



DG GROW / UNWTO Workshop

Measuring the economic impact of tourism in Europe: the Tourism Satellite Account (TSA)

BREY Building, Brussels, Belgium, 29-30 November 2017

Session 3

Wednesday 29 November 2017, 10:00-10:30

State of affairs on TSA compilation in Europe

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Outline of the presentation

1. State of affairs
2. Framework for TSA in EU
3. Voluntary transmission
4. Some food for thought



State of affairs

Since 2000, the European Commission has actively supported the compilation of TSA in Europe

- 2000 – 2006: 3 waves of grants to promote TSA production
- 2008 – 2009: EUROSTAT: wide-scale TSA project (workshops, manuals, technical assistance to countries)
- 2010 – 2016: EUROSTAT: voluntary data transmission
- 2017 – 2018: DG GROW / UNWTO project

Result of the efforts: TSA in Europe are ...

- fragmented
- not sufficiently harmonised
- poorly comparable

Framework for TSA in the EU

No legal framework for TSA

- No obligation for countries to compile TSA and transmit to Eurostat
- Contrary to the primary tourism statistics for which accommodation statistics and tourism demand statistics are regulated: countries sent monthly and annual harmonised data to Eurostat

TSA is kept alive via a voluntary data transmission

- motivation to continue work at national level (making sure the know-how is not lost)
- dissemination of results by Eurostat (visibility, awareness raising among users and producers)



Voluntary data transmission to Eurostat (1)

More or less regular frequency

- 3 data collection waves: 2010, 2013 and 2016 (\approx triennial)
- Stable, unchanged template

Voluntary: countries are invited to share what they have

- 19 countries participated in the most recent exercise (2016)

Team of experts assisting Eurostat in this work

- Pavel Vančura (CZ), Zdeněk Lejsek (CZ), Peter Laimer (AT)
... also on a voluntary basis (many thanks!)

Final, tangible stage of each exercise: publication

Voluntary data transmission to Eurostat (2)

Harmonised reporting template

- Focus on headline series of each TSA table
- Template with 50 pre-defined indicators:
 - 21 indicators to be filled in for Tables 1 to 9
 - 10 summary indicators for Tables 1 to 9 (subtotals, totals)
 - 19 non-monetary indicators for Table 10

T5. Production accounts of tourism industries and other industries (in million EUR)	
T5.1	Total output of domestic producers (at basic prices) Total output of tourism industries and other industries in the economy of reference.
T5.2	Total intermediate consumption of domestic producers (at purchasers' prices) Total intermediate consumption of tourism industries and other industries in the economy of reference.
T5.3	Total gross value added (at basic prices) $T5.3 = T5.1 - T5.2$
T5.4	Additional comments on data or methodology Please put information which you consider to be important or helpful (e.g. differences between concepts of TSA:RMF 2008 and concepts of your TSA).

Voluntary data transmission to Eurostat (3)

Metadata: coverage and organisation of TSA work

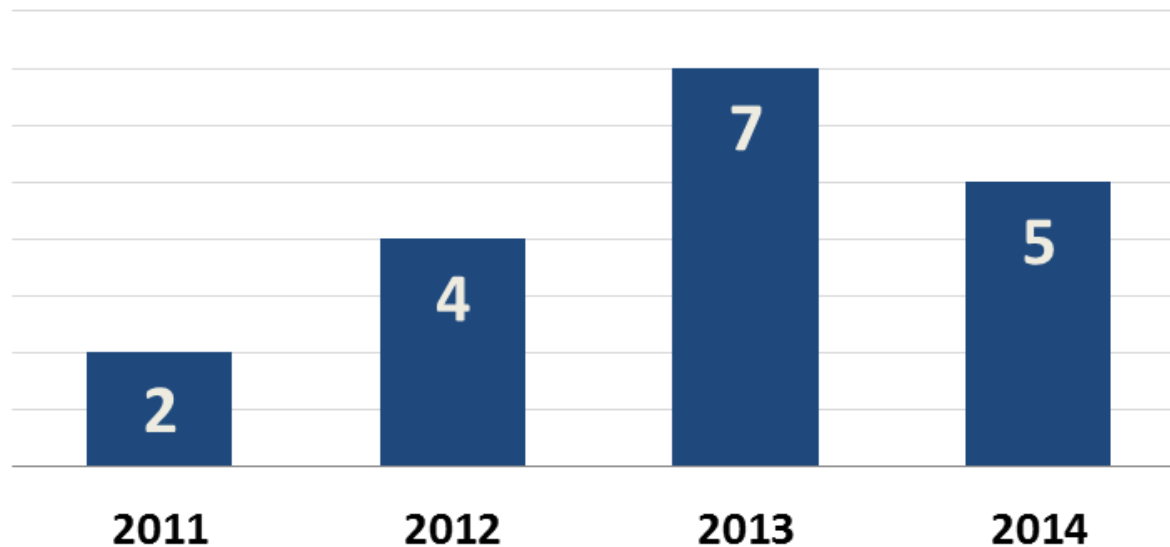
- 17 EU Member States + Norway + Switzerland countries sent TSA data
 - ⇒ fewer countries compared to 2013, some important 'tourism countries' missing (e.g. Germany, Italy, UK)
 - ⇒ one country only sent non-monetary indicators

