

Tourism Satellite Accounts in Europe

2023 edition



Tourism Satellite Accounts
in Europe | **2023 edition**

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1

Introduction

In many countries worldwide, tourism plays an important role in the economy. For a large number of EU Member States, tourism has been a significant driver of the national economy and labour market during the periods of economic slowdown in the past decades. However, in recent years, the COVID-19 pandemic hit the tourism sector particularly hard. While most European countries have a well-established system of statistics to track tourism demand in terms of domestic and outbound trips, tourist accommodation and tourist expenditure, these statistics don't measure the overall contribution of tourism to the economy.

To this end, the World Tourism Organisation (UNWTO), the United Nations Statistics Division (UNSD), the Organisation for Economic Cooperation and Development (OECD) and the Statistical Office of the European Union (Eurostat) developed a harmonised system of tourism satellite accounts (TSA)⁽¹⁾. It uses the same concepts, definitions and classifications as national accounts and is the internationally recognised framework for measuring tourist activity and the importance of tourism to national (or regional) economies. While traditional tourism statistics focus primarily on 'flows' (number of visitors, number of overnight stays etc.), TSA can tell us how much tourism contributes to an economy and how many jobs it creates. In its 2022 report *Transition Pathway for Tourism*⁽²⁾, the Commission reminded the statistical community to develop TSA.

Since the early 2000s, the European Commission has launched a number of initiatives to encourage Member States to compile TSA, starting with three rounds of grants in 2000-2006 and a two-year multi-country project⁽³⁾ in 2008-09. Following international workshops gathering TSA experts and users, organised in 2017 and 2018, Eurostat launched a course on TSA in the European Statistics Training Programme (ESTP), that took place in 2019, 2021 and 2022 (a next course is planned in November 2023). Finally, since 2010, European countries submit every three years, on a voluntary basis, available TSA data to Eurostat (2010, 2013, 2016, 2019 and 2022).

This report presents an analysis of the data gathered in 2022 and is a follow-up to the 2019 edition of *Tourism Satellite Accounts (TSA) in Europe*⁽⁴⁾. At this stage of development, national methodologies are not sufficiently harmonised for the data to be fully comparably across countries. However, even without entirely fulfilling the high quality standards of official statistics, the results give useful insights about the state-of-affairs of TSA implementation and about EU and national level estimates of the economic dimension of tourism.

Eurostat would like to thank all the national authorities that contributed to this publication. Special thanks go out to Pavel Vančura and Zdeněk Lejsek (Czech Statistical Office), Peter Laimer (Statistics Austria), and Giorgi Bregadze (Caucasus University, Georgia; formerly vice-chair of the UNWTO Committee on Statistics and TSA) who kindly agreed to assess and validate the data.

⁽¹⁾ 2008 Tourism Satellite Account: Recommended Methodological Framework (TSA:RMF 2008); United Nations Statistics Division (UNSD), Statistical Office of the European Communities (Eurostat), Organisation for Economic Cooperation and Development (OECD) and World Tourism Organisation (UNWTO). The document is available on the Eurostat website (see footnote 1).

⁽²⁾ <https://ec.europa.eu/docsroom/documents/49498/attachments/1/translations/en/renditions/native>

⁽³⁾ For more information, see <http://ec.europa.eu/eurostat/web/tourism/methodology/projects-and-studies>.

⁽⁴⁾ <https://ec.europa.eu/eurostat/web/products-statistical-reports/-/KS-FT-19-007>

2

Main findings

The objective of this report is twofold: to take stock of the state-of-affairs regarding TSA implementation across Europe, and to compile a limited set of TSA indicators allowing analysing European tourism in a macroeconomic framework.

Coverage and methodology

Since 2010, Eurostat invites the Member States every three years to transmit the available national TSA data, using a pre-defined template (for a list of indicators in the questionnaire, see Annex I).

The current paper is based on the results of the most recent exercise, which took place in 2022 and in which 27 European countries participated (23 EU members, 3 EFTA countries, 1 candidate country). The 23 Member States account for 93.5 % of tourism activity in Europe in terms of trips made by residents and 90.8 % in terms of overnight stays in tourist accommodation (see Table 1). This coverage allows producing not only national data but also meaningful and sufficiently representative results for the EU as a whole. To extrapolate the data of the available countries to the level of aggregates for the EU, the data for missing countries is estimated using their share in EU tourism. For the purpose of this publication, a country's share in EU tourism is estimated as the average of their share in supply (based on number of nights spent, from the accommodation statistics) and of their share in demand (based on the number of trips made by residents of the country, from the tourism demand statistics).

Most countries submitted data for the reference year 2019. About half of the reporting countries submitted, in addition, data for the reference year 2020, which allows to look into the impact of the COVID-19 pandemic on the European tourism sector.

The internationally accepted TSA framework, the *2008 Tourism Satellite Account: Recommended Methodological Framework (TSA:RMF 2008)*, was jointly developed by the United Nations Statistics Division, Eurostat, the OECD and the UN World Tourism Organisation, and consists of 10 tables. However, coverage of these tables varies widely across the participating countries. The tables relating to the demand side and supply side are relatively complete (Tables 1 to 6 of the TSA system), but the information for the table on employment (Table 7) is much more fragmented. The indicators on gross fixed capital formation and collective consumption were only sparsely covered (Tables 8 and 9). Table 10 comprises primary tourism statistics that help to put the macroeconomic data into perspective.

Improving the harmonisation of TSA compilation across Europe remains a key challenge. Different degrees of adherence to TSA:RMF 2008 affects the comparability. Limitations (or absence) of data sources, lead to slight deviations from the international recommendations.

Implementation and harmonisation of TSA has gained importance in recent years. Firstly, TSA can have a pivotal role in measuring the economic and/or environmental sustainability of tourism. Secondly, TSA can feed SDG indicator 8.9.1 "Tourism direct GDP as a proportion of total GDP and in growth rate", proposed for assessing goal 8.9 "By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products".

Analysis

The analysis of the demand side (see Chapter 4) shows that domestic tourism accounted, on average in the EU in 2019, for 62 % of internal tourism expenditure, and inbound expenditure for 38 %. In 14 out of the 26 European countries for which data is available, inbound tourism expenditure was higher than domestic tourism expenditure. The importance of domestic tourism in internal tourism expenditure ranged from more than 80% in Romania and Germany to less than 15 % in Luxembourg, Bulgaria, Estonia and Croatia.

Representing 69 % of domestic tourism expenditure and 91 % of inbound tourism expenditure on average, overnight visitors were more important than same-day visitors for internal tourism expenditure.

The analysis of the supply side is based on macroeconomic variables such as gross value added, gross domestic product and internal consumption relating to tourism and how they compare with totals for the overall economy. These variables are useful for gauging the importance of tourism for the economy as a whole and compared with other economic activities (see Chapter 5).

The contribution of tourism to an economy can be expressed by comparing the internal tourism consumption to the domestic supply, the latter being defined as the sum of the output by domestic producers and the imports corrected for taxes less subsidies. The proportion of total domestic supply accounted for by internal tourism consumption is called the tourism ratio. The average tourism ratio in the EU amounted to 3.7 %, i.e. domestic and inbound visitors consumed 3.7 % of the total output of tourism and non-tourism industries. The ratio ranged from around 1 % in Ireland and Luxembourg to more than 8% in Iceland (8.3 %) and Croatia (9.5 %).

An alternative measure of the contribution of tourism to an economy, is the share of tourism direct gross value added in the total gross value added (meaning the total output of domestic producers in the economy, minus their intermediate consumption). The tourism share in total gross value added varied from 1.9 % in Luxembourg to 11.3 % in Croatia. The average for the EU was 4.5 %. In absolute terms, the tourism direct gross value added was estimated to be EUR 572 billion in 2019, of which Germany accounted for EUR 124 billion, followed by Italy (EUR 100 billion), France (EUR 87 billion) and Spain (EUR 78 billion).

Based on available data for 2020 for a subset of countries (not necessarily representative for the EU as a whole), TSA can contribute to assessing the impact of the pandemic on the tourism sector, as well as the impact on the sector's relative position in the economy. In the set of countries for which 2020 data is available, the internal tourism consumption dropped by 45 % and tourism lost 1.3 percentage point of its weight in the economy's total gross value added. Extrapolating the available data to the entire EU, indicates an estimated daily loss of EUR 500 million in tourism direct gross value added during 2020, compared with 2019.

3

Background and introductory comments on the data

This report presents results from the fifth round of TSA data collection in Europe (EU, EFTA and candidate countries). Data was transmitted on a voluntary basis⁽⁵⁾ to Eurostat in 2022.

The first TSA exercise of this kind took place in 2010, with 23 participating countries. Eurostat's aim was to collect readily available and voluntarily submitted TSA data from Member States, EFTA and candidate countries at regular intervals but not each year. The next exercises took place in 2013 (22 countries), 2016 (19 countries) and 2019 (27 countries).

Scope and coverage

The indicators included in the reporting template (see Annex I) are a subset of the tables in the TSA:RMF 2008 and focus on headline indicators and totals. The reporting template remained stable over time, but was slightly modified for this fifth exercise. While none of the indicators were changed, a few less relevant or less used indicators were deleted, and some others were newly added. The latter mainly concerns additional macro-economic key aggregates in Table 5 and 6 (gross value added of tourism industries or GVATI, tourism direct gross value added or TDGVA, tourism direct gross domestic product or TDGDP) and figures on direct employment effect in Table 7.

It should be noted — especially when comparing and interpreting results — that the comparability of the results is still affected by methodological differences between national TSAs and the TSA:RMF 2008, different degrees of completeness, different levels of statistical 'maturity' (some figures are preliminary, others come from pilot projects) and different reference years. To give data users a clearer idea of data quality, explanatory notes on the tables and graphs are included where relevant and possible. It is highly recommended that the user takes into account this metadata in the notes accompanying the tables and graphs when analysing, comparing or interpreting results.

For the fifth TSA exercise in the EU, 27 countries provided data⁽⁶⁾:

- 23 Member States (Belgium⁽⁷⁾, Bulgaria, Czechia, Denmark, Germany, Estonia, Ireland, Spain, France, Croatia, Italy, Latvia, Lithuania, Luxembourg, Hungary, the Netherlands, Austria, Portugal, Romania, Slovenia, Slovakia, Finland, Sweden);
- 3 EFTA countries (Iceland, Norway and Switzerland);
- 1 candidate country (North Macedonia).

⁽⁵⁾ The compilation and transmission of TSA data goes beyond the legal requirements for tourism statistics, as laid down in Regulation (EU) No 692/2011 concerning European statistics on tourism, hence the voluntary nature of this data transmission.

⁽⁶⁾ Malta and Poland are currently updating their TSA, however, the update was not finalised to be included in this paper.

⁽⁷⁾ Tourism being a subnational competence in Belgium, TSA is generally compiled at regional level. For the purpose of this paper, the Flemish Statistics Authority kindly compiled a national TSA for Belgium.

Table 1 indicates how many of the 53 indicators were transmitted by each of the countries (see Annex I for the complete set of indicators). Coverage (which was partial in all cases, ranging from 25 to 52 indicators) also gives an indication of how complete the national TSA are. Table 1 also includes some core tourism statistics to illustrate the representativeness of the participating countries when estimating aggregates for the EU as a whole: the 23 Member States account for 90.8 % of all nights spent in tourist accommodation establishments across the Union and 93.5 % of all tourism trips made by EU residents (reference year 2019).

Table 1: TSA transmission and number of indicators available, by country

Country	Number of indicators transmitted (n=53)	Nights spent in tourist accommodation (2019)		Domestic + outbound tourism trips (2019)	
		Number (millions)	Share in EU total (%)	Number (millions)	Share in EU total (%)
EU	-	2 874.8	100.0	1 138.9	100.0
Belgium	34	42.5	1.5	18.3	1.6
Bulgaria	32	27.2	0.9	4.9	0.4
Czechia	48	57.0	2.0	34.8	3.1
Denmark	39	34.3	1.2	29.7	2.6
Germany	37	437.0	15.2	260.5	22.9
Estonia⁽¹⁾	35	7.0	0.2	5.2	0.5
Ireland	45	32.6	1.1	17.1	1.5
Greece	-	143.6	5.0	6.2	0.5
Spain	40	469.8	16.3	154.3	13.6
France	31	446.6	15.5	216.6	19.0
Croatia	26	91.2	3.2	6.0	0.5
Italy	43	436.7	15.2	62.3	5.5
Cyprus	-	17.6	0.6	3.2	0.3
Latvia	32	5.5	0.2	4.0	0.3
Lithuania	40	8.9	0.3	5.2	0.5
Luxembourg	41	2.9	0.1	2.6	0.2
Hungary	43	33.2	1.2	19.8	1.7
Malta	-	9.9	0.3	0.9	0.1
Netherlands	24	123.4	4.3	46.5	4.1
Austria	40	127.9	4.4	24.8	2.2
Poland	-	93.3	3.2	63.6	5.6
Portugal	34	77.6	2.7	20.5	1.8
Romania	42	29.9	1.0	19.4	1.7
Slovenia	43	15.8	0.5	4.9	0.4
Slovakia	52	17.2	0.6	13.9	1.2
Finland	37	23.1	0.8	38.7	3.4
Sweden	36	63.2	2.2	54.9	4.8
Iceland	40	8.4	-	-	-
Liechtenstein	-	0.2	-	-	-
Norway	30	35.2	-	-	-
Switzerland⁽¹⁾	33	56.2	-	20.0	-
North Macedonia	37	2.3	-	0.6	-

⁽¹⁾ Reference year for TSA data: 2019 (EE, CH: 2017).

