

**Seminar on Tourism Satellite Accounts for Portugal,
Lisbon, Thursday 21 September 2006**

USING TOURISM SATELLITE ACCOUNTS (TSA) FOR POLICY ASSESSMENT AND ANALYSIS

Tourism Satellite Account and Policy

- Towards a changing role of the State in tourism and TSA objectives
- Some country experiences in using TSA for Policy
- What can we learn from the TSA for Policy decisions?
- Some concluding remarks

Towards a changing role for the State in tourism

- Obtain better information on services industries
- Get socio-economic and analytical data on tourism
- Face sectoral/intersectoral challenges which modify the role of the State
- Develop exchanges with broad community

Towards a changing role for the State in tourism

- Make tourism a strategic industry for the economy
- Strengthen quality and competitiveness of tourism supply
- Target research and information to support these objectives

Objectives of the TSA

- To respond to the need of economic information for tourism decision-makers
- To improve the definition and measurement of economic activities linked to tourism
- Provide NSO with a reference statistical tool, based on SNA93 and compatible with other standards

Objectives of the TSA (cont.)

- **To add credibility:** SNA concepts and economic theory, modification without upsetting the basic premises -credibility established
- **To bring comparability:** a common framework shared by all countries, calculation of aggregates, same basis as for other industries
- **To bring consistency:** the definitions, the survey frame, the universe, the methodology, the concepts

CANADA - Tourism Gross Domestic Product – 1988 and 1992

Industries	Millions of dollars		total variation (%)	Relative share (%)	
	1988	1992		1988	1992
Transportation	3,825	3,643	-4.8	28.9	25.7
Accommodation	2,905	3,438	18.3	22.0	24.3
Food services	1,635	1,903	16.4	12.4	13.4
Other tourism industries (1)	1,316	1,391	5.7	10.0	9.8
Total tourism industries	9,682	10,374	7.1	73.2	73.2
Other industries	3,542	3,789	7.0	26.8	26.8
Total tourism activity	13,224	14,163	7.1	100.0	100.0

(1) Includes recreational services and travel agencies.

MEXICO'S TOURISM SATELLITE ACCOUNT
Selected indicators

Share of tourism in GDP (%)	8.3
<i>of which:</i>	
Transport	2.4
Restaurants and bars	2.0
Accommodation	1.0
Commerce	1.0
Handicrafts and other goods	1.0
Other	0.9
Composition of tourism GDP(%)	100
<i>of which:</i>	
Transport	29.2
Restaurants and bars	24.8
Accommodation	12.7
Commerce	12.3
Handicrafts and other goods	11.4
Other	9.6
Total tourism consumption, 1988 (million USD)	55,969

MEXICO'S TOURISM SATELLITE ACCOUNT (*cont'd*)
Selected indicators

Total tourism consumption, share of total private consumption (%)	17.8
Composition of total tourism consumption, 1998 (%)	100
<i>of which:</i>	
Domestic	73.5
Inbound	15.4
Outbound	11.1
Tourism consumption expenditure on the domestic market, 1998 (million USD)	51,054
Composition of tourism consumption expenditure on the domestic market, 1998 (%)	100
<i>of which:</i>	
Domestic	80.5
Business	12.6
Pleasure	35.8
Other	25.5
Same day travel	6.6
Inbound	16.9
Business	0.8
Pleasure	10.4
Other	2.1
Same day travel	3.6
Outbound	2.6
Employment, 1998 ('000s of salaried occupations)	1,765

UNITED STATES -- Tourism Employment by Industry in 1992,1996, and 1997

(Thousands of employees)

Industry	Tourism employment			Average annual growth rate	
	1992	1996	1997	1992-	1992-
Hotels and lodging places ...	1,347	1,452	1,474	1.9	1.8
Eating and drinking places ...	1,158	1,317	1,327	3.3	2.8
Railroads and related services ...	9	7	7	-5.4	-3.7
Local and suburban transit and interurban highway passenger transportation, except taxicabs ...	103	106	109	0.6	1.2
Taxicabs...	15	15	15	0.0	0.1
Air transportation...	506	575	565	3.3	2.3
Water transportation...	14	14	17	-0.7	3.0
Automotive rental and leasing, without drivers...	97	125	126	6.4	5.3
Arrangement of passenger transportation...	43	48	46	3.2	1.8
Miscellaneous amusement and recreation services (except membership sports and recreation clubs); racing including track operation; marinas; libraries and museums, art galleries, and botanical and zoological gardens...	120	184	196	11.1	10.3
Membership sports and recreation clubs...	95	103	105	2.1	2.0
Motion picture theaters; dance studios, schools, and halls; theatrical producers (except motion pictures), bands, orchestras, and entertainers...	56	61	63	2.1	2.1
Professional sports clubs and promoters...	6	6	6	0.7	0.4
Gasoline service stations...	47	50	50	1.6	1.3
Retail excluding eating and drinking places and gasoline services stations...	318	378	384	4.5	3.9
Total tourism industries...	3,933	4,440	4,491	3.1	2.7
Total industries...	117,998	127,009	130,085	1.9	2.0
Tourism share (percent)...	3.3	3.5	3.5

Note: The estimates shown in this table are those that were derived using method 2; see the section "Estimating Methods" in the document referred to in the bibliography.

Use for policy and business

- A reference framework that offers a common methodology and credibility
- A tool that allows comparisons at national level: to compare the tourism industry with other industries
- A tool that allows comparisons at the international level: to assess the performance of tourism policies in a growing globalisation context

Use for policy and business (cont..)

- **A tool for industrial analysis:**
information on competitiveness, structural differences of tourism-related industries
- **A tool to analyse human resources:**
to analyse the role of tourism in employment - This approach is to be complemented by tools like the OECD Employment module

Use for policy and business (cont)

- **A tool to make analysis at the regional level: later on, the tool could be redesigned for new information needs**
- **A tool to make impact analysis: the TSA offers a reference framework to construct impact models to measure the economic impacts of indirect and induced tourism demand**

Some concluding remarks

- TSA has become a reference framework for tourism statistics
- A majority (80%) of OECD countries are implementing the TSA
- TSA data are much more mature today than just 4 or 5 years ago
- TSA can benefit from various international network of policy and statistics experts (e.g. OECD, WTO-OMT, APEC, Eurostat)

Some concluding remarks

- Not to think that TSA can respond to all information and policy needs
- It is now agreed that the TSA offers a unique tool for analysis
- But TSA data are still largely underused for policy and business development
- OECD Tourism Committee project will focus on good practices in using the TSA for business and policy analysis and design. This effort will be done in cooperation with other international organisations active in this field

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