-Collection of the information: average period of time necessary to complete the different questionnaires sent for the preparation of the Yearbook and the Compendium of Tourism Statistics</li> <li>-Processing of the information: checking of the information received and request of appropriate explanations, if necessary</li> <li>-Dissemination of the information: improvements included in the different kinds of means of support used</li> </ul> <p>Supporting activities:</p> <ul style="list-style-type: none"> <li>-Management rationalisation inside the Department: number of initiatives introduced to increase productivity</li> </ul>
3.2 Metadata Project	To promote the preparation of metadata associated to those statistics included in the Yearbook and Compendium	Methodological guidelines	<p>Documentation related to the information received:</p> <ul style="list-style-type: none"> <li>- Documentation of the main series (metadata) for a selected number of countries</li> </ul>

Outcome 4: Securing international comparability of tourism statistics			
4.1 Create horizontal networks for statistical development	Enzo Paci Papers on measuring the economic significance of tourism	Disseminate UNWTO's projects already in place and potential initiatives in the field of tourism statistics and TSA	
4.2 Tourism macroeconomic indicators	Enlarging the scope of international comparability by identifying tourism-related economic indicators in order to generate an additional set of quantitative data	Methodological guidelines	Number of countries that provide UNWTO with these indicators

## **Annex 2**

### TSA development around the world

*Updated 1 August 2005*

The list of countries corresponds to those that can be included in one of the following categories:

- Countries with an established Tourism Satellite Account;
- Countries expecting that the implementation of their TSA will be highly developed during the period 2004/2005;
- Countries that have recently developed relevant macroeconomic studies on the economic importance of tourism.

You should be aware that the following list does not intend to be exhaustive and therefore, could be enlarged to more than the 66 countries listed below.

Argentina  
Aruba  
Australia  
Austria  
Bahamas  
Barbados  
Belize  
Brazil  
Cameroon  
Canada  
Chile  
Colombia  
Costa Rica  
Cuba  
Czech Republic  
Denmark  
Dominican Republic  
Ecuador  
Egypt  
Fiji  
Finland  
France  
Germany  
Ghana  
Hong Kong, China  
Hungary  
India

Indonesia  
Ireland  
Israel  
Italy  
Jamaica  
Korea, Republic of  
Malaysia  
Maldives  
Malta  
Martinique  
Mexico  
Morocco  
Namibia  
Netherlands  
New Zealand  
Norway  
Panama  
Peru  
Philippines  
Poland  
Portugal  
Saint Lucia  
Saudi Arabia  
Seychelles  
Senegal  
Singapore  
Slovenia  
South Africa  
Spain  
Sri Lanka  
Sweden  
Switzerland  
Taiwan  
Thailand  
Trinidad / Tobago  
United Kingdom  
United Republic of Tanzania  
United States  
Zambia

## Annex 3

### New terms of reference

#### *Mission*

1. The Committee is a subsidiary advisory body of the Executive Council. As such, it contributes to the fulfilment of Article 13, paragraph 3 of the Agreement signed between the United Nations and UNWTO, which states:

*“The United Nations recognizes UNWTO as the appropriate organization to collect, to analyze, to publish, to standardize and to improve the statistics of tourism, and to promote the integration of these statistics within the sphere of the United Nations system”.*

Consequently, the Executive Council requires the collaboration of the Committee in the following areas:

- proposing initiatives related to the design and implementation of international tourism statistics standards;
- promoting international comparability of tourism statistics by proposing initiatives relative to the collection, homogeneity, processing and dissemination of data;
- supporting efforts to integrate such data into the frameworks of the system of national tourism statistics and the Tourism Satellite Account;
- helping member countries in their initiatives to improve their respective national systems of tourism statistics and in the development of the TSA;
- liaising with other international bodies with delegated responsibilities for leadership and coordination of related international statistics and their standards within sphere of the UN system.

