

TWINNING CONTRACT

2023/447-234



EU for Further Development of Statistics System in BiH



MISSION REPORT

Activity 2A: Tourism Satellite Accounts (TSA) Component 2: Tourism Statistics

Mission carried out by

Janja Kalin, Statistical Office of the Republic of Slovenia

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Version: final

EU FOR FURTHER DEVELOPMENT OF STATISTICS SYSTEM IN BIH



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Statistics Finland

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List of Abbreviations

BHAS	Agency for Statistics of Bosnia and Herzegovina
BiH	Bosnia and Herzegovina
CBBH	Central Bank of Bosnia and Herzegovina
EC	European Commission
EU	European Union
FBiH	Federation of Bosnia and Herzegovina
FIS	Institute for Statistics of the Federation of Bosnia and Herzegovina
MS	EU Member State
RSIS	Institute for Statistics of Republika Srpska
RTA	Resident Twinning Adviser
ToR	Terms of Reference



Executive Summary

Within the mission, main features of tourism statistics in BiH were presented and discussed. Surveys are conducted for data on arrivals and overnight stays of tourists and for data on travels of domestic population. Besides, some physical indicators are available in transport statistics and data on revenues in services' activities. There are presently no surveys of foreign visitors. The concepts of TSA (Tourism Satellite Accounts) were presented and discussed, as well as main data sources used in Croatia and Slovenia, experiences by compilation and main challenges.

Main conclusions are that BiH will have to assure some steps and additional data in the field of tourism statistics and in the field of national accounts to be able to introduce the compilation of TSA. These are listed in the continuation of the report. For work within the project, it is recommended to assess in detail the availability and adequacy of data sources and the feasibility of introducing TSA compilation and to prepare a master plan for the necessary activities to be conducted before the introduction of TSA compilation.

1. General comments

This mission report was prepared within the EU Twinning Project "Further Development of the Statistics System in Bosnia and Herzegovina". It was the first mission to be devoted to the Tourism Statistics Component of the Project.

The purposes of the mission were (first two days of the activity were joint with a USAID workshop):

- Presentation of state of the art for tourism statistics in BiH
- Presentation of how Tourism Statistics are compiled in Croatia and its challenges
- Presentation of the concept of (tourism) satellite accounts
- Experiences from the Republic of Croatia on TSA
- Presentation on how TSA is compiled in the Republic of Slovenia

The consultant would like to express her thanks to all officials and individuals from Bosnia and Herzegovina met, for their kind support and valuable information, which highly facilitated the work of the consultant.

These views and observations stated in this report are those of the consultant and do not necessarily correspond to the views of EU, BHAS, FIS, RSIS, CBBH, Statistics Denmark, Statistics Finland, Statistical Office of the Republic of Slovenia and The Italian National Institute of Statistics.

2. Assessment and results

The state of the art for tourism statistics in BiH was presented.

Regular tourism statistical surveys carried on by BHAS cover:

- Arrivals and overnight stays of domestic and foreign tourists collected by monthly questionnaire sent to identified units in accommodation activity. Issues are in identification of all active units and in non-response.

- Survey on travels of domestic population collected by using CATI and PAPI methods once a year. Issues are in non-response and less reliable answers, also due to only once a year frequency.

Additionally, some tourism relevant data from transport statistics are available: arrivals of passengers at airports, data from road passenger transport at border crossings.

Available are data from the survey on revenues in services sectors, including NACE I, and for recent years VAT revenues (fiscal data) for these activities.

Within national accounts, production account data are available by activities, but supply and use tables and input-output tables are not yet available.

Identified needs in existing surveys: better coverage of tourist accommodation objects / capacities (accommodation register), modernization of data collection of tourism arrivals and overnights (system of e-evidence of guests), preferably more frequent collection of survey of domestic population.

Presentations of consultants from the Institute for Tourism (IT) from Croatia covered compilation of tourism statistics in Croatia and its challenges, the concept of tourism satellite accounts and Croatian experiences on the preparation of TSA. TSA for Croatia were developed by IT and the production was in recent years transferred to the national accounts unit of the Croatian Bureau of Statistics (CBS). Until now, they have produced and published TSA tables 1, 2, 4, 5 and 6. On other tables they are still confronting issues. Recently, the IT has started a project for studying the possibilities of connection of indicators of sustainability and some regional components to the TSA.

Representatives from IT explained their system of e-evidence of guests and their surveys on the expenditures of visitors, which comprise, besides survey of domestic population, also survey of foreign visitors at the borders, carried out by Croatian central bank, and survey of foreign tourists in accommodation facilities, carried out by ITC. Data from supply and use tables of Croatian statistical office are used for the supply side calculations.

Main data sources from tourism statistics used for the compilation of TSA in Slovenia were presented. In recent years, Slovenia adopted unified e-system of registration of tourists, which is maintained by the Agency for public evidences (AJPES), together with the register of accommodation facilities. For the identification of number of foreign travellers in Slovenia, data from counting at border crossings are regularly available at SURS (Statistical Office of Republic of Slovenia). SURS is regularly carrying out quarterly survey of domestic population, according to EU legislation. On a 3-yearly basis, surveys on foreign visitors are carried out at SURS: survey on foreign tourists is carried out in the accommodation facilities, survey on foreign travellers (one-day visitors and transit passengers) is carried out at the borders. The surveys include questions on types of trips and visitors expenditures. They serve for the purpose of SURS tourism statistics and TSA, as well as for Balance of Payments statistics at the Central Bank of Slovenia.

For the supply side, main data sources are supply and use tables of national accounts. Presently, there are ongoing projects at SURS for the use of mobile phone and payment card data to augment estimations of visitors' expenditures and data on visitors' arrivals and to possibly, at least partially, replace surveys on foreign tourists and foreign travellers and data from traffic counting. Slovenia compiles TSA tables 1 – 8 and 10. TSA are compiled within national accounts section.

