



UNWTO Special Workshop on Tourism Statistics

20-21 November 2014

Todaiji Temple Cultural Center – Nara – Japan

Session 3:

Institutional and technical requirements for successful Tourism Satellite Account (TSA) implementation

b. The examples on developing TSA

Tourism Satellite Accounts in Europe: state of affairs

DG EUROSTAT, Unit G-3 'Short-term business statistics and tourism'



Outline of the presentation

- TSA governance in the European Union
- TSA initiatives (including some analytical results)
- Outcomes of TSA survey (conducted among tourism statisticians and TSA compilers in October 2014)





TSA governance in the European Union

No EU-wide legal framework for TSA

- EU legal framework for European statistics on tourism
- Focus on primary statistics (tourism flows in accommodation establishments, domestic and outbound tourism demand)... also as "building blocks" for TSA
- No EU requirements on Tourism Satellite Accounts... but many primary data sources (tourism statistics, business statistics, National Accounts, etc.) harmonised at EU level





TSA governance in the European Union

Compiling TSA is a decision at (sub)national level

- Depending on the importance of tourism for a given country (user needs), priority setting, availability of budget
- In most European countries that compile TSA, the **national statistical institute** is in charge; in a few cases it is the tourism ministry or yet another institution
- Where national statistical institute is in charge, in half of the cases the **tourism statistics** department is responsible, in the other half it is the **national accounts** department





TSA initiatives

Methodological work in the EU

- 3 waves of grants for European countries to support the development of TSA (2000 – 2006, financed by the European Commission (DG ENTR))
- Project "Methodological work on Tourism Satellite Accounts in the European Union" (2008 – 2009, led by the European Commission (Eurostat))
 - Inventory of TSA work done and progress made in EU countries, comparison of methodologies, empirical results, directory of good practices, now-casting of TSA figures
 - http://epp.eurostat.ec.europa.eu/portal/page/portal/tourism/methodology/projects_and_studies





TSA initiatives

Voluntary transmission of selected TSA indicators

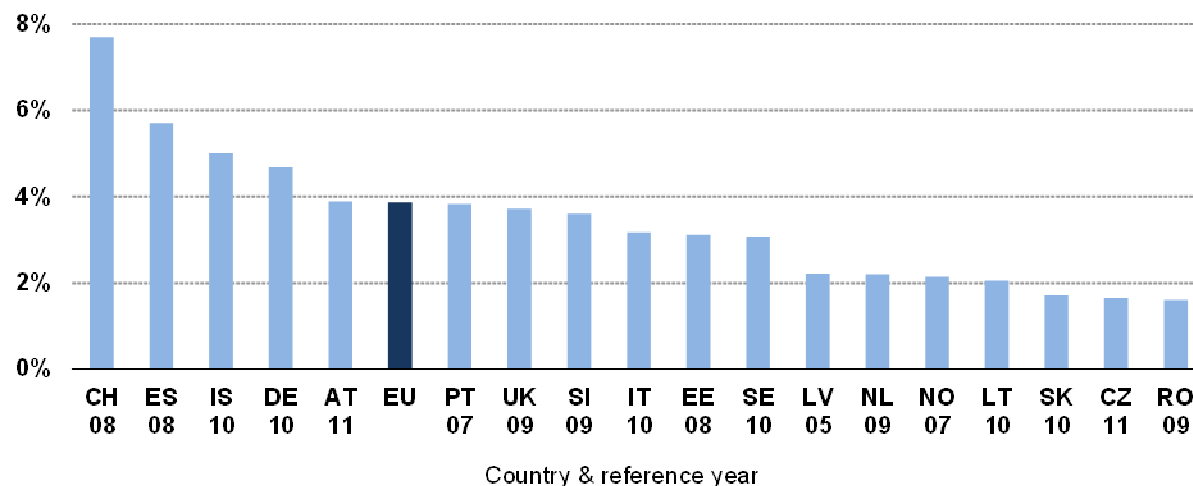
- In 2010 and 2013, Eurostat asked European countries to send, on a voluntary basis, available national TSA figures for a pre-defined set of indicators
 - 22 countries participated
 - Results somehow representative at EU level but often fragmented and not entirely comparable
 - Publication available on the Eurostat website ([2013 edition](#))
 - Likely to be repeated in 2015/2016



TSA initiatives

Voluntary transmission of selected TSA indicators

- Some observations
 - The contribution of tourism to the economy was on average 3.9% (= the internal tourism consumption as a proportion of total domestic supply)