Voluntary data transmission to Eurostat (4)

Metadata: coverage and organisation of TSA work

- Data for different reference years due to irregular compilation of TSA

Reference years for TSA indicators transmitted in 2016 (number of countries)



Voluntary data transmission to Eurostat (5)

Metadata: coverage and organisation of TSA work

- Different coverage of the 10 TSA tables

Country	BE	BG	CZ	DK	EE	ES	FR	LV	LT	HU	NL	AT	PL	RO	SI	SK	FI	SE	NO	CH		
TSA Table 1		3	3	3	3	1	1	3	3	3	1	3	1	3	3	3	3	1	1	3	3	75%
TSA Table 2		3	3	3	2	1	1	3	3	3	1	3	1	3	3	3	3	1	1	3	3	73%
TSA Table 3		3	3	1		1	1		3	3	1	1	1	3	3	3				1	3	47%
TSA Table 4		4	4	4	5	5	5	5	4	4	4	5	5	5	5	5	5	4	4	5	5	87%
TSA Table 5			3	3	3	3		3	3	3	3	3	3	3	3	3	3	3	3	3	3	85%
TSA Table 6		1	7	7	7		5	5	7	6	8	7	6	7	7	7	6	7	7	3	8	69%
TSA Table 7			3	1	1		3	3	1	3	3	3	1	3	1	4	3	2	1	1	4	46%
TSA Table 8			1		1			1		1			1			1				1	1	35%
TSA Table 9				1		1															1	10%
TSA Table 10	10	17	17	11	11	18	17	16	17	17	14	13	13	14	14	17	13		7	8	19	69%
	10	31	44	34	33	40	27	35	41	43	35	38	32	41	39	46	36	18	25	27		

Available indicators per country (out of 50)

Number of indicators in the template (total = 50)

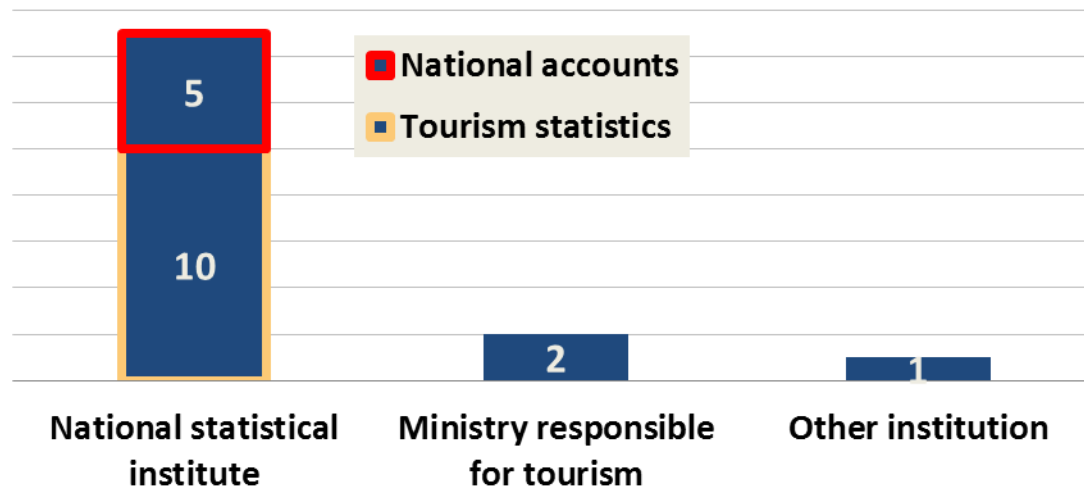
Availability in participating countries (%)

Voluntary data transmission to Eurostat (6)

Metadata: coverage and organisation of TSA work

- In general, the national statistical office is responsible for TSA (17), in some cases the ministry (2) or other body (1)
- In general, compiled by tourism statistics units, in some cases national accounts units

Institutions in charge of TSA compilation (number of countries)



