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Progress Report on Improving Statistical Capacities of Tourism Sector in the Mediterranean and Gulf Region of OIC

1 Introduction

Aiming at building statistical capacity in tourism statistics and overall contributing to the National Statistical Systems (NSS) of the member countries of the Organisation of Islamic Cooperation (OIC) through short-term trainings and one regional workshop, the “2013-SESRIC-111: Improving Statistical Capacities of Tourism Sector in Mediterranean and Gulf Regions” Project has been one of the two projects of SESRIC that have been supported by the Project Cycle Management (PCM) Programme of the OIC Standing Committee for Economic and Commercial Cooperation (COMCEC).

The project was structured in two phases. In the initial phase of the project, questionnaires – designed with the valuable feedback of the Turkish Statistical Institute (TurkStat) and Turkish Ministry of Culture and Tourism – have been circulated to the countries under scope in order to identify their needs and capacities. The trainings then were conducted in accordance with the matching based on the received questionnaire responses. The project was concluded with the Regional Workshop on Tourism Statistics and Tourism Satellite Accounts in December 2014.

2 Short-Term Trainings

Within the project framework, six short-term trainings were conducted in the period from 13 October 2014 to 19 November 2014 in Albania, Jordan, Oman, Qatar, Tunisia and United Arab Emirates. The trainers were generously provided by the NSOs and Tourism Authorities of Egypt, Jordan and Turkey. The training contents were focused on:

- Tourism Concepts, Definitions and Methodology;
- Domestic Tourism Statistics;
- Inbound Tourism Statistics;

- Outbound Tourism Statistics; and
- Accommodation Statistics.

The trainings were attended by more than 85 participants who were mainly tourism statisticians either working for the National Statistics Offices (NSOs) or relevant national tourism authorities. The trainings not only included the methodological sides of the measurement of tourism activities but also included sharing country specific experiences both from the host and provider countries enriched with question and answer sessions at the end of relevant course topics. This type of training approach also enabled the trainers from the provider countries to give particular recommendations on the types of challenges the experts from the host countries happen to face.

The overall findings from the responses collected through the satisfaction questionnaires completed by participants indicated a 98% satisfaction with the trainings received and the competence of the trainers who conducted the courses.

The participants further stated that more trainings are needed to cover each topic in more detail with more focus on the implementation of tourism satellite accounts (TSA).

On the other hand, the trainers of the six trainings gave the following comments to take the tourism statistics level to a further level:

- Direct involvement of the NSOs in the design, implementation and coordination of relevant surveys to measure tourism activities;
- Establishment of individual tourism statistics departments under the NSOs rather than maintaining tasks related to tourism statistics under different departments;
- Consideration of seasonality effects while estimating growth rates for tourism activities;
- More frequent conduct of surveys with smaller samples;
- Interdepartmental coordination with the sampling departments to better construct a sample for the surveys to be conducted;
- Maintaining statistical capacity development activities to keep up with the international recommendations and with practices of other countries; and
- Interagency communication and coordination to avoid overlapping efforts in the collection, collation, processing, and disseminating tourism data.

3 Regional Workshop on Tourism Statistics and Tourism Satellite Accounts

As to the Regional Workshop on Tourism Statistics and Tourism Satellite Accounts¹ organized by SESRIC in collaboration with the United Nations World Tourism Organization (UNWTO) and COMCEC on 2-4 December 2014 in Ankara, Turkey, 50 representatives from 27 OIC member countries who were tourism statisticians in the NSOs, relevant tourism authorities, and Central Bank experts together with international experts attended the event. The contents were mainly about:

- System of Tourism Statistics (STS);
- Inbound Tourism Statistics;
- Outbound Tourism Statistics;
- Tourism Expenditure Statistics;
- Domestic Tourism Statistics;
- Tourism Industries Statistics;
- Employment in the Tourism Industries; and
- Tourism Satellite Accounts (TSA)

90% of the participants found the Regional Workshop timely and satisfactory. An important exchange of views took place on:

- the constitution of Inter-institutional Platforms in order to put in practice regular working programmes on statistical researches;
- the situation of tourism statistics;
- the difficulties met in the reconciliation of data from different origins (demand and supply data; diagnosis of the reasons of these differences and the way to resolve them);
- the links established with National Accounts and Balance of Payments statistics;
- the difficulties and inconsistencies related to classifications, treatment of the basic data on tourism, and the scope of statistics from the supply side, etc., and
- different pathways and funding towards compilation of TSA, among other methodological subjects.

The question and answers sessions held after the presentations revealed that there appears to be still some limitations on:

¹ For future reference, the Workshop materials are accessible on:
<http://www.oicstatcom.org/event-detail.php?id=1050>

- statistics on flow of tourists;
- statistics on tourism expenditure under its different forms;
- national accounts, and
- statistics on balance of payments, (items travel and passenger transportation) in the case of some countries.

