

Capacity Building Programme on Tourism Statistics  
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## Activities on TSA in the European Union

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# Outline of the presentation

- **The Economic Impact of Tourism**
- **Development of an harmonized methodology**
- **TSA implementation in the EU**
- **Future progress in the implementation of TSA**
  - ✓ **Update of the legal act on tourism statistics with reference to TSA**
  - ✓ **Eurostat's TSA project**

# The Economic Impact of Tourism

- Tourism an important economic factor
- In particular for rural regions compensation for a lack of jobs in the manufacturing sector
- The economic impact has only lately been recognized
- Various branches contribute to tourism services
  - ✓ Accommodation
  - ✓ Leisure and cultural activities
  - ✓ Transport
  - ✓ Retail trade
  - ✓ Restaurants/Cafés
  - ✓ Financial and insurance services
  - ✓ Etc.

# The Economic Impact of Tourism II

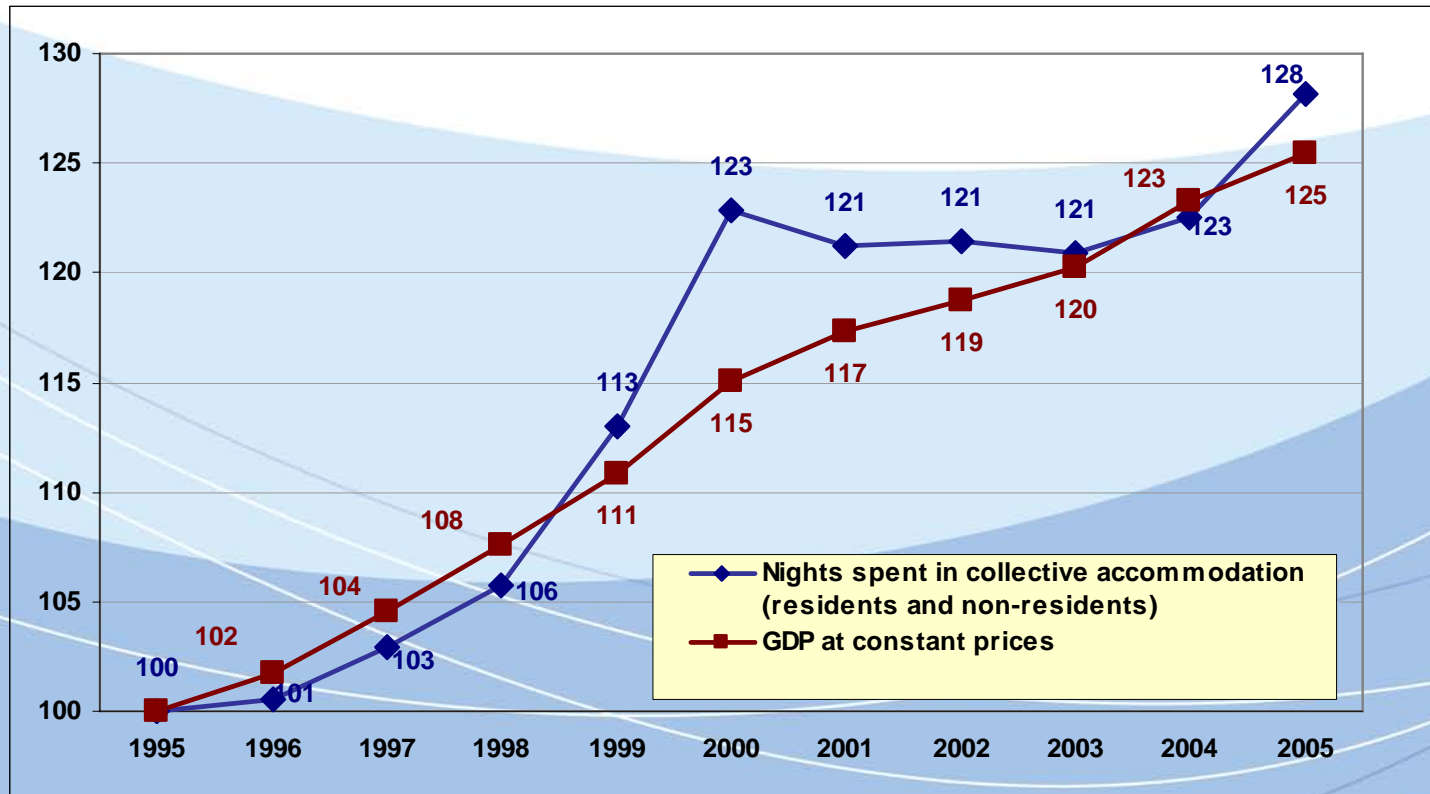
- Tourism as a cross-section domain of the economy
- Difficult to analyze the share of tourism in the economy
  - ✓ GDP
  - ✓ Employment
- Tourism output vs. non-tourism output