Source: Eurostat, Data collection on TSA 2022, Tourism statistics.

Table 2 shows the coverage of the selected indicators for the 10 TSA tables. *TSA Tables 1 to 6 and 10* are relatively well covered. All 27 countries reported on 'total internal tourism expenditure' (included in *TSA Table 4*) and its two components 'total inbound tourism expenditure' (included in *TSA Table 1*) and 'total domestic tourism expenditure' (included in *TSA Table 2*). For the core *TSA Table 6*, coverage was very good, and availability was mainly affected for newly introduced macro-economic aggregates such as tourism direct gross value added (TDGVA) and tourism direct gross domestic product (TDGDP).

For *TSA Table 7* on employment — considered essential for analysing the tourism sector — data availability was more fragmented. On the one hand because respondents chose one of the two approaches (tourism industries versus tourism after applying tourism shares), on the other hand because of limited availability of concepts in national accounts (for instance number of persons employed, but not number of jobs).

The least complete TSA tables are *Tables 8 and 9*, for which only eight countries (30%) and two countries (7%), respectively, transmitted the single indicator requested. This reflects on the one hand the complexity of compiling these tables and on the other hand the lower priority in terms of user relevance given to these tables.

Table 2: Overview of coverage of TSA tables

Table		Number of indicators in questionnaire	Availability in participating countries (%)
TSA Table 1	Inbound tourism expenditure	3	91
TSA Table 2	Domestic tourism expenditure	3	91
TSA Table 3	Outbound tourism expenditure	3	57
TSA Table 4	Internal tourism consumption	5	93
TSA Table 5	Production accounts of tourism industries and other industries	4	98
TSA Table 6	Total domestic supply and internal tourism consumption	11	90
TSA Table 7	Employment in the tourism industries	13	38
TSA Table 8	Tourism gross fixed capital formation	1	30
TSA Table 9	Tourism collective consumption	1	7
TSA Table 10	Non-monetary indicators	9	72

Source: Eurostat, Data collection on TSA 2022.

The reference year for the data is for most countries 2019 (see Table 3), the year before the start of the COVID-19 pandemic. While Greece, Cyprus, Malta and Poland did not provide data for this round, TSA figures for Greece for 2015 are available from the previous edition of this paper (2019 edition). Recent TSA figures for Malta and Poland are work-in-progress but were not available yet at the time of writing.

It was suggested to respondents to align as much as possible to a common reference year (2019), but the template also allowed countries to send, where available, more recent data for one of the pandemic years. 14 countries provided data for 2020, this data is tentatively explored in Chapter 8 of this paper.

Table 3: Reference year for TSA data

Year	Country
2019	BE, BG, CZ, DK, DE, IE, ES, FR, HR, IT, LV, LT, LU, HU, NL, AT, PT, RO, SI, SK, FI, SE, IS, NO, MK
2017	EE, CH

Source: Eurostat, Data collection on TSA 2022.

Governance

Depending on how the statistical system is organised in a given country, various agencies can be involved in compiling and disseminating official tourism statistics and the TSA. In all but two cases, the statistical office compiles the data (see Table 4).

Table 4: Institution responsible for compiling the TSA

Institution	Country
National statistical institute	BE ^(*) , BG, CZ, DE, EE, IE, ES, FR, HR, IT, LV, LT, LU, HU, NL, AT, PT, RO, SI, SK, FI, IS, NO, CH, MK
National tourism board	DK (Visit Denmark)
Other government body	SE (Swedish agency for economic and regional growth)

(*) TSA for Belgium was compiled by the Flemish regional statistical authority, in coordination with other regions' stakeholders.

Source: Eurostat, Data collection on TSA 2022.

If the national statistical institute (NSI) is responsible for compiling the TSA, this is done either by the unit dealing with tourism statistics or by the unit in charge of national accounts (see Table 5). Both approaches have their advantages. However, the most important is that tourism statisticians and national accountants work closely together and pool their knowledge and experience.

Table 5: Unit within NSI responsible for compiling the TSA

Responsible unit in NSI	Country
Tourism Statistics Unit	BG, CZ, IE, ES, FR, LV, LT, HU, AT, RO, SK, FI, CH, MK
National Accounts Unit	DE, EE, HR, IT, LU, NL, PT, SI, IS, NO

Source: Eurostat, Data collection on TSA 2022.

Data sources for TSA compilation

TSA compilers use a wide range of sources as input to the accounts. In the 2022 data collection, compilers were asked to indicate for each of the TSA Tables the most relevant sources used, selecting from a pre-selected set of potential sources and differentiating between 'main source' and 'auxiliary source'.

Annex II includes the full overview. The most commonly cited sources for the demand and supply information (TSA Tables 1 to 6) were data collected in the context of Regulation (EU) 692/2011 concerning European statistics on tourism, namely accommodation statistics (business surveys) and tourism demand surveys (household surveys). Where available, countries also relied on border surveys or specific surveys addressed to tourism service providers (for instance travel agencies or tour operators). Given the close link to national accounts, Supply-Use tables, Input-Output tables or (other) information from National Accounts were often mentioned as essential building blocks. The data on employment (TSA Table 7) generally includes information from the labour force survey and from (structural) business statistics.

Besides the pre-defined list of potential sources, countries also indicated other sources, for instance transport statistics, surveys on earnings and hours worked, data on short-stay accommodation booked via online collaborative economy platforms, travel statistics based on mobile positioning data, Balance of Payments.

4

The demand side: How much do visitors spend?

The first four TSA tables contain demand-side data on expenditure by visitors (before and during their trip) and tourism consumption. Tourism expenditure is divided into inbound, domestic and outbound tourism in *TSA Tables 1, 2 and 3* respectively. *TSA Table 4* focuses on internal tourism consumption, summarising inbound and domestic tourism expenditure, but also covering other components of consumption.

Tourism consumption is more or less the same as tourism expenditure, albeit a little broader in scope. Apart from expenditure, consumption also covers among other elements such as the imputed rent of holiday homes or services paid by non-profit institutions for trips made by, for instance, groups of disabled people.

Overnight visitors (tourists) account for 87 % of the inbound tourism expenditure

Table 6 on the next page (*TSA Table 1*) shows inbound tourism expenditure in the country visited. These results are available for all 27 countries (the split between expenditure by overnight tourists and same-day visitors, however, is only available for 22 countries, of which 19 EU members).

Spain recorded the highest value: EUR 82.7 billion or 19 % of the EU total inbound tourism expenditure. France came second (EUR 65.4 billion), followed by Italy (EUR 55.4 billion), Germany (EUR 46.9 billion) and the Netherlands (EUR 34.7 billion). These five countries accounted for nearly two-thirds (65 %) of total inbound tourism expenditure in the EU (see also Figure 1).

Table 6: Inbound tourism expenditure (TSA Table 1)
(million EUR)

Country	Total	By tourists	By same-day visitors
EU-27	436 510	381 362	55 149
Belgium	4 598	4 071	527
Bulgaria⁽¹⁾	4 324	3 821	503
Czechia⁽²⁾	6 890	4 942	1 949
Denmark	8 233	7 465	768
Germany	46 885	41 025	5 860
Estonia⁽³⁾	1 873	1 435	437
Ireland⁽⁴⁾	7 267	6 986	281
Greece	:	:	:
Spain⁽⁵⁾	82 725	:	:
France⁽⁶⁾	65 403	:	:
Croatia⁽⁷⁾	10 517	9 888	629
Italy	55 437	51 824	3 614
Cyprus	:	:	:
Latvia	1 296	748	548
Lithuania	1 499	1 155	344
Luxembourg	3 086	913	2 173
Hungary	6 909	5 078	1 831
Malta	:	:	:
Netherlands	34 729	:	:
Austria	20 778	17 281	3 497
Poland	:	:	:
Portugal⁽⁸⁾	21 187	20 535	652
Romania	1 725	1 464	261
Slovenia	3 377	1 607	1 770
Slovakia⁽⁹⁾	1 645	1 137	508
Finland	5 288	4 553	735
Sweden	9 099	:	:
Iceland	2 803	2 769	34
Liechtenstein	:	:	:
Norway⁽¹⁰⁾	6 031	:	:
Switzerland	15 314	13 564	1 750
North Macedonia	361	274	87

Notes: EU aggregate estimated for this publication using available data. The results on average expenditure were not available for all countries mainly due to missing data on the number of visitors (physical data). Reference year for TSA data: See Table 3.

(¹) Same-day visitors include transits, which accounted for 251 million EUR.

(²) Same-day visitors (T1.1.2) include transits, which accounted for 926 387 million EUR.

(³) Expenditures of seasonal/border workers, exports of educational/medical services are excluded.

(⁴) Inbound expenditure includes fare receipts of Irish carriers and covers all reasons for travel by overseas travellers to Ireland from PCI (fare costs split has been estimated between overnight and same-day visitors). Added NI visitor overnight expenditure figure taken from Fáilte Ireland report, to overnight visitors expenditure. Note: No same-day NI expenditure available at present.

(⁵) No split available between tourist and same-day visitor expenditure

(⁶) Figures adjusted with the balance of payment (international transport included).

(⁷) Inbound tourism expenditure estimated by the Institute for Tourism, Zagreb, using various data sources in order to obtain the breakdown of the inbound tourism expenditure by products (bottom up method).

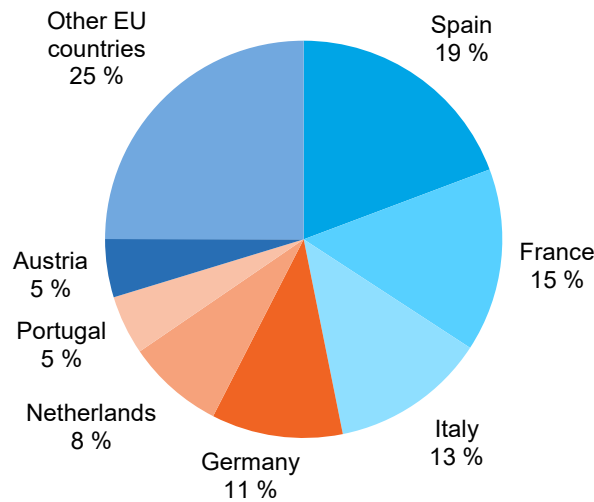
(⁸) Includes business tourism expenditure.

(⁹) Same-day visitors (T1.1.2) include transits which accounted for 147 494 million EUR.

(¹⁰) Includes both overnight and same-day visitors. The services associated with vacation homes and the estimated rents for these are included in the overall tourism expenditure figures.

Source: Eurostat, Data collection on TSA 2022.

Figure 1: Inbound tourism expenditure — top countries
(% share in EU total)

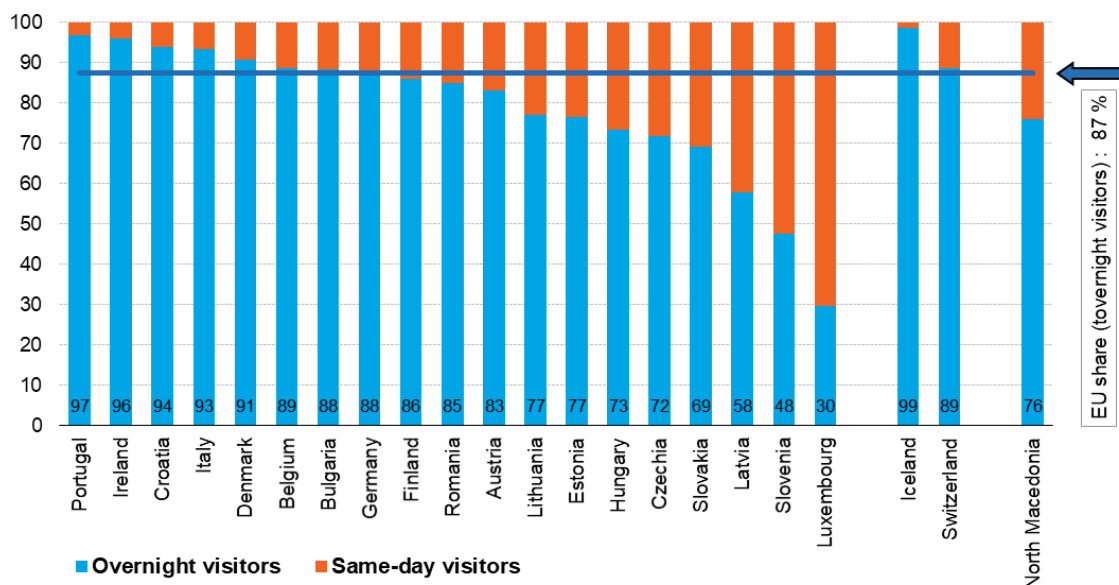


Note: Missing data for Greece, Cyprus, Malta and Poland.
Source: Eurostat, Data collection on TSA 2022.

Figure 2 gives an overview of the countries' average share of total inbound tourism expenditure accounted for by overnight tourists (as opposed to same-day visitors' inbound tourism expenditure).

At EU level, this share was 87 %, an estimate based on data from the 19 Member States that were able to distinguish by type of visitor. The highest percentage was reported by Portugal (97 %), Ireland (96 %) and Croatia (94 %). By contrast, Luxembourg and Slovenia recorded shares under 50% (respectively 30% and 48%), meaning same-day visitors contributed more to inbound tourism expenditure than overnight visitors did (47 %).

