What activities has been undertaken and recent development since workshop II?

I. ACNER* survey becomes regular starting with 2009, having the full results for the year 2008 (as a pilot study)

II. Two new (demand side) pilot surveys on:
   - Tourism Expenditure of non-residents accommodated in private accommodation establishments (TOUR_PA)
   - <Accommodation provided by non-residents> Module within pilot Survey on same-day trips (TOUR_SDT)

III. Carrying out (from supply-side) the new yearly survey for travel agencies (having also data on inbound tourism)

* - Survey of tourism expenditure of non-residents accommodated in collective tourism establishments
I. ACNER survey becomes regular, having complete results for 2008

- Starting 2009 ACNER survey is a regular survey carried out quarterly by INS and included in the National Statistical Plan
- Some brief results for the year 2008:
  - Total tourism expenditure of foreign tourists accommodated collective establishment EUR 1.14 bn.
  - Total number of foreign tourists 1,466,289 (~ 1,465,891 the figure from supply side occupancy statistics!!!)
  - Full coverage of expenditure by products (21 categories - even more detailed than the 10th international categories found in 2008 TSA:RFM)

Tourism expenditures of non-residents accommodated in collective establishments in Romania, by categories, 2008

- Accommodation (BB, HB, FB, ony) 47.7%
- Restaurant, bar and similar 17.4%
- Transport (Rail, Road, Air, Ship, Rental) 8.6%
- Purchasing goods (Food and beverage, cigarettes from retail trade, Gifts, souvenirs) 15.6%
- Cultural services (Performing arts, films, theatre; Visits to museums, zoo/botanical gardens and other attractions) 2.0%
- Sport and recreational services (Playing various sports, Films, theatre and exhibitions, renting, hiring, renting and assurance equipment) 3.0%
- Other services (Health and medical care, Cosmetics, hairdressers and other beauty services) 2.2%
- Other expenditures 3.5%
II. Two new (demand side) pilot surveys

- Tourism Expenditure of non-residents accommodated in private accommodation establishments (TOUR_PA)
  - Necessary to complement ACNER survey
  - Exhaustive survey only for rooms and apartments for rent, licensed by Ministry of Tourism (over 500 establishments)
  - Similar questionnaire with ACNER survey
  - Technique: self-completion of the questionnaires together with a blank envelope; then the envelops are collected in a “master envelope” by the owners
  - The first data were collected in May 2009 and validated in June

II. Two new (demand side) pilot surveys (cont.)

- <Accommodation provided to non-residents> Module within Pilot survey on same-day trips (TOUR_SDT)
  - Household survey, face-to-face interview, for 1st quarter it was carried out in April 2009 (8,590 dwellings)
  - Special module to get data (“from supply side”) referring to:
    - number of households providing accommodation to non-residents (in the main dwelling or in other owned dwelling)
    - number of non-residents accommodated in the households
    - country of residence of tourists
    - number of overnight stays spent
    - services provided to non-residents (accommodation, meals, transport, other service) of which free of charge services

- ACNER + TOUR_PA + TOUR_SDT surveys = integrated system to collect data on inbound tourism in Romania (starting with 2009)
III. Carrying out (from supply-side) the new yearly survey for travel agencies (having also data on inbound tourism)

- Precious data relating to incoming activity of travel agencies & tour operators in 2008:
  - non-monetary variables:
    - number of tourists (148,663 TO; 8,326 TA)
    - % of incoming from total sales of packages (21% TO; 14.4% TA)
    - separately breakdown for tour operators and travel agencies
  - structure of tourist package (%):
    - Accommodation
    - F&B
    - Transport
    - Culture and recreational services
    - Other services
    - The commission of the travel agencies/tour operators

- Main finding: unfortunately incoming is not an important component of travel agencies’ activity in Romania:
  - 11.6% share of inbound tourists in total number of tourists registered by TO
  - 14.9% ~ by TA