TWINNING CONTRACT

Support to the State and Entity Statistical Institutions, phase V

Bosnia-Herzegovina

MISSION REPORT

on

Tourism Statistics

Component no. 1.5, Activity 1.5.2

Mission carried out by Ulrich Spörel, Destatis

17 – 20 April 2012

Version: Final

		STATISTICS DENMARK

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Table of contents

List of Abbreviations

BiH	Bosnia-Herzegovina
BHAS	Agency for Statistics of Bosnia and Herzegovina
FIS	Institute for Statistics of Federation of Bosnia and Herzegovina
NACE	Statistical Classification of Economic Activities in the European Union
NUTS	Nomenclature of Territorial Units for Statistics
RS	Republika Srpska
RTA	Resident Twinning Adviser
RSIS	Institute for Statistics of Republika Srpska
SBR	Statistical Business Register
ToR	Terms of Reference

General comments

The agenda of this second mission on tourism statistics had to be changed to a large extent for several reasons. Firstly, the expert from Italy who was foreseen to contribute to this mission was not able to attend the meeting and a replacement could not be found on a short term perspective. Secondly, it was agreed upon at the first mission to have a meeting with the stakeholders of BiH tourism to discuss with them their information needs and priorities concerning the pilot survey on travel behaviour of the BiH population and the current situation of accommodation statistics. However, it was not possible to organise this meeting in preparation of this mission. Furthermore, clarifications related to the conduct of the envisaged pilot survey on tourism behaviour have not been conducted before this mission as it was concluded at the first mission. This refers to the funding of such a pilot survey as well as to organisational aspects (separate survey or embedding of the survey in any other already existing survey).

In consequence of that it was necessary to revise the agenda considerably. At the suggestion of the RTA all items related to demand side issues of tourism statistics were deleted from this mission's agenda and postponed to the next mission taking place in the month of June. Hence, the focus of this mission was laid on two issues:

- Training in tourism statistics methodology (which was also a topic of the original agenda)
- Support for the improvement of the existing survey on tourism (accommodation statistics), bringing it in line with EU requirements and standards as laid down in EU regulation No 692/2011

On two days the meetings was also attended by two representatives of the EU funded project "Technical Assistance to Support Tourism Industry in Bosnia and Herzegovina". It was concluded to continue cooperation between the two projects as it was assessed this could be of mutual benefit for both sides.

Training on Tourism Statistics Methodology

This item of the agenda was attended also by two representatives of the EU funded project "Technical Assistance to Support Tourism Industry in Bosnia and Herzegovina", Ms. Mary McKeon and Mr. Alessandro Guzzo.

A presentation was given by the expert on basic concepts and sources of tourism statistics. The main issues to be discussed were:

- The economic impact of tourism
- The statistical definition of tourism
- The visitor concept
- The concept of usual evironment
- Forms and concepts of tourism
- Internal versus national tourism
- Sources of tourism statistics
- Core variables in different statistical sources

In a bilateral meeting with the expert the representatives of the EU project expressed their interest to organise such a presentation on tourism statistics methodology in the framework of their tourism working group. It was agreed that a cooperation of both projects could be of mutual benefit.

The second presentation as part of the training activities was about the German accommodation statistics. Some issues that were raised in this context were:

- The definition of the statistical unit
- Way of reporting
- Three different questionnaires for respective NACE divisions
- Presentation and publication of the results
- The use of register information

One focus of this presentation was laid on specific methods applied in Germany to enrich the statistical information on tourism through the combination of information derived from two registers, one concerning the establishments and the other containing information on the municipalities. By this method it is possible to obtain additional information on different types of tourism without additional burden for the respondents.

Improvement of BiH Accommodation Statistics

The second main issue of this mission was the improvement of the current system of accommodation statistics in BiH. In preparation of this topic the relevant questionnaires and instructions that are in use in the two entities and the Brcko district were transmitted in English translation to the expert. The classification of types of accommodation applied in BiH was checked for its compliance with the NACE Rev 2 classification.

- Currently, a unique national administrative classification does not exist in BiH. The BiH accommodation statistics for the time being refers to two entity level administrative categorisations of types of accommodation. The EU regulation requires a data transmission according to the NACE Rev 2 classification consisting of three divisions for the accommodation statistics. Therefore it is necessary to draft a correspondence table providing a link between both classifications, the European NACE Rev 2 classification on the one hand a nd the classification(s) applied in BiH on the other hand. The assignment of the national classification to the three NACE divisions was intensively discussed. Two items were identified that are not covered by the scope of the EU regulation (Vessel cabins and sleeping cars). One accommodation group consisting of private rooms, apartments flats, etc. was identified as running risk for producing a double counting. It was concluded in preparation of the next mission to draft a correspondence table linking the national classification with the NACE classification.

