



UNWTO COMMITTEE ON STATISTICS AND TSA

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Item of the provisional programme: Understanding tourism and measuring its contribution to the economy: 2008 International Recommendations and complementary documents

UNWTO JOINT PUBLICATION OF IRTS 2008 AND TSA:RMF 2008: PROVISIONAL ANNOTATED INDEX

Presentation:

- Why a joint publication: disseminating international standards for producers, researchers and other users
- Tourism statistics as a case study of integrated statistics:
 - a). about the term “integrated statistics”
 - b). from the 2000 TSA official document to the revision of the 1993 Recommendations
 - c). the new IRTS 2008 and the updated TSA:RMF 2008
 - d). Key elements of the System of Tourism Statistics as an integrated framework: concepts / definitions / classification
- Implementing the new recommendations: the responsibility of UNWTO
- Understanding what is tourism in the new international recommendations: basic glossary
- How tourism can contribute to other fields of interest and research areas? (X)

Tourism Statistics International Recommendations

Part A) 2008 International Recommendations for Tourism Statistics (IRTS 2008)

Part B) 2008 Tourism Satellite Account: Recommended Methodological Framework (TSA:RMF 2008)

Complementary documents:

- Related with IRTS 2008:
 - a). Why IRTS 2008 cares (to be presented to the Committee)
 - b). The key recommendations at a glance
 - c). The System of Tourism Statistics: basic references (X)
- Related with TSA:RMF 2008:
 - a). Why TSA:RMF 2008 cares (to be presented to the Committee)
 - b). Basic National Account background for a better understanding of TSA
 - c). Satellite accounts and other extensions of the System of National Accounts (SNA 2008, chapter 29)

Annexes

1. Comprehensive glossary for tourism statistics
2. Selected issues referred in both international recommendations
3. International Network for Regional Economics, Mobility and Tourism (INRouTe) (X)
4. Keeping relevant the 2008 international recommendations (X)

Note: those items marked with (X) are included in this document.

HOW TOURISM CAN CONTRIBUTE TO OTHER FIELDS OF INTEREST OR RESEARCH AREAS?¹

“Time has come to turn the traditional one-way flow of knowledge and its involutory processes into a two-way traffic, by also exporting knowledge to other academic fields (and to the world of practice). Tourism needs to make returns to the disciplines that contributes to its scientific status.....We must stop looking inwards, talking to ourselves.....Instead we should turn our attention to building bridges of outreach: going further afield and becoming public” (Jafar Jafari, “Bridging Out, Nesting Afield: Powering a new platform”)

Transport

- Tourism and mobility have clear connections as areas of statistical analysis and measurement. Complementarity in terms of conceptual frameworks (specifically, on the statistical units used in both fields as well as associated characteristics) and the use of household surveys as a privileged source of information, are just some examples. International comparability of data could also be an issue of interest.

Other sectorial insights

- Identifying and clarifying what part of the Meeting Industry GDP it claims can be derived to tourism and what is the GDP of this industry (a cases similar to that of Culture...)
- Analyzing the real estate industry and its contribution in the provision of accommodation to visitors (time-share and leasing properties, residential tourism developments, etc.)
- Interaction between supply (tourism industries’ production of goods and services) and consumption components (tourism expenditure) in the economic territory allows for the analysis of specific goods and services as in commodity balances.

Tourism as an international traded service

- The measurement of specific subsets of travelers is of special interest for GATS and other institutional users; examples are: persons crossing borders to supply services (this category required by GATS is one that border surveys collect), persons travelling for health and education purposes, etc. These and other examples highlight the fact that the development of statistical sources to measure international tourism flows (as well as their expenditure) should not be developed without consultation (and coordination) of Balance of Payment compilers.

¹ This is a working paper and hence, it represents research in progress. It is not meant to represent the position or opinions of the UNWTO Secretariat, nor the official position of any staff members.

- Border surveys allow for the precise identification of visitors and their motivations. Furthermore, a short term estimate of potential migrants could come from the compared use of concepts as “country of residence”, “nationality/citizenship” and “main place of residence”.

Marketing

- The tourism statistics conceptual framework allows for the identification of the nature and characteristics of the different target groups or markets. Therefore, visitors’ information about characteristics of both individuals and trips could be used as an input for a more efficient marketing design and initiatives to be carried out in the countries of origin.
- Tourism changes the pattern of consumption of individuals during a trip. This can be measured, for the most part, regarding domestic tourism. As the understanding of how tourism markets work (and consequently, the importance of measuring tourism flows between markets, identifying related tourism products, etc.) is principally related to subnational levels, it is clear that the local dimension is fundamental for the analysis of tourism and the design of regional policies.

Social and cultural issues

- The foundation of tourism statistics refers to individuals that travel outside their usual environment for specific purposes and under certain circumstances. The conceptual framework as well as the statistical approach for indentifying the main purpose of the trip can be adapted to those subsets of travelers for health and education purposes that do not qualify as visitors.
- Tourism /leisure /recreation: these concepts are strictly interconnected and frequently compete for the use of free time. The propensity to “consume” recreation/leisure activities depends not only on the quantity but also on the quality of the free time, or on its distribution over time intervals. According to recent developments of tourism sociology, “...forms of social organization are no longer emerging from factories and offices... Rather, new forms of organization are emerging from a broadly based framework of leisure activities.... ‘Life-style’/ ‘Wellness’ are generic terms for specific combinations of work and leisure that are replacing “occupation” as the basis of social relationship formation, social status and social action”.
- The identification of visitors’ profile and consumption behavior could help describe demand for cultural attractions and services by analyzing the relationship between trips and cultural-type activities, differentiating cultural tourism (where the main motivation is the visit of cultural attractions/purchase of cultural services) vs cultural fruition (visit/use of cultural attractions/services even if the main motivation is other than the cultural one).
- Tourism is not a traditional sector of activity and therefore it poses questions about its peculiarities which might not be raised in relation to the more traditional sectors (for instance, linking between tourism and handicrafts).

Sustainability

- The measurement of the contribution of tourism to sustainable development: besides sharing practices and finding common guidelines at the subnational level, there are an increasing number of initiatives to generate indicators for analysing, monitoring, etc. the environmental implications (social-economic-physical) of tourism development. The existence of macro-accounting for both tourism and environment could contribute to specify the links.
- There is a recurring debate among tourism experts as to whether the concept of sustainability could be replaced by that of compatibility. In fact, the former requires the definition of a given threshold beyond which tourism impacts are no longer sustained by the destination. However, carrying capacity is a dynamic issue and the related thresholds can vary substantially over time. Thus, the concept of compatibility rather than sustainability could better convey the idea of a joint evolution of tourism development and the environment (both natural and social) in an area.
- How to translate in management terms the principles in which the sustainability / compatibility concept is inspired. In order to make this possible, it is necessary to be able to manage complexity, i.e. the tangled network of relationships between man, nature and society. The peculiar characteristic of tourism requires in itself an integration of knowledge and culture among the different actors which can help identify a common direction.
- An operative definition of local and regional tourism destination is basic to link decision making/planning to measurement and economic analysis issues. Moreover, local and regional tourism destinations should allow for a framework of analysis on its own (both the origin and destination perspective of the flow of visitors and other travelers are important for the analysis of both tourism and mobility).

Statistics development

- Relationship between transitory characteristics of individuals (to be a visitor to a certain place at a certain moment in time) and macroeconomic statistics, in which the characteristics of economic agent are based on permanency.
- Transferring knowledge on measuring tourism to the field of practitioners in other related areas of work in National Statistical Offices (NSOs): sample design in household surveys, unbundling package tours, etc.
- Combining survey data and administrative records to develop national Systems of Tourism Statistics could be used as case studies in relation to other service sectors statistics.
- The national/regional link is of key relevance in tourism and goes far beyond regional disaggregation of national data.
- Second homes for retirees: a limit case between resident/non resident with conflicting criteria in household surveys, tourism analysis and border survey data.