*EU estimate:
average value
based on data from
18 countries for
which the tourism
ratio could be
calculated*



TSA initiatives

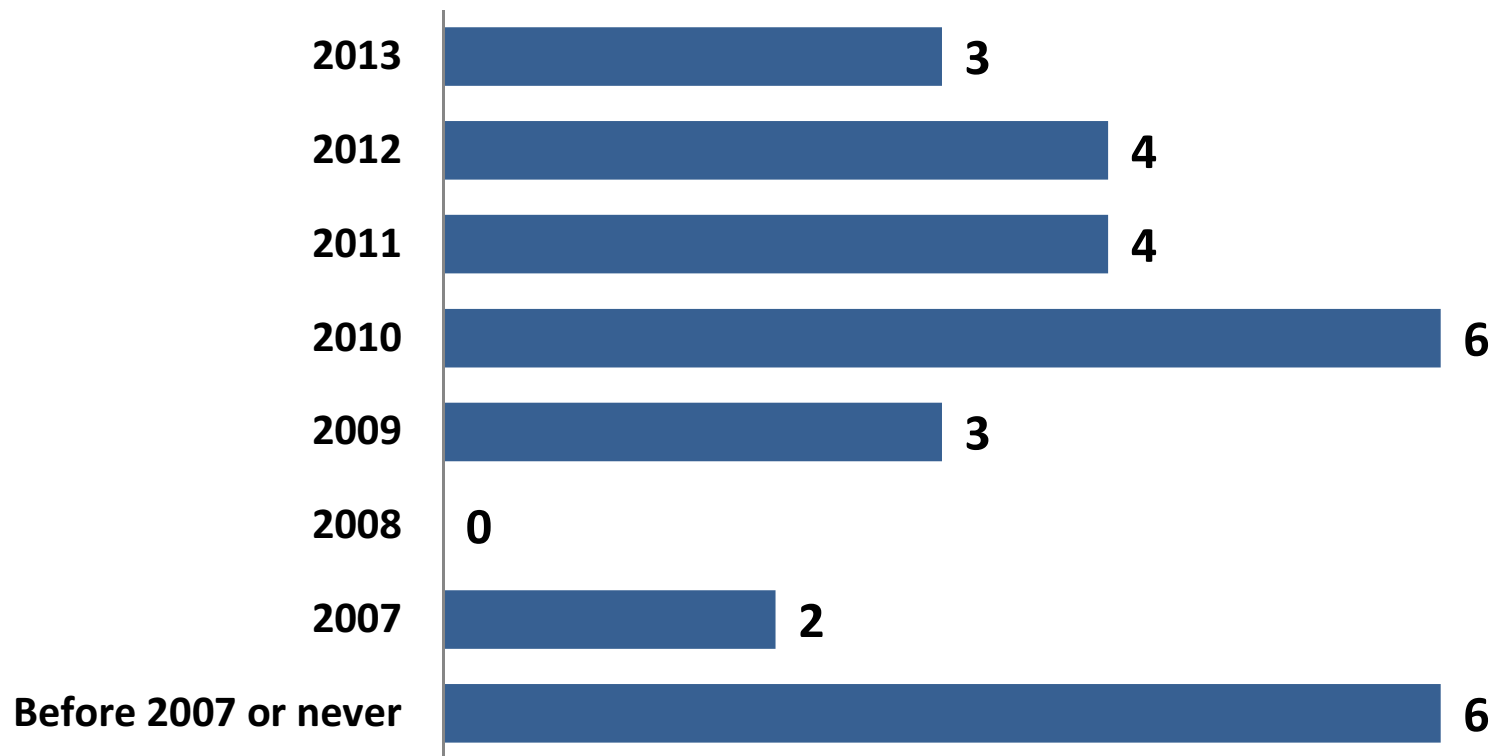
Voluntary transmission of selected TSA indicators

- Some observations (continued)
 - **Domestic tourism** accounted on average for 70% of internal tourism expenditure, ranging from 83% in Germany to 8% in Montenegro
 - More than half of domestic tourism expenditure was by **same-day visitors** (52%), while inbound tourism expenditure was dominated by overnight visitors (90%)
 - In the 12 countries for which employment data was available, tourism generated more than 10 million **jobs** [extrapolation to EU-28 level would estimate the tourism employment at around 17 million jobs]



Outcomes of TSA survey (n=28)

Most recent reference year for TSA (# countries)