## *Composition*

2. For the period 2004-2007, the composition of the Committee is as follows:

<u>Chairman</u>	Canada
<u>Vice-Chairmen</u>	France and Spain
<u>Members</u>	Australia Canada* Cyprus Ecuador Egypt France* India Israel Mexico Mozambique Philippines Spain* Tunisia
<u>Representative of the Associate Members</u>	
Aruba	
<u>Representatives of the Affiliate Members</u>	
Association of Greek Tourist Enterprises Centro Internazionale di Studi sull'Economia Turistica (CISSET) Egyptian Tourist Federation George Washington University International Congress & Convention Association (ICCA)	
<u>Observers (Non-member States)</u>	
Singapore Sweden United States of America	
<u>Invited institutions and organizations</u>	
International Labour Organization (ILO) Organisation for Economic Co-operation and Development (OECD) Statistical Office of the European Communities (Eurostat) Ufficio Italiano dei Cambi (UIC) United Nations Statistics Division (UNSD) World Travel & Tourism Council (WTTC)	
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* Ex officio Member	

The Secretariat of the Committee is the Department of Statistics and Economic Measurement of Tourism.

#### *Invited observers*

3. For each of the Committee's meetings, the Secretariat may extend invitations to non-member countries, national and international organizations and institutions in order to enlarge the perspective of statistics producers, users and stakeholders and facilitate UNWTO's international leadership and coordination activities, according to the content of the agenda.
4. Invited observers may address the Committee only with the permission of its Chairman.

#### *Venues of the meetings*

5. The sessions of the Committee shall take place annually and shall be held at the UNWTO Headquarters, save on exceptional occasions in which the Secretariat decides otherwise.

#### *Creation of working groups*

6. The Committee will determine whether it is relevant to create temporary working groups of these appropriate parties that would strive to solve, clarify or provide insights, advice and liaison assistance on any particular issue of interest related with the UNWTO's statistics programme and its international leadership responsibilities relating to tourism statistics.

#### *Repercussions on the Programme of Work of the Statistics Department*

7. If requested by its members, the Secretariat of the Committee can accept commitments that will partially modify the biannual Programme of Work of the Statistics Department.
8. In no case shall these potential modification/s justify new financial or human resources for the Secretariat.

#### *Communication between meetings*

9. The Secretariat of the Committee is responsible for encouraging communication among its members between sessions. In order to enhance its capacity for action, the Secretariat will consider using electronic or other means in order to make it possible for it to continue to work effectively between meetings.





**Conference on “*The Tourism Satellite Account (TSA):  
Understanding Tourism and Designing Strategies*”**

**Iguazu (Argentina / Brazil / Paraguay), 3-6 October 2005**

**THE IGUAZU CONFERENCE:  
UNWTO FINDINGS AND EVALUATION**

## INTRODUCTION

The Conference, whose eight sessions and two workshops were attended by more than 430 delegates and 70 speakers from more than 80 countries, was an opportunity to assess the actual level of development, analysis and application of the Tourism Satellite Account (TSA) worldwide.

The UNWTO believes that, with this level of participation, the Conference served as a valuable forum of exchange of experiences and helped to delineate a set of basic goals that should guide its programme of work in the coming years.

A significant and growing number of countries have included the development of a TSA in their agendas, with the understanding that tourism requires rigorous measurement of its activity in order to boost the credibility of tourism as a factor of economic development as is the case in other sectors of economic activity.

In many countries, developing countries in particular, tourism's achievements contribute to macroeconomic stability and the performance of current accounts and the balance of payments.

A survey whose results constituted an important input in the discussion identified 67 countries as having an established TSA project, having recently developed relevant TSA experimental exercises, or expecting to begin constructing a TSA during the period 2005/2006.

The experimental exercises, for their part, suggest that in most countries there is a need to improve basic tourism statistics, which in turn increasingly stimulates demand for cooperation and the specialized technical support offered by the WTO.