Figure 2: Inbound tourism expenditure, by overnights visitors (tourists) and same-day visitors
(%)



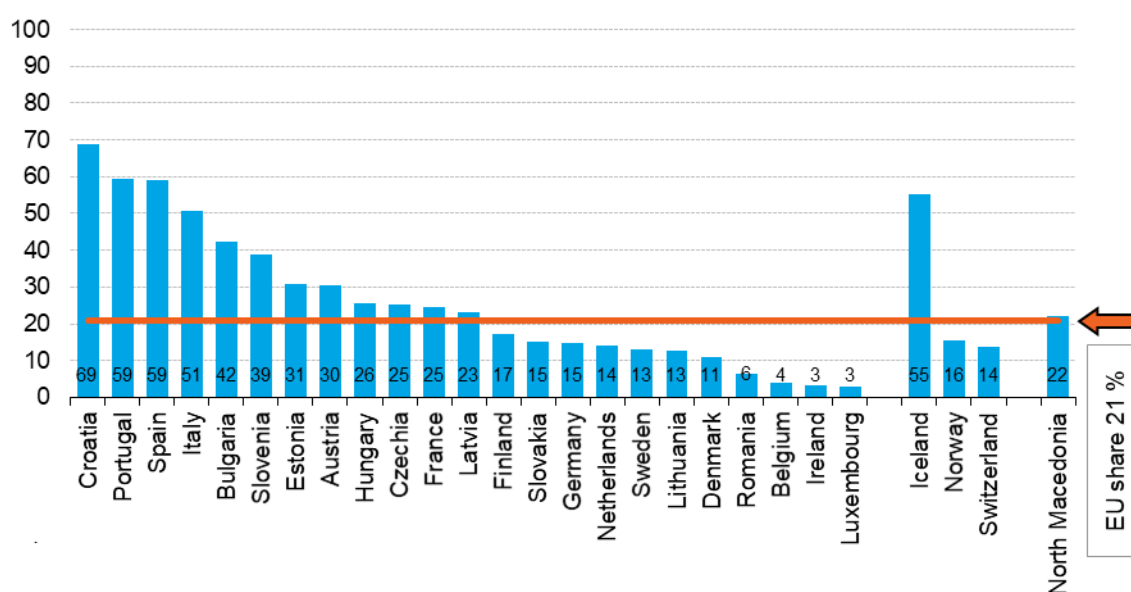
Notes: EU aggregate estimated for this publication using available data. Missing data for EL, ES, FR, CY, MT, NL, PL and SE.
Reference year for the data: See Table 3.
Source: Eurostat, Data collection on TSA 2022.

For many countries, tourism is an important driver for international trade in services. The credit side of this part of the balance of payments (BoP) details the foreign receipts of a country.

Figure 3 depicts the share of inbound tourism expenditure (TSA) in relation to the total international trade in services (BoP). Even if the travel concept (used in BoP) and the tourism concept (used in tourism statistics and in TSA) are not entirely comparable⁽⁶⁾, this ratio gives an idea of the importance of inbound tourism for the trade in services.

For the 27 countries for which both series of data are available, inbound tourism expenditure amounts to over one-fifth (21 %) of international trade in services, ranging from 3 % in Luxembourg and Ireland to more than 50 % in Italy (51%), Spain (59%), Portugal (59 %) and Croatia (69 %).

Figure 3: Share of inbound tourism expenditure in relation to total international trade in services (%)



Notes: EU aggregate estimated for this publication using available data. Reference years for data on international trade in services match TSA reference years (see Table 3).

Source: Eurostat, Data collection on TSA in 2022, Statistics on international trade in services.

⁽⁶⁾ BoP includes for instance border workers, long-term students etc. For a more comprehensive discussion of conceptual differences between balance of payments and tourism statistics, see the bridge table (Figure 8.1) on pp.72-73 in the International Recommendations for Tourism Statistics 2008 [IRTS2008]

Nearly one-third of the domestic tourism expenditure is linked to same-day visits

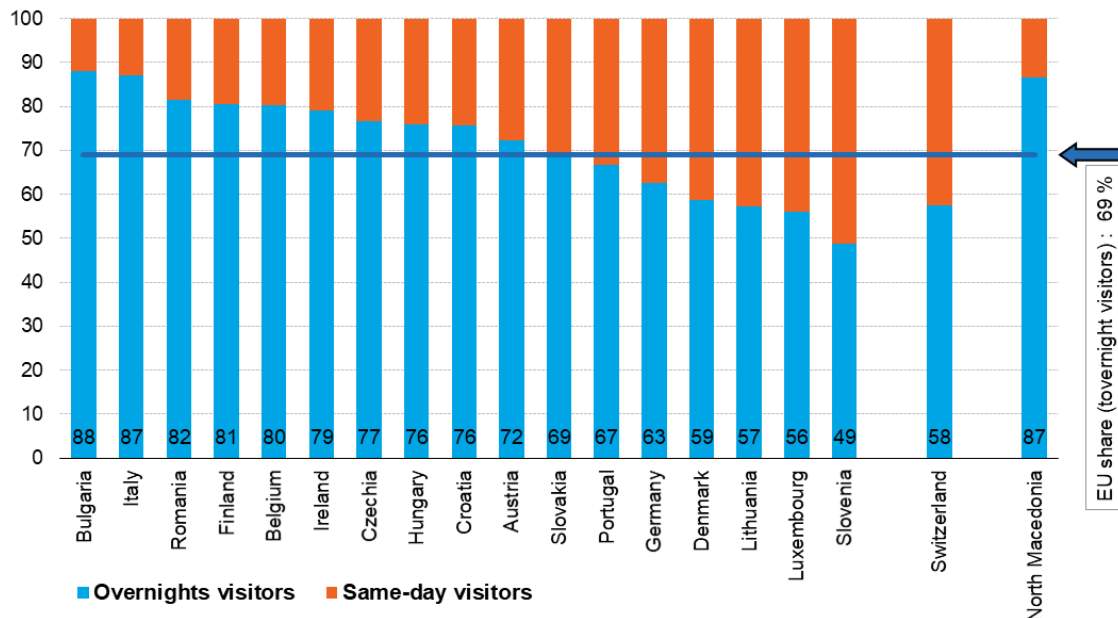
In almost every country, domestic tourism expenditure makes a significant contribution to the economy and is therefore a key component of the TSA. It comprises expenditure by residents travelling within their own country, but also expenditure linked to outbound trips but incurred in the country of residence, such as fares for transport to a foreign destination but paid to a carrier in the country of origin or purchase of a new suitcase before the trip.

The highest figure was reported by Germany (EUR 247.0 billion, corresponding to 36% of EU27 total domestic tourism expenditure), followed by France (EUR 114.7 billion) and Italy (EUR 71.6 billion) (see Table 7 on the next page (corresponding to *TSA Table 2*)).

Domestic tourism expenditure includes amounts spent by tourists in their country of residence in connection with an outbound trip. However, non-monetary data (the number of domestic same-day trips and domestic overnight stays) only covers trips/stays in the country of origin. Therefore, no average is calculated for domestic tourism expenditure. Domestic expenditure on domestic trips and domestic expenditure on outbound trips is reported separately in the TSA framework, but this breakdown was not included in the template gathering the input data for this paper.

Available data reveals that same-day visitors had an average impact of 31% on the level of domestic tourism expenditure. As shown in Figure 4, same-day domestic trips were more significant than overnight trips for Slovenia (51%, as compared to 49% for overnight tourists).

Figure 4: Domestic tourism expenditure, by overnights visitors (tourists) and same-day visitors (%)



Note: EU aggregate estimated for this publication using available data. Missing data for EE, EL, ES, FR, CY, LV, MT, NL, PL and SE.

Source: Eurostat, Data collection on TSA 2022.

Table 7: Domestic tourism expenditure (TSA Table 2)
(million EUR)

Country	Total	By tourists	By same-day visitors
EU-27	695 103	480 526	214 577
Belgium	10 594	8 495	2 099
Bulgaria	577	508	69
Czechia ⁽¹⁾	5 117	3 927	1 189
Denmark	10 403	6 099	4 304
Germany ⁽²⁾	246 986	154 714	92 272
Estonia ⁽³⁾	278	:	:
Ireland ⁽⁴⁾	2 718	2 147	571
Greece	:	:	:
Spain ⁽⁵⁾	55 897	:	:
France ⁽⁶⁾	114 731	:	:
Croatia ⁽⁷⁾	1 575	1 192	383
Italy	71 589	62 321	9 268
Cyprus	:	:	:
Latvia	:	:	:
Lithuania	998	572	426
Luxembourg	411	230	180
Hungary	2 224	1 686	537
Malta	:	:	:
Netherlands	52 924	:	:
Austria ⁽⁸⁾	15 323	11 072	4 250
Poland	:	:	:
Portugal ⁽⁹⁾	10 056	6 704	3 352
Romania	10 444	8 519	1 925
Slovenia	1 339	653	686
Slovakia ⁽¹⁰⁾	3 049	2 108	941
Finland	8 852	7 130	1 722
Sweden	16 865	:	:
Iceland	1 040	:	:
Liechtenstein	:	:	:
Norway ⁽¹¹⁾	13 692	:	:
Switzerland ⁽¹²⁾	21 821	12 556	8 316
North Macedonia	95	82	13

Notes: EU aggregate estimated for this publication using available data. The results on average expenditure were not available for all countries mainly due to missing data on the number of visitors (physical data). Reference year for TSA data: See Table 3.

(1) Tourists (T2.1.1) include business trips which accounted for 350 801 million EUR.

(2) T2.1.1 includes a domestic expenditure part of outbound tourism.

(3) Domestic tourism expenditures by same-day visitors are not estimated, due to the lack of data.

(4) Domestic tourism expenditure includes business trips which accounted for €125 million in T2.1.1 and €64 million in T2.1.2.

(5) Estimations of rents associated to vacation homes are included.

(6) "Holiday and other short-stay accommodation" in the 55 ISIC' consumption from National Account is missing → Information comes from the tourism demand survey.

(7) Domestic tourism expenditure estimated by the Institute for Tourism, Zagreb, using various data sources in order to obtain the breakdown of the domestic tourism expenditure by products (bottom up method).

(8) "Tourists/overnight visitors" include imputed rents for second homes.

(9) The parcel referring to tourists is further split between expenditure made for trips within the country (5.502 million €) and trips abroad (1201 million €) . It includes business tourism expenditure.

(10) Tourists (T2.1.1) include business trips which accounted for 222 351 million EUR.

(11) Includes both overnight and same-day visitors. For resident producers only the expenditures for business travels (transport, travel agency fees, accommodation and catering) are included as tourism expenditures. Expenditures on tour operator services are calculated gross. Expenditures on transport services on outbound trips are included regardless of the producer being resident or non-resident. The services associated with vacation homes and the estimated rents for these are included in the overall tourism expenditure figures. Expenditures on valuables and costly durables subject to custom control like cars, are not included.

(12) Business tourism is added to domestic expenditure. The value of business tourism is 948 479 million EUR.

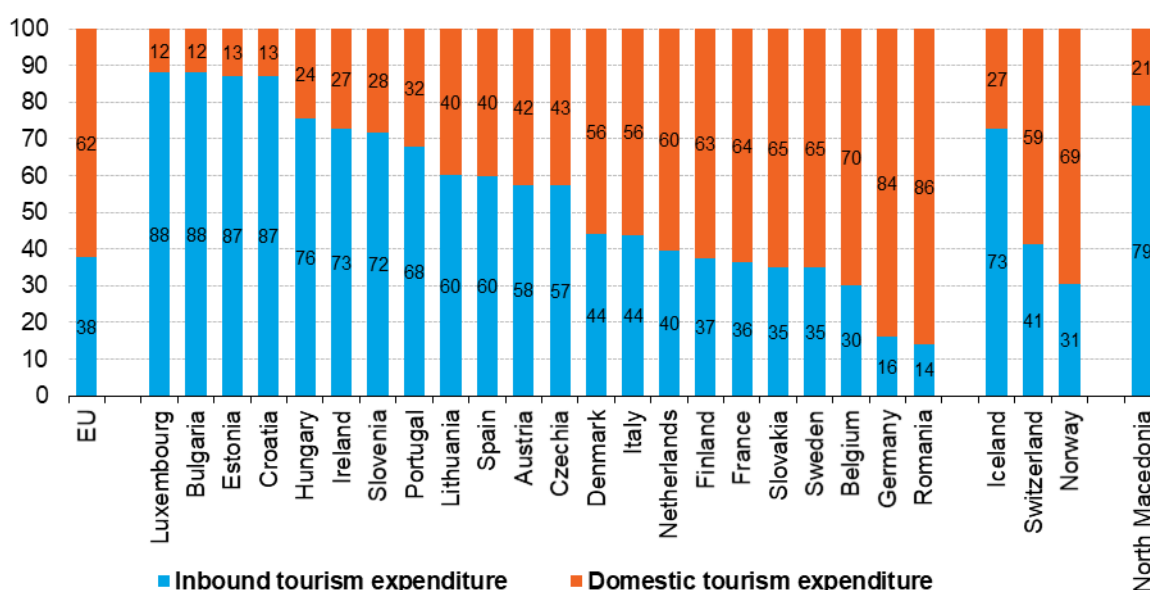
Source: Eurostat, Data collection on TSA 2022.

Domestic tourism expenditure 1.6 times higher than inbound tourism expenditure

For many countries, domestic tourism is more important than inbound tourism. Furthermore, domestic tourism expenditure includes the 'domestic' part of expenditure on outbound trips (see above and methodological notes in Annex IV). Therefore, it is no surprise that domestic tourism expenditure dominated internal tourism expenditure in EU27, accounting for 61 %, with the remaining 39 % relating to inbound tourism expenditure. Figure 5 shows the breakdown for individual countries.

