



CAPACITY BUILDING PROGRAMME ON TOURISM STATISTICS

- 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

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- **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 (NIRD)** – 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 NIRD (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;*

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- 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 NIRD 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)

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- 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.

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- 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)

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- 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).

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- 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.

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- 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

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- 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);

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- 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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