## LOOKING FORWARD: BASIC GOALS

### 1. Ensuring the legitimacy and credibility of a TSA exercise

Because it is a powerful supporting instrument for the formulation of policies, a national TSA exercise has to meet the following conditions:

- that the data used in its compilation be sufficiently statistically robust;
- that its design be legitimized (a condition that necessarily requires the direction or at least the active participation of the Department of National Accounts – usually located within the Central Statistical Office (CSO)-- to the project); and
- that its results be credible (a condition provided basically by the National Tourism Administration (NTA) and basic tourism stakeholders).

Particularly in the case of an initial TSA experimental exercise, special care should be taken in the management of expectations regarding the results provided by TSA among politicians and persons in charge of the tourism sector.

Fostering false expectations—for instance by suggesting overestimated evaluations of the share of tourism in total GDP--can put NTAs in a difficult situation and debilitate the future credibility of the data it might provide. One way of avoiding this risk—prior to formally initiating a TSA project--would be to evaluate the availability of information and to highlight the importance of constant statistical improvement. Another would be to develop, in parallel with the project, a set of macroeconomic indicators based on the information used in the Balance of Payments, national accounts and tourism statistics themselves, as an initial approach to the quantification of tourism activity within the national economic activity as a whole.

## 2. Protecting the TSA brand

There is increasing misuse of the term TSA, at both the national and sub-national levels. As a consequence, there is an increasing need for the TSA brand to be protected. As there is also a consensus that the UNWTO should begin to disseminate TSA data, it is necessary to find the most practical way to request from countries (basically NTAs and CSOs) an assessment of the conformance of their TSA methods to the recommended methodological framework for TSAs (in effect, a brand validation approach).

It is understood that such an initiative is consistent not only with the specific function of the UNWTO within the United Nations System, as mentioned in Article 13 of the Agreement between the United Nations and the World Tourism Organization, but also with the responsibility derived from the application of the Principles Governing International Statistical Activities in the field of tourism statistics<sup>1</sup>.

The UNWTO is deeply committed to the promotion of the macroeconomic analysis of tourism, as well as to the measurement of the indirect and induced effects of tourism, its effect on the environment, etc., above and beyond the immediate possibilities that the TSA itself can afford (description of the direct effects of visitor expenditure on all the industries producing the goods and services that visitors consume).

## 3. Guaranteeing its continuity

The UNWTO has been insisting on the importance of promoting the establishment of an inter-institutional network or platform that includes, at the very least the NTA, the CSO, and the Central Bank (CB). Furthermore, the presence of other governmental and private tourism organizations (such as immigration authorities, representatives of the private sector, universities and economic research centres) could be important in order to ensure the representation of different professional spheres (accountants responsible for the national accounts, statisticians, economists, etc.)

The NTAs should play an especially active role in this process and contribute to ensuring the stability of the basic core of technical officials with the appropriate training.

Distancing the TSA from this inter-institutional network and converting it into a self-contained operation that might then be turned over to a consultancy firm is not the proper way to ensure continuous improvement and expansion of national Systems of Tourism Statistics (STS). Instead, the TSA should be viewed as a useful instrument for the systematic reconciliation of economic data on tourism, both internally, and with other systems of macroeconomic data.

## 4. The TSA as a work in progress

Based on the experience of countries that have already gone through the process of establishing a TSA, three circumstances are needed to ensure the successful implementation of a TSA: the existence of a stable inter-institutional network or platform to support cooperation, a certain degree of flexibility regarding the implementation of the international standard approved by the UN Statistical Commission and finally, gradualism in its execution (meaning development through a series of different phases).

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<sup>1</sup> These principles will be presented to the UN Statistical Commission for their official approval at its forthcoming March 2006 session.

There is no unique way of organizing the elaboration process and each country should establish its own path, taking into consideration the peculiarities of tourism in the country (in terms of the present and the foreseeable future), its statistical infrastructure and development and potential resources (both human and financial).

