Measuring the economic dimension in sustainable tourism in France

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Statistical framework for measuring the sustainability of tourism SF-MST

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Insee
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French NSI – INSEE - has worked since 2011 on accommodation statistics and took over in 2020 the work on economic statistics in tourism, including TSA, realized by a new INSEE’s team at its Dijon’s establishment.

INSEE’s priorities are given to:

- Comply with 692/2011 European regulation on tourism statistics with quality standards (reliability, timeliness etc.)
- Respond to international organizations (UNWTO, OECD, Eurostat), national and regional demand in statistics
- Coordinate French tourism statistics response in conjunction with statisticians of the French ministries (ecological transition, housing, transports, culture etc.)
• ASSESSMENT BASED ON SYSTEM OF NATIONAL ACCOUNTS‘S FRAMEWORK (SUPPLY AND USE TABLES)

• ALL EXPENDITURES MADE DURING TOURIST TRIPS - INCLUDING SAME-DAY VISIT - OUTSIDE ONE’S USUAL ENVIRONMENT

• PROFESSIONAL EXPENDITURES (INCLUDING INTERMEDIATE CONSUMPTIONS)

• VALORIZATION OF SECONDARY DWELLINGS
MAIN SOURCES FOR INTERNAL TOURISM CONSUMPTION (ITC) ESTIMATE

- Surveys on domestic and inbound tourism (expenditure, occupancy etc.)
- Overall household consumption

TWO MAIN METHODS TO CALCULATE ITC

- Method 1 - data is available in surveys then use of "Survey’s method"
  - In accommodation services, food & beverage-serving services, gas, tolls
- Method 2 - data is NOT available in surveys then "Tourism ratio method", i.e. NA results by product * tourism rate
  - In transport services, transport & equipment rental, travel agencies and other reservation services, cultural, sports and recreationnal services

For example: in railway passenger transport (part of transport services)
- Tourism ratio is estimated at 44% with statistical sources in France in 2019 over 12.8 billion € (NA source)
- Therefore, it represents 5.6 billion € in 2019
TSA RESULTS ON INSEE.FR

- In 2019 64% of ITC is domestic
- ITC is 34% lower in 2020 than in 2019
- ITC is still 24% lower in 2021 than in 2019

IN PROGRESS: TOURISM VALUE ADDED

- Gross Valued Added in Tourism Industries (GVATI)
- Tourism Direct Gross Value Added (TDGVA)
FEW ECONOMIC RESULTS BEYOND TSA, ABOUT RECOVERY SINCE THIS SUMMER

Hotel & restaurant business turnover level higher than in 2019 (same result with credit card spendings), but watch out price effects...

International visitors are back, residents attendance is even higher than precrisis level

Business tourism came back in urban territories such as Paris and its suburbs

Sparsely populated territories benefited from the recovery

Nights (in millions) spent by non-residents and residents tourists in hotels in France during july, august, septembre & october of each year since 2019

Source: Insee - France, supply survey
BASED ON AN ADMINISTRATIVE SOURCE: NOMINATIVE SOCIAL DECLARATIONS OF COMPANIES (DSN IN FRENCH)

TOURISM RATIO METHOD BY ACTIVITY SECTOR OF EMPLOYMENT

- 6.4% of employment in France in 2019
- For ex. see a french Insee’s study

ISSUE OF LABOUR SHORTAGE
NEED FOR METHODOLOGICAL WORK, QUALITY EXPERTISE AND NATIONAL COORDINATION

- Entry cost and complexity with huge scope of topics (every activity has a part of tourism), organizations involved, methods used
- **Tourist function rate** (TFT in french) used by statisticians in the ministry of ecological transition

CHALLENGES FOR TSA AND MOST OTHER SOURCES ON TOURISM

- Alignment to national account and obtaining a complementary dataset
- Estimating of tourism ratio by sector
- Reconciliation of the tourism definition « outside one’s usual environment »

PURPOSE TO COMMENT RECENT SITUATION WITH ALTERNATIVE SOURCES, CANNOT REPLACE TSA (FOR EX. SEE INSEE’S BLOG ON TOURISM)

HOW TO MEASURE ECONOMIC IMPACT ON OTHER DIMENSIONS?

- What is good in economic dimension is not always good in environment (for ex. over-tourism) neither in social aspects (for ex. resident houses replaced little by little with tourist accommodations)