Outcomes of TSA survey

Overview of state-of-affairs (countries, TSA tables)

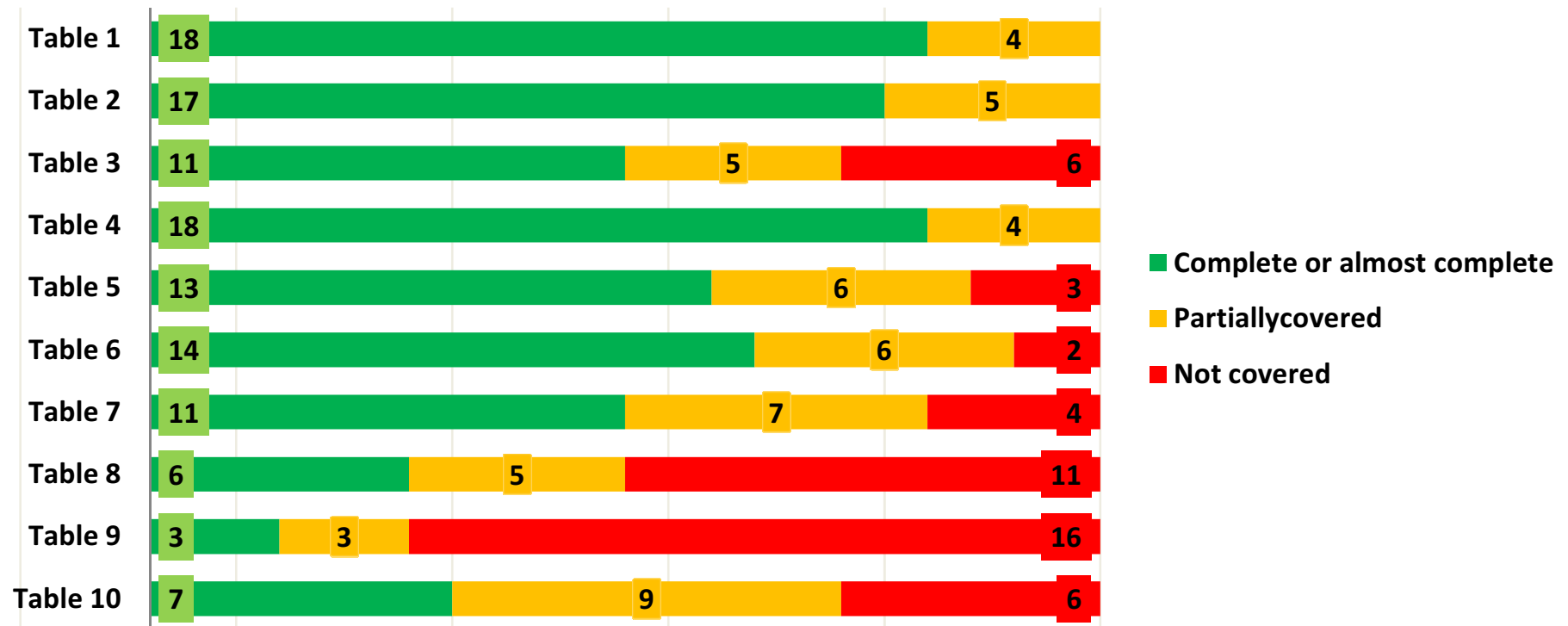
	BG	CZ	DK	EE	IE	ES	FR	HR	IT	CY	LV	LT	HU	MT	NL	AT	PL	PT	SI	SK	FI	IS	NO	CH	MK	RS	TR	AL
T1	Green	Green	Green	Green	Red	Yellow	Green	Green	Green	Green	Yellow	Green	Green	Red	Yellow	Green	Green	Green	Green	Green	Green	Green	Yellow	Green	Red	Red	Red	Red
T2	Green	Green	Green	Yellow	Red	Yellow	Green	Green	Green	Green	Yellow	Green	Green	Red	Yellow	Green	Green	Green	Green	Green	Green	Green	Yellow	Green	Red	Red	Red	Red
T3	Green	Green	Green	Red	Red	Yellow	Red	Red	Green	Green	Red	Green	Green	Red	Yellow	Red	Green	Green	Yellow	Green	Yellow	Green	Red	Yellow	Red	Red	Red	Red
T4	Green	Green	Green	Green	Red	Yellow	Green	Green	Green	Green	Yellow	Green	Green	Red	Yellow	Green	Green	Green	Green	Green	Green	Green	Yellow	Green	Red	Red	Red	Red
T5	Red	Green	Green	Green	Red	Yellow	Red	Green	Green	Green	Yellow	Green	Green	Red	Yellow	Green	Yellow	Green	Green	Green	Red	Yellow	Yellow	Green	Red	Red	Red	Red
T6	Red	Green	Green	Green	Red	Yellow	Red	Green	Green	Green	Yellow	Green	Green	Red	Yellow	Green	Yellow	Green	Green	Green	Green	Yellow	Yellow	Green	Red	Red	Red	Red
T7	Red	Green	Green	Red	Red	Yellow	Red	Green	Green	Green	Red	Yellow	Green	Red	Yellow	Green	Green	Green	Yellow	Green	Yellow	Yellow	Yellow	Green	Red	Red	Red	Red
T8	Red	Green	Green	Green	Red	Yellow	Red	Red	Red	Green	Red	Red	Green	Red	Yellow	Red	Yellow	Green	Red	Yellow	Red	Red	Yellow	Red	Red	Red	Red	Red
T9	Red	Red	Green	Red	Red	Yellow	Red	Red	Red	Green	Red	Red	Red	Red	Yellow	Red	Yellow	Green	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red
T10	Green	Yellow	Green	Yellow	Red	Yellow	Red	Red	Green	Green	Yellow	Red	Green	Red	Yellow	Red	Yellow	Green	Yellow	Green	Yellow	Yellow	Red	Red	Red	Red	Red	Red

