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

Share of the tourism sector in total GDP

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
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)


- 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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