Satellite Accounts

- TSA experience and practice can help clarify general critical aspects of the construction of Satellite Accounts in other fields (such as culture, health and education).
- One of the critical issues that Ministries of Culture face is that cultural events (festivals, shows, exhibitions, concerts, etc..) have more effects on tourism GDP than on the GDP of culture.... So they tend to, in their measurements, include externalities.
- Adapting the TSA to regional levels can play not only the role of a node within a network of sources/data and economic modeling / estimates, but also act as a network of qualified researchers and practitioners that encourage analysis of the tourism sector.

THE SYSTEM OF TOURISM STATISTICS: BASIC REFERENCES^(*)

A. The System of Tourism Statistics and its links with the National Statistical System

1. The National Statistical System (NSS) of a country encompasses a series of statistical functions, each of them corresponding to entities that conduct statistical observations on some of the fields belonging to the broader universe of socio economic phenomena. The term statistical activity refers to all those activities that are required for statistical information to be produced; it spans from planning and programming statistical operations to the dissemination of the information and includes for instance the design of the procedure, the collection of the data, the production, processing, compilation, and storing of the data, etc.
2. The coverage and extension of a NSS at any given moment in time are determined by a series of factors, such as:
 - the organization and legal structure of the entities that produce statistical information (mostly public);
 - the legally established links and administrative mechanisms that exist for coordination and integration, usually through specific procedures between these bodies and a Central Unit (usually the National Statistical Office –NSO-);
 - the human and material resources assigned to statistical activities in each of these entities.
3. The overall objective of a NSS is to provide users with reliable, consistent and appropriate statistical data relative to the country's main socio-economic variables, both in structure and change over time and at different territorial levels; such data need to be comparable with similar data obtained in other countries. As a consequence, in addition to all the nationally required statistical sources existing at a given time, NSSs must include additionally those methodological and instrumental elements that are required to meet the objective of international comparability.
4. On account of its objective and content, NSSs must therefore harmonize statistical information at the national (or federal, where appropriate), infra-national and international levels, through appropriate coordination and integration procedures, that require the existence of a Central Unit.
5. For the purposes of this task, *harmonization* is taken to mean the controlling activity that makes it possible to ensure that a particular statistical process meets the purpose assigned to it within the NSS; *coordination* is taken to mean the function that serves to balance different statistical programmes from the twofold standpoint of activities and projects of those bodies that produce statistical information; *integration* is a function geared to ensuring the connection and assembly of the different statistical information that are part of a NSS.

^(*) A working paper prepared by UNWTO Statistics and TSA Department. The present version has been prepared by January 2010.

6. Regarding the integration function, it should be made of *instrumental elements* (concepts, definitions, classifications, data and indicators, national and international recommendations, etc) on the one hand, and *integrated statistical information systems* (systems of national accounts and socio-demographic statistical systems based either on international or national standards) on the other.
7. The System of National Accounts (SNA) is doubtless the more developed of the two. In this respect, it would be desirable for countries to achieve a greater balance between the two systems in the future, insofar as they share some concepts, definitions and classifications, and because splitting economic statistics from social statistics is in part conventional since many statistical variables are at the same time of an economic and social nature, or affect both economic and social issues without distinction.
8. There is a reciprocal relationship between those integrated statistical information systems and basic statistics: the former determine the basic statistics that are required for their design and compilation, and on the other hand, the latter have to be compiled using concepts, definitions, classifications that are part of the reference frameworks, both of concepts and of tables of results. Consequently, integrated systems become the centre of gravity for statistical work in all areas.
9. The System of Tourism Statistics (STS) should be understood, as that part of the NSS providing reliable, consistent and appropriate statistical information on the socio-economic aspects related to tourism, integrated within all the economic and social statistics related to other fields, at different territorial levels (national –or federal, where appropriate-, infra-national and international).
10. The design of a national STS should be viewed as the basic coordination and integration framework of the statistical information produced by all tourism stakeholders. Concepts, definitions, classifications, data, indicators, aggregates and table of results relating to tourism, designed so as to provide an exhaustive description of the tourism phenomenon in all its aspects (physical, social, economic, etc.) and a measurement of its economic contribution within a context of international comparability are a structural part of the NSS.
11. Regarding its socio-economic aspect, the STS can be defined as a set of components, made of the statistical sources themselves and the corresponding data obtained (i.e. statistics drawn from census, sample surveys, collection of data from administrative records, a derived statistical activity – in which data are estimated, modelled, or otherwise derives from statistical data sources -, etc.), the specific tools, methodological references and instruments used at some stages of the process that the generation of statistics entails (as is the case of concepts, definitions, classifications, databases, etc.), and also the instrumental and organizational resources used in all these processes. As a consequence, the STS encompasses in particular the technical aspects of field operation, the creation of statistical infrastructure, the elaboration of the results, and the completion of work leading to an integration of the data into a system of information.
12. It is worth recalling that the general guidelines for most of its work on the international harmonization of tourism concepts and statistics were determined at UNWTO's fifth General Assembly held in New Delhi in 1983. The *1993 Recommendations on Tourism Statistics* (adopted by the United Nations Statistical Commission –UNSC- in 1993 and published in 1994) represent the first international recommendation; a second one (the *2000 Tourism Satellite Account: Recommended Methodological Framework*) was

adopted by the UNSC in 2000 and published in 2001. Both recommendations determine the basic foundations of the System of Tourism Statistics. Since then, there have been many contributions from institutions and individuals alike, finally enabling the necessary basis for enhancing the credibility of the measurement of tourism's economic importance to be constructed.

13. The development of a national STS is closely linked to the implementation of the Tourism Satellite Accounts (TSA). In fact, the TSA provides the conceptual framework and the organizational structure for the harmonization and reconciliation of most tourism statistics internally within the sector as well as with other economic statistics. From this perspective, it should be seen as an instrument to assist countries in the identification of data gaps and to guide them during the revision of existing data sources as well as in the development of new sources.
14. The new *2008 International Recommendations for Tourism Statistics (IRTS 2008)* and *2008 Tourism Satellite Account: Recommended Methodological Framework (TSA:RMF 2008)* constitute the updated reference framework for the STS: both documents are mutually consistent in terms of concepts, definitions and classifications. As a consequence, they should be used as a reference for the design of new statistical sources as well as for the harmonization, coordination and integration of available tourism statistical information, even though these recommendations might extend in the coming years beyond the still restricted domain they touch upon. Examples are expanding the concept of consumption to include other components of demand (such as collective consumption and gross fixed capital formation), developing the sub-national perspective, by developing the link with other statistical system (such as that on environmental issues), etc.
15. Although it is each country's responsibility to carry out the development of the STS, the UNWTO recommends this development should follow the Basic Principles of Official Statistics approved by the UNSC (11/15 April 1994) as indicated in IRTS 2008 chapter 9.
16. Those principles provide guidelines for establishing and maintaining a credible STS and therefore, the use of such principles should be understood as a necessary condition to maintain users' confidence in tourism statistics and, particularly, to help guarantee the integrity, transparency and confidentiality of the individual data as well as the public access to the available consolidated statistics.
17. The information system created by national STS should be the foundation for a reliable and accurate national Tourism Information System (TIS). In addition to STS data, TIS should also include non-statistical information and complementary indicators (principally short-term, both qualitative and quantitative) focusing on:
 - Enlarging the scope of the economic analysis of tourism;
 - Specific needs of key stakeholders of the tourism sector (specially NTA's and industry associations in order to find adequate information to monitor tourism economic performance.)
 - Different users sharing common concepts and language in order to favour the identification / statement process for the information needs by private and public stakeholders.