Figure 5: Inbound tourism expenditure and domestic tourism expenditure as proportions of internal tourism expenditure

(%)



Note: EU-27 aggregate estimated for this publication using available data.

Source: Eurostat, Data collection on TSA 2022.

Table 8 (corresponding to *TSA Table 4*) shows the internal tourism consumption, the sum of inbound tourism expenditure, domestic tourism expenditure, and other components of tourism consumption (for instance imputed rent for second homes). Germany had the highest figure: EUR 330 billion, or 26 % of the EU total internal tourism consumption, followed by France (EUR 180 billion), Italy (EUR 164 billion) and Spain (EUR 159 billion). Jointly, these four countries accounted for two-thirds (66.7 %) of the EU total internal tourism consumption.

As can be seen in Table 8, nine of the reporting countries didn't cover other components of tourism consumption. In most cases, this was due to a lack of reliable data sources, although some countries had included these components as 'expenditure' (which is not fully in line with the TSA:RMF 2008).

To put tourism consumption in a country into perspective (inbound as well as domestic components), Figure 6 shows the internal tourism consumption in relation to the population of the country. Per capita internal tourism consumption in the European Union was estimated at EUR 2 794 per inhabitant. At country level, Luxembourg (EUR 5 831 per inhabitant), the Netherlands (EUR 5 255) and Austria (EUR 4 277) were on top. Outside the EU, the highest per capita internal tourism consumption was in Iceland, at EUR 11 339 per inhabitant.

Table 8: Internal tourism consumption (TSA Table 4)
(million EUR)

Country	Internal tourism consumption	Internal tourism expenditure	Inbound tourism expenditure	Domestic tourism expenditure	Other components of tourism consumption
EU-27	1 247 515	1 131 613	436 510	695 103	:
Belgium ⁽¹⁾	18 708	15 192	4 598	10 594	3 516
Bulgaria	4 900	4 900	4 323	577	:
Czechia ⁽²⁾	12 007	12 007	6 890	5 117	:
Denmark	18 636	18 636	8 233	10 403	:
Germany	329 560	293 871	46 885	246 986	35 689
Estonia	2 519	2 150	1 873	278	369
Ireland ⁽³⁾	9 985	9 985	7 267	2 718	:
Greece	:	:	:	:	:
Spain ⁽⁴⁾	158 578	138 623	82 725	55 897	19 955
France ⁽⁵⁾	180 134	180 134	65 403	114 731	:
Croatia ⁽⁶⁾	12 372	12 092	10 517	1 575	281
Italy	164 012	127 027	55 437	71 589	36 985
Cyprus	:	:	:	:	:
Latvia	1 304	1 296	1 296	:	8
Lithuania	2 497	2 497	1 499	998	:
Luxembourg	3 579	3 496	3 086	411	83
Hungary ⁽⁷⁾	9 133	9 133	6 909	2 224	:
Malta	:	:	:	:	:
Netherlands	90 814	87 653	34 729	52 924	3 161
Austria	37 886	36 101	20 778	15 323	1 785
Poland	:	:	:	:	:
Portugal	32 906	31 243	21 187	10 056	1 663
Romania	12 222	12 169	1 725	10 444	53
Slovenia	4 797	4 716	3 377	1 339	81
Slovakia ⁽⁸⁾	5 875	4 695	1 645	3 049	1 181
Finland ⁽⁹⁾	16 261	14 140	5 288	8 852	2 121
Sweden	28 123	25 964	9 099	16 865	2 159
Iceland ⁽¹⁰⁾	4 048	3 843	2 803	1 040	204
Liechtenstein	:	:	:	:	:
Norway ⁽¹¹⁾	19 723	19 723	6 031	13 692	:
Switzerland	41 714	37 135	15 314	21 821	4 579
North Macedonia	456	456	361	95	:

Notes: EU aggregated estimated for this publication using available data. Reference year for TSA data: See Table 3.

⁽¹⁾ Includes imputed rent second homes (1,351 million euro), social transfers in kind (1,390 million euro) and durables (745 million euro).

⁽²⁾ Tourism social transfers in kind and consumption of individual non-market services are not included in the Czech TSA. All other components of tourism consumption (e.g. business trips, imputed rent) are directly included in tables T1 and T2.

⁽³⁾ Data does not contain any estimates of non-monetary consumption, nor does it place a value on vacation accommodation on own account.

⁽⁴⁾ Other components of tourism consumption (T4.1.2) includes business expenses.

⁽⁵⁾ The data are adjusted to national accounts, except for accommodation which is too low in the accounts and is readjusted with the surveys.

⁽⁶⁾ Other components of tourism consumption includes only the estimated value for imputed rental for the owners of a vacation home, without correction for tourism share.

⁽⁷⁾ Tourism social transfers in kind and consumption of individual non-market services are not included in the Hungarian TSA. All other components of tourism consumption (e.g. business trips, imputed rent) are directly included in tables T1 and T2.

⁽⁸⁾ Other components includes: Social transfers in kind, Imputed rentals for housing.

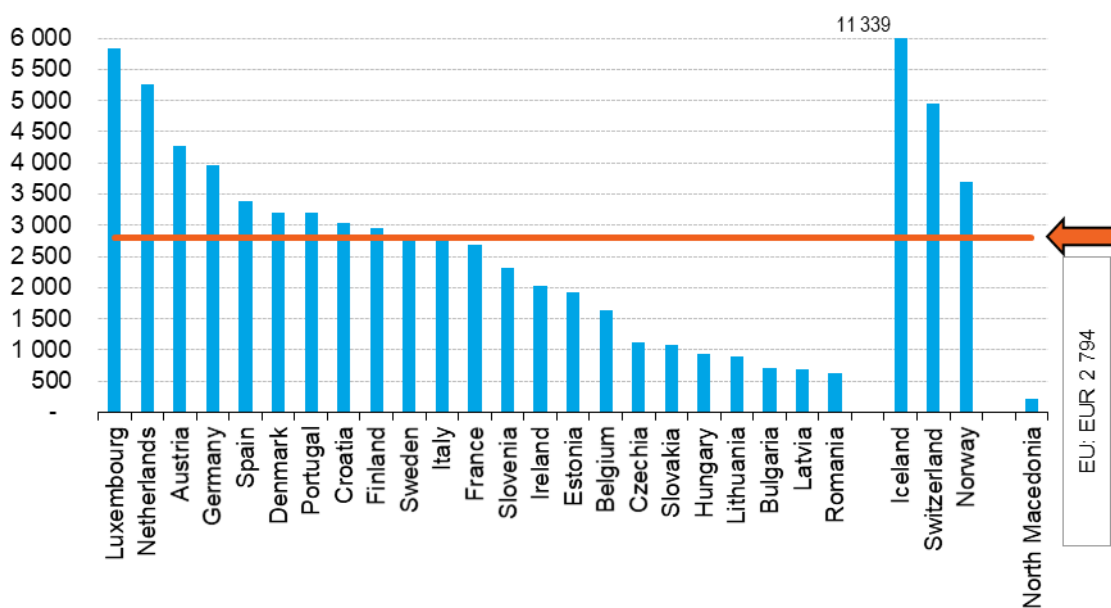
⁽⁹⁾ Other components contain imputed consumption of vacation accommodation on own account, and expenditure on business trips paid by employers.

⁽¹⁰⁾ Tourism social transfers in kind and consumption of individual non-market services are not included. Other components of tourism consumption, e.g. business trips, imputed rent of summer houses, are included.

⁽¹¹⁾ The services associated with vacation homes and the estimated rents for these are included in the tourism expenditure figures. Calculations on social transfers in kind, FISIM, home exchange etc have not been carried out.

Source: Eurostat, Data collection on TSA 2022.

Figure 6: Internal tourism consumption per capita (EUR)



Note: EU aggregate estimated for this publication using available data. Reference years for population match TSA reference years (see Table 3). Missing data for EL, CY, MT and PL.

Source: Eurostat, Data collection on TSA 2022.

Outbound tourism expenditure in the EU is estimated to be 364 billion euro

Outbound tourism expenditure is the spending by residents of a country making tourism trips abroad on goods and services acquired from non-resident providers. This is not included in the reconciliation of tourism demand and supply, which may explain why not all countries completed *TSA Table 3*, despite its importance for the balance of payments.

Table 9: Outbound tourism expenditure (TSA Table 3)
(million EUR)

Country	Total	By overnight visitors	By same-day visitors
EU-27	364 038	340 700	23 338
Belgium	:	:	:
Bulgaria	1 961	1 905	56
Czechia ⁽¹⁾	3 291	3 134	157
Denmark ⁽²⁾	8 934	:	:
Germany	125 369	117 659	7 710
Estonia	:	:	:
Ireland ⁽³⁾	8 324	8 253	71
Greece	:	:	:
Spain	28 282	:	:
France ⁽⁴⁾	43 348	:	:
Croatia	:	:	:
Italy	40 109	37 681	2 429
Cyprus	:	:	:
Latvia	:	:	:
Lithuania	1 255	1 044	211
Luxembourg	2 862	2 487	375
Hungary	2 763	2 127	636
Malta	:	:	:
Netherlands	17 584	:	:
Austria	:	:	:
Poland	:	:	:
Portugal ⁽⁵⁾	5 991	5 325	666
Romania	2 180	2 168	12
Slovenia	1 269	1 130	139
Slovakia ⁽⁶⁾	2 087	1 890	197
Finland	:	:	:
Sweden	14 824	:	:
Iceland	:	:	:
Liechtenstein	:	:	:
Norway	:	:	:
Switzerland	:	:	:
North Macedonia	92	85	7

Notes: EU aggregated estimated for this publication using available data. Reference year for TSA data: See Table 3.

(¹) Tourists (T3.1.1) include business trips which accounted for 669 849 million EUR.

(²) Travel account, BoP.

(³) Outbound tourism expenditure includes business trips which accounted for €1,088 million in T3.1.1 and €20 million in T3.1.2.

(⁴) Balance of payments data after deduction of cross-border workers' expenditure.

(⁵) Includes business tourism expenditure.

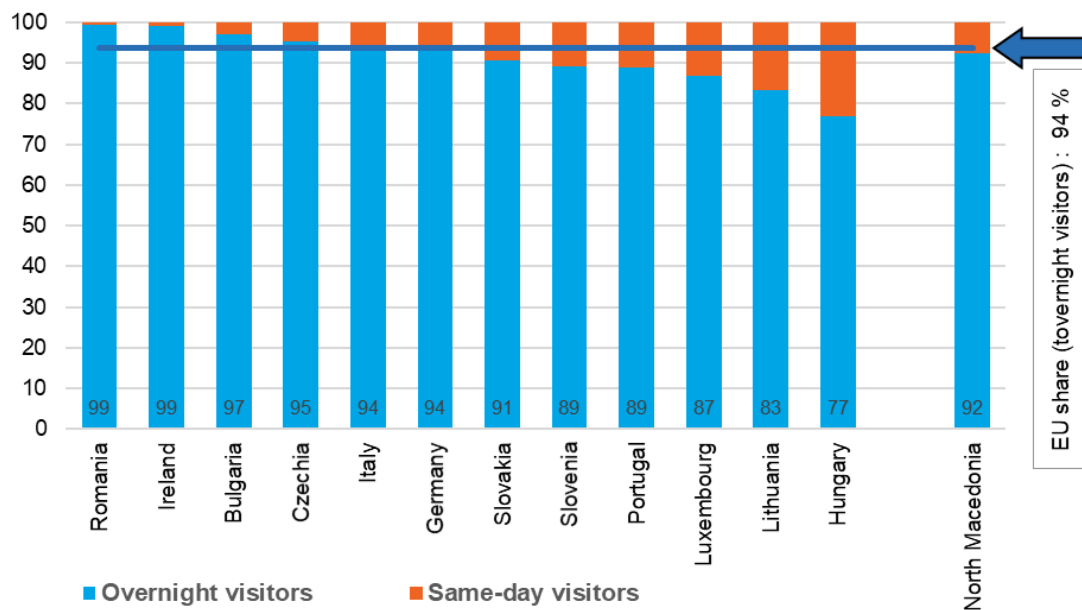
(⁶) Tourists (T3.1.1) include business trips which accounted for 277 854 million EUR.

Source: Eurostat, Data collection on TSA 2022.

Total outbound tourism expenditure at EU level is estimated at EUR 364 billion. Germany accounted for more than one-third of this total (see Table 9 (corresponding to *TSA Table 3*)).

The division of outbound tourism expenditure into overnight tourists and same-day visitors is available for only 12 EU members (accounting for 54 % of the EU total outbound tourism expenditure). Figure 7 gives the breakdown by type of visitor, indicating that, at EU level, 6.4 % of outbound tourism expenditure was spent by same-day visitors and 93.6 % was spent by overnight visitors (tourists) spending at least one night away from home during their outbound trips.

Figure 7: Outbound tourism expenditure, by overnight visitors (tourists) and same-day visitors (%)



Note: EU aggregate estimated for this publication using available data, only for indicative purpose (the 12 EU countries for which data is available account for only 41% of EU tourism in terms of nights spent and 54% of EU outbound tourism expenditure - see shares mentioned in Table 1).

Source: Eurostat, Data collection on TSA 2022.

