

**TSA (Tourism Satellite Account)
Flemish Region and Brussels-Capital Region 2012**

Executive Summary

**Pieter De Maesschalck & Karolien Weekers
Studiedienst Vlaamse Regering (SVR)
(Research Centre of the Government of Flanders)**

Under the guidance of
Jan Van Praet, Toerisme Vlaanderen
Christel Leys, Departement Internationaal Vlaanderen
Josée Lemaître en Thierry Vergeynst, Studiedienst Vlaamse Regering

INTRODUCTION

A Tourism Satellite Account (abbreviation TSA in international literature) is an internationally recognised instrument for indicating the economic significance of tourism. The tourism sector is not an easily definable or clearly visible economic sector, but rather an amalgamation of (parts of) different branches of activity. Often, only a part of the output of these branches of activity is used for tourism consumption, which is why a TSA is necessary. On the supply side, the TSA brings together the various essential functional components of the national accounts and at the same time, it links this supply with the actual tourism consumption.

The setting up of the TSA for the Flemish Region is a project carried out by the Research Centre of the Government of Flanders, in collaboration with the Flemish Department of Foreign Affairs, Tourism Flanders-Brussels and the Flemish Support Centre for Tourism, each of which is represented in the Steering Committee. All decisions related to the preparation of the TSA for the Flemish Region have been made within this Steering Committee. The first TSA described the situation in 2008 and was presented in march 2012. A few months later an extensive methodological report was published (Weekers, 2012). In 2013 the report on the TSA 2010 was published (Weekers, 2013a), together with an elaborated report on employment in the sector of tourism in 2008 en 2010 (Weekers, 2013b).

In this executive summary, the results of the TSA 2012 will be presented. This TSA is an updated version of the TSA 2008 en 2010 based on more recent data and a further refining of the method. A complete Tourism Satellite Account consists of 10 tables, which are listed below. In the current stage of the project, we only focus on TSA Tables 1, 2, 4, 5, 6 and 7.

- TABLE 1: Inbound¹ tourism consumption
- TABLE 2: Domestic tourism consumption
- ~~TABLE 3:~~ *Outbound tourism consumption*
- TABLE 4: Internal tourism consumption
- TABLE 5: Production accounts of tourism industries and other industries
- TABLE 6: Domestic supply and internal tourism consumption
- TABLE 7: Employment in the tourism industries
- ~~TABLE 8:~~ *Tourism gross fixed capital formation of tourism and other industries*
- ~~TABLE 9:~~ *Tourism collective consumption*
- ~~TABLE 10:~~ *Non-monetary indicators*

In this Executive Summary, we will first discuss the used methods, sources and results per table for the TSA of the Flemish Region. In a second part, we take a look at the estimated results for the Brussels-Capital Region and for the total of Flemish and Brussels-Capital Region. Further, we discuss in greater detail the most important indicators and compare these with the results in other countries and with the share of other sectors in the value added in the Flemish Region. In attach, we give an overview of the results in the TSA 2008, 2010 and 2012. All details regarding methods, choices of methods, calculations and (partial) results for each component can be read in the final report on the TSA 2012, which is only available in Dutch (De Maesschalck & Weekers, 2014).

¹ Since our objective is to prepare not a national but a regional TSA, we must interpret certain concepts differently: "inbound" refers to tourism from outside the Flemish Region (= from abroad + Brussels + Wallonia), while "internal" and "domestic" refer to the Flemish Region.

1. METHODS, SOURCES AND RESULTS PER TSA TABLE FOR THE FLEMISH REGION

The methodological approach of the TSA is described in the manual "*Tourism Satellite Accounts: Recommended Methodological Framework*" (UNSD et al., 2008). This report has been prepared in accordance with the modified "*International Recommendations for Tourism Statistics 2008*", (UNSD & WTO, 2008). The application of this methodology for the Flemish case was described in the methodological report on the TSA 2008 (Weekers, 2012). In the report on the TSA 2010 (Weekers, 2013a) some parts of the methodology were refined and TSA-Table 7 on employment was developed for the first time. The TSA 2012 uses the same methodology as the TSA 2010. The results of the TSA 2012 for the Flemish Region will be presented below. We discuss TSA-Tables 1, 2, 4, 5, 6 and 7.

1.1. TSA TABLES 1, 2 AND 4: TOURISM CONSUMPTION IN THE FLEMISH REGION 2012

On the consumption side, three tables must be completed:

- TSA Table 1 for inbound tourism consumption
- TSA Table 2 for domestic tourism consumption
- TSA Table 4 for total internal tourism consumption.

In **TSA Tables 1 and 2** (inbound and domestic tourism consumption), tourists are divided into different categories. In the first place, we make a distinction between same-day visitors and overnight visitors. We also make a distinction depending on the purpose of the trip: recreational, MICE (Meetings, Incentives, Conferences & Events) or other professional purposes. For TSA Table 1, we also need to know the origin of the tourists and for TSA Table 2, we need to know if the tourists are staying in the Flemish Region or whether they have another destination. For each of these groups, we must try to find out the volume and expenditures of the tourists. The results per group of tourists can be read in the final report on the TSA 2012 (De Maesschalck & Weekers, 2014).

Table 1: TSA Tables 1 and 2, divided according to groups of tourists

| TSA TABLE 1: INBOUND TOURISM | | | TSA TABLE 2: DOMESTIC TOURISM | | |
|---|--------------------|--|--|--------------------|--|
| 1a: Visitors from Wallonia and Brussels to the Flemish Region | Same-day visitors | Recreational MICE Other business trips | 2a: Flemish visitors to the Flemish Region | Same-day visitors | Recreational MICE Other business trips |
| | Overnight visitors | Recreational MICE Other business trips | | Overnight visitors | Recreational MICE Other business trips |
| 1b: Foreign visitors to the Flemish Region | Same-day visitors | Recreational MICE Other business trips | 2b: Flemish visitors travelling to Brussels or Wallonia, or abroad | Same-day visitors | Recreational MICE Other business trips |
| | Overnight visitors | Recreational MICE Other business trips | | Overnight visitors | Recreational MICE Other business trips |

These data are the result of various surveys and reports, the linking of different data sources, the estimation of certain volumes and expenditures or the application of ratios. Six groups of sources can be distinguished, on the basis of the nature of the suppliers of the data and the research results:

- Tourism Flanders-Brussels: "Toerisme in Cijfers" (Tourism in Figures) (2012); MICE (2013): the dataset on participants; "Vlaanderen Vakantieganger" (Flemish tourism research) (2011).
- WES: "Reisgedrag van de Belgen" (Travel behaviour of Belgians) (2012)
- Westtoer (provincial enterprise for tourism in West Flanders): KITS (Flemish project on seaside tourism indicators and statistics) (2012); "Dagtoerisme kust" (Same-day tourism at the seaside) (2009); "Gebruikers van vakantiewoningen" (Use of second homes) (2011)
- Joint research : "Daguitstappenonderzoek" (Day trip study) (2011)
- Foreign studies: Travelpack (UK, 2012); SIT (Statistics on Inbound Tourism) (NED, 2010).

Since all these studies and source data pertain to different years, the data on expenditures needed to be converted to 2012 prices, which was achieved by means of the Consumer Price Index (CPI).

The expenditures of second-home owners, which cannot be categorised on the basis of their origