

TSA compilation in Flanders and Belgium: methodology, sources, difficulties and solutions in constructing the TSA tables, user relevance as a policy instrument

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Introduction



Introduction to the TSA in Belgium and Flanders

Tourism Satellite Account or TSA

= internationally recognised instrument for indicating the economic significance of tourism

Regional responsibility

- Tourism = the responsibility of the Regions in Belgium
- Regions took first steps in constructing TSA
- Flanders:
 - Every two years a TSA for Flanders since the 2008 measurement year
 - Eurostat asked the Flanders Statistics Authority to construct the Belgian TSA, in collaboration with other Regions and the Belgian Statistical Office (Statbel).
 - Today 3 TSA for Belgium (2016, 2019 and 2022)

Methodology and challenges

- TSA tables 1, 2, 4, 5, 6 and 7 are constructed using the “Recommended Methodological Framework” (UNWTO, OECD & Eurostat, 2008).

Methodology and Data Sources

Methodology and data sources

- **“Recommended Methodological Framework”**
 - **Data sources and regional differences**
 - Wide range of sources: surveys, national and regional accounts and administrative data, ...
 - Tourism surveys conducted by Statbel
 - Regional studies and surveys provide detailed insights
 - Flanders attracts coastal tourists
 - Brussels urban visitors
 - Wallonia appeals to nature and tranquillity seekers.
 - **Challenges in ensuring consistency and accuracy**
 - Accurate estimation of all tourist types and their expenditures
 - Consistent methodology guarantees comparability between Belgian and Flemish TSA
- ➔ Difficult when there are different sources for the different levels



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Results

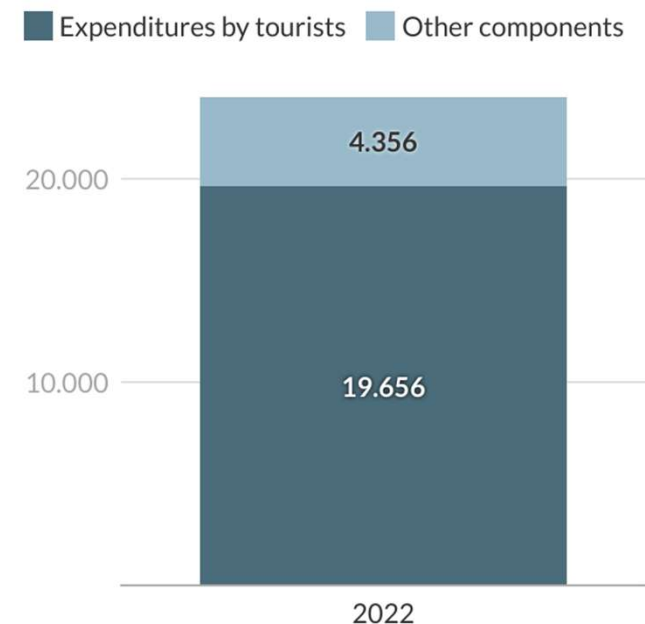


Tourism Consumption

Tourism Consumption

- **Compilation of consumption in TSA-table 1, 2 and 4**
 - Different regions conduct various surveys reflecting unique visitor types and tourism policies.
 - Belgian TSA: as many Belgian data sources as possible (Belgian over regional data) to ensure consistency and avoid double-counting
 - Multiple sources: Statbel, regional data and Eurostat
- **Results**
 - Total tourism consumption reached €24 billion, with actual expenditure comprising 82% or €19.7 billion
 - Belgian tourists spent €15.5 billion; foreign tourists €4.2 billion
 - Other components include imputed rent, subsidies, and durable goods amounting to €4.4 billion.

Tourism Consumption
Belgium, 2022, billion euro



Source: Flanders Statistics Authority: Tourism Satellite Account for Belgium 2022

Tourism Supply

Tourism Supply

- **Compilation of supply in TSA- table 5**

- Sources used for national and regional TSA are more closely aligned:
 - Regional TSA (Flanders): supply and use tables from interregional input-output tables
 - National TSA (Belgium): supply and use tables derived from national accounts
- Need for more detailed industry information than SUT can provide: adjustments by using more specific labour statistics:
 - Example:
 - One SUT-group includes museums, zoos, libraries, and archives
 - Only museums and zoos belong to tourism, libraries and archives not
 - Adjustments use the proportion of total wage bill in subcategories to exclude irrelevant sector
- Different countries/regions may use varying adjustment methods, which can reduce comparability

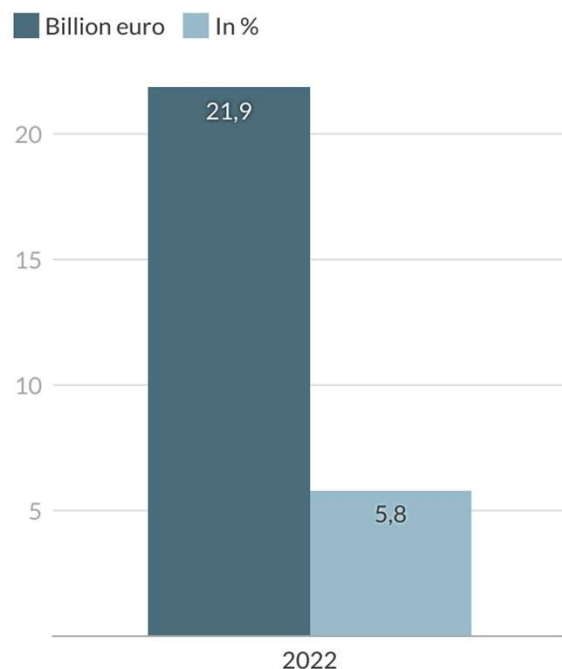
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Economic indicators



