TSA development in Romania

Cristi Frenț, PhD.
INCDT

Outline

- General overview
- TSA not only a project but a continuous activity
- Key actions 2004-2009
- Progress evaluation 2009 vs. 2005
- Future perspectives
General overview

- TSA in Romania is an **incipient phase** (not yet implemented...)
- Rather an "unofficial/informal" TSA activity than a continuous one officially assumed by NTA (Ministry of Tourism) and INS
- A pilot TSA within 2004 INCĐT research project (unpublished data)
- General guidelines provided by 2005 and 2008 INCĐT (feasibility) studies
- Some actions **to facilitate** the TSA process carried out (2007-2009) – obtaining detailed data on:
  - expenditure of foreign tourists
  - excursionists (domestic and abroad)
  - travel agencies for disaggregating tourist packages
- A lot of work to be done to "officialize" the TSA process
- Lack of resources (human, financial)

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TSA not only a project but a continuous activity

The scheme of the TSA process in Romania (from 2004 onwards):

- **Pilot TSA**
- **TSA feasibility study** (partly)
- **Actions to improve the statistical basis**
- **Having a full TSA** (at least Tables 1-6)
- **TSA extensions** (regional, indirect effects etc.)

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Key actions 2004-2009

- **2004**: *INCDT pilot TSA* (a sort of “supply side oriented TSA”):
  - one-time project supported by research funds
  - based only on the existing data
    - no demand side data for inbound tourism expenditure (use of estimations from supply side)
    - lack of same-day visitors data
  - difficulties in breakdown the total tourist expenditure (use estimations from supply side)
  - difficulties in establishing tourism shares
  - no inter-institutional platform - unofficial collaboration with INS, National Accounts Division
  - data not published

- **December 2005**: *INCDT TSA Feasibility study* (part I – System of tourism statistics in Romania – description and diagnosis)
- **March 2006**: *simulated TSA of WTTC OE* within Romania Country special report
- **2006-2007**: *Facilitating the process of developing TSA* (*soft* stage) by:
  - **2006** – small improvements to the existing tourism surveys of INS in Romania (the reference year 2007):
    - Travel agencies survey
      - -> adding two questions regarding the structure of tourist packages (unpublished)
    - Accommodation capacity and occupancy surveys
      - -> data on number of occupied rooms (unpublished)
      - -> expanding the survey on the existing capacity of accommodation establishments (+units below 5 bed-places) (published)
  - **2007** - drafting the questionnaire and methodology for the new INS survey entitled ACNER (Survey on tourist expenditure of non-residents accommodated in tourism collective establishments)

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Key actions 2004-2009 (cont.)

- December 2008 *INCDT study*: some short general guidelines referring to the TSA implementation (a sort of continuation of 2005 TSA study)
- 2008-2009 *Facilitating the process of developing TSA* by tourism surveys carried out by INS ("hard" stage)
  - ACNER survey becomes regular (2009)
  - a *new yearly survey on travel agencies* with a *special module for tourist packages* (2009)
  - March 2009, *TSA consultancy mission* received from Mr. Gerd Ahlert within the Eurostat project on TSA 2008-2009
  - 2009 *Pilot survey on same-day visitors* and *accommodation provided to non-residents* (household survey) and *Pilot survey on private accommodation* (demand side survey to complement ACNER survey) April – September 2009

Progress evaluation 2009 vs. 2005

<table>
<thead>
<tr>
<th>Measures proposed in the 2005 TSA feasibility study*</th>
<th>2005</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Demand side) survey for inbound visitors</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Survey on tourism package (on travel agencies)</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Improvement to ACTR survey (Household survey on tourism demand of residents)</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Survey on same day trips</td>
<td>No</td>
<td>Yes (pilot)</td>
</tr>
<tr>
<td>Survey on private accommodation</td>
<td>No</td>
<td>Yes (pilot, partly)</td>
</tr>
<tr>
<td>Room occupancy calculation</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Research activities on GFCF and tourism collective consumption</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

* - carried out by INCDT, financed by NTA and having contributions from INS and BNR

...but Yes, starting to 2010

...but only from demand side
Future perspectives

- Starting with 2010 a module on same-day visitors and accommodation provided to non-residents within the existing regular ACTR survey
- Improving the survey on travel agencies
- "Reconciliation" of the questionnaires related to tourism expenditure breakdown (ACTR, ACNER, survey on same day visitors)
- Creating an integrated system of tourism surveys for having complete demand side statistics:
  - Inbound: ACNER survey (collective) + Survey on foreign tourists accommodated in small private accommodation units + ACTR survey having data for accommodation provided to non-residents by households
  - Domestic: ACTR survey (including the module for excursionists)
  - Outbound: ACTR survey (including the module for excursionists)

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Future perspectives (cont.)

- Creating of an inter-institutional TSA platform
- 2009-2010: INCDT and INS joint research project for surveying the "characteristicity" of tourism industries in Romania (from supply side) and surveying vacation homes
- 2009-2010: lobby for the introduction of vacation homes questions within the 2011/2012 Population and Dwellings Census
- ... and finally having a full TSA (at least Tables 1-6) for the reference year 2009 – foreseen in 2011/2012 due to the SUT availability
- TSA in Romania should be a continuous activity developed each year or at least periodically ... and constantly improved

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Thank you for your attention

Contact

cristi_frenti@incdt.ro

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