3. Conclusions and recommendations

To be able to introduce the compilation of TSA in BiH, there will be necessary to assure mainly the following:

1. Establish production of SUT (Supply-Use Tables) for BiH in national accounts, or at least as a first step appropriate detailed compilation of production account data on NACE level (Statistical Classification of Economic Activities) and CPA (classification of products by activity) activities and products which pertain to tourism, to be able to compile the supply side of TSA and to facilitate compilation of the demand side.
2. Assure regular comprehensive data source for tourists' arrivals and overnight stays for domestic and foreign tourists. Important basis has to be a comprehensive register of accommodation facilities. Preferably in e-evidence, serving primary various administrative needs (moving of persons, taxation).
3. Investigate the possibility of acquiring data of booking platforms from Eurostat and perform cross-checks with existing accommodation statistics data (for the identification of under-reporting).
4. Establish regular data sources for arrivals of foreign one-day visitors (excursionists and transit guests): counting at the borders data with combination of travellers' surveys and alternative data sources (mobile data).
5. Establish preferably more frequent survey on the travel of domestic population (quarterly in EU legislation): for travels within BiH and outbound, for tourists and one-day visitors, assuring data on expenditures and their structure.
6. Introduce regular tourism surveys of foreign visitors and their expenditures, for tourists and for one day visitors (e.g. 3-yearly). They can serve both needs of the Statistical office and of the Central bank.
7. Investigate the possibility of alternative data sources for visitors expenditures (paying cards data), for domestic and foreign visitors.
8. Use of detailed Balance of Payments data from the Central bank.
9. Analysis of potential data from statistical surveys of transport, culture and other fields, data from individual specific firms.
10. Analysis of Household Budget Survey data: domestic expenditures and expenditures abroad.

Recommendation for the work within the project:

Asses in detail the availability and adequacy of data sources and the feasibility of introducing TSA compilation, prepare a master plan of necessary activities for the introduction of TSA compilation.

4. What to do before the next mission for the BC Counterpart

Action	Deadline	Responsible person
Presentation of data in tourism statistics supply side	Next mission	Tourism (service) statistics unit BiH
State of play of present supply side calculations within national accounts / SUT	Next mission	National accounts unit BiH

Annex 1. Terms of Reference for the current mission

Terms of Reference

EU Twinning Project BA 19 IPA ST 01 23

**Component 2 - Tourism Statistics:
Tourism Satellite Accounts**

Timing: Monday 13 May at 9:00 – Wednesday 15 May 15:30

Venue:

**13 and 14 May 2024: Hotel Ibis, Sarajevo
15 May 2024: Agency of Statistics of BiH, TBC, Sarajevo
Bosnia and Herzegovina**

Activity 2A: Tourism Satellite Accounts (TSA)

1. Mandatory result

The TSA is an extension, or satellite, of the System of National Accounts (SNA). As a result, TSA compiles information on both the supply side and the demand side of tourism. This means that it highlights economic activity in tourism-related industries and portrays tourism in the context of the overall economy and alongside other sectors. Putting tourism in an economic context is a key reason for compiling TSA.

As TSA is currently not being produced in BiH, the result of the project is to produce a report on available data sources and a road map for the way forward producing TSA in BiH

2. Purpose of the activity (first two days of the activity is joint with a USAID workshop)

- Presentation of state of the art for tourism statistics in BiH
- Presentation of how Tourism Statistics are compiled in Croatia and its challenges
- Presentation of the concept of (tourism) satellite accounts
- Experiences from the Republic of Croatia on TSA
- Presentation on how TSA is compiled in the Republic of Slovenia

3. Expected output of the activity:

- Work plan for TSA in the project
- ToR for next mission drafted
- Mission report drafted

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Annex 2. (input for the) Terms of Reference for the next mission

Activity 2B	Tourism Satellite Accounts (TSA)
Budget section	III. Components Mandatory Results – Component 2
Subject	<ul style="list-style-type: none"> • Presentation and discussion of BiH supply side data in tourism statistics and in national accounts, detailed presentation of Slovenia TSA compilation, presentation of surveys used for TSA in Italy • Preparation of ToR for next activity
Methods	Onsite, STE mission in BiH
Resources	MS: Janja Kalin, SURS, other STE: to be decided, RTA, RTAA and language assistant BC: Relevant staff expected to be involved in the component
Duration	2 STEs x 2,5-3,5 working days for MS staff
Output	<ul style="list-style-type: none"> • Assessment of available data for TSA in BiH made • Mission report • ToR (including time (frame)) for next activity
Time schedule	October 2024

Annex 3. Persons met

BHAS:

Alen Bajramović, Head of Department for Services Statistics
Azra Bander Demirović, Senior Advisor

FIS:

Nikola Radović, Senior Statistician

RSIS: (not present at the mission)

Jelena Glamočika, Head of Department for Services Statistics
Jelena Kljajić, Senior Statistician

External stakeholders:

Consultants from the Institute for Tourism from Croatia; Mr. Damir Krešić, Mrs. Zrinka Marušić and Mr. Neven Ivandić

RTA Team:

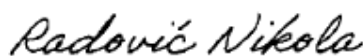
Niels Madsen, RTA
Larisa Muslimovic, RTA Assistant
Senka Ahmetovic-Palic, Language Assistant

Signatures

For the approval of the contents of this report, representatives from BHAS, FIS and RSIS as well as MS experts and the RTA sign here:



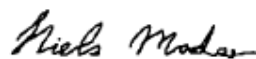
Component leader, BHAS



Component leader, FIS

(Not present)

Component leader, RSIS



RTA



MS Expert