# The Economic Impact of Tourism III

- **Increased political interest in the economic impact of tourism**
  - ✓ Important factor for growth and employment in general
- **Specific policies of the Commission**
  - ✓ Regional Policy
  - ✓ Rural Policy
  - ✓ Maritime Policy

# Growth of nights spent in the EU

*The number of tourism nights in accommodation establishments in the EU is growing faster than the overall economic activity*

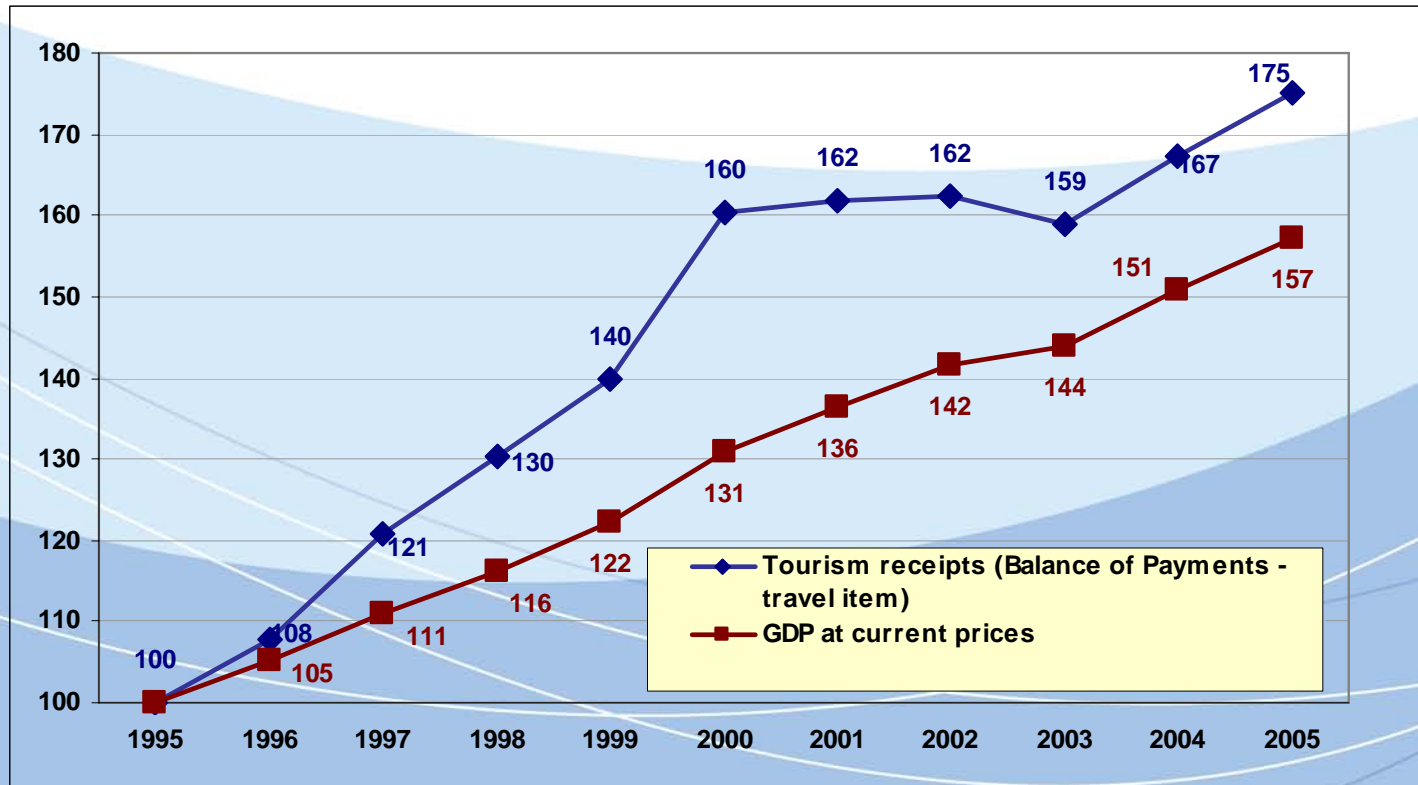


Source: Eurostat (Tourism Statistics & National Accounts), excl. Romania



# Growth of European tourism receipts

*From 1998 to 2005, the tourism receipts have increased with 75%, compared to 57% GDP growth over the same period*