This complementary set of information should be designed for national purposes only.

18. Regarding this complementary set, special attention should be given to the following set of indicators:
- a) **early warning indicators** could be derived from the use of credit card records as well as air traffic slot allocation data. Both types of data are administrative information (as arrivals figures are) and some countries have already experience in deriving these indicators which have proved of great interest for analysis. Spain (regarding slot allocation data) and New Zealand (using credit card data to evaluate the production performance of commercial accommodation industry) are just some examples;
 - b) **short-term performance indicators of tourism industries turnover and employment** could be derived from administrative records produced by official sources such as fiscal sources and social security schemes. The following document provides different examples already in place in OECD countries (<http://www.unwto.org/statistics/sts/strengthening/oeecd.pdf>);
 - c) **business cycle indicators** could be derived from business tendency surveys. This type of qualitative information (based on answers of staff personnel in some key tourism industries such as accommodation or travel agencies) is very much used in most countries for non service sectors and UNWTO has identified its application in some countries: France, Spain, Canada, Brazil, New Zealand;
 - d) the development by National Tourism Administrations of a **system of indicators for monitoring purposes** characterized by an increasingly closer relationship between planning, management and evaluation / control of the effects generated by the adopted strategies, and by a flexible structure capable of being relevant to any development or policy plan.

B. National System of Tourism Statistics and international comparability

19. The following scheme highlights the basic core of a national STS for international comparability purposes. It identifies two basic organizational frameworks of data and indicators
- the basic information framework (identified with a basic core of tourism data and indicators and supported by the IRTS 2008 as its conceptual background)¹ and
 - the measurement of tourism economic contribution framework (identified with a basic set of TSA aggregates figures which finds in the TSA:RMF 2008 its conceptual background)

both of them with their corresponding components.

¹ In the UN System, Tourism is included under “Economic Statistics” covering “statistics regarding visitor’s activity (such as arrivals / departures, overnight stays, expenditure, main purpose of the trip, etc.) associated to different forms of tourism (inbound, domestic and outbound), tourism industries activity and infrastructure, employment and tourism satellite accounts”.

B.1. The basic information framework

B.1/A. Conceptual framework

Concepts	Observation units ²	Main related characteristics
Visitor	Visitor Travel party	Classes (Overnight visitor-tourist-/same-day visitor-excursionist) Country of residence / regions Size
Trip	Tourism trip	Main purpose Duration Main destination Modes of transport Types of accommodation used Organization Expenditure
Tourism industries	Establishment	<u>Monetary</u> Output Intermediate consumption Gross value added Compensation of employees Gross Fixed Capital Formation <u>Non-monetary</u> Non-monetary characteristics specific for each tourism industries
Employment	Establishment (in the tourism industries)	Persons Size Status in employment Jobs Duration of work Full-time equivalent jobs

B.1/B. Classifications

- 2.1. Forms of tourism
- 2.2. Classification of consumption products acquired by visitors
- 2.3. Classification of productive activities serving visitors
- 2.4. Other classifications

² A *statistical unit* is an entity about which information is sought and for which statistics are ultimately compiled. These units are either observation or analytical units:

- *Observation units* are those identifiable legal/organizational or physical entities which are able, actually or potentially, to report data about their activities
- *Analytical units* are created by statisticians, often by splitting or combining observation units with the help of estimations and imputations in order to compile more detailed and more homogeneous statistics than is possible using data on observation units. Examples of analytical unit is the homogeneous unit of production used in input-output analysis

In the design of the system of tourism statistics as well as in the measurement of tourism activity, only observation units are used.

Finally, *reporting units* are those entities from which information is collected by means of a questionnaire, interview, administrative records, etc. *Reporting unit*, in most cases, coincide with the *observation units*: exceptions are tourism trips (for which the visitor is the reporting unit) and in some cases, establishments (for which information might be collected from enterprises)

B.1./C. Tables of results

- 3.1. Inbound tourism
- 3.2. Domestic tourism
- 3.3. Outbound tourism
- 3.4. Tourism industries
- 3.5. Employment
- 3.6. Complementary indicators

B.2. The TSA framework

B.2/A. Concepts and definitions

- 1.1 Demand perspective
 - 1.1.1. Internal tourism consumption
- 1.2. Supply perspective
 - 1.2.1. Tourism direct gross value added
 - 1.2.2. Tourism direct gross domestic product

B.2/B. Classifications

- 2.1. Products (consumption and non-consumption products)
- 2.2. Industries (tourism industries and other industries)

B.2/C. Tables of results

- 3.1. Contribution of tourism to the national economy
- 3.2. Internal tourism consumption, by products and forms of tourism
- 3.3. Domestic tourism consumption, by products and categories
- 3.4. Inbound tourism consumption, by products and categories
- 3.5. Direct gross value added and tourism direct gross value added, by industries
- 3.6. Tourism gross value added, by components
- 3.7. Domestic supply of goods and services, by products

THE SYSTEM OF TOURISM STATISTICS

C. International comparability and national Systems of Tourism Statistics (STS): the basic information network data set

INBOUND TOURISM

Concepts and definitions	Observation units	Characteristics	Related data / indicators	Statistical sources
Visitors	Inbound visitors	Classes of visitors (overnight visitor-tourists-/ same-day visitor-excursionist-) Country of residence/regions	<u>BASIC DATA</u> ^{1/} Arrivals by classes of visitors <ul style="list-style-type: none"> ◆ overnight visitors (tourist) ◆ same-day visitors (excursionist) * of which, cruise passengers ^{2/} Arrivals by region ^{3/} <ul style="list-style-type: none"> ◆ Africa ◆ Americas ◆ East Asia and the Pacific ◆ Europe ◆ Middle East ◆ South Asia ◆ Other not classified * of which, nationals residing abroad 	<ul style="list-style-type: none"> - E/D card - Other type of administrative registers - Surveys: <ul style="list-style-type: none"> • Borders • Accommodation • Transport • Other
	Travel party	Size	Average size of travel parties ^{4/}	<ul style="list-style-type: none"> - Surveys: <ul style="list-style-type: none"> • Borders • Accommodation • Transport • Other
Trips	Tourism trips	Main purpose	Arrivals by main purpose of the trip <ul style="list-style-type: none"> ◆ personal * holidays, leisure and recreation * other personal purposes ◆ business and professional 	<ul style="list-style-type: none"> - E/D card - Surveys: <ul style="list-style-type: none"> • Borders • Accommodation • Transport • Other
		Modes of transport	Arrivals by mode of transport used <ul style="list-style-type: none"> ◆ Air ◆ Water ◆ Land * railway * road * others 	<ul style="list-style-type: none"> - E/D card - Other type of administrative registers - Surveys: <ul style="list-style-type: none"> • Borders • Accommodation • Transport • Other
		Types of accommodation used	Accommodation related data <ul style="list-style-type: none"> ◆ overnight stays in hotels and similar establishments ◆ guests in hotels and similar establishments ◆ overnight stays in all types of accommodation establishments 	<ul style="list-style-type: none"> - E/D card - Other type of administrative registers - Surveys: <ul style="list-style-type: none"> • Borders • Accommodation • Transport • Other

