



TSA development in Romania

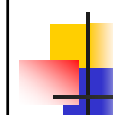


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Outline

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

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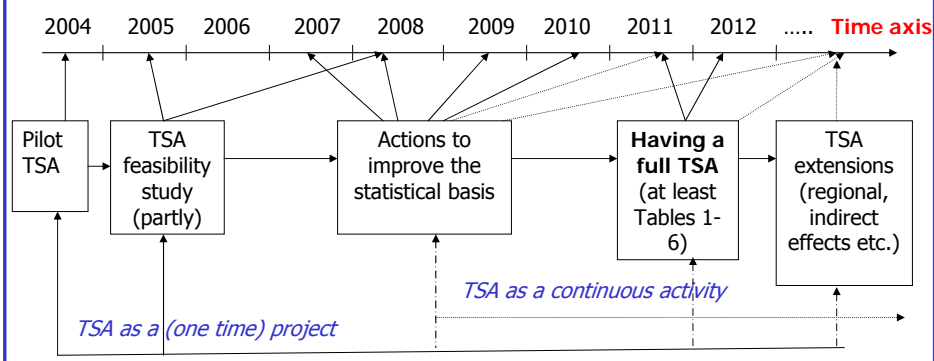
General overview

- TSA in Romania is a **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- A pilot TSA within 2004 INCDT research project (unpublished data)
- General guidelines provided by 2005 and 2008 INCDT (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):



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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

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Key actions 2004-2009 (cont.)

- 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

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Progress evaluation 2009 vs. 2005

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

...but
Yes,
starting
to 2010

...but only
from
demand
side

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



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

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