- Green = completely or almost completely covered ; orange = partially covered ; red = not covered
- Self-assessment as reported by the country



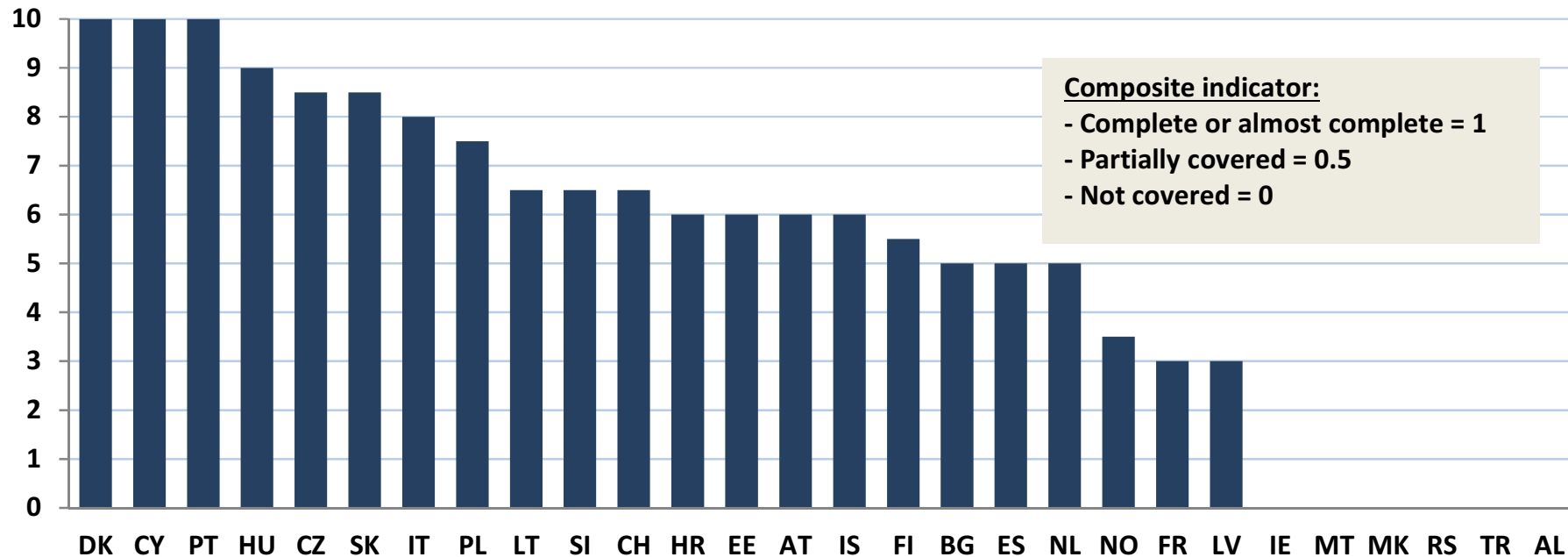
Outcomes of TSA survey

Self-assessed coverage, by TSA:RMF table (# countries)



