In 2008 Romania was selected to participate in the “programme”, aiming to gain experience in building up a modern and efficient system of tourism statistics;

One of the conclusions reached by the national team:

- Institutional cooperation of all organizations involved in the compilation of official tourism statistics is essential;

- This will lead to an integrated tourism statistics of a greater quality, which meets the requirements in the field of tourism statistics, Balance of payments and Tourism Satellite Account.
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- Compilation of Inbound tourism statistics before 2008, was ensured by:
  
  - National Institute of Statistics (NIS):
    - Number of arrivals of inbound visitors registered at the border – based on administrative data source
    - Accommodation statistics: tourist arrivals and overnight stays by type of accommodation and country of residence

- National Bank of Romania (NBR): Balance of Payments
  - *Travel in the BOP* relies primarily on:
    - Information collected from the banking system, regarding cross-border receipts and payments related to travel,
    - Supplementary information on credit/debit cards transactions also reported by banks and
    - Estimations of cash amounts spent by resident during their trips abroad (included on the debit side of item "Travel")

- In 2004, as a first exercise, TSA was compiled by the National Institute for Research Development in Tourism (NIRDT) – a research institute subordinated to the Ministry of Tourism, in cooperation with NSI ("one time project");
- There were no monetary data (coming from statistical survey – demand side) regarding the expenditure of inbound visitors
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- Developments in the European statistics have shown the need for improvement in all areas: tourism statistics, BOP and TSA;

- Cooperation started in late 2007 between the NIS, the NBR and NIRDT (under the umbrella of Ministry of Tourism), in order to conduct a new survey ("ACNER") with the aim to estimate:
  - The expenditure of the non-residents accommodated in tourism collective establishments in Romania;

The survey results will be used for the compilation of all tourism related statistics: Travel BOP, TSA, as well as for the estimation of tourist arrivals and overnight stays, from demand side;

Although there is no formal Tourism Statistics Working Group, at the technical level, in 2008, an expert group with specialists from the three institutions started a fruitful cooperation for survey implementation:
- The questionnaire was designed by the NIS, in cooperation with NIRDT and the central bank.
- The questionnaire was tested in the capital city and other two main cities: Constanta and Brasov;
- April 2008, the NIS has started the survey implementation as a pilot
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- Cut-off sample has been set up: establishments accommodating more than 950 foreign tourists in 2007 (including rural pensions having more than 40 foreign tourists accommodated);
- Reference period: The ACNER pilot survey was carried out quarterly during a period of 20 days/month in April, June, August and December 2008;
- Data collection:
  - The questionnaires are distributed to the non-resident tourists when they check in; they can leave them to the reception desk, as soon as the data are provided, until the tourists check out;
  - About 60,000 foreign tourists were surveyed in 2008 (and planned to be surveyed in 2009)

The questionnaires are collected by the Territorial Statistics Offices to be validated and processed using an IT soft. The processed data are further sent to NIS headquarter;

Preliminary results of pilot survey have shown a good response rate (53% in Q1, 58% in Q2, 61% in Q3 and 58% in Q4).
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- Main difficulties faced in conducting the ACNER survey:
  - Lack of cooperation of accommodation establishments owners (especially in the capital city);
  - Non-responses;
  - The selected establishments in the sample might not register the same tourists flow as in 2007;
  - A discrepancy between the number of non-residents tourists obtained after grossing up and number of the non-residents tourists estimated in an existing survey “Occupancy in the tourism collective establishments”. The total difference is insignificant, but by countries it is higher.

Future plans:
- For the survey ACNER:
  - The results of the pilot survey will not be published, nor used for the BOP compilation for 2008 data;
  - Starting 2009, the survey is conducted on regular basis, being part of the official Statistical Survey Plan of the NIS.
- To improve the coverage of Travel item, two other new surveys are envisaged, currently in the process of preparation (pilot surveys in 2009):
  - Survey on tourism expenditure of non-residents accommodated in private accommodation establishments (TOUR-PA);
  - Household survey on same-day trips (TOUR-SDT).
The findings of the new surveys will be used for TSA, BOP purposes, as well as for official statistics on the number and residency of the non-resident tourists;

Although the new surveys are carried out within a PHARE Project who’s beneficiary is the NIS, cooperation took place in the group of experts to ensure the surveys will serve all travel related statistics purposes (official statistics, BOP, TSA).

Quarterly Survey on expenditure non-residents accommodated in private establishments (TOUR PA):
- Exhaustive survey among private accommodation establishments (rooms and apartments for rental) licensed by Ministry of Tourism (over 500 identified);
- Based on questionnaires placed in the guest rooms; they are collected by the owners in a “master envelope” and sent for processing;
- Data obtained:
  - Expenditures broken down by type of service (accommodation, transportation, restaurants etc.)
  - Number of days foreseen to be spent in Romania
  - Number of tourists by country of residence, means of transportation, purpose of travel, etc.
Quarterly Survey on same-day trips (TOUR SDT):
- Face to face interview among households representatively selected;
- Data obtained:
  - Expenditures broken down by type of services (domestic and outbound, inbound SDT not covered);
  - Additionally: Module on households providing accommodation to non-residents, getting data on:
    - Number of non-residents accommodated by households
    - Country of residence
    - Number of overnight stays
    - Other services provided, of which free of charge.

Future plans: The surveys are planned to be carried out on a regular basis starting 2010, after the results of the pilot surveys will be analyzed and the data quality assessed within the expert group.

The results will be disseminated in bilingual (Romanian/English) publications.
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Conclusions:

- The three new surveys will significantly improve the quality of the inbound tourism statistics in Romania, creating an integrated statistics;
- The main users will be all public institutions involved in the compilation of tourism statistics in Romania: The National Institute of Statistics, the central bank and the Research Institute for Tourism (on behalf of the Ministry of Tourism);

This was possible due to:
- An evaluation of the tourism related statistics compiled by different institutions at the national level, carried out during the Programme;
- Assessment of the further statistical needs in the three areas: accommodation statistics, BOP, TSA;
- Work within the expert group for implementation of new surveys, or improvement of existing one;
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Thank you for your attention!
Questions are welcome

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