UNWTO should design general guidelines for TSA development with the aim of helping countries define and develop their own national projects. To this end, it is essential that the UNWTO identify good practices and to draw up a basic set of typical national situations in order to be able to develop a prototype outline of priorities and sequential procedures for each situation.

## **5. Promoting a strategic alliance between NTAs and CSOs**

Setting up a TSA is a great opportunity to develop a strategic alliance at the national level between the CSO and the NTA, which could generate important mutual benefits.

On the one hand, in the majority of countries, the CSOs are in charge of compiling the National Accounts, of which the TSA is a satellite. This circumstance, and the obvious fact that the development of the TSA should be linked to the development of the national system of statistics, would by themselves explain the central role that belongs to the CSOs. Furthermore, the preparation of the TSA requires the use of techniques such as sampling, the design of general surveys, and specific applications to households and productive units in order to develop tourism statistics from the perspectives of both demand and supply.

On the other hand, the NTA provides the CSO with greater insight and focus regarding the economic impact of the movement of persons for tourism purposes over the borders and within the economic territory.

This strategic alliance should lead to the development and continuity of the official statistics necessary for both the TSA project and the design of strategies on the part of the NTA.

In order to develop credible strategies, the NTAs need rigorous measurements of the expenditure by visitors (either associated with international arrivals or tourism movements of residents within the economic territory) as well as of the activities of industries that cater to them (value of output, value added, employment, prices, etc.)

## **6. Bringing economic analysis to the forefront**

The TSA is a particularly powerful instrument to face different types of economic analysis of tourism: it allows tourism to be described in much the same way as other sectors of economic activity, to identify tourism as an internationally traded service, as well as a better implementation and development of models to analyze economic aspects of tourism and trends. This analysis is essential in order to evaluate the different aspects associated with tourism and to propose a selected set of consistent actions to be undertaken.

Extensions to the present TSA conceptual framework developed by NTAs reflect their interest in having a wide variety of instruments of observation and analysis. Nevertheless, caution should be taken not to overstate and distort the meaning of the results that can be provided by the system.

In order to inform decision-makers about the capability and versatility of a TSA, it is necessary to increase its understanding among politicians and businesspersons through the use of a common, though conceptually correct, language.

## **7. Fostering its use for the formulation of policies and strategies**

National examples illustrating the different kinds of linkages between the TSA and tourism policy are plentiful: by establishing an official measure of tourism within the national economy, by including the direct benefits for the resident population in terms of employment, by identifying the composition of tourism industries, by providing a solid base for justifying public sector investment in tourism development and marketing, etc.

There is also an increasing number of examples on how the development of a TSA project provides an instrument to improve the design of business strategies (autonomously or in conjunction with NTAs): by including the collection and confrontation of data, providing instruments to develop short-term economic analyses, business trend surveys (also called business opinion, conditions or climate surveys), forecasting programs, etc.

Based on all these experiences, there is broad consensus on the importance of tourism as a strategic sector in the national economy insofar as it provides an essential contribution to the economic well-being of the resident population, contributes to the economic objectives of governments and shows its possible role as a relevant player in moving towards a more innovative economy.

## **8. A new leadership for NTAs**

The TSA has also paved the way for very different initiatives that NTAs might take, such as:

- the exploration of new venues of public-private cooperation: the measurement of government income derived from tourism activity, the role played by tourism industries, the improvements of tourism related infrastructure, etc.;
- a new approach to marketing: there is growing evidence that more complete statistical information (regarding both domestic and inbound tourism) can contribute to a more precise design of marketing policies, strategies and programs, to ensure a more efficient management of the resources allocated to NTAs, and to improve analysis; and
- reorienting, to a certain extent, its role relative to the local and regional tourism administrations, contributing to a new framework for shared initiatives.