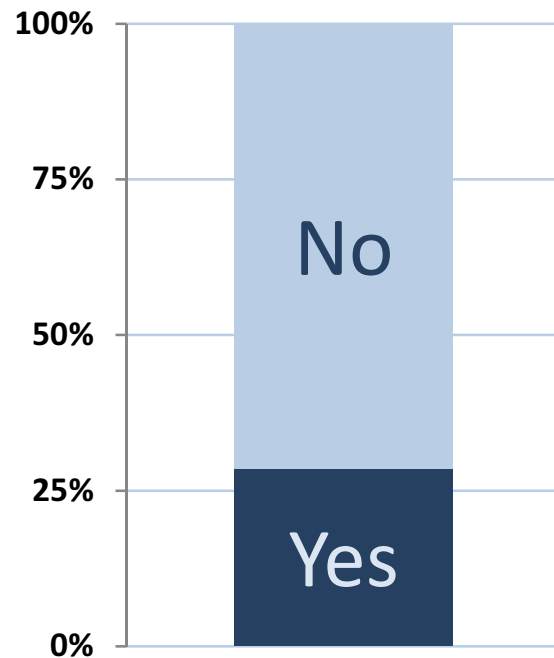
Outcomes of TSA survey

Self-assessed coverage, by country (# TSA tables)



Outcomes of TSA survey

Is TSA used properly and at its full potential?

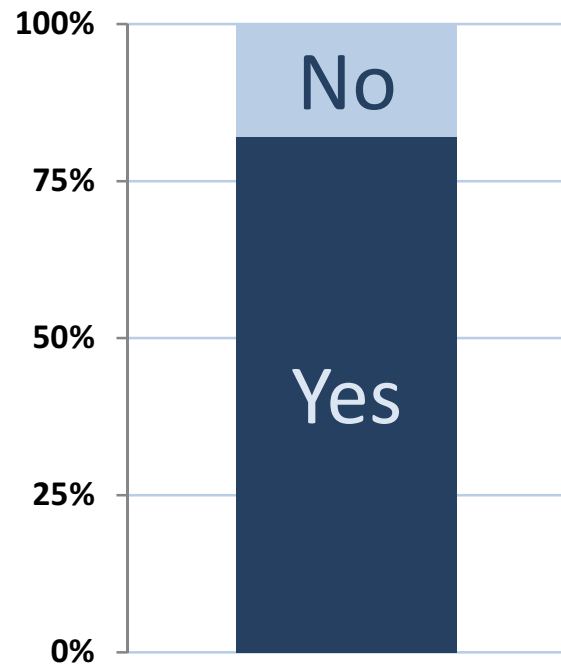


- No significant differences between advanced and less advanced TSA countries
- Does the "internationally recognised framework" live up to its expectations?
- Possibilities and limitations of currently available TSA data?
- Costs versus benefits?
Resources versus relevance?
- How to educate users?



Outcomes of TSA survey

Should TSA be a priority area for financial support?

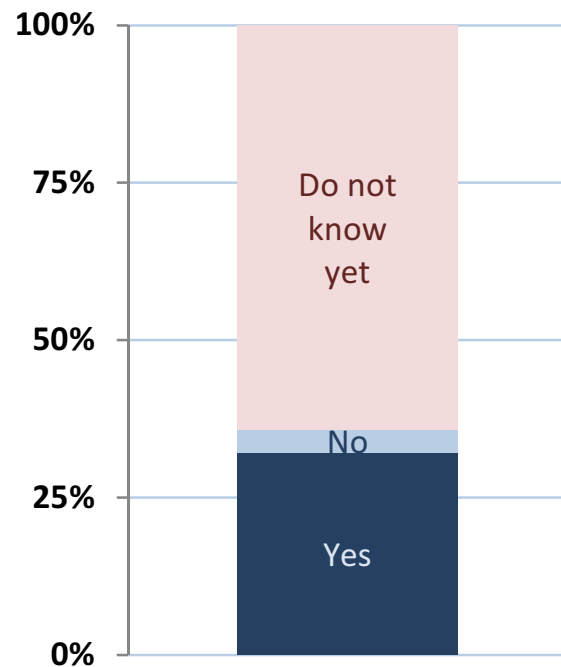


- Majority of responding countries think that TSA should be further supported
- Again, no significant differences were observed for advanced and less advanced TSA countries



Outcomes of TSA survey

Would you take part in a project (grant/contract)?