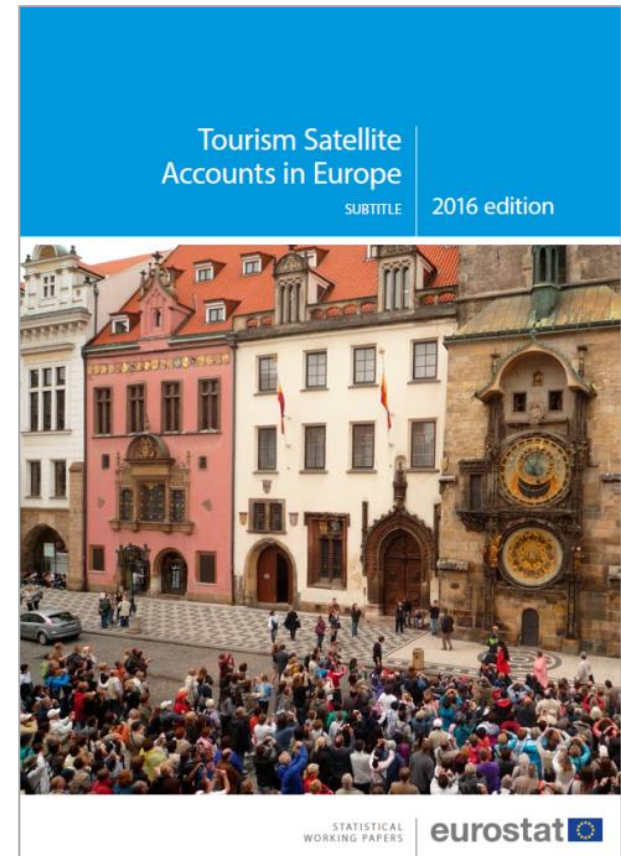
Voluntary data transmission to Eurostat (7)

Some observations

- Tourism ratio (weighted average value based on available data from 16 countries)= **3.2 %**
- Domestic tourism accounted on average for nearly 60% of internal tourism expenditure (inbound tourism: ca. 40%)
- An important part of domestic tourism expenditure was by same-day visitors (35%), while inbound tourism expenditure was dominated by overnight visitors (83%)

Full report

- Available from Eurostat's [website](#)



Voluntary data transmission to Eurostat (8)

Conclusions

- Is take-up and implementation in Europe still better than in other parts of the world?
 - Slow or no progress in take-up / completeness compared to the 2010 or 2013 voluntary data collection
 - Not covered by the EU Regulation on tourism statistics
 - Pressure on NSI resources in the past years / priority setting
 - TSA in 2017: fragmented ... not sufficiently harmonised ... poorly comparable
- ↪ **The Commission is still not able to release reliable figures on the importance of the tourism sector for the EU economy ...**

Voluntary data transmission to Eurostat (9)

One example: what do we know about employment?

Table 11: Employment in the tourism industries (TSA Table 7)

Country	Note: Reference year: 2011 (EE, ES and CH), 2012 (HU, PL, FI and SE), 2013 (BG, DK, LV, LT, RO, SK and NO) and 2014 (CZ, FR, NL, AT and SI).
Bulgaria	(1) Data are based on "Tourism Employment Module (TEM)", which is compiled by CZSO. All data represent so-called domestic concept of employment.
Czech Republic	
Denmark ⁽²⁾	(2) A part of the numbers for the shipping share also includes freight and not only passengers.
Estonia ⁽³⁾	(3) Number of full-time equivalent jobs is estimated only in tourism characteristic industries.
Spain	
France ⁽⁴⁾	(4) For number of people employed, year 2014; Source: Acooss.
Latvia	(5) Absolute figures; "number of people employed" in FTE; 2013 data.
Lithuania	
Hungary	(6) The number of people employed (employees and self-employed) is according to national accounts and corresponds to total people employed in tourism industries. Number of people employed directly connected with tourism is 30.573 (calculation upon number of persons employed in national accounts according to activities and tourism ratios of supply in individual activities).
Netherlands	
Austria ⁽⁵⁾	
Poland	
Romania	
Slovenia ⁽⁶⁾	(7) Employment and working hours in the tourism industries. Full-time definition based on Labor force survey.
Slovakia	
Finland ⁽⁷⁾	(8) RMF 2008.
Sweden ⁽⁸⁾	
Norway ⁽⁹⁾	(9) Regarding the industries included, see comment under T6.
Switzerland ⁽¹⁰⁾	(10) Tourism employment in all industries.

Some food for thought...

