

Item 17 “Statistics on visitor expenditure – data sources and data compilation issues”

Miguel Oliva (SECTUR, NTA Argentina), moliva@turismo.gov.ar;
Rodrigo Oliver (SECTUR, NTA Argentina), roliver@turismo.gov.ar

Observation from WTO: We have read your answers to the questionnaire and we would kindly suggest you to add some clarifications on this item. More specifically, we find that: “en su respuesta a D.2 entendemos que sería de especial interés para los asistentes al Taller conocer cómo han llevado a cabo algunos de los contrastes que consideren de mayor interés o relevancia cuantitativa para armar la CST que han permitido sugerir / introducir modificaciones en diversas encuestas. Obviamente, una referencia de cuál ha sido el orden de magnitud de las diferencias encontradas sería la mejor presentación en cuanto a destacar la importancia de esta nueva cultura de contrastes de fuentes que aportan información respecto a una misma variable”.

Regarding statistics on visitor expenditure in Argentina, the most important data sources are:

International Tourism Survey (ETI, Encuesta de Turismo Internacional): is uninterrupted from year 2004, is made in seven important migratory positions of the country (two aerial ones, Ezeiza and Aeroparque Jorge Newbery Bs. As., a fluvial one, Port of Buenos Aires, and four terrestrial ones, Puerto Unzué, San Ignacio de Loyola, Sistema Cristo Redentor and Tancredo Neves). It studies the visitors consumption, the composition of the trip group, length of stay, points visited in the Argentina, organization of the trip, as the most important data. The migration office information of international travelers is used for sample weighting. ETI is used to calculate figures for inbound and outbound consumption in the Balance of Payments.

Hotel Occupation Survey (EOH, Encuesta de Ocupación Hotelera y Parahotelera): EOH is a hotel survey, that started in 2004 in 17 cities of Argentina. In 2005 the sample was extended to a total of 39 cities. Between the most important variables, EOH captures the occupation in hotel and similars, the length of stay of travelers, and the prices of the services. The number of stays in hotels is used for domestic and international tourism consumption estimates.

Household tourism consumption survey (EVITUR, Encuesta de Viajes y Turismo en los Hogares): a new survey of household tourism consumption is going to be accomplished in September 2006, and it will provide new scope of household consumption in tourism, and of the number of tourism trips of argentine households.

Module of Survey intermediate consumption in Large Companies Survey (EGE, Encuesta a Grandes Empresas): collects information on intermediate business tourism consumption in Bussiness. It is done in 500 companies, every year. In 2004 it was done in 1500 companies, as a part of the National Economic Census (Censo Económico Nacional), and a business tourism module was added, requested by NTA. In this module different information on travel expenses was required to the companies.

These data collection is performed by NSO (INDEC), with the financing and technical support of the NTA (SECTUR). Using these information about consumption, the TSA could estimate monetary consumption of inbound, outbound and domestic tourism.

In 2005, a TSA pilot test was done for 1997 data. The comparison between tourism consumption and value of supply of goods and services by tourism industries to visitors was done with the Input / Output matrix of Argentina (the last one done in our country, in 1997; a new one will be done with 2004 base). In response to WTO observation, this comparison (demand / supply) is not a repeated practice, but it is going to be continuous by 2007, year scheduled for a TSA series regular estimation. As a TSA pilot test, it was designed to analyze methodological issues and the lack of information for different estimates. So the quantitative difference between supply and demand estimates are not very meaningful, and no recalculation of figures was done.

In the TSA pilot test, the figures for TSA **Table 1**, the monetary consumption of inbound tourism, were estimated in 3.005.405 thousand pesos. This figures of consumption were estimated from the travel and passenger services account (credit) of Balance of Payments (BP), which sum 2.929.500 and 375.400 thousands pesos (\$), which is a total of 3.304.900 \$. From this total we subtract the tourism packet component, 244.495 pesos, which finally sum 3.005.405 thousand pesos, which is the total direct tourism consumption.

Also, no estimates of tourism consumption of business was done in this test. The business tourism consumption will be incorporated in further estimates, with the data collected in an Enterprise Surveys done in 2005 by INDEC, with technical support of NTA.

The original estimates of BP were calculated with the International Tourism Survey done in 1996. All these estimates of BP will be recalculated for the information of ETI 2004 – 2006, using new data of the ETI of 2004.

The opening for different products of tourism consumption was accomplished with a household consumption survey (ENIGH97), a general household consumption survey done every ten years in Argentina.

In 2006, a new survey of household consumption, but with a specific scope on tourism consumption, will be done, the (EVITUR), and will provide new scope for these figures.

As an example, for hotel consumptions, the provisional figures for Table 6 hotels consumption and production were 2.695.510, with a ratio of 51%. This ratio of 51% does not consider the business tourism consumption, which will be incorporated from the Business Survey tourism modules (EGE). Also, the new survey (EVITUR) of household tourism consumption, will provide new scope of these figures.

In broad terms, in this pilot test a few suggestions were made to modify the scope of different surveys and data collection.

These will reduce the gap between the estimates of the data on tourism consumption and the estimate of value of supply of goods and services by tourism industries, some recommendations where done from the TSA pilot test:

Regarding EVITUR;

- include the transferences in kind and reimburses received by households when out of their usual environment (social security and assistance, including health services used by tourists, and the consumption of health travel assistance, exchange of homes).
- Define usual environment, using distance and frequency criteria, that is not going to be the same criteria for all the cities in Argentina.
- Include the place where services to travel agencies was bought,
- Check the desegregation of consumption of tourism goods and services, to be captured by EVITUR.

Regarding Encuesta de Ocupación Hotelera (EOH):

- compare hotel production with hotel consumption.
- check if the hotel is part of a national or international holding.
- include a question of commercialization, proportion of income from direct sells to passengers, and resident and non resident travel agencies.

Other issues about these survey that seem important, regarding quality of data, are:

ETI: since these a sample surveys, the aggregate expenditure is calculate with the expansion (weighting) to a universe of international visitors. If the weighting process is done with bad estimates, the figures for consumption are wrong. Regarding this, the data from Migration of arrival of visitors is not very good, and in Argentina we do not have alternative data sources (i.e. FRONTUR of Spain). Other issues here is disaggregating consumption in the ETI, and to split tourism packets in consumption.

EVITUR: defining the usual environment, to have a good estimate of trips of households, to have good estimates of trips to seconds homes, have estimates of tourism consumer durables.

EOH: to have good estimates and response from hotel businessmen, to have a good estimate of the rates of the hotels, and to have figures.

Item 20 “Designing a strategic alliance between NTA and NSO in compilation of tourism statistics and its analytical applications”

Miguel Oliva (SECTUR, NTA Argentina), moliva@turismo.gov.ar;
Rodrigo Oliver (SECTUR, NTA Argentina), roliver@turismo.gov.ar

Observation from WTO: One of the findings of the past Iguazu Conference “The TSA: Understanding tourism and designing strategies” was on the relevance of promoting a strategic alliance between NTAs and CSOs. As recorded in the document prepared by UNWTO, setting up a TSA is a great opportunity to develop a strategic alliance at the national level between the CSO and the NTA, which could generate important mutual benefits.

On the one hand, in the majority of countries, the CSOs are in charge of compiling the National Accounts, of which the TSA is a satellite. This circumstance, and the obvious fact that the development of the TSA should be linked to the development of the national system of statistics, would by themselves explain the central role that belongs to the CSOs. Furthermore, the preparation of the TSA requires the use of techniques such as sampling, the design of general surveys, and specific applications to households and productive units in order to develop tourism statistics from the perspectives of both demand and supply.

On the other hand, the NTA provides the CSO with greater insight and focus regarding the economic impact of the movement of persons for tourism purposes over the borders and within the economic territory.

This strategic alliance should lead to the development and continuity of the official statistics necessary for both the TSA project and the design of strategies on the part of the NTA.

In order to develop credible strategies, the NTAs need rigorous measurements of the expenditure by visitors (either associated with international arrivals or tourism movements of residents within the economic territory) as well as of the activities of industries that cater to them (value of output, value added, employment, prices, etc.).

The objective of including this issue as item 20 of the Agenda is to have the opportunity to discuss about it and to present some national experiences (with their own findings, potentials, challenges, difficulties, etc.) and not just have a declaration of principles.

Argentina is in a process of calculation of the first TSA. The aim of the work was to develop a statistic system of tourism in Argentina, and to compile the basic information for these estimates.

The work of the Institutional Platform of TSA began in 2000, as an strategic alliance between NTA, the National Statistics Bureau, and the tourism private sector (CTA, Camara Argentina de Turismo). Argentina had, before, different statistical procedures with no harmonization of definitions and classifications, and lacked of time series.