As additional comments, the Workshop participants stated the following:

- To maintain the framework of cooperation among SESRIC, COMCEC and UNWTO after the Workshop to continue interaction between countries for a dynamic progression;
- More active involvement of the UNWTO is needed for the TSA implementation at the individual country level;
- UNWTO should review the manual, particularly in terms of details of the information required; such as (country of residence, purpose of visit of inbound/outbound tourist). As discussed, more countries are abandoning the usage of cards. These information are usually acquired through surveys;
- This type of Workshop is exemplary and in order to measure our progress, these Workshops should continue in the future;
- Outlining a roadmap is necessary to follow up and achieve specific requirements to reach good quality of tourism statistics in OIC countries.

An overwhelming majority of the participants indicated that their NSO would benefit from further capacity building programmes in tourism statistics.

4 Conclusion and the Way Forward

Strengthening the national systems of tourism statistics (NSTS) in the Mediterranean and Gulf regions, especially in the developing member countries of these regions, is particularly pertinent as the tourism sector plays a significant role in the national economic development plans. However, sustained transformation in the current NSTSs of the region countries necessitate a strong sense of ownership guided by a long-term vision for statistical capacity development.

Individual projects on their own cannot accomplish this ambitious task but they should be considered as contributors to the whole process on this long path. Yet, all relevant stakeholders concurrently need to work on building capacities and strengthening systems to be able to produce high quality tourism data in line with the international statistical standards.

In this respect, 2013-SESRIC-111 project carried out by SESRIC in 2014 is the first step in mobilizing the available capacities of both OIC member countries and international partner institutions to respond to the most pressing needs of the countries under project scope concerning the tourism statistics.

Throughout the project duration, the following observations have been made:

1. Improving statistical capacities of the tourism sector in Mediterranean and Gulf Regions is a large-scale and ambitious task – one that would require not only one but more consecutive phases, during which a particular theme of tourism statistics should be focused on.
2. The participants of the Regional Workshop pointed out that the TSA is a long term process to be achieved for which the countries should establish proper channels to involve all relevant stakeholders to produce the required data. Taking this finding into consideration, the concerted efforts should be exerted with a focus not only concerning building capacities on the TSA processes but also the sound inter-agency coordination and communication mechanisms through a multi-year planning under the leadership of the NSOs of member countries.

The SESRIC is enthusiastic to take the current 2013-SESRIC-0111 project to further phases by broadening the project scope to all OIC member countries. Given the wide spectra of the needs concerning the tourism statistics themes of the OIC member countries (GCC countries mainly with a focus on outbound tourism, North African member countries for inbound tourism, countries such as Turkey on the industrial side of tourism), the second phase of the project to be implemented by the SESRIC will involve the OIC member countries and the UNWTO.

The subjects of the upcoming Regional Workshops in the near future will be finalised after reaching a consensus with the UNWTO and member countries. Yet, there is strong inclination shown by the member countries that participated in the Regional Workshop organised within the framework of 2013-SESRIC-0111 project to have a dedicated Workshop for the TSA processes.

In this regard, a new questionnaire has recently been designed with the collaboration of the UNWTO to continue organising new and more country needs focused tourism statistics trainings in the interested OIC member countries. This questionnaire has been circulated to the OIC-StatCom members in March 2014 to enable the OIC-StatCom Secretariat identify the tourism statistics capacities and needs of the member countries. The needs and capacities of the countries pertaining to the TSA processes have been particularly asked in the questionnaire by including a specific section concerning the following TSA tables:

- Table 1: Inbound tourism expenditure by products and classes of visitors
- Table 2: Domestic Tourism expenditure by products, classes of visitors and types of trips
- Table 3: Outbound tourism expenditure by products and classes of visitors
- Table 4: Internal tourism consumption by products
- Table 5: Production accounts of tourism industries and other industries (at basic prices)
- Table 6: Total domestic supply and internal tourism consumption (at purchasers' prices)
- Table 7: Employment in the tourism industries
- Table 8: Tourism gross fixed capital formation of tourism industries and other industries
- Table 9: Tourism collective consumption by products and levels of government
- Table 10: Non-monetary indicators

The questionnaire results will be evaluated by the OIC-StatCom Secretariat to match the training needs and capacities of the OIC member countries for organizing the relevant statistical capacity development activities in the near future.

Last but not least, the statistical capacity development efforts for the tourism sector should not be confined to short term vision rather should be spread over long-term. Consequently, the SESRIC is optimistic about the involvement of relevant stakeholders in the next phases of the project together with the possible partnership of the UNWTO.