INBOUND TOURISM

Concepts and definitions	Observation units	Characteristics	Related data / indicators	Statistical sources
		<p>Organization</p> <p>Expenditure</p>	<p>Arrivals by form of organization of the trip</p> <ul style="list-style-type: none"> ◆ package tour ◆ other forms <p>Inbound tourism expenditure ^{5/}</p> <ul style="list-style-type: none"> ◆ "travel" ◆ "passenger transport" <p>Inbound tourism expenditure by main purpose of the trip ^{6/}</p> <ul style="list-style-type: none"> ◆ personal <ul style="list-style-type: none"> * holidays, leisure and recreation * other personal purposes ◆ business and professional <p><u>INDICATORS</u> ^{7/}</p> <p>Average length of stay ^{8/}</p> <ul style="list-style-type: none"> ◆ All types of accommodation establishments <ul style="list-style-type: none"> * Hotel and similar establishments ◆ Non commercial accommodation <p>Average expenditure per day</p>	<p>Surveys:</p> <ul style="list-style-type: none"> • Borders • Accommodation • Transport • Travel agencies • Tour operators • Others <p>BP items</p> <ul style="list-style-type: none"> • Travel • International passenger transport <p>- Surveys:</p> <ul style="list-style-type: none"> • Households • Borders • Accommodation • Transport • Travel agencies • Tour operators • Other <p>- Other type of administrative registers</p>

Notes:

- 1/ As a general warning, it must be taken into account that the flows of inbound tourism are measured in arrivals (in case of using the border surveys) or in persons (in case of using the guest type information in accommodation establishments). In both cases, national practices are not known which, for statistical purposes, define the corresponding databases of each observation system with the purpose of grouping the corresponding registers to the same person: the difficulties and cost associated with this distillation explains why registers of international flows do not refer to individuals but to the entry or accommodation of travelers.
- 2/ Even though this is not strictly speaking a typology of visitors, its importance in some countries (island countries and others) warrants its separate identification, as published by the UNWTO in the "Compendium of Tourism Statistics". In case some cruise passengers make an overnight stay in the country of reference, they should be considered as tourists and classified as such.
- 3/ It is recommended that regions should be derived as the aggregation of the country of residence of international visitors. If not possible, nationality should be used instead.
- 4/ IRTS does not suggest any threshold for classifying travel parties by size but the composition of them (especially those including children) are certainly relevant for measurement and analysis. Countries should classify travel parties as is appropriate.
- 5/ These data are Balance of Payments data.
- 6/ These data are Balance of Payments data ("travel" item exclusively).
- 7/ These data are obtained from visitor surveys (mainly from border surveys).
- 8/ Be ware that not all visitors stay at accommodation establishments.

DOMESTIC TOURISM

Concepts and definitions	Observation units	Characteristics	Related data / indicators	Statistical sources
Visitors	Domestic visitors	Classes of visitors (overnight visitor-tourists-/ same-day visitor-excursionist-)	<u>BASIC DATA</u> Trips by classes of visitors ^{1/} <ul style="list-style-type: none"> ◆ overnight visitors (tourist) ◆ same-day visitors (excursionist) 	- Surveys: <ul style="list-style-type: none"> • Households • Accommodation • Transport • Other - Other type of administrative registers
	Travel party	Size	Average size of travel party ^{2/}	- Surveys: <ul style="list-style-type: none"> • Households • Accommodation • Transport • Other - Other type of administrative registers
Trips	Tourism trips	Main purpose	Trips by main purpose <ul style="list-style-type: none"> ◆ personal <ul style="list-style-type: none"> * holidays, leisure and recreation * other personal purposes ◆ business and professional 	- Surveys: <ul style="list-style-type: none"> • Households • Accommodation • Transport • Other - Other type of administrative registers
		Modes of transport	Trips by mode of transport used <ul style="list-style-type: none"> ◆ Air ◆ Water ◆ Land <ul style="list-style-type: none"> * railway * road * others 	
		Types of accommodation used	Accommodation related data <ul style="list-style-type: none"> ◆ overnight stays in hotels and similar establishments ◆ guests in hotels and similar establishments ◆ overnight stays in all types of accommodation establishments 	
		Organization	Trips by form of organization of the trip <ul style="list-style-type: none"> ◆ package tour ◆ other forms 	
			<u>INDICATORS</u> Average length of stay ^{3/} <ul style="list-style-type: none"> ◆ All types of accommodation establishments <ul style="list-style-type: none"> * Hotel and similar establishments ◆ Non commercial accommodation Average expenditure per day	- Surveys: <ul style="list-style-type: none"> • Households • Accommodation • Transport • Travel agencies • Tour operators • Other

Notes:

1/ Household surveys are the observation instrument by excellence for the measurement of resident traveller flows: however, only in the case that the survey makes use of a panel sample is the unit of analysis the trip and not the

2/ The IRTS does not suggest any threshold for classifying travel parties by size.

3/ Be ware that not all visitors stay at accommodation establishments.

TOURISM INDUSTRIES

Concepts and definitions	Observation units	Characteristics	Related data / indicators	Statistical sources
Tourism industries	Establishments (in the the tourism industries)	<p><u>Non-monetary</u></p> <p>Size Other characteristics for specific industries</p> <p><u>Monetary</u></p> <p>Output Intermediate consumption Gross value added Compensation of employees Gross fixed capital formation</p>	<p><u>BASIC DATA</u></p> <p>Number of establishments in tourism industries, by size</p> <ul style="list-style-type: none"> ◆ accommodation for visitors (hotels and similar establishments) ◆ other accommodation services ◆ food and beverage serving activities ◆ passenger transportation ◆ travel agencies and other reservation services activities ◆ other tourism industries <p>Accommodation for visitors (hotels and similar establishments)</p> <p>A1) monetary data</p> <ul style="list-style-type: none"> ◆ output ◆ intermediate consumption ◆ gross value added ◆ compensation of employees ◆ gross fixed capital formation <p>A2) non-monetary data</p> <ul style="list-style-type: none"> ◆ number of establishments ◆ number of rooms ◆ number of bed-places <p>A3) indicators</p> <ul style="list-style-type: none"> ◆ Occupancy rate / rooms ◆ Occupancy rate / bed-places ◆ Average lenght of stay ◆ Available capacity <p>Travel agencies and other reservation service activities</p> <p>A1) monetary data</p> <ul style="list-style-type: none"> ◆ output ◆ intermediate consumption ◆ gross value added ◆ compensation of employees ◆ gross fixed capital formation <p>A2) non-monetary data</p> <ul style="list-style-type: none"> ◆ domestic trips <ul style="list-style-type: none"> * with package tour * withouth package tour ◆ Inbound trips <ul style="list-style-type: none"> * with package tour * withouth package tour ◆ Outbound trips <ul style="list-style-type: none"> * with package tour * withouth package tour 	<ul style="list-style-type: none"> - Surveys: <ul style="list-style-type: none"> • Establishments • Businesses - Other type of administrative registers <ul style="list-style-type: none"> - Surveys: <ul style="list-style-type: none"> • Establishments • Businesses - Other type of administrative registers <ul style="list-style-type: none"> - Surveys: <ul style="list-style-type: none"> • Establishments • Businesses - Other type of administrative registers <ul style="list-style-type: none"> - Surveys: <ul style="list-style-type: none"> • Establishments • Businesses - Other type of administrative registers

EMPLOYMENT

Concepts and definitions	Observation units	Characteristics	Related data / indicators	Statistical sources
<p>Employment</p>	<p>Establishments (in the the tourism industries)</p>	<p>Persons Size Status in employment Jobs Duration of work Full-time equivalent jobs</p>	<p><u>BASIC DATA</u></p> <p>Number of persons, by tourism industries</p> <ul style="list-style-type: none"> ◆ accommodation services for visitors (hotels and similar establishments) ◆ other accommodation services ◆ food and beverage serving activities ◆ passenger transportation ◆ travel agencies and other reservation service activities ◆ other tourism industries <p>Number of jobs by status in employment</p> <ul style="list-style-type: none"> ◆ employees ◆ self employed <p><u>INDICATORS</u></p> <p>Number of full-time equivalent jobs by status in employment</p> <ul style="list-style-type: none"> ◆ employees <ul style="list-style-type: none"> * male * female ◆ self employed <ul style="list-style-type: none"> * male * female 	<ul style="list-style-type: none"> - Surveys: <ul style="list-style-type: none"> • Establishments • Business • Business - Other type of administrative registers