All these initiatives derive from the basic nature of the TSA, are outcomes of activities carried on by the network of inter-institutional cooperation and will also stimulate a change in the role of NTAs in the medium term.

## **9. Sharing knowledge and experience**

The advances that have been made in the development of basic tourism statistics and the strong impulse to the compilation of TSAs in an increasing and significant number of countries have led the international community to include tourism statistics within the process of revision of those standards that are the backbone of the General System of Statistics and the basis of international comparability (as is the case of international classifications of economic activities and products, the System of National Accounts (SNA93) and the Manual of Balance of Payments (BPM5)).

Between April and September 2006, the Inter-Agency Coordination Group on Tourism Statistics (IACG on TS)<sup>2</sup> will hold an international consultation (using an electronic discussion forum on the UNWTO website) in order to update the international standards governing tourism statistics (the so-called 1993 and 2000 Recommendations) with the double purpose of improving the integration between the TSA conceptual framework and that of the SNA93 and the BPM5 (both in a process of revision), and of collecting all the knowledge and experience accumulated over all these years in order to enhance the concepts and definitions of the basic tourism statistics.

We should take advantage of this collective effort in order to identify new cases of best practices and find the most efficient way for less advanced countries to benefit from the experience of more advanced ones.

## 10. Defining a far-reaching program of technical assistance

The success of the TSA Project as it was designed and promoted by the UNWTO and the significant development of national Systems of Tourism Statistics in many countries during the recent years would not have been achieved without the political determination of many NTAs and CSOs to make progress in this area. It is absolutely necessary to strengthen this power and it is urgent to define an ambitious technical assistance program which would enhance the effectiveness of our workshops, pay special attention to the training of staff participating in the process, open new avenues of co-operation with the academic and economic research fields and make it possible to achieve the main targets for WTO Agenda 2010<sup>3</sup> concerning statistical information.

With the experience gained in the 22 workshops held between 2000 and 2004, the UNWTO is in a position to complete the technical material that was generated in the last years. A key initiative here is the design of a *Manual for the development of a TSA*, to be updated regularly and addressed both to compilers and users (especially to those active in the academic and research fields).

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<sup>2</sup> The IACG on TS was created in 2004 in order to “identify issues where coordination is required and find mutually acceptable solutions”. The permanent members of the group are: the United Nations Statistics Division, the Statistical Office of the European Communities (Eurostat), the Organisation for Economic Co-operation and Development (OECD), the International Monetary Fund (IMF), the International Labour Organization (ILO), the World Trade Organization (WTO) and the World Tourism Organization (UNWTO). Other international agencies, such as the United Nations Conference on Trade and Development (UNCTAD), the United Nations Economic Commission for Latin America and the Caribbean (UN ECLAC) and the United Nations Economic and Social Commission for Asia and the Pacific (UN ESCAP), have attended occasionally.

<sup>3</sup> The document “WTO Agenda 2010”, submitted to WTO’s General Assembly (Dakar, Senegal, 28 November – 2 December 2005) identifies the following expected results and performance indicators regarding statistics:

- two-thirds of members countries using United Nations tourism statistics standards;
- two-thirds of the countries of the world regularly providing statistical data for the *Compendium of Tourism Statistics*;
- one-third of member countries having a TSA compliant with United Nations standards;
- one-third of member countries publishing significant data on employment in tourism, within the framework of WTO/ILO cooperation;
- one-third of member countries engaged in improving knowledge of the “travel” item of the balance of payments, within the framework of WTO/IMF cooperation.

**VOTE OF THANKS**

Finally, UNWTO wants to express its deep appreciation to the Secretariat of Tourism of Argentina, the Ministry of Tourism of Brazil and the National Tourism Secretariat of Paraguay, for the thoughtful and efficient organization of this conference, and to sincerely thank them for the excellent hospitality and for providing the spectacular environment of the Iguazu waterfalls area in which to conduct this important conference.