5 The supply side: How much does tourism contribute to the economy?

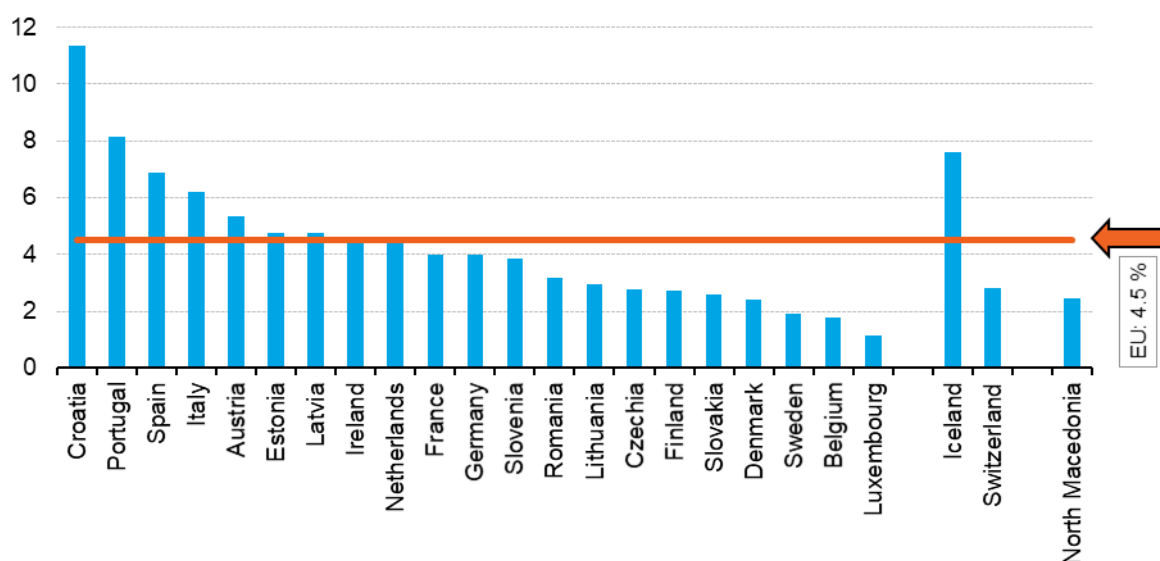
The TSA is an extension, or satellite, of the System of National Accounts (SNA). As a result, TSA compiles information on both the supply side and the demand side of tourism. This means that it highlights economic activity in tourism-related industries and portrays tourism in the context of the overall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

TSA Table 6 provides a consolidation of TSA Table 4 (demand side — internal tourism consumption) and TSA Table 5 (supply side — production accounts of tourism industries and other industries). This enables the calculation of the product-specific ‘tourism ratio in supply’ and the aggregates ‘tourism value added’ and ‘tourism gross domestic product’. It forms the basis of the TSA system.

Table 10 (corresponding to TSA Table 6) shows that Germany recorded the highest tourism (direct) gross value added (EUR 124 billion). Italy (EUR 100 billion), France (EUR 87 billion) and Spain (EUR 78 billion) followed at a distance.

As regards the ratio of tourism direct gross value added to total gross value added in the economy (see Figure 8), Croatia recorded the highest figure (11.3%), followed by Portugal (8.1%), Spain (6.9%) and Italy (6.2%). The average for the EU was estimated at 4.5%.

Figure 8: Tourism share in total gross value added (%)



Note: EU aggregate estimated for this publication using available data.
Source: Eurostat, Data collection on TSA 2022.

Table 10: Internal tourism consumption, tourism direct gross value added (TSA Table 6)
(million EUR)

Country	Internal tourism consumption	Domestic supply (at purchasers' prices)	Tourism ratio* (%)	Tourism direct GVA (at basic prices)	Tourism share on total GVA (%)	Tourism direct GDP	Tourism share on total GDP
EU-27	1 247 515	33 920 501	3.7	572 426	4.5	:	:
Belgium	18 708	1 261 965	1.5	7 345	1.8	8 063	1.9
Bulgaria	4 900	168 701	2.9	:	:	:	:
Czechia	12 007	676 365	1.8	5 638	2.8	6 488	2.9
Denmark	18 636	797 938	2.3	6 471	2.4	:	:
Germany	329 560	8 006 049	4.1	123 805	4.0	:	:
Estonia	2 519	66 299	3.8	994	4.8	1 296	5.4
Ireland ⁽¹⁾	9 985	964 709	1.0	13 477	4.4	15 535	4.8
Greece	:	:	:	:	:	:	:
Spain	158 578	2 756 848	5.8	77 663	6.9	84 246	6.8
France	180 134	5 376 771	3.4	86 952	4.0	98 206	4.0
Croatia ⁽²⁾	12 372	130 443	9.5	5 194	11.3	6 574	11.8
Italy	164 012	4 049 090	4.1	99 903	6.2	:	:
Cyprus	:	:	:	:	:	:	:
Latvia	1 304	55 916	2.3	1 270	4.8	1 270	4.8
Lithuania	2 497	128 085	1.9	1 292	2.9	1 496	3.1
Luxembourg	3 579	329 874	1.1	661	1.2	695	1.1
Hungary ⁽⁴⁾	9 133	392 434	2.3	:	:	:	:
Malta	:	:	:	:	:	:	:
Netherlands	90 814	2 249 269	4.0	31 841	4.4	:	4.4
Austria ⁽⁵⁾	37 886	988 967	3.8	18 946	5.3	22 211	5.6
Poland	:	:	:	:	:	:	:
Portugal ⁽⁶⁾	32 906	495 500	6.6	15 091	8.1	:	:
Romania	12 222	421 995	2.9	6 412	3.2	6 652	3.3
Slovenia	4 797	132 811	3.6	1 636	3.9	2 612	5.4
Slovakia	5 875	305 460	1.9	2 123	2.6	2 618	2.9
Finland	16 261	578 823	2.8	5 659	2.7	:	:
Sweden	28 123	1 119 847	2.5	8 119	1.9	11 635	2.4
Iceland	4 048	48 888	8.3	1 511	7.6	1 790	8.1
Liechtenstein	:	:	:	:	:	:	:
Norway ⁽⁷⁾	19 723	779 939	2.5	:	:	:	:
Switzerland	41 714	1 561 196	2.7	17 171	2.8	:	:
North Macedonia	456	31 615	1.4	240	2.5	266	2.4

(*) Tourism ratio = Internal tourism consumption as proportion of domestic supply (at purchasers' prices).

Notes: EU aggregated estimated for this publication using available data. Reference year for TSA data: See Table 3.

⁽¹⁾ Data from 2018 Supply & Use Tables. TDGVA and TDGDP are estimated using adjustments based on NACE 4-digit employment proportions from PMOD data.

⁽²⁾ Croatia-specific tourism characteristic industries are the following: retail trade and industries producing merchandise (one column in table 6), mooring services of nautical port, renting of vessel (nautical charter).

⁽³⁾ There is no available data for taxes - subsidies.

⁽⁴⁾ TDGDP incl. Value Added Tax; based on estimated time-series.

⁽⁵⁾ Total GDP generated by tourism for 2019: 25,403 million euro (Using Input /Output matrices, PT only estimates total Tourism Generated GDP, there is no value for direct GDP; data implicit only in the press release).

⁽⁶⁾ T6.5, see comments under T2 and T4.

Source: Eurostat, Data collection on TSA 2022.

The tourism ratio, namely the internal tourism consumption as proportion of domestic supply (at purchasers' prices), is estimated at 3.7 % for the EU. At country level, the highest tourism ratios were observed in Croatia (9.5 %), Portugal (6.6 %) and Spain (6.5 %).

Table 10 also includes information on tourism direct gross domestic product (TDGDP). This, newly introduced, variable was reported by fewer countries, representing only about half of the nights spent in the EU or trips made by EU residents. Because of this limited representativeness, no EU estimate was calculated. Among the countries for which data is available, the highest tourism share in total GDP was observed in Croatia (11.8 %). Outside the EU, Iceland recorded a tourism share in GDP of 8.1 %.

Italy has 4.5 million jobs in tourism industries

Employment is a key variable in the economic analysis of productive activities. 'Employment in tourism' measures the number of jobs in tourism and non-tourism industries (but directly connected to tourism) held by self-employed, employees and family workers.

Table 11 (TSA Table 7) is very fragmented and doesn't allow to calculate EU level data. It reveals that tourism industries generated 4.5 million jobs in Italy, corresponding to 3.4 million full-time equivalents.

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

Country	Number of jobs	Number of hours worked	Number of full-time equivalent jobs	Number of people employed
EU-27	:	:	:	:
Belgium⁽¹⁾	378 752	:	274 890	:
Bulgaria	:	:	:	:
Czechia⁽²⁾	:	731 470 474	392 014	393 017
Denmark	:	:	273 168	236 605
Germany	:	:	:	8 144 784
Estonia	:	:	:	:
Ireland⁽³⁾	:	521 190 000	351 700	:
Greece	:	:	:	:
Spain⁽⁴⁾	2 680 500	:	:	:
France	:	:	:	:
Croatia	:	:	:	:
Italy	4 493 737	6 586 428 951	3 368 876	:
Cyprus	:	:	:	:
Latvia	:	:	:	:
Lithuania	157 038	:	:	:
Luxembourg⁽⁵⁾	:	57 041 150	:	38 617
Hungary⁽⁶⁾	:	842 079 493	421 036	443 156
Malta	:	:	:	:
Netherlands	:	:	:	:
Austria	584 100	:	467 500	:
Poland	:	:	:	:
Portugal	559 568	:	463 372	:
Romania	:	:	475 815	480 705
Slovenia	:	109 692 255	:	71 729
Slovakia	194 301	312 429 530	184 891	186 498
Finland⁽⁷⁾	:	255 900 000	133 200	154 100
Sweden	:	437 503 000	227 118	284 500
Iceland	37 026	41 631 145	:	30 867
Norway⁽⁸⁾	:	291 480 000	182 900	220 100
Switzerland	:	:	:	:

Note: Reference year for TSA data: See Table 3.

(¹) For self-employed: jobs as 'main' profession are counted as FTE, self-employed people in tourism as secondary activity are counted in number of jobs, not in FTE.

(²) Data based on "Tourism Employment Module (TEM)", compiled by CZSO. All data represent so-called domestic concept of employment.

(³) Data based on mix of Business Demography and Labour Market data.

(⁴) 12.7 (the ratio No. jobs in tourism industries/No.jobs in total economy is published yearly).

(⁵) No difference in methodology between jobs in tourism industries and jobs in tourism.

(⁶) There is no separation of tourism industries and tourism.

(⁷) Full-time definition for tourism industries based on hours worked according to Labour force survey.

(⁸) Regarding the industries included, see comment under T6.

Source: Eurostat, Data collection on TSA 2022,

6 Tourism gross fixed capital formation and collective consumption

To produce *TSA Tables 8 and 9*, compilers need to gather data from sources other than those usually included in official statistics. Furthermore, these tables present conceptual challenges. Therefore, drawing up these tables can be considered a definite step towards compiling a full set of TSA. However, only few countries are currently able to provide this information (see Table 12 (corresponding to *TSA Tables 8 and 9*)).

Table 12: Tourism gross fixed capital formation (*TSA Table 8*) and tourism collective consumption (*TSA Table 9*) (million EUR)

Country	Tourism gross fixed capital formation	Tourism collective consumption
EU-27	:	:
Belgium	:	:
Bulgaria	:	:
Czechia	1 819	:
Denmark⁽¹⁾(²)	1 411	90
Germany	17 317	:
Estonia	452	:
Ireland	:	:
Greece	:	:
Spain	:	:
France	:	:
Croatia	:	:
Italy	:	:
Cyprus	:	:
Latvia	:	:
Lithuania	:	:
Luxembourg	:	:
Hungary	2 917	:
Malta	:	:
Netherlands	:	:
Austria	:	:
Poland	:	:
Portugal	:	196
Romania	:	:
Slovenia⁽³⁾	341	:
Slovakia⁽⁴⁾	906	:
Finland	:	:
Sweden	:	:
Norway⁽⁵⁾	3 690	:

Note: Reference year for TSA data: See Table 3.

(¹) Tourism gross fixed capital formation: Includes the following industries: 55560 (Accommodation and food service activities), 79000 (Travel agent activities), 90920 (Arts and entertainment; libraries, museums and other cultural activities; gambling), 93000 (Sports activities and amusement and recreation activities).

(²) Tourism collective consumption: Governmental and municipal COFOG=473.

(³) Data corresponds to total GFCF of tourism industries. Calculated total GFCF of tourism industries directly connected with tourism amounts to 201 555 million EUR (calculation upon total GFCF of tourism industries and tourism shares of supply in individual industries).

(⁴) Data on tourism gross fixed capital formation without Retail trade.

(⁵) Regarding the industries included, see comment under T6.

Source: Eurostat, Data collection on TSA 2022.

7

Non-monetary data

TSA Table 10 presents a basic set of physical, non-monetary indicators that relate mainly to the demand side TSA tables and complement the core TSA figures. They also allow further analysis and enable proper interpretation of the monetary information.

The non-monetary data in Table 13 (corresponding to *TSA Table 10*) on the number of same-day trips, overnight trips and overnight stays for inbound, domestic and outbound tourism was added to this data collection exercise to facilitate analysis. It also provides the basis for calculating the average expenditure.