COMPLEMENTARY INDICATORS

Demand

Gross travel propensity

Carrying capacity

Macroeconomic indicators related to international tourism

Inbound tourism expenditure over GDP

Outbound tourism expenditure over GDP

Tourism balance (inbound minus outbound tourism expenditure) over GDP

Tourism openness (inbound plus outbound tourism expenditure, over GDP)

Tourism coverage (inbound over outbound tourism expenditure)

Inbound tourism expenditure over exports of goods

Inbound tourism expenditure over exports of services

Inbound tourism expenditure over exports of goods and services

Inbound tourism expenditure over Balance of Payments current account credits

Outbound tourism expenditure over imports of goods

Outbound tourism expenditure over imports of services

Outbound tourism expenditure over imports of goods and services

Outbound tourism expenditure over Balance of Payments current account debits

Inbound tourism expenditure over workers' remittances



INRouTe: An Introduction to the Network

**International Network on Regional Economics, Mobility and Tourism
(INRouTe)**



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LIST OF ABBREVIATIONS AND ACRONYMS

AP	Associate Partner
FP	Founding Partner
GCS	General Coordination Secretariat
MoA	Memorandum of Agreement
SC	Steering Committee
SFC	Scientific Committee
TS	Technical Secretariat
TSA	Tourism Satellite Account
UNWTO	World Tourism Organization

1. BACKGROUND

The International **Network** on Regional Economics, Mobility and Tourism (hereafter: the **Network**) is a non-profit initiative promoted by the World Tourism Organisation (UNWTO) that has been transformed in a long term project thanks to the collaboration of two entities that are Affiliate Members of the UNWTO: the Cooperative Research Centre in Tourism, CICTourGUNE, and the firm Araldi, both based in Spain.

An expert knowledge-driven network, INRouTe has the ambition to bring together a wide yet complimentary diversity of technicians, scholars, practitioners and industry professionals to share information, practices and experiences that encourage comparative analyses, strengthen the scientific foundation of tourism, and provide guidance to the competitive position of tourism destinations and service providers.

As a result, the **Network** aspires to become a privileged instrument:

- for the UNWTO: to design and disseminate general guidelines, foster the worldwide development of statistics, measurement and analysis of the economic contribution of tourism at the regional level, as well as the use of appropriate tools for tourism destination management, and
- for all Associate Partners: to promote access to relevant knowledge, as well as to provide a platform for communication and to establish **Network** activities identifying collaborative research/professional projects, Partner search and consortia potential.

A selected number of individuals and institutions covering a wide geographic area will be invited to become Associate Partners (APs) of the **Network**. Specifically, potential individuals and institutions may originate from the following:

- Regional and local destinations partnerships
- Universities
- Research centres
- Industry associations
- Trade bodies
- Individual firms
- Individual experts
- Other international and national networks
- Regional/local statistical offices
- Regional/local tourism administrations
- Other (regional/local) government departments/agencies

1.1. Mission

The **Network** endeavours to stand as an international reference for the measurement of tourism as an economic activity and analysis of mobility at the regional level; becoming a privileged instrument to improve the management of regional and local tourism destinations,

creating and imparting relevant knowledge and best practices within the Research Areas identified (Section 1.3).

1.2. Vision and Objectives

The main objective of the **Network** is to foster a setting of collaboration among a select group of individuals and institutions from different yet relevant backgrounds to employ novel tools and technologies while sharing experiences, practices, and methods in the study of regional economies, mobility and tourism. The outcome will be a systematic collection and interpretation of documents contributing to the future development of tourism industries and tourism as an academic field through the integration of Information and Communication Technologies (ICT).

The **Network** has identified three key strategic objectives, to a) promote new perspectives and approaches toward conducting science in tourism (multidisciplinary research), b) favour the willingness to share information, solutions and best practices between private and public entities at the destination level (collaborative versus competitive approach) and c) facilitate organisation of educational and training activities lead by **Network** APs (fostering consortia potential).

1.3. Focus

In practice, tourism social/economic behaviours and practices are too multifaceted and unpredictable to be summarized within a limited set of indicators and specifications. What's more, in spite of the natural occurrence of diverse situations, there will inevitably emerge innovative systems with greater knowledge and capabilities. Interpretation, that is, the struggle to extract meaning and purpose from our environment (by primary data or intelligent reasoning), will be at the forefront of our agenda.

The **Network** will direct its efforts to **four Research Areas**, each of which is composed of several **Research Topics** (Annex 1):

- **flows of visitors:** cross-border and interregional flows, statistical use of administrative records, data from the use of new technologies, measurement and analysis tool, forecast modelling and other accounting tools.
- **tourism and territory:** indicator systems (related both to territory and sustainability), Geographic Information Systems (GIS), specific software, and the relation between tourism statistics and the environment.
- **tourism and its economic contribution:** tourism satellite accounts (TSA), other modelling tools (such as Computational General Equilibrium Models, Input-Output and econometric models), and employment in tourism industries.
- **tourism destination management:** statistical and analytical units, monitoring and evaluation procedures, and indicator systems.

2 ORGANIZATION

The 'Founding Partners' (FPs) refer to the three institutions that sign the Memorandum of Agreement (MoA) to collaboratively launch the INRouTe project. In addition to the FPs, the **Network** will bring together a unique group of individuals and institutions each identified as an 'Associate Partner' (AP). Both FPs and APs may be referred to as 'Network Partners'.

Each and every initiative carried out under the purview of the **Network**, including contributions to and exchanges of material within the **Network**, are the exclusive responsibility of the AP(s) that execute(s) or produce(s) said material(s), and includes those individuals whose **Network** partnership is established in conjunction with an institutional AP.

FPs are inherently involved in the governance of the **Network**; however, the **Network** will also rely on the participation of certain APs to participate in its governing. FPs and APs selected to participate in one or more of the following governing bodies may also be specifically referred to as '**Network Members**':

- Steering Committee (SC)
- Technical Secretariat (TS)
- General Coordination Secretariat (GCS)
- Scientific Committee (SFC)

These governing bodies are described further in Section 3; however, some reference is made to them here as they govern the affiliation of the Partners described below.

2.1. Founding Partners

2.1.1. World Tourism Organisation

As a specialized agency of the United Nations, the World Tourism Organisation (UNWTO) is the leading international organisation in the field of tourism, acting as a global forum for tourism policy issues and a practical source of tourism know-how. The Organisation encourages the stance of ensuring that member countries, tourist destinations and businesses maximize the positive economic, social and cultural effects of tourism and fully reap its benefits, while minimizing its negative social and environmental impacts.

The general mission of the *Department of Statistics and Tourism Satellite Account (TSA)* is to foster the development of national Systems of Tourism Statistics, the international comparability of tourism statistics and the macroeconomic analysis of tourism. Considering all possible extensions of these developments, the UNWTO grants priority to advancing along the regional perspective.

The World Tourism Organisation is based in Madrid, Spain (www.unwto.org).

2.1.2. **CICtourGUNE**

In the face of today's challenge to cope with sustainability and competitiveness in tourism, it is vital for the travel and tourism industries as well as research organisations to pool knowledge and resources for multidisciplinary research. CICtourGUNE, a Cooperative Centre for Tourism Research, seeks to generate excellence knowledge in the field of tourism and mobility. It is a unique public-private partnership generating scientific breakthroughs in tourism and mobility, resulting in the development of innovative products and technologies that respond to industry and consumer demands for travel and mobility.