- The current design of the questionnaire for the data collection of accommodation statistics was examined on the background of the requirements of the EU regulation. Several items were identified that are not covered by the EU requirements and should be checked for still being necessary:

  o The triple question concerning the activity
  o Question concerning the facility
  o Question concerning the seasonal character of the business

  It was agreed to revise the questionnaire on the basis of this meetings discussion and to submit a new draft version to the next mission.

- Concerning the countries of origin of the guests the following list was identified that has to be added being in line with the EU requirements:
  o Cyprus
  o Estonia

       o   Latvia
       o   Lithuania
       o   Malta
       o   Ukraine
       o   Africa
       o   To be reported separately: Republic of South Africa
       o   North America
       o   South and Central America
       o   To be reported separately: Brazil
       o   Asia
       o   To be reported separately: Republic of South Korea
       o   Australia, Oceania and other Territories

Besides, a footnote has to be introduced to include Liechtenstein into the figures for Switzerland.

It was agreed that a revised list of countries of origin will be drafted before the next mission.

- The usefulness of 3 tables concerning data collection on revenues, data on employees and data on mode of tourist arrival was examined. These data are not required by the EU regulation. The pros and cons of this data collection were discussed. It was concluded to continue this discussion internally with other units of the BHAS as some of these variables are also collected within other statistical surveys.

Actions needed for preparing and conducting the next mission or future missions

Action	Deadline	Responsible person/institution
Draft a correspondence table linking the national classification with the NACE classification on the basis of the discussion held on the second mission	May 31st 2012	BHAS (BD), FIS, RSIS
Provide the experts with the English translation of the correspondence table	June 15th 2012	RTA
Draft a revised questionnaire for data collection in accommodation statistics taking into account the requirements of EU regulation 692/2011	May 31st 2012	BHAS (BD), FIS, RSIS
Provide the experts with the English translation of the draft revised questionnaire	June 15th 2012	RTA
Prepare a meeting with the main stakeholders including the EU project on "Technical assistance to support BiH tourism industry"	May 31st 2012	BHAS RTA
Clarification on the availability of financial resources to conduct a pilot survey of the tourism demand side	May 15th 2012	BHAS RTA
Contact Eurostat to find out whether there is an intention to include BiH into the NUTS-classification and/or to implement a "type of locality"-classification for the municipalities in BiH.	Before 3rd mission	Ulrich Spörel
BHAS and the entities will examine the availability of technical assistance for the statistical design of the sample survey on demand side and invite the relevant colleagues to the next meeting.	Before 3rd mission	BHAS (BD), FIS, RSIS
Collect information on other potential sources providing information on tourism issues	Before 3rd mission	BHAS (BD), FIS, RSIS

Topics for the next meeting, action 1.5.3

1. Presentation of the Danish demand side survey

2. Additional information on the demand side survey in Germany

3. Discussion on the pilot survey on travel behaviour in BiH
   a. Organisational structure (Separate survey vs. inclusion in an existing survey)
   b. Sample design
   c. Number of waves of data collection
   d. Timing
   e. Decision on the list of variables

4. Accommodation statistics
   a. Discussion of the revised data collection programme
   b. Discussion of the revised questionnaire
   c. Experience of data collection in German accommodation statistics
   d. Experience from Danish Accommodation statistics

5. Investigation of availability and possible use of administrative sources

6. Specification of future work plan

7. Planning of future missions

Annex 1

The following terms of reference have only been handed out to the expert on 17 April at the beginning of the meeting. Hence, they could not more be included into the preparation of this mission.

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Tourism Statistics
17th April 2012 to 20th April 2012
Terms of Reference - Activity 1.5.2
EU Twinning Project BA 08-IB-FI-03
Zelenih beretki 26, Sarajevo

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Component 1 Business Statistics
        1.1. Statistical Business Register
        1.2. Structural Business Statistics
        1.3. Construction Statistics
        1.4. Retail Trade Statistics
        1.5. Tourism Statistics
Component 2 Extended Household Budget Survey
Component 3 Institutional Capacity
        3.1. Long term strategy
        3.2. Metadata and classification system development
        3.3. Promotion of dissemination

Benchmarks
A) Plan for pilot survey on tourism statistics developed by the 2nd project quarter (March 2012).   **NOTE: Not met since has not held any mission (activity) devoted to demand side of tourism, which should be the subject of a pilot survey. BiH side has no experience in it.**   B) Plan for modification of existing survey on tourism statistics developed by the 2nd project quarter (March 2012).   **NOTE: Met only in respect of preparing of the list of planned activities by their order. Terms and deadlines for implementation of activities could not be determined before the conducting of Activity 1.5.3, related to the improvement of existing surveys. Activities may start only after the implementation of this mission.**   C) Detailed plan and preparation for regular production of tourism statistics by 4th project quarter (September 2012).   D) Pilot survey on tourism statistics conducted and existing surveys on tourism statistics modified by the 6th project quarter (March 2013).   E) Relevant results analysed and plans for regular surveys in force by 8th project quarter (September 2013).   F) Methodologies developed and documented by 8th project quarter (September 2013).