Source: Eurostat (Balance of Payments & National Accounts)

# The Development of an International Harmonised TSA Methodology

- Mid of 80s: OECD started working on the integration of tourism into the framework of National Accounts (SNA) enabling a measurement and comparison of tourism with other sectors of the economy
- 1991: Manual on Tourism Economic Accounts (TEA) published by the OECD. Within the OECD countries data collection and analysis on the basis of TEA
- 1991: Ottawa Conference
  - Recommendations on Tourism Statistics and
  - Standard International Classification of Tourism Activities (SICTA); 1993 adopted by the UNSC



# The Development of an International Harmonised TSA Methodology II

- After 1993 OECD and UNWTO started developing a TSA with reference to SNA chapter 21
- 1999 WTO conference in Nice adopted in principle the TSA-RMF (officially adopted by the UNSC in 2000)
- Update of the TSA-RMF submitted to the recent meeting of the UNSC in February 2008

## Active Role of Eurostat and DG ENTR in this Process

- Eurostat contributed actively to the IACG to submit the TSA-RMF to the UNSC 2000 as well as 2008
- 2002: European Implementation Manual (EIM)
- 2003-2007 financial grants by the Commission to foster the implementation of TSA in the Member States
  - 16 Member States participated
- 2005 Methodological workshop on TSA in Brussels

# TSA implementation in the EU (I)

## State of the exercise:

**TSA implemented and regular reporting at least on a core set of tables: 5 Member States (AT, FI, PL, PT, ES)**

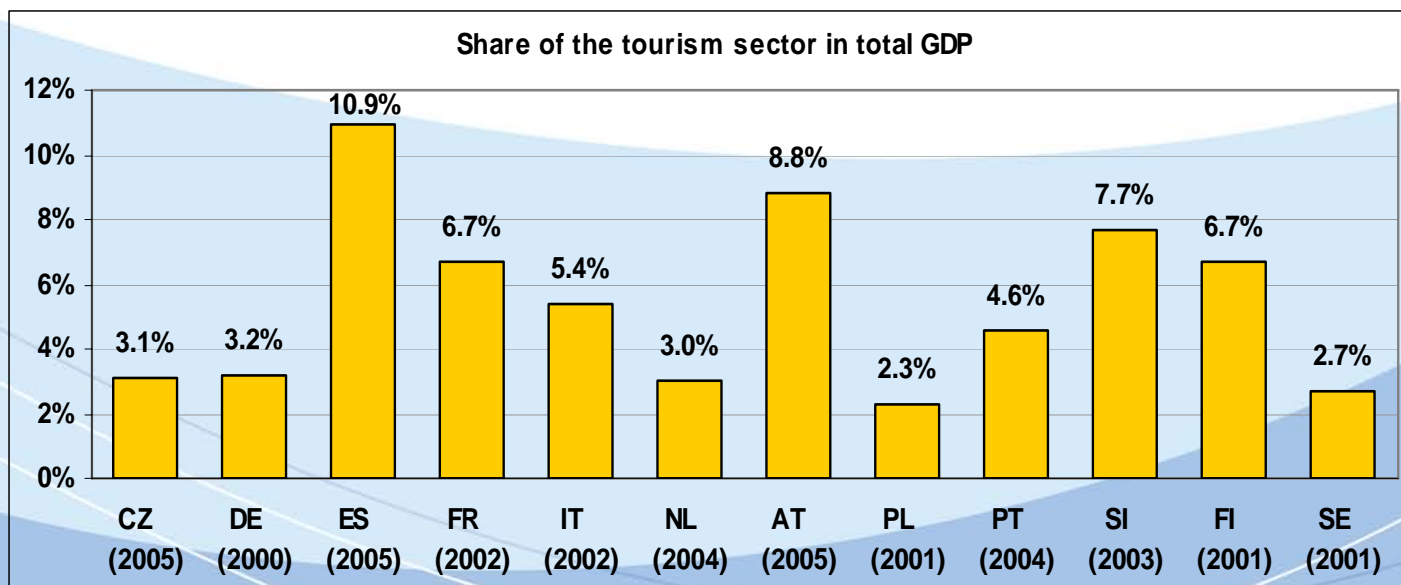
- **Pilot studies available: 8 Member States**
- **Compilation started/Feasibility studies conducted: 10 Member States**
- **TSA non-compliant with common methodology in 2 Member States**
- **No action yet in 2 Member States**