CICtourGUNE plays an important role in, bridging the gap between scientific and economic innovation in travel and tourism industries; innovation networks and clusters by providing a collective environment for academics, as well as a sufficient critical mass of people who can synergistically extend research and diffuse the resulting knowledge.

CICtourGUNE is based in San Sebastian, Spain (www.tourgune.org) and is an Affiliate Member of the UNWTO.

2.1.3. **Araldi**

Araldi is a private consultancy firm that focuses its activity and services in information management and processing and has several branch offices throughout Spain. Recently Araldi has begun the process of internationalization starting in Central America and gradually expanding into other Latin American countries.

Araldi's business and creative approach are grounded in the innovation and continuous improvement of methodologies and tools. This approach has allowed Araldi to become a leading Spanish company in data production and analysis for the tourism sector, placing the company at the forefront of the industry.

Araldi is based in San Sebastian, Spain (www.araldi.es) and is an Affiliate Member of the UNWTO.

Additional information on INRouTe Founding Partners is available to all Partners upon request.

3 **NETWORK GOVERNANCE**

The establishment of a strong management structure is essential to the success of all initiatives undertaken by the **Network**. Different bodies, described below, will be formed to guide and advance those initiatives.

3.1 Steering Committee

The Steering Committee (SC) serves as the managerial and decision-making body responsible for defining, directing and evaluating the **Network**'s activities. The SC is formed by the three Founding Partners – the World Tourism Organization, CICtourGUNE and Araldi.

In principle, the SC will remain composed of the three Founding Members (Section 2.1), however, additional SC Members may be added should circumstances warrant following **Network** set-up.

3.2. Technical Secretariat

The **Network** will maintain a full-time uni-personal Technical Secretariat (TS) under the responsibility of CICtourGUNE receiving technical support from Araldi. The TS organizes and carries out **Network** activities based on the guidelines and priorities outlined by the SC, and is in general responsible for the daily operation and organisation of **Network** activities, including coordination of all technical, financial and administrative aspects.

3.3. General Coordination Secretariat

The **Network** will maintain a uni-personal General Coordination Secretariat (GCS) with the responsibility for internal coordination between the Steering and Scientific Committees' decisions and initiatives. The GCS is appointed by the SC through a unanimous vote rule. Currently, the GCS is under the responsibility of the head of the UNWTO Statistics Department and Tourism Satellite Account (TSA).

3.4. Scientific Committee

The Scientific Committee (SFC) functions as the research and expertise consulting body. It is chiefly responsible for monitoring the depth and breadth of **Network** activities to the degree that they pertain to the state of the art within the four identified Research Areas. Members of the SFC are jointly responsible for quality management all materials contributed to and produced within the **Network**, and leading and promoting interactive dialogue among Partners. Members of the SFC are selected by the SC and include anywhere between 15 to 19 APs.

4 ASSOCIATE PARTNERS

APs are regarded as either individual experts in their respective field(s) or, in the case of a firm or institution having established a collective expert knowledge pool, where the knowledge, skills and resources of these individuals and/or institutions are valued as pertinent to attaining the objectives of the **Network**. APs will be invited to make significant, thoughtful and innovative contributions in the four Research Areas (Section 1.3) identified. Ideally, each of the four Research Areas and related Research Topics will boast a dynamic passionate group of APs that



maintain lively discussion and contribute positively to the **Network**. It is expected that APs will originate from various disciplines and professional backgrounds (see Annex 1).

The **Network** envisions that APs will enjoy several benefits from their partnership, including:

- the prestige of identifying oneself as a Network Partner of this **Network**;
- establishing new expert contacts;
- access to useful tools for their research/professional agenda;
- possibilities to foster strategic alliances;
- the opportunity for publicizing current and future projects, including the opportunity to recruit Partners and/or interested institutions;
- the opportunity to solicit feedback relating to one's research/professional agenda or other issues of interest; and
- the opportunity for an institutional AP to publically display its logo and link to its website (as applicable) on the **Network's** official website and selected publications and documents.

4.1 Discovery Process

Discovery is the process through which the **Network** selects, assesses, and formally incorporates new Associate Partners (APs) into the **Network**. *Discovery* is an ongoing process involving multiple steps and **Network Partners**.

In general, *Discovery* is as follows:

Step 1: Identification of Candidates

- Candidates are pursued based on known research/professional activities relevant to the **Network**; proposal or recommendation by Network Partner(s); or self-identification of a candidate.
- Candidates are provided an introductory document to the **Network** (*INRouTe: an Introduction to the Network*) and may be required to complete a *Profile Review Form*.

Step 2: Profile Review

- Review and assessment by the SC and SFC of potential candidates is made based on their Profile Review Form and/or foreknowledge of their current and previous work, theoretical and practical contributions, and potential contributions to the **Network**.

Step 3: Notification

- Final decisions regarding **Network** Partnership are made by the SC in consultation with the SFC, and;
- Formal notification is sent to each candidate by written letter (via TS).

Step 4: Cooperation Agreement

- Upon acceptance, each new AP is required to complete (if not completed in Step 1) a Profile Review Form, and;
- Read, sign and submit the *Cooperation Agreement for Partnership*.

Step 5: Incorporation

- TS will create for each new AP a Network Profile accessible to all Partners via the Intranet;
- Individual APs are assigned one (1) password to access the Intranet space and participative application;
- Institutional APs are required to assign one (1) and up to a maximum of three (3) individuals (Network Users) to each receive a password, of which one must act as a liaison to the **Network** for communication and administrative purposes.

This is a proposed outline, where some deviations may be made given the circumstance and if deemed appropriate by the TS.

4.2 Dissemination of Contributions

Contributions generated by and for the **Network** will be disseminated according to the following procedure:

Level 1: Internal publication on the Intranet space – i.e. all Briefs and provisional Core Papers

Level 2: Public content on the official INRouTe website – selected (by SFC) Briefs and all Core Papers and Conference papers as well as conference material as deemed appropriate by the GCS.

Level 3: Published material in hardcopy or electronic format with ISBN number – selected Briefs, Core Papers and Conference material or any other commissioned documents/reports generated by or for the **Network** and that may be compiled.

4.3 Network Commitments

In order to maintain the proper dynamic, functioning and forward progress of the **Network**, APs are required to maintain certain **Network** 'commitments':

- Submission of at least one (1) Brief per calendar year. Each Brief is subject to review by the SFC (as part of a Core Paper) and should focus on one, or a combination of the 19 Research Topics identified within the four Research Areas of the **Network**

(Section 1.3). Briefs must be submitted using the standard template provided and are subject to certain target dates established by the GCS.

- Annual (per calendar year) updates to APs' Annual Summary of Work in online Network Profile, including research/professional positions, projects/activities and advances in academic/industry standing. Each AP will submit an initial Profile Review as part of the Selection Procedure (which will be termed Discovery). The updated Annual Summary of Work should include a minimum of five (5) new citeable references to publications (books, articles, policy papers, annual reports, etc.) relevant to the **Network's** scope.
- Voluntary engagement in **Network** activities: participation in discussion forums, providing new and relevant information and resources, proposing new Network Partners, and actively engaging in question/answer process, etc.
- Strict adherence to the Stipulations for Network Participation (among others, Confidentiality, Copyright and Intellectual Property) that will be provided with the Cooperation Agreement.
- Acceptance of the SC's reserved right to terminate any AP's partnership if these commitments are not fulfilled, revoking all rights and privileges associated to it.