Table 13: Non-monetary indicators (TSA Table 10)
(thousands)

Country	Inbound tourism			Domestic tourism			Outbound tourism		
	Same-day trips	Overnight trips	Nights	Same-day trips	Overnight trips	Nights	Same-day trips	Overnight trips	Nights
EU	:	:	:	:	:	:	:	:	:
Belgium	8 742	:	33 012	36 129	:	45 982	:	:	:
Bulgaria	1 536	7 775	44 319	2 131	4 702	15 046	1 184	5 822	39 243
Czechia⁽¹⁾	22 551	14 651	46 617	53 580	32 287	123 750	3 319	9 655	59 391
Denmark	17 340	14 146	58 900	56 401	17 640	67 968	:	7 475	62 794
Germany⁽²⁾	:	39 563	89 261	:	151 381	347 694	112 610	99 533	:
Estonia⁽³⁾	2 901	3 244	13 711	:	3 277	6 718	:	1 279	8 384
Ireland⁽⁴⁾	1 450	10 634	73 589	11 058	11 621	29 469	710	9 350	66 927
Greece	:	:	:	:	:	:	:	:	:
Spain	42 661	83 509	594 018	257 619	173 755	649 516	2 971	20 120	144 392
France⁽⁵⁾	126 963	90 914	619 887	120 688	207 624	921 767	14 241	38 301	272 540
Croatia	:	:	:	:	:	:	:	:	:
Italy	30 886	57 908	378 733	78 351	69 222	369 817	27 505	32 192	269 069
Cyprus	:	:	:	:	:	:	:	:	:
Latvia	6 408	1 935	9 868	10 622	2 501	5 792	1 138	1 480	8 928
Lithuania	3 275	2 875	11 720	11 958	2 827	7 332	2 534	2 347	14 738
Luxembourg	:	1 041	2 505	1 598	124	348	1 515	2 548	:
Hungary	42 670	15 949	72 144	33 674	14 249	45 032	12 404	8 318	21 763
Malta	:	:	:	:	:	:	:	:	:
Netherlands	:	:	:	:	:	:	:	:	:
Austria⁽⁶⁾	:	31 884	112 765	:	14 312	39 944	2 486	11 902	74 428
Poland	:	:	:	:	:	:	:	:	:
Portugal	:	:	:	:	:	:	:	:	:
Romania	1 440	2 684	5 291	36 062	18 263	66 378	136	1 713	13 515
Slovenia	:	4 702	11 371	:	1 528	4 405	2 879	3 170	16 292
Slovakia	10 456	5 630	16 441	35 087	10 348	36 831	3 699	5 971	34 661
Finland	:	3 290	7 056	:	29 320	81 750	1 030	9 400	54 520
Sweden	:	:	:	:	:	:	:	:	:
Iceland	557	2 013	7 317	:	1 048	:	:	626	:
Norway⁽⁷⁾	:	:	:	:	14 710	48 020	:	8 890	60 310
Switzerland	:	:	:	65 560	7 938	31 962	8 906	16 099	131 904
North Macedonia	802	1 472	2 197	830	274	692	175	479	2 663

Note: Reference year for TSA data: See Table 3.

(¹) Data for collective accommodation establishments = an establishment with at least five rooms and ten beds used for the purpose of tourism.

(²) Data from Tourism Department

(³) Number of inbound overnight stays = nights spent by foreign visitors in collective accommodation establishments; domestic and outbound data based on the Household Budget Survey.

(⁴) Data for inbound trips taken from PCI and includes passenger transfers. Additional overnight trips and nights spent from Northern Ireland are included and taken from NISRA. No data available for same-day trips from Northern Ireland. Domestic/outbound trip figures are taken from HTS.

(⁵) Quality problems in the border survey (Banque de France). Figures about inbound tourism uploaded with others sources by Banque de France.

(⁶) T10.1.3./T10.2.3.: Based on accommodation statistics in NACE 55.1, 55.2, 55.3 and private tourist accommodation (excl.second/vacation homes). T10.3.1/T10.3.2/T10.3.3: Holiday and business trips.

(⁷) T10.2 and T10.3 is from the national travel survey conducted by Statistics Norway following the EU regulation 692/2011.

Source: Eurostat, Data collection on TSA 2022, Tourism statistics.

8

Insights on the impact of the COVID-19 pandemic on the tourism sector

With this collection of TSA data, countries were recommended to transmit data for the reference year 2019, even if data that is more recent was available. The main reason for this approach was to compile TSA data for a 'normal' and more comparable year, before the COVID-19 pandemic started affecting tourism. Notwithstanding this, countries were invited to send any more recent TSA-related data that was available. The current chapter wants to give insights on the impact of the pandemic on tourism, in (macro)economic terms rather than in terms of physical tourism flows.

Fourteen countries sent indicators for the reference year 2020, albeit very fragmented, namely Czechia, Denmark, Spain, France, Lithuania, Luxembourg, Hungary, the Netherlands, Austria, Portugal, Slovenia, Finland, Sweden and Iceland. The thirteen Member States represent around 54% of European tourism (based on average weight in supply side and demand side statistics). The results in this chapter shall therefore not be considered as reflecting the situation for the EU as a whole, even if all EU Member States were affected by the pandemic. The analysis focuses on the year-to-year evolutions between the first year of the pandemic and the pre-pandemic year 2019, without discussing the absolute levels for 2020.

Internal tourism consumption dropped by 45 % in 2020

From March 2020 onwards, the pandemic affected the tourism sector. On the basis of the available data for fourteen countries, the internal tourism consumption (TSA Table 4) in those countries decreased from EUR 600 billion to EUR 330 billion, or a drop by 45 % (see Figure 9). Although all countries were significantly affected, the drop in internal tourism consumption ranged from less than 20 % in Luxembourg to over 60 % in Spain and Iceland.

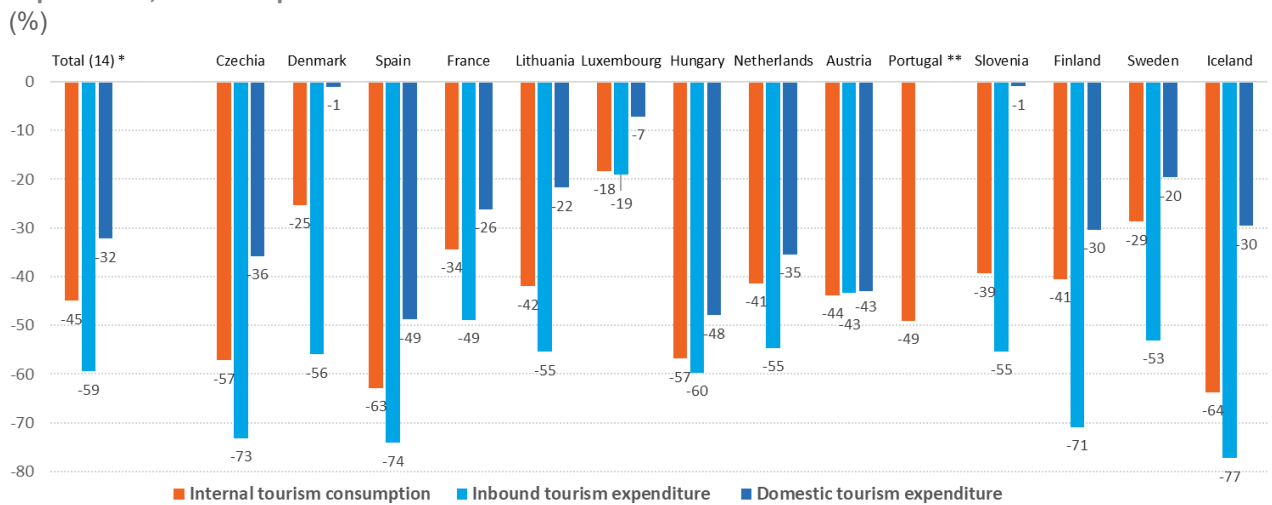
It's interesting to take a closer look at the two main components of internal tourism consumption, namely inbound tourism expenditure (TSA Table 1) and domestic tourism expenditure (TSA Table 2). While the inbound tourism expenditure by foreign visitors dropped by 59 % in 2020, the domestic tourism expenditure spent by residents on trips in their country dropped less significantly, namely by 32 %.

In all countries considered in the analysis for this chapter, both inbound and domestic tourism expenditure were lower in 2020 compared to 2019, but the two types of expenditure were affected differently in different countries. In Denmark and Slovenia, domestic tourism expenditure proved to be relatively resilient (-1 % in both countries) compared with inbound tourism expenditure (-56 % and -55 % respectively). On the other hand, in Austria both flows were equally affected (-43 %). The heaviest impact on inbound tourism expenditure was observed in Iceland (-77 %), Spain (-74 %), Czechia (-73 %) and Finland (-71 %).

The stronger impact on inbound flows can be explained by the travel and border crossing restrictions that applied in one way or another throughout most of 2020, or the preference of travellers to visit

destinations closer to home (thus more likely within their country of residence). The strong drop in inbound tourism expenditure hit in particular those countries hard that depend mainly on foreign visitors. This can explain why the overall internal tourism consumption dropped by more than 60 % in Iceland and Spain, countries where, in 2019, respectively 87 % and 64 % of visitors (staying at rented accommodation) came from abroad. Countries that are primarily depending on domestic tourists, such as Denmark (residents accounting for 62 % of nights spent at tourist accommodation establishments in 2019), France (70 %) or Finland (69 %) were slightly less impacted overall, with drops in internal tourism consumption of -25 %, -34 % and -41 % respectively.

Figure 9: Internal tourism consumption, inbound tourism expenditure and domestic tourism expenditure, 2020 compared with 2019



Notes: (*) "Total (14)" based on the fourteen countries with available data, and not necessarily representative for the EU. (**) Split by inbound and outbound not available for Portugal

Source: Eurostat, Data collection on TSA 2022.

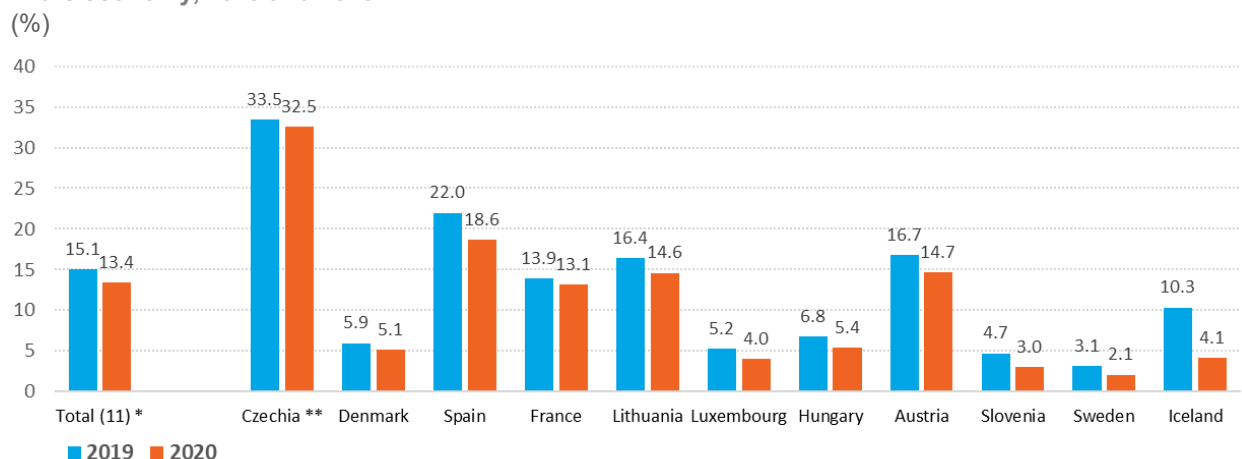
The decrease in international tourism was also reflected in the data on outbound tourism expenditure for 2020. Based on data for ten countries (Czechia, Denmark, Spain, France, Lithuania, Luxembourg, Hungary, the Netherlands, Slovenia and Sweden), outbound tourism expenditure (TSA Table 3) was 55 % lower in 2020 compared with 2019.

The split of tourism expenditure by overnight visitors and by same-day visitors was available for only few countries. Based on data for seven countries (Czechia, Denmark, Lithuania, Luxembourg, Hungary, Austria and Slovenia), inbound tourism expenditure dropped a bit more for the segment of overnight visitors (-52 %, compared with -48 % for inbound tourism expenditure by same-day visitors). A similar pattern, albeit less strong, was observed for domestic tourism expenditure: -28 % for overnight visitors versus -26 % for same-day visitors.

Tourism lost 1.3 percentage points of its share in the economy's total gross value added

TSA Table 5 (production accounts of tourism industries and other industries) allows the comparison of the gross value added of tourism industries with the gross value added in the total economy. Gross value added of the tourism industries (GVATI) is available for eleven countries. It is worth noting that GVATI doesn't only relate to output consumed by tourists but can, for instance, also include use of transport or restaurant services by locals or commuters (the concept of tourism direct gross value added – see further – is more directly related to tourism demand). In these eleven European countries, the total gross value added in the economy decreased by 5 % between 2019 and 2020, while the gross value added of tourism industries was more affected, recording a drop by 16 %. As a result, the tourism industries' share in total gross value added decreased from 15.1 % to 13.4 % (see Figure 10), indicating that these industries were hit harder by the pandemic.

Figure 10: Gross value added of tourism industries (GVATI) as share of total gross value added in the economy, 2019 and 2020



Notes: (*) "Total (11)" based on the eleven countries with available data, and not necessarily representative for the EU. (**) Czechia: gross value added for tourism industries (GVATI) includes all specific activities and industries connected with tourism.

Source: Eurostat, Data collection on TSA 2022.

TSA Table 6 comprises the key macro-economic indicators of the TSA framework. The following paragraphs discuss the impact of the pandemic on the tourism ratio and on the tourism share in the total economy's gross value added. Based on the twelve countries for which all necessary information is available (Czechia, Denmark, Spain, France, Lithuania, Luxembourg, Hungary, the Netherlands, Austria, Slovenia, Sweden and Iceland), the tourism ratio – this is the share of internal tourism consumption in the domestic supply at purchasers' prices – dropped from 3.7 % in 2019 to 2.2 % in 2020 (see Table 14 and Figure 11). Note that the 2019 share for this subset of twelve countries is identical to the share observed for the full set of countries in Table 10, namely 3.7 %.