The Interinstitutional Platform of the CST-A is constituted by:

a) National Tourism Administration (SECTUR): Governing organism of the touristic policies at national level.

b) National Bureau of Statistic and Census (INDEC): it has the direct responsibility in the methodological design, organization of the national statistics works, and surveys, and the production of other basic statistics. The INDEC also has the responsibility to coordinate the

National Statistical System - SEN -, under the principle of normative centralization and executive decentralization. This means that the INDEC is responsible for the methodological and normative development for the production of official statistics, assuring the equivalence of the information originated in different sources. The National Statistical System is integrated by the statistical services of the national, provincial and municipal organisms. In each province a Direction of Statistic - DPE-, dependent of the provincial government exists. These Directions coordinate the Provincial Statistical System, and they do the capture and processing of information in the provinces. This is consolidated by the INDEC or other national services for the obtaining of information at national level. The production of statistical information is done with different methods from data collection (administrative censuses, surveys, registries, etc.), that allow the construction of indicators in relation to different thematic areas.

c) National Migration Office, Dirección Nacional de Migraciones (DNM): Its primary target is to promote the regularization of the migratory situation of the foreigners in the national territory, and to accomplish the migratory control of entrance and exit and the stay of foreign citizens. It works jointly with other law enforcement organisms (Gendarmeria, Prefectura Naval Argentina, National Aeronautical Police and the Department of INTERPOL of the Federal Police Argentina, that act the as of migratory auxiliary police).

d) Camara Argentina de Turismo (CAT): It is the private sector representation, whose main target is the private promotion, hierarchical structuring and development of the Tourism, grouping different sectors from the tourist activity.

With these institutions the SECTUR signed the agreement named: "Plan of Action for the Development of the TSA".

After this, a TSA technical commission is created. It is formed by the SECTUR Direction of Studies of Market and Statistics and the TSA Research Area, the National Direction of International Accounts (responsible for the elaboration of the Balance of Payments) and the National Direction of Statistics of the External Sector (responsible for the production of basic statistics for the elaboration of the BP), CAT and DNM. The president of this commission is the National Director of Cuentas Nacionales (INDEC), in charge of the elaboration of the GDP of Argentina.

The result of the Interinstitutional Platform was the accomplishment of a set of successful statistical procedures, that is also an important data source for the National Statistical System.

In January of 2004 two survey started, with the financing and technical support of the NTA, the a) International Tourism Survey (ETI) and the b) Hotel Occupation Survey (EOH).

a) The International Tourism Survey, uninterrupted from 2004, studies the visitors consumption and its opening by tourism characteristic products, the composition of the trip group, length of stay, points visited in the Argentina, organization of the trip, between the most important variables.

With the National Direction of Migraciones (DNM) a complementary act is signed in 2004, so as to use the information of international of travelers, used for the expansion of the sample information of the International Tourism Survey (ETI).

b) The EOH it is a new experience in Argentina and demanded an important effort between the SECTUR, INDEC and the Tourism Private Cameras (CAT, FEHGRA and AHT), for the definition of the variables and hotel owners support of the survey. The EOH was made during the 2004 in 17 localities of the country extending the sample to a total of 39 localities in 2005. The profit was a regional and national statistical representativeness for the studied variables.

The joint work with the INDEC allows to integrate it to the National Statistical System.

At the same time, this joint work with regional statistics offices allows to study the methodologies of regional estimation of similar aggregates, and to measure in different regions and provinces the impact of the tourist activity in the economy, in a consistent way with regional accounts. These kind of statistics could be useful to develop tourism in different areas. In Argentina the natural flow of tourism is to high socioeconomic level regions and cities, without social conflict. The idea that we want to go to natural paradise for holydays is associated with the idea that we want to go to a social paradise. This natural flow can be reoriented to other regions, or areas with low socioeconomic level indicators (such as high poverty income), with poverty alleviation aims.

The Interinstitutional Platform of the CST in Argentina is a successful case of institutional collaboration in national statistics, that allows to obtain the set of basic information for the implementation of the TSA with budgetary efficiency. The surveys that the SECTUR finances help to improve the basic statistics of the country. The EOH improves the statistics of services and the ETI the statistic of the Balance of Payments.

Between the pending actions, it is necessary to incorporate the Universities to the Interinstitutional Platform, with the aim to foment the academic research in the subject of economic impact of the tourism, and the discussion of TSA methodology.