5 ELECTRONIC PLATFORM

5.1. Operating System

The success of the **Network** relies critically on its ability to seamlessly and effectively communicate with both its internal Network Partners and a wide diversity of external organisations and peoples. For this purpose, the **Network** implements an operating system of integrated management and communicative platforms to execute a wide range of **Network** activities, comprising:

- administrative duties;
- creation of permanent communication channels (upload of a text, suggestions, questions, answers, etc.);
- collection of pertinent information (news of general information, calls for meetings, tenders, etc);
- management of (research) projects and collaborative initiatives;
- consortia creation;
- organisation and facilitation of Network Partner search;
- dissemination of information on **Network** events and activities; and
- gathering and disseminating knowledge generated in line with **Network** objectives, including but not limited to, Core Papers and Briefs.

The **Network** operating system consists of three main components providing Network Partners access to Public content (general information for the public via the Internet), an Intranet space for internal activities, and a Participative application offering discussion forums and other communicative tools (these last two with access restricted to Partners, administration, and guests). The three components will be integrated into a sole product, known as the **Network's** Electronic Platform.

All Network Partners will have access (via a personal user name and password) to the reserved intranet space accessed through the main **Network** website. Conditions of Use of the **Network** intranet space are applicable to all Network Partners and will be covered in the **Network** Platform User's Guide (available in 2010) and provided in the Cooperation Agreement.

English is the official language of the **Network**, thus all official documentation (including Briefs, Core Papers, Intranet correspondence, public communication etc.) will be carried out and produced in English. In certain cases, documents in either French or Spanish may be accepted on a conditional basis by the SFC but the **Network** will not assume the translation effort and the author will be required to translate the title and keywords for purposes of documentation and analysis.

In the following section, applications for **Network** operation, participation and documentation are detailed.

5.2. Classification Structure and Resource Inventory

The **Network** employs a Classification Structure (see Annex 1) outlining the various categories necessary for its set up. It implements a bi-level Resource Inventory system composed of a Document inventory and Participative inventory to organize and exploit the wealth of information received and produced. Cataloguing these materials is done by means of a 'controlled vocabulary' according to a structure provided by the Institute for Tourism Studies of Spain (*Instituto de Estudios Turísticos*) and completed by the UNWTO Documentation Resources and Archives Section.

The **Network** will possess a Resource Inventory for organizing and exploiting the wealth of information received and produced. Cataloguing these materials is done using a "controlled vocabulary".

The Resource Inventory distinguishes between material produced as an outcome of **Network** activities and outside information gathered as references in conducting **Network** activities, and in essence, functions as a library accessible by all Network Partners.

ANNEX

1. ELECTRONIC PLATFORM CLASSIFICATION STRUCTURE

Code	Classification
A	<p>Research Areas and corresponding Research Topics</p> <ul style="list-style-type: none"> • Flows of visitors <ul style="list-style-type: none"> A1. Cross-border flows A2. Interregional flows A3. Stats use of admin records A4. Data from new technologies A5. Measurement and analysis tools A6. Forecast modelling A7. Other accounting tools • Tourism and territory <ul style="list-style-type: none"> A10. Indicator systems (related to territory) A11. Indicator systems (related to sustainability) A12. GIS systems A13. Specific software A14. Tourism statistics and environment • Economic contributions <ul style="list-style-type: none"> A20. TSA A21. Other tourism economic measurement tools A22. Employment in tourism industries • Tourist destination management <ul style="list-style-type: none"> A30. Statistical and analytical units A31. Monitoring procedures A32. Evaluation procedures A33. Indicator systems
B	<p>Associate Partners</p> <ul style="list-style-type: none"> • Identification <ul style="list-style-type: none"> - Personal name / professional addresses and post / name / type of the Associate institution (if appropriate) - Typology B1. Regional and local Destinations Partnerships B2. Universities B3. Research centres B4. Industry associations B5. Trade bodies B6. Individual firms B7. Individual experts B8. Other international and national networks B9. Regional/local statistical offices B10. Regional/local tourism administrations B11. Other (regional/local) Government Departments/Agencies • Other characteristics <ul style="list-style-type: none"> B15. Country (UN classification)

Code	Classification
	B16. Region <ul style="list-style-type: none"> ○ Name ○ NUTS code (if European country) B17. Area of specialization within codes A1/A33
C	Compilation <ul style="list-style-type: none"> C1. Creation of Website (or sites?) C2. Site visits C3. Identify and/or analyse case studies C4. Cataloguing relevant pubs docs and Internet resources
D	Promotion of networking activities and collaborative projects <ul style="list-style-type: none"> D1. Identify collaborative research projects D2. Identify Network Partner search D3. Identify consortia potential D4. Promoting an electronic publication for secretariat to disseminate intelligence D5. Organise appropriate symposiums and/or meeting as required
E	Actions to be executed <ul style="list-style-type: none"> E1. Upload of a text E2. Suggestion E3. Calls for meetings, tenders E4. Question E5. Answer E6. Proposal of potential collaborative projects E7. News of general interest

2. DEFINITIONS AND TERMS

Associate Partner (AP) refers to those

- a) individuals acknowledged as experts in (a) specific Area(s) of **Network** research/activity, and,
- b) institutions (companies, public agencies or other organisations) that are involved in (a) specific Area(s) of **Network** research/activity

that provide support to the **Network** through contributions and proactive participation and knowledge exchange. They have been invited by the **Network's** Steering and Scientific Committees to become part of the **Network**, whereupon they are officially accepted by signing the Cooperation Agreement.

Annual Summary of Work is the written summary of current work, projects and/or research/professional activities that each AP is obliged to upload onto his/her **Network** profile page.

Brief is the written report focusing on one (or a combination) of the 19 Research Topics that each AP is obliged to contribute to the **Network** once per calendar year. This contribution is subject to review by the SCF as part of their Core Paper.

Confidential Information means knowledge, materials, know-how or any proprietary information, whether in electronic, written, graphic or other tangible form and any such oral information that has been reduced to writing within two weeks of its disclosure.

Cooperation Agreement for Partnership or “Cooperation Agreement” is the agreement that all institutional APs must have completed, signed, and sent (both to the GCS and the TS) in order to officially become Partner.

Core Paper is the written interpretation of the Briefs of all APs that each SCF Member is responsible for and which should be contributed to the **Network** every calendar year.

General Coordination Secretariat (GSC) refers to the body appointed by the Steering Committee who is responsible for internal coordination between the Steering and Scientific Committee decisions and initiatives, sustained co-operation and suggesting corrective actions when necessary.

Intellectual Property means all materials, concepts, know-how, formulae, inventions, improvements, industrial designs, processes, patterns, machines, manufactures, compositions of matter, compilations of information, patents and patent applications, copyrights, trade secrets, technology, technical information, software, prototypes and specifications, including any rights to apply for protections under statutory proceedings available for those purposes, provided they are capable of protection under the law.

Memorandum of Agreement (MoA for Launching INRouTe) refers to the Agreement document for collaboratively launching INRouTe plus all attachments and appendices that may be amended over time as necessary and which has been signed by the three FPs.

Network refers to the International Network on Regional Economics, Mobility and Tourism (INRouTe), a collaborative non-profit project.

Network Partner or “Partner” refers to all individuals and institutions, comprising the FPs and all APs (which include Network Members, e.g. SFC Members), that form part of the **Network**.

Network Member or “Member” refers to individuals in a sub-group of Network Partners and refers to all those Partners that hold a position in the **Network’s** governance structure. These include the FPs whose efforts are directly or indirectly related to **Network** initiatives, as well as any individual or organisation holding a seat on any **Network** internal committee or secretariat (i.e. the SC, TS, GCS, and SFC).