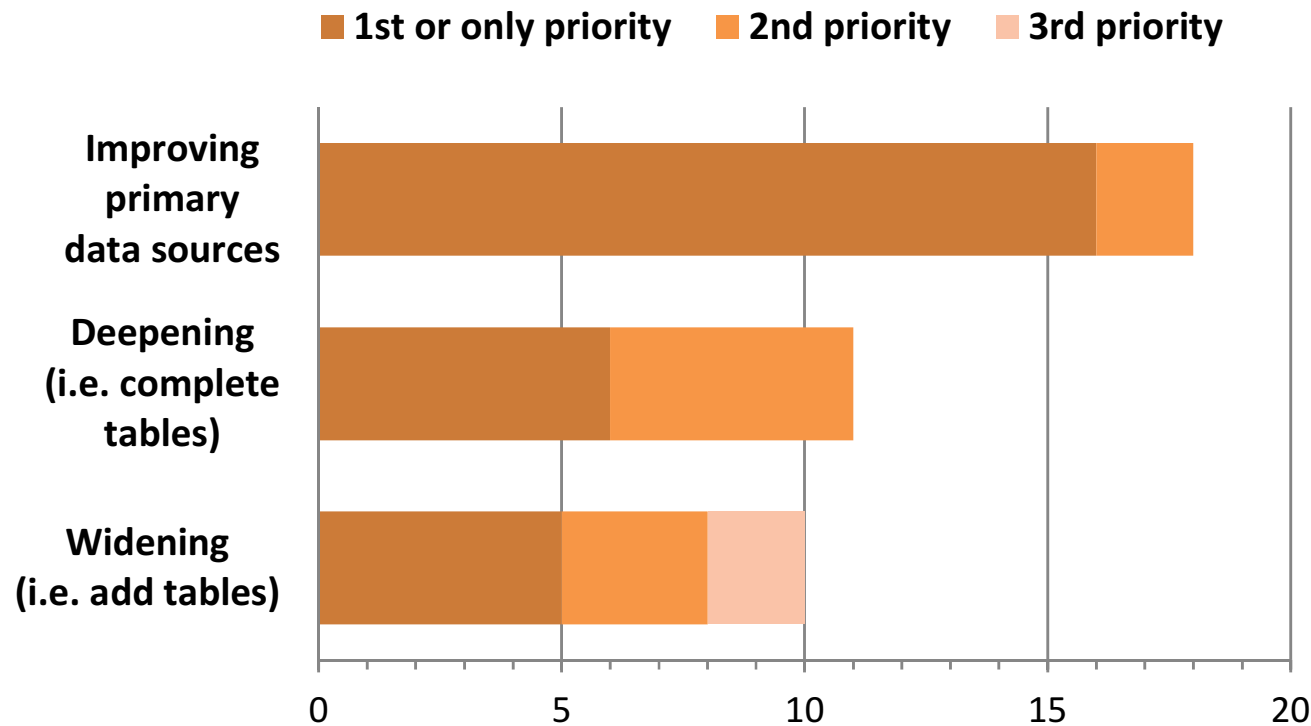


- Many countries were not able to confirm whether they would embark in a project related to TSA
 - ↳ Lack of human resources and skills to perform the project tasks ?
 - ↳ A matter of priority setting in tourism statistics (or even statistics in general) ?
- *Challenge:* how to develop a project satisfying as many countries' needs as possible and maximising output in terms of available harmonised TSA tables ?



Outcomes of TSA survey

Priority setting for further TSA development?



- Primary data are essential for TSA compilation
- "Learn to walk before wanting to run"
- *Challenge:* balance between development of primary data and accounting data



European
Commission

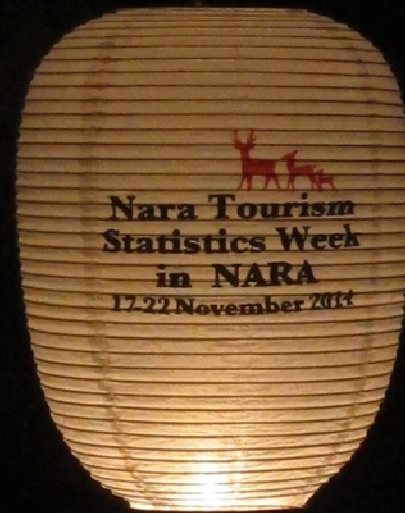
Thank you for your attention !

ありがとうございました。





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Questions ?