Gross Value Added of Tourism Industries (GVATI)

Gross Value Added of Tourism Industries
Belgium, billion euro and % total value added



Source: Flanders Statistics Authority: Tourism Satellite Account for Belgium 2022

- **GVATI**

= the gross value added generated by tourism sector, consumed by both tourists and non-tourists

- **Results**

Belgium's tourism industry contributed €21.9 billion, representing 5.8% of the country's total gross value added

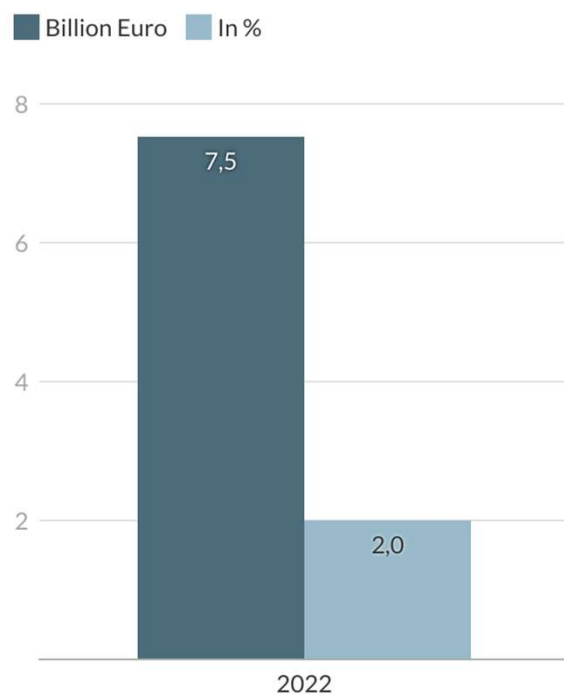
- **Comparability**

- Comparing GVATI in Belgium (between national and regional) is possible
- Comparing GVATI across countries: awareness that comparing is sometimes difficult due to option to include country-specific characteristic industries, like the healthcare sector for medical tourism

Tourism Direct Gross Value Added (TDGVA)

Tourism Direct Gross Value Added

Belgium, billion euro and % total value added



Source: Flanders Statistics Authority: Tourism Satellite Account for Belgium 2022

- **TDGVA**

= value added by tourism and other industries, but only for consumption by tourists

- **Results**

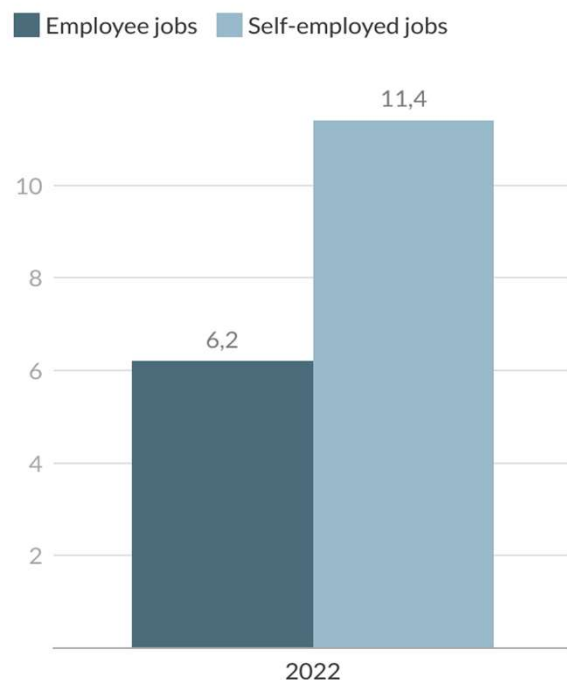
Belgium's tourism direct gross value added was €7.5 billion, representing 2.0% of total national gross value added

- **Comparability**

- TDGVA is widely used for comparing countries, linking tourism supply to actual tourist consumption
- Comparing TDGVA requires less caution than GVATI, but different countries can also use different sources to map consumption

Employment Tourism Industries

Employment in the Tourism Industries
Belgium, % total amount of jobs



Source: Flanders Statistics Authority: Tourism Satellite Account for Belgium 2022

- **Employment Tourism Industries**

= includes all employee and self-employed jobs within the tourism sector

- **Results**

- Belgium had 263,386 employee jobs and 140,942 self-employed jobs in tourism, representing 6.2% of employee and 11.4% of self-employed jobs

- **Comparability**

- To compare employment in the tourism industries across countries, the total number of jobs is considered, adding together both employee and self-employed positions
- For Belgium, this results in 404,328 jobs in tourism, accounting for 7.4% of all jobs in the country.

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Conclusion

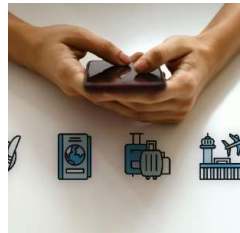
Conclusion

- **Experience with regional TSA: compilation of Belgian TSA**
 - Third Belgian TSA (2022 reference year) was submitted to Eurostat 2025
 - Revealed challenges and areas for improvement of TSA



Transparency and Alignment

Need for transparency and alignment in data sources, definitions and delineations used



Inclusion of Alternative Tourism

Integrating informal accommodations, second homes, digital platform stays, ... remains a challenge



Enhanced Cooperation and data sharing

Data sharing could help resolve data gaps and improve data comparability and digital data sources could offer new opportunities

Conclusion

- **TSA remains indispensable tool for both regions and countries to**
 - quantify the economic significance of tourism
 - monitor the effects of policy measures at the sector level
- **Many results and sub-results** regarding consumption by different tourist groups, provide important information for policymakers
- **Uniform TSA methodology** facilitates international comparisons
= crucial within the framework of European tourism policy

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