Scientific Committee (SFC) is the research and expertise consulting body responsible for monitoring the depth and breadth of the **Network’s** activities as it pertains to the state of the art in the **Network’s** key Research Areas.

Steering Committee (SC) means the committee comprised of the three granting agencies’ UNTWO, CICTourGUNE and Araldi, S.L, which has overall responsibility for the **Network** and is considered the managerial & decision-making body responsible for defining, directing and evaluating the **Network’s** activities.

Stipulations of Network Participation refers to the combination of Articles included in the Cooperation Agreement which regulate the legal rights, obligations and restrictions of all activities and procedures of all Partners and Members within the **Network**.

Technical Secretariat (TS) is the body responsible for the general management of the **Network’s** day-to-day operation, including all technical, financial and administrative aspects.

KEEPING RELEVANT THE 2008 INTERNATIONAL RECOMMENDATIONS

1. The IRTS 2008 official document mentions explicitly the way forwards for keeping it relevant. “It is recognized that the updating process of the *International Recommendations 2008* should be envisaged as a recurrent and well-organized procedure. While preparation of editorial amendments and clarification beyond dispute are to be done by UNWTO, issuing interpretations should be a cooperative responsibility of UNWTO and United Nations Statistics Division. Any proposed changes in the *International Recommendations 2008* should be developed jointly by UNWTO and United Nations Statistics Division endorsed by the United Nations Expert Group on Tourism Statistics and submitted to the United Nations Statistical Commission for approval” (paragraph 9.36)
2. In addition to this responsibility, UNWTO understands that also complementary initiatives regarding availability of other type of data focused on specific needs of institutional users, could contribute to foster public / private partnership on tourism statistics.
3. As mentioned in “The System of Tourism Statistics: Basic References”, “the information system created by national System of Tourism Statistics (STS) should be the foundation for a reliable and accurate System of Tourism Information (STI). In addition to STS data, STI should also include non-statistical information and complementary indicators (principally shortterm, both qualitative and quantitative) focusing on:
 - Enlarging the scope of the economic analysis of tourism;
 - Specific needs of key stakeholders of the tourism sector (specially NTA’s and industry associations in order to find adequate information to monitor tourism economic performance.)
 - Different users sharing common concepts and language in order to favour the identification / statement process for the information needs by private and public stakeholders.” (paragraph 17)
4. As previously stated¹, “UNWTO understands that the following typology of cases is the best approach to characterizing potential updates in order to sustain the relevance of the present conceptual framework of tourism statistics:
 - (a) Amendments that do not require major changes to key concepts, or data collection and compilation systems, such as:
 - (i) Editorial amendments: pertaining to wording errors, and apparent contradictions, as well as translation errors that affect neither core concepts nor the structure of the system;
 - (ii) Clarification beyond dispute: pertaining to cases where an unambiguous clarification can be made;

¹ “Designing a Work Programme on Tourism Statistics” (Report presented by UNWTO to the second session of the Inter-Agency Coordination Group on Tourism Statistics / New York, 28 February, 2005)

- (iii) Interpretation: referring to cases where a new situation arises for which the treatment in existing recommendations may not be clear;
- (b) Changes to the basic conceptual framework, requiring changes in key concepts, that would impact data collection, compilation processes and analytical results. In these instances, suggested changes should be proposed on a case-by-case basis, including a precise justification, a discussion of the possible timing of the introduction of the identified change, the link with available comparable data across countries, and the consistency with other macroeconomic statistics frameworks. In all cases, such major suggested changes should be based on statistical experience and evidence.”

Also, the World Tourism Organization understands that the updating process should, as a general requirement:

- (a) Focus on a number of specific issues related to the conceptual framework of IRTS 2008 and TSA:RMF 2008;
 - (b) Address users’ needs (that is to say, quality elements related to these issues);
 - (c) Take into account the feasibility or adequacy of the suggested proposal;
 - (d) For the time being the updating process will limit excludes in potential amendments.
5. UNWTO should prepare “Complementary clarification notes” both to IRTS 2008 and TSA:RMF 2008 when considered appropriate in order to keep both international standards regularly updated with those amendments that may need further conceptual clarifications.
6. Regarding the selection of those issues that would deserve attention, there is a need to use a standard format to be circulated to the Committee for each of them. (The Annex provides a model example -included in the previously mentioned UNWTO document prepared in 2005 - that could allow for further discussion by the Committee).

ANNEX

Definition of visitor

Background – summary description:

The criteria used in Tourism Statistics to differentiate an international visitor from a traveller have to do with the fact of being outside one’s usual environment, the duration of the stay, and the activities deployed by the individual during his/her stay in the country visited and their remuneration (REC93 para 20., 21.). The main difficulty resides in the classification to be given to individuals going to a country for “business and professional purposes”, either as an employee or a self-employed, for any of the skill levels contemplated in labour statistics, and being paid either from within the country of origin or within the country of arrival.

BPM5 excludes those paid ² from the country of arrival from its definition of travellers (para. 243 “A traveller is an individual staying, for less than one year, in an economy of which he is not a resident for any purpose other than [...] (iii) undertaking a productive activity directly for an entity that is a resident of that economy”).

Nevertheless, this same framework includes their expenditure in “travel”. As a consequence, their treatment in BPM5 is ambiguous.

Migration statistics are silent concerning individuals departing to exercise an activity remunerated from within the country visited for less than three months, as the category of short-term migrant only refer to those with work contracts between three and twelve months. They are also excluded from the category of business travellers used in Migration statistics that only includes those not remunerated from the country visited (the Tourism recommendation for visitors).

Tourism statistics are unambiguous concerning border and seasonal workers, which are explicitly excluded from those classified as visitors. The case of other categories of workers, mainly those of high levels of technical skills, engaged in service providing activities, is presently under discussion in order to review the relevance, in terms of tourism analysis, mostly from the supply point of view, of treating differently those remunerated from within the country visited (considered as visitors in REC93) and the others, provided that the origin of the remuneration might not always be clearly defined and does not seem to have an effect on their consumption behaviour.

Comments:

The key issues seems to be:

- the case of technicians or other individuals having special skills visiting the country in order to perform an activity on a temporary basis, even remunerated from the place visited (a foreign artist, a foreign lecturer to a conference, a foreign consultant, etc.), who have no intention to settle there but come mainly to provide a very specific service;
- new categories of workers different from seasonal and border workers, in service industries such as IT service providers, hotels, etc.

Proposals:

- tourism statistics should modify the list of tourism purposes and specify unambiguously what has to be considered within the “business and professional” purpose, and as a consequence the classification as visitors of those travelling for this main purpose;
- migration statistics should mention in the definitions of short-term migrants that movements for a period of less than 3 months (Box 1) are not taken into account. In particular, they should consider the possibility to register those workers that move for a period of less than 3 months, admitted by the receiving State for the specific purpose of exercising an economic activity remunerated from within the receiving country (Box 2.11);

² If we consider that being paid is equivalent for undertaking a productive activity directly for an entity...

- BPM6 should state clearly in which cases their remuneration should be treated as Income (non-resident employees of resident firms) and when the work provided should be treated as part of transactions on services;
- there is a need for reconciliation of present definitions of business travellers, business visitors, and other workers in all related frameworks

Related questions and remarks for discussion by the Committee

Feasibility or adequacy of implementation:

Documents of references

Typology^(*)

^(*) For each issue, it should be identified which of the following amendments applied.

EA: Editorial amendments: pertaining to working errors, and apparent contradictions, as well as translations errors that affect neither core concepts nor the structure of the system.

CL: Clarification beyond dispute: pertaining to cases where an unambiguous clarification can be made.

I: Interpretation referring to cases where a new situation arises for which the treatment in existing recommendations may not be clear.