# TSA implementation in the EU (II)

## Problems:

- **Different state of the exercise**
- **Lack of basic tourism statistics information**
- **Lack of comparability:**
  - ✓ Compliance with TSA methodology (TSA-RMF, EIM) not clear
  - ✓ Use of non-comparable and non-harmonized estimation methods
- **Lack of information on the methods applied**

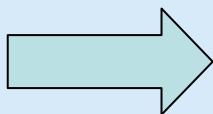
# TSA implementation in the EU (III)



Source: National Statistical Institutes, provisional and final TSA results

# Future Progress in the Implementation of TSA in the Member States

- **Improving the Primary Data Collection**



**Update of the Legal Act on Tourism Statistics**

- **Project on Tourism Satellite Accounts**



# Update of the Tourism Statistics Legal Act with Reference to TSA

- **Information on Private Accommodation (at least on the basis of good estimation)**
- **Information on Same-Day visits**
- **More detailed information on Tourist Expenditure**

# Update of the Tourism Statistics Legal Act with Reference to TSA (I)

## Better information on Private Accommodation

- ✓ Even as good estimation
  - ✓ Concerning the supply side restricted to
    - Private rental accommodation
  - ✓ Information on non-rental private accommodation from the demand side surveys
- ⇒ Improve the completeness of total visitor flows

# Update of the Tourism Statistics Legal Act with Reference to TSA (II)

## Information on Same-Day visits

- ✓ Increasing share of same-day trips
  - ✓ Lack of information
  - ✓ Difficulties in data collection
  - ✓ Distinction between tourism same-day trips and non-tourism leisure activities (Usual environment criterion)
- ⇒ Information necessary for a complete depiction of relevant tourism flows

# Update of the Tourism Statistics Legal Act with Reference to TSA (III)

## More detailed information on Tourist Expenditure

- Breakdown by type of expenditure
  - ✓ Transport expenditure
  - ✓ Accommodation expenditure
  - ✓ Other expenditure
- For Outbound Trips: Better distinction between the domestic share and the share abroad

# Update of the Tourism Statistics Legal Act with Reference to TSA (IV)

- **More detailed information on destination of trip**
  - ✓ Breakdown by nights spent domestic and abroad
- **More comprehensive coverage of trips**
  - ✓ All tourism trips, including same-day visits
- **Transmission of micro-data (demand-side)**
  - ✓ Increased flexibility in evaluation of the data

# Objectives of the TSA Project

- **Assessment of the implementation of TSA in the Member States**
  - Stock-taking of the state of the implementation
  - Compliance with international methodological standards (TSA-RMF, EIM)
  - Comparability of the results across the countries
  - Completeness of the TSA (coverage of the tables)
  - List of problems encountered; possible obstacles to start the work



# Objectives of the TSA Project II

- **Drawing up of a Directory of best practices**
  - Best use of existing statistical sources in the Member States
  - Estimation methods for missing data
- **Organisation of exchange of best practices and experience**
  - Individual consultancy missions
  - Organisation of two multi-country workshops
- **Proposal for key figures for an intermediate short-term update of basic TSA information**

# Eurostat's TSA project (2008-2009) timetable

## Phase 1: Jan 2008 – Oct 2008

- **Country-specific reports**  
[June 2008]
- **Comparative analysis report on TSA implementation in the EU Member States**  
[June 2008]
- **Draft practical guide for TSA compilation (preliminary version)**  
[June 2008]
- **Workshop**  
[Sep/Oct 2008]

## Eurostat's TSA project (2008-2009) timetable (2)

### Phase 2: Oct 2008 - Aug 2008

- **Technical assistance missions**  
[Oct 2008 – March 2009]
- **Practical guide for TSA compilation (final version)**  
[May 2009]
- **2nd workshop**  
[June/July 2009]
- **Report on key TSA figures for short-term update**  
[May 2009]

# Thank you for your attention

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