When considering the share of tourism direct gross value added (TDGVA) in the economy's total gross value added (at basic prices), a decrease by 1.3 percentage points was observed in the first year of the pandemic (see Table 14 and Figure 12). Based on the eleven countries for which all necessary information is available (Czechia, Denmark, Spain, France, Lithuania, Luxembourg, the Netherlands, Austria, Slovenia, Sweden and Iceland), the tourism share in total gross value added dropped from 4.4 % in 2019 to 3.1 % in 2020 (note that the 2019 share for this subset of eleven countries is very

close to the share observed for the full set of countries in Table 10, namely 4.5 %).

The strongest drop in tourism share on total gross value added was observed in Iceland (from 7.6 % down to 2.4 %), but also in Czechia and the Netherlands, the tourism share in the economy's total gross value added nearly halved (from 2.8 % to 1.5 % and from 4.4 % to 2.3 % respectively).

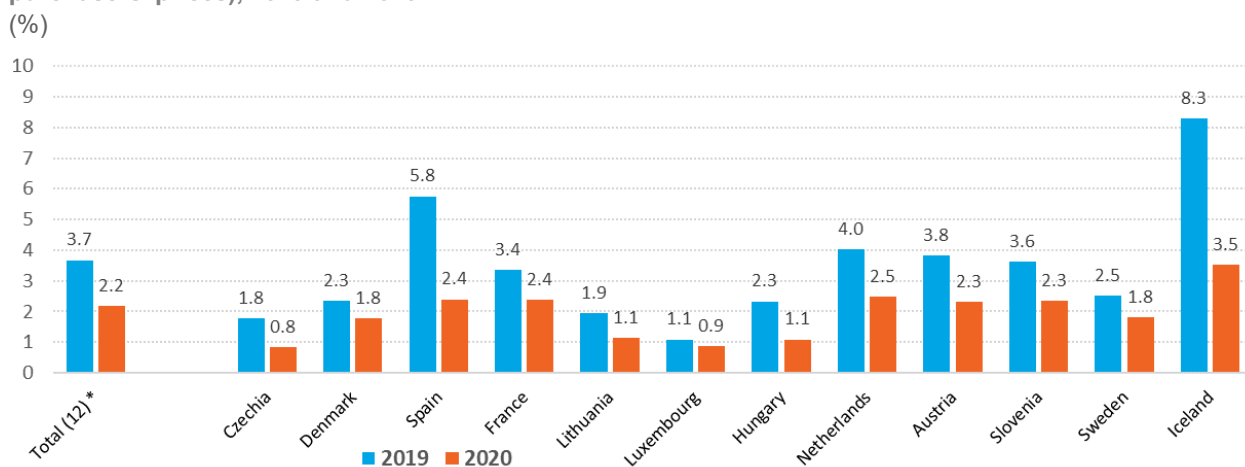
Table 14: Tourism ratio, tourism direct gross value added, tourism direct GDP, 2019 and 2020
(million EUR)

Country	Tourism ratio (%)		Tourism direct gross value added (at basic prices)		Tourism share on total gross value added (%)		Tourism direct GDP		Tourism share on total GDP (%)	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
Total *	3.7	2.2	240 731	163 201	4.4	3.1	:	:	:	:
Czechia	1.8	0.8	5 638	2 851	2.8	1.5	6 488	3 188	2.9	1.5
Denmark	2.3	1.8	6 471	4 227	2.4	1.6	:	:	:	:
Spain	5.8	2.4	77 663	54 281	6.9	5.3	84 246	59 843	6.8	5.3
France	3.4	2.4	86 952	66 158	4.0	3.2	98 208	73 696	4.0	3.2
Lithuania	1.9	1.1	1 292	742	2.9	1.7	1 496	947	3.1	1.9
Luxembourg	1.1	0.9	661	610	1.2	1.0	695	640	1.1	1.0
Hungary	2.3	1.1	:	:	:	:	:	:	:	:
Netherlands	4.0	2.5	31 841	16 547	4.4	2.3	:	:	:	:
Austria	3.8	2.3	18 946	11 052	5.3	3.2	22 211	13 388	5.6	3.5
Portugal	6.6	:	15 091	8 382	8.1	:	:	:	:	:
Slovenia	3.6	2.3	1 636	952	3.9	2.3	2 612	1 536	5.4	3.3
Finland	2.8	:	5 659	3 527	2.7	1.7	:	:	:	:
Sweden	2.5	1.8	8 119	5 379	1.9	1.3	11 635	8 126	2.4	1.7
Iceland	8.3	3.5	1 511	402	7.6	2.4	1 790	666	8.1	3.5

Notes: (*) "Total" based on the twelve countries with available data for "tourism ratio" (not including Portugal and Finland); based on eleven countries for "tourism direct gross value added" and "tourism share on gross value added" (not including Hungary, Portugal and Finland).

Source: Eurostat, Data collection on TSA 2022.

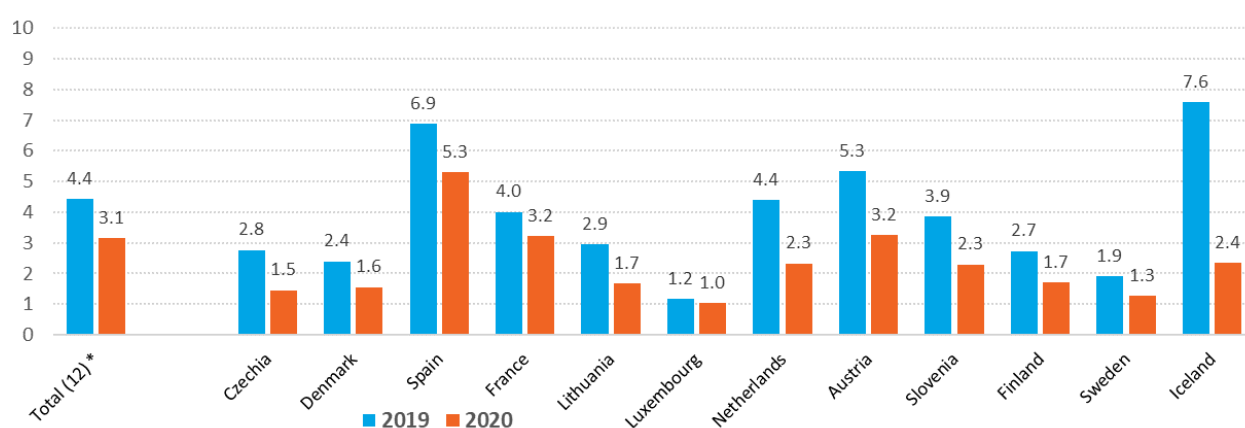
Figure 11: Tourism ratio (internal tourism consumption as share of domestic supply at purchasers' prices), 2019 and 2020



Notes: (*) "Total (12)" based on the twelve countries with available data, and not necessarily representative for the EU.

Source: Eurostat, Data collection on TSA 2022.

Figure 12: Tourism direct gross value added as share of total gross value added, 2019 and 2020 (%)



Notes: (*) "Total (12)" based on the twelve countries with available data, and not necessarily representative for the EU.

Source: Eurostat, Data collection on TSA 2022.

The pandemic caused an estimated 500 million euro loss each day in tourism direct gross value added in the EU in 2020, compared with 2019

If the assumption would hold that these eleven countries (Czechia, Denmark, Spain, France, Lithuania, Luxembourg, the Netherlands, Austria, Slovenia, Sweden and Iceland) are representative for the full set of countries, the tourism direct gross value added for the EU could be estimated at EUR 388 billion in 2020, a loss of EUR 184 billion compared with the EUR 572 billion estimated for 2019 (as listed in Table 10). This would correspond to over EUR 500 million less tourism direct gross value added on each day in 2020 on average. The EUR 184 billion loss in tourism direct gross value added played a significant role in the total estimated loss of gross value added in the EU economy in 2020 (which amounted to EUR 438 billion according to national accounts).

Among the countries for which data is available, the most affected in absolute terms were Spain (EUR 23 billion less tourism direct gross value added in 2020) and France (EUR 21 billion less). In Spain, the importance of tourism direct gross value added in total gross value added dropped from 6.9 % to 5.3 %, in France from 4.0 % to 3.2 %.

Tourism direct gross domestic product (TDGDP) was available for only nine countries. The biggest decreases in absolute terms were recorded in Spain and France, both losing around EUR 24.5 billion of tourism direct gross domestic product. In relative terms, tourism gross domestic product dropped most sharply in Iceland (-63 %) and Czechia (-51 %). These two countries also observed the highest relative drop in tourism contribution to the country's GDP (from 8.1 % to 3.5 % and from 2.9 % to 1.5 % respectively).

Although based on only a subset of European countries, this chapter highlighted the importance and explanatory power of tourism satellite accounts as a tool to assess the impact of endogenous or exogenous shocks to the tourism ecosystem, as well as the impact on its relative position in a country's economy, beyond the descriptive nature of primary tourism statistics on inbound, domestic and outbound physical flows.

Annex I — List of indicators in the questionnaire

Note: indicators printed in *italics* were newly included in the reporting template for 2022

TSA Table 1

Inbound tourism expenditure [three indicators]

- 1.1. Total inbound tourism expenditure [= 1.1.1. + 1.1.2.]
- 1.1.1. Inbound tourism expenditure by tourists/overnight visitors
- 1.1.2. Inbound tourism expenditure by same-day visitors/excursionists

TSA Table 2

Domestic tourism expenditure [three indicators]

- 2.1. Total domestic tourism expenditure [= 2.1.1. + 2.1.2.]
- 2.1.1. Domestic tourism expenditure by tourists/overnight visitors
- 2.1.2. Domestic tourism expenditure by same-day visitors/excursionists

TSA Table 3

Outbound tourism expenditure [three indicators]

- 3.1. Total outbound tourism expenditure [= 3.1.1. + 3.1.2.]
- 3.1.1. Outbound tourism expenditure by tourists/overnight visitors
- 3.1.2. Outbound tourism expenditure by same-day visitors/excursionists

TSA Table 4

Internal tourism consumption [five indicators]

- 4.1. Total internal tourism consumption [4.1.1. + 4.1.2.]
- 4.1.1. Internal tourism expenditure [= 4.1.1.1. + 4.1.1.2.]
 - 4.1.1.1. Inbound tourism expenditure
 - 4.1.1.2. Domestic tourism expenditure
- 4.1.2. Other components of tourism consumption

TSA Table 5

Production accounts of tourism industries and other industries [four indicators]

- 5.1. Total output of domestic producers (at basic prices)
- 5.2. Total intermediate consumption of domestic producers (at purchasers' prices)
- 5.3. Total gross value added (at basic prices) [= 5.1. – 5.2.]
- 5.4. *GVATI = Gross value added of tourism industries (at basic prices)*

TSA Table 6

Total domestic supply and internal tourism consumption [eleven indicators]

- 6.1. Total output of domestic producers (at basic prices) [= 5.1.]
- 6.2. Total imports
- 6.3. Taxes less subsidies on products produced and imported nationally
- 6.4. Domestic supply (at purchasers' prices) [= 6.1. + 6.2. + 6.3.]
- 6.5. Internal tourism consumption [= 4.1.]
- 6.6. Tourism ratio (%) [= 6.5. / 6.4. * 100]
- 6.7. *TDGVA = Tourism direct gross value added (at basic prices)*
- 6.8. *Tourism share on total GVA (in %)* [= 6.7. / 5.3. * 100]
- 6.9. *Total gross domestic product (GDP)* [= 5.3. + 6.3.]
- 6.10. *TDGDP = Tourism direct gross domestic product*
- 6.11. *Tourism share on total GDP (in %)* [= 6.10. / 6.9. * 100]

TSA Table 7

Employment in the tourism industries [thirteen indicators]

- 7.1. *Number of jobs in total economy*
- 7.2. *Number of hours worked in total economy*
- 7.3. *Number of full-time equivalent jobs in total economy*
- 7.4. *Number of people employed in total economy*
- 7.5. Number of jobs in tourism industries
- 7.6. Number of hours worked in tourism industries
- 7.7. Number of full-time equivalent jobs in tourism industries
- 7.8. Number of people employed in tourism industries
- 7.9. *Number of jobs in tourism*
- 7.10. *Number of hours worked in tourism*
- 7.11. *Number of full-time equivalent jobs in tourism*
- 7.12. *Number of people employed in tourism*
- 7.13. *Tourism share on total full-time equivalent jobs (in %)* [= 7.11. / 7.3. * 100]

TSA Table 8

Tourism gross fixed capital formation [one indicator]

- 8.1. Total

TSA table 9

Tourism collective consumption [one indicator]

- 9.1. Total

TSA Table 10

Non-monetary indicators [nine indicators]

- 10.1. Inbound tourism
 - 10.1.1. Number of same-day trips
 - 10.1.2. Number of overnight trips
 - 10.1.3. Number of overnight stays
- 10.2. Domestic tourism
 - 10.2.1. Number of same-day trips
 - 10.2.2. Number of overnight trips
 - 10.2.3. Number of overnight stays
- 10.3. Outbound tourism
 - 10.3.1. Number of same-day trips
 - 10.3.2. Number of overnight trips
 - 10.3.3. Number of overnight stays

Annex II — Data sources for TSA tables

Data sources

The table gives for a list of possible data sources (in the rows) the number of countries that use this source for compiling a given TSA Table (in the columns), distinguishing whether it was used as a main source or an auxiliary source.

The number between brackets next to the TSA Table number in the header line shows the number of countries having reported on data sources for the given TSA Table.