- Importance of **educating the users**, who often 'want' TSA, but don't know how to exploit TSA
 - Only focus = 'share in GDP' and 'jobs'
- How to translate/**communicate TSA** to the average user?
- Need for case studies using TSA for policy
- In many countries TSA are user-driven (i.e. financial support)
- Importance of international cooperation (shared methodology, harmonisation)

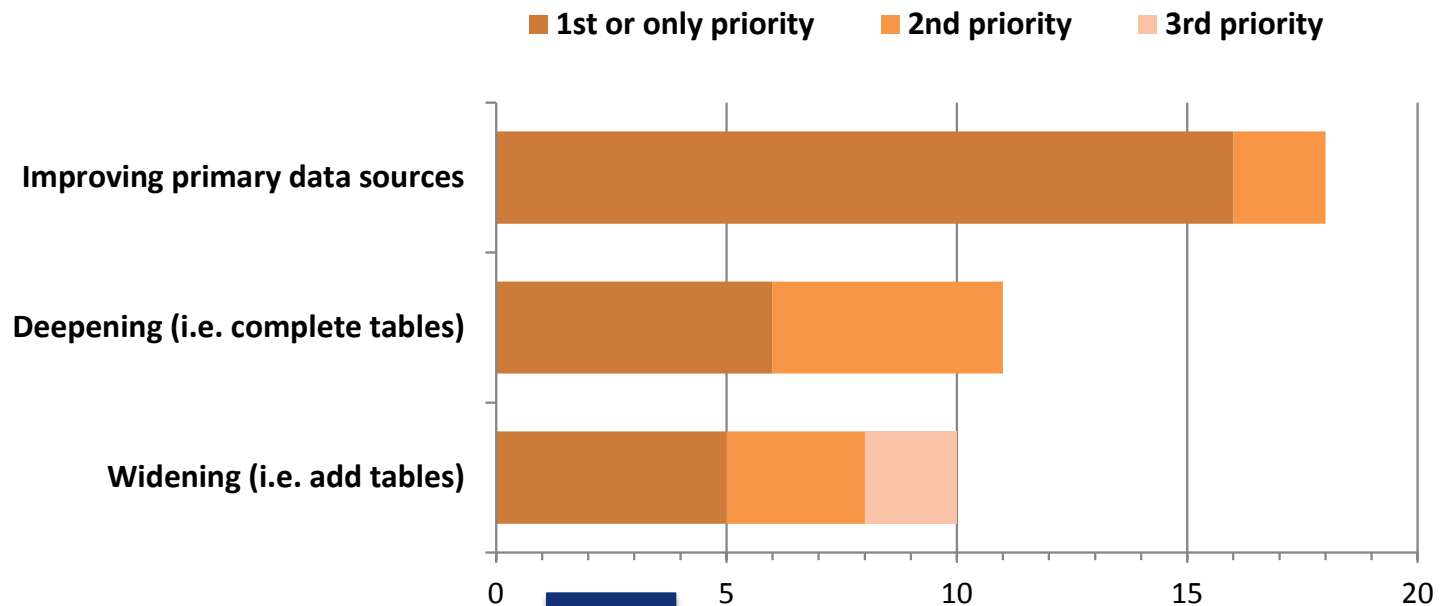
⇒ **TSA Workshop 29-30 November 2017**

⇒ **Forthcoming TSA Compilation Guide (UNSD)**

Some food for thought

Outcomes of a stakeholder survey (2014)

- Is TSA used properly and at its full potential?
 - Majority of respondents (> 70%) answered 'NO'
- Priority setting for further TSA development



Some food for thought

Next steps ?

- Continuation of the voluntary data transmission
 - Minimum of the minimum!
 - Next exercise: end 2018 / early 2019?
 - Increase ambitions: more data? more harmonisation?
- Follow-up of this workshop ?
- Dedicated training program?
 - ESTP?
- **Where do YOU see the main obstacles and solutions?**



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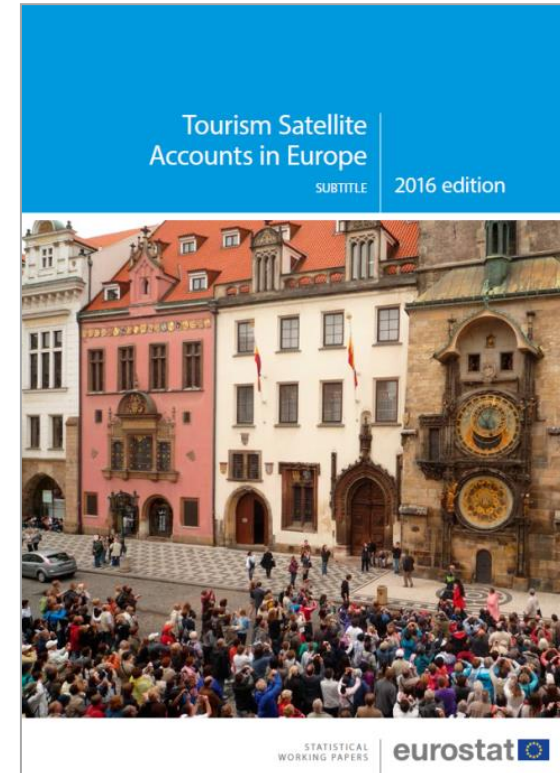
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