1.5.2. Activity – Training on tourism statistics and preparation of pilot for new survey on tourism (modified)

The expected activities are:

➢ Discussion of the agenda for the second mission; review of the actions needed for preparing this mission
➢ Presentation on the conceptual framework of tourism statistics
       – Forms and concepts of tourism
       o The visitor concept
       o The usual environment
       o The definition of tourism
       o Sources of information on tourism
       o Main variables and their content of information
  ➢ Supply side issues:
    – Presentation of the German accommodation statistics
    – Data collection on occupancy rate of bed places
    – Data collection on occupancy rate of bedrooms
    – Classification issues related to
        o NACE
        o NUTS
    - Others issues (i.a. list of countries of origin and the issue of residency)
➢ Discussion of concrete problems in the BiH accommodation statistics
➢ Specification of future work plan
➢ Preparation for the next mission

    - Preparation of the list of activities to be done before the next mission
    - Preparation of the list of topics for the next mission

Expected output

➢ Learning about tourism statistics regulations and the experience of implementing surveys.
➢ Analysis of existing surveys in BiH and other material in use on accommodation statistics (capacity, occupancy) and giving proposals for modification existing practices based on European standards.
➢ Draft version of improved Questionnaire for monthly indicators on accommodation statistics elaborated
➢ Mission report – summarized and detailed version completed
➢ Detailed plan of the activities for the next mission and draft ToR for the next mission prepared and agreed by all partners (BHAS / FIS/ RSIS participants, experts and RTA)

Explanation of the Expected output

It is expected that BiH statisticians expand their knowledge concerning tourism statistics regulations and practices.

We expect detailed analysis of our existing monthly tourism statistics forms of accommodation and advice what and how to improve them, to create a draft an improved questionnaire and to agree methods which would be fully harmonized with EU standards and, also, to meet state level needs.

NOTE: Output from the Twinning Work plan designed for Activity 1.5.2 cannot be realized but we hope that it will largely be achieved output intended for the Activity 1.5.3.

Annex 2: Programme for the mission

Agenda for the 2nd mission on tourism statistics

17/04:

12 – 13 h
Discussion of the agenda for the second mission; review of the actions needed for preparing this mission

13 – 16 h
Presentation on the conceptual framework of tourism statistics

18/04:

Supply side issues:
-   Presentation of the German accommodation statistics
-   Data collection on occupancy rate of bed places
-   Data collection on occupancy rate of bedrooms
-   Classification issues related to
    o   NACE
    o   NUTS
-   Others issues (i.a. list of countries of origin and the issue of residency)

19/04:

Supply side issues:
-   Detailed analysis of the questionnaire/form used in accommodation statistics in BiH
-   Modifications of the existing survey on accommodation statistics
-   Other problems of accommodation statistics in BiH

20/04:

Specification of future work plan
Planning of future missions

Annex 3: Persons met

<u>BHAS</u>

Naraša Lučić, Assistant Director in the Sector of Business Statistics

Jasmina Omić, Senior Adviser for Service Statistics

Alen Bajramović, Senior Adviser for Service Statistics

Azur Đapo, Senior Officer for services

<u>Institute for Statistics of Federation of BiH (FIS)</u>

Sanja Ambrožić, Head of the Service Statistics and foreign trade Unit

Dževahira Bušatlija, Senior Adviser for Tourism statistics

Fatima Demirović, Senior Officer for technical work and data entry

<u>Institute for Statistics of Republika Srpska (RSIS)</u>
Jelena Glamočika, Head of the Service Statistics Department
Miroslav Ilić, Senior statistician, Hotels and Restaurants statistics.

<u>EU-Tourism BiH (Technical Assistance to Support Tourism Industry in Bosnia and Herzegovina</u>
Mary McKeon, Team Leader
Alessandro Guzzo, Tourism Marketing and Product Development Expert

<u>Twinning Project Administration</u>

Bente Dyrberg, RTA

Djemka Sahinpasic, RTA Assistant