TSA table 1 to TSA table 3

Relevance of data sources for each table	T1 (# = 27)			T2 (# = 27)			T3 (# = 16)		
	Source	(main)	(aux)	Source	(main)	(aux)	Source	(main)	(aux)
Household surveys on tourism demand	4	2	2	25	21	4	13	7	6
Business statistics (e.g. SBS, short-term statistics)	7	2	5	11	2	9	4	-	4
Accommodation statistics (business surveys for NACE55)	19	10	9	21	12	9	4	-	4
Survey of (other) tourism service providers (e.g. TA/TO)	11	2	9	14	3	11	6	1	5
Border surveys (≠ customs data)	15	12	3	4	1	3	6	4	2
Surveys of tourists at destinations or at accommodation	13	7	6	8	4	4	1	-	1
Price statistics	10	-	10	12	-	12	3	-	3
Household budget survey	4	1	3	12	3	9	4	1	3
Banking surveys (excluding credit/debit card data)	4	2	2	2	-	2	3	-	3
Credit/debit card data (from banks or card issuers)	7	2	5	1	1	-	4	1	3
Administrative data (e.g. tax, customs, social security)	5	1	4	8	2	6	3	-	3
Partner country data (e.g. mirror statistics)	6	2	4	3	1	2	2	-	2
Supply-Use-Tables / Input-Output-Tables	13	8	5	14	10	4	6	4	2
Other National Accounts data	9	3	6	8	2	6	5	1	4
Labour Force Survey (LFS)	1	1	-	2	1	1	1	-	1
Mobile Positioning data	-	-	-	-	-	-	-	-	-
Other 'big data' sources	2	1	1	2	-	2	1	-	1
Other data sources	3	1	2	2	-	2	4	2	2
Estimates and models	2	-	2	2	-	2	1	-	1

TSA table 4 to TSA table 6

Relevance of data sources for each table	T4 (# = 26)			T5 (# = 26)			T6 (# = 27)		
	Source	(main)	(aux)	Source	(main)	(aux)	Source	(main)	(aux)
Household surveys on tourism demand	14	11	3	1	-	1	5	3	2
Business statistics (e.g. SBS, short-term statistics)	12	2	10	13	5	8	14	4	10
Accommodation statistics (business surveys for NACE55)	11	6	5	1	-	1	5	3	2
Survey of (other) tourism service providers (e.g. TA/TO)	10	1	9	6	1	5	7	1	6
Border surveys (≠ customs data)	6	5	1	-	-	-	5	2	3
Surveys of tourists at destinations or at accommodation	6	4	2	-	-	-	3	3	-
Price statistics	6	-	6	2	-	2	4	-	4
Household budget survey	7	4	3	-	-	-	2	1	1
Banking surveys (excluding credit/debit card data)	1	-	1	-	-	-	-	-	-
Credit/debit card data (from banks or card issuers)	1	1	-	-	-	-	-	-	-
Administrative data (e.g. tax, customs, social security)	9	3	6	6	1	5	7	2	5
Partner country data (e.g. mirror statistics)	1	-	1	-	-	-	-	-	-
Supply-Use-Tables / Input-Output-Tables	17	13	4	22	22	-	24	24	-
Other National Accounts data	11	3	8	16	8	8	17	8	9
Labour Force Survey (LFS)	1	1	-	-	-	-	1	1	-
Mobile Positioning data	-	-	-	-	-	-	-	-	-
Other 'big data' sources	1	1	-	-	-	-	-	-	-
Other data sources	3	-	3	2	-	2	3	-	3
Estimates and models	1	-	1	-	-	-	1	-	1

TSA table 7 to TSA table 10

Relevance of data sources for each table	T7 (# = 22)			T8 (# = 8)			T9 (# = 2)			T10 (# = 23)		
	Source	(main)	(aux)	Source	(main)	(aux)	Source	(main)	(aux)	Source	(main)	(aux)
Household surveys on tourism demand	1	-	1	-	-	-	-	-	-	18	17	1
Business statistics (e.g. SBS, short-term statistics)	13	7	6	6	5	1	1	-	1	8	6	2
Accommodation statistics (business surveys for NACE55)	1	-	1	-	-	-	-	-	-	16	16	-
Survey of (other) tourism service providers (e.g. TA/TO)	3	1	2	-	-	-	-	-	-	4	2	2
Border surveys (≠ customs data)	-	-	-	-	-	-	-	-	-	10	10	-
Surveys of tourists at destinations or at accommodation	-	-	-	-	-	-	-	-	-	3	3	-
Price statistics	-	-	-	-	-	-	-	-	-	-	-	-
Household budget survey	1	1	-	-	-	-	-	-	-	2	1	1
Banking surveys (excluding credit/debit card data)	-	-	-	-	-	-	-	-	-	-	-	-
Credit/debit card data (from banks or card issuers)	-	-	-	-	-	-	-	-	-	-	-	-
Administrative data (e.g. tax, customs, social security)	4	3	1	1	1	-	-	-	-	4	2	2
Partner country data (e.g. mirror statistics)	-	-	-	-	-	-	-	-	-	2	-	2
Supply-Use-Tables / Input-Output-Tables	6	3	3	4	3	1	1	-	1	1	-	1
Other National Accounts data	13	10	3	5	5	-	2	2	-	-	-	-
Labour Force Survey (LFS)	16	10	6	1	1	-	-	-	-	-	-	-
Mobile Positioning data	-	-	-	-	-	-	-	-	-	-	-	-
Other 'big data' sources	1	-	1	-	-	-	-	-	-	1	1	-
Other data sources	3	2	1	-	-	-	-	-	-	1	1	-
Estimates and models	-	-	-	-	-	-	-	-	-	-	-	-

Other data sources reported

Besides the pre-defined set of possible sources, some countries also reported other data sources used in the process of compiling TSA.

These sources include other tourism surveys such as visitors expenditure surveys or data from related statistical domains, for instance transport statistics (mainly for TSA Table 2) or Balance of Payments (mainly for TSA Tables 1 and 3), which can be based on surveys, registers, administrative data, or innovative sources such as mobile positioning data. Regarding innovative sources, also the new Eurostat data series on short-stay accommodation offered via online collaborative economy platforms were mentioned as a data source.

For Table 7, countries reported to use, in addition to the LFS, data from the statistics on earnings, labour costs and hours work, or data from employment registers.

Annex III — List of links to national TSAs

Country	Link to the national TSA
Belgium	https://www.vlaanderen.be/statistiek-vlaanderen/rapporten
Bulgaria	https://www.nsi.bg/bg/node/1998
Czechia	https://www.czso.cz/csu/czso/tourism_satellite_account
Denmark	https://www.visitdenmark.dk/corporate/videncenter/turismens-oekonomiske-betydning
Germany	www.destatis.de
Estonia	https://www.stat.ee/en/find-statistics/methodology-and-quality/esms-metadata/21403
Ireland	-
Greece	http://www.mintour.gov.gr/userfiles/de145b9b-fc1f-4650-91eb-b6315a192e52/Activity_1_1_1.zip
Spain	https://www.ine.es/dyngs/INEbase/en/operacion.htm?c=Estadistica_C&cid=1254736169169&menu=ultiDatos&idp=1254735576863
France	https://www.insee.fr/en/statistiques/6442340
Croatia	https://podaci.dzs.hr/2021/hr/31541
Italy	https://www.istat.it/it/archivio/265443
Cyprus	-
Latvia	https://data.stat.gov.lv/pxweb/lv/OSP_PUB/START__NOZ__TU__TUS/TUS010/
Lithuania	https://osp.stat.gov.lt/en_GB/statistiniu-rodikliu-analize#/
Luxembourg	-
Hungary	http://www.ksh.hu/apps/shop.lista?p_lang=HU&p_temakor_kod=KSH&p_kapcsolodo=turszat
Malta	https://nso.gov.mt/en/publicatons/Publications_by_Unit/Documents/A1_National_Accounts/TSA_2010.pdf
Netherlands	https://www.cbs.nl/en-gb/our-services/methods/surveys/brief-survey-description/tourism-accounts
Austria	https://www.statistik.at/en/statistics/tourism-and-transport/tourism/tourism-satellite-accounts
Poland	www.msit.gov.pl
Portugal	https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=cn_quadros&boui=391712807
Romania	https://insse.ro/cms/ro/content/contul-satelit-de-turism-cd-rom-2
Slovenia	https://www.stat.si/StatWeb/en/News/Index/10279
Slovakia	<i>TSA data are published in Information report format on the website. Data are provided to consumer in excel-file format upon request</i>
Finland	http://visitfinland.stat.fi/PXWeb/pxweb/en/VisitFinland/
Sweden	Statistik om turism - Tillväxtverket (tillvaxtverket.se)
Iceland	https://stalice.is/statistics/economy/national-accounts/tourism-satellite-accounts/
Norway	www.ssb.no/turismesat_en/
Switzerland	https://www.bfs.admin.ch/bfs/en/home/statistics/tourism/monetary-aspects/satellite-accounts.html
North Macedonia	https://www.stat.gov.mk/PrikaziSoopstenie_en.aspx?rbrtxt=148

Annex IV — Methodological notes

The methodology for TSA is based on the *2008 Tourism Satellite Account: Recommended Methodological Framework* (TSA: RMF 2008) and, for tourism statistics in general, on the *2008 International Recommendations for Tourism Statistics* (IRTS 2008).

Tourism Satellite Accounts

The purpose of tourism satellite accounts is threefold: to analyse in detail all aspects of demand for goods and services associated with the activity of visitors, to observe the operational interface with the supply of such goods and services within the economy and to describe how this supply interacts with other economic activities.

Visitor

A visitor is a traveller taking a trip to a main destination outside his/her usual environment for less than a year for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. These trips taken by visitors qualify as tourism trips.

Tourist and same-day visitor

A visitor (domestic inbound or outbound) is classified as a tourist (or overnight visitor) if his/her trip includes an overnight stay, or as a same-day visitor (or excursionist) otherwise.

Inbound tourism

Inbound tourism comprises the activities of a non-resident visitor within the country of reference on an inbound trip.

Domestic tourism

Domestic tourism comprises the activities of a resident visitor within the country of reference either as part of a domestic trip or part of an outbound trip.

Internal tourism

Internal tourism comprises domestic tourism and inbound tourism, i.e. the activities of resident and non-resident visitors in the country of reference as part of domestic or international trips.

Outbound tourism

Outbound tourism comprises the activities of a resident visitor outside the country of reference either as part of an outbound trip or as part of a domestic trip.

Tourism expenditure

Tourism expenditure refers to the amount paid for the acquisition of consumption goods and services

as well as valuables for own use or to give away for and during tourism trips. It includes expenditure by visitors themselves as well as expenses paid for or reimbursed by others.

Tourism (direct) gross value added

Tourism gross value added adds the parts of gross value added generated by tourism industries and other industries of the economy that directly serve visitors in responding to internal tourism consumption. The use of the term 'direct' in this aggregate refers to the fact that the TSA measures only that part of value added (by tourism industries and other industries) due to consumption by visitors and leaves aside the indirect and induced effects that such consumption might generate.

Domestic tourism expenditure

Domestic tourism expenditure includes not only the expenditure of visitors on domestic trips, but also expenditure in the country of origin of visitors undertaking outbound trips. The economy benefiting from tourism expenditure is not always identical with the places visited during the trip. There is not always a strict relationship between the places visited and the economy/economies affected. For instance, not all expenditure associated with international trips occurs outside the visitor's economy of origin; in particular, some services might be acquired from producers in the country of origin or another country (international transport in particular, or any expenditure *en route*).

Domestic supply

Supply of goods and services by domestic industries, thus not supply via imports.

Tourism consumption

According to formal definitions, 'tourism consumption' is the same as 'tourism expenditure'. However, the concept of tourism consumption as used in the TSA goes beyond that of tourism expenditure. In addition to 'the amount paid for the acquisition of consumption goods and services as well as valuables for own use or to give away for and during tourism trips', which corresponds to monetary transactions (the focus of tourism expenditure), it includes services associated with holiday accommodation on own account, tourism social transfers in kind and other imputed consumption, such as the imputed rent of holiday homes or services paid by non-profit institutions for trips made by, for instance, groups of disabled people.

Gross fixed capital formation

Gross fixed capital formation is an important component of the description and analysis of tourism industries. It should be noted that, from an industry perspective, not only is gross fixed capital formation an important variable but transactions in non-produced non-financial assets (such as land) and in non-produced intangible assets (such as landing rights) may also be important in a broader perspective.

Tourism collective consumption

Although collective non-market services have been excluded from tourism consumption, this does not mean that the measurement of expenditure by public administrations in the tourism-related fields of market promotion, information, planning, etc. is not relevant and that it does not have its place in the aggregate measurement of the economic importance of tourism.

Trip

A trip refers to travel by a person from the time of departure from his or her usual residence until he/she returns, i.e. a round trip. A trip can be made up of visits to different places.

A **same-day trip** is a trip without an overnight stay; an **overnight** or **tourism trip** is one that includes at least one overnight stay.

Note on rounding in tables

Due to rounding, totals or subtotals are not always equal to the sum of the (rounded) components.

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Tourism Satellite Accounts in Europe

Tourism plays an important role in many countries' economies and labour markets. Tourism Satellite Accounts (TSA) is a framework developed to quantify the importance of tourism. This publication disseminates national results for a set of key TSA indicators for EU and EFTA countries, submitted on a voluntary basis to Eurostat, and is a follow-up of the publication Tourism Satellite Accounts in Europe of 2019. The publication focuses on data for the reference year 2019, but also includes an ad-hoc chapter using partial data for 2020 and giving insights on the impact of the COVID-19 pandemic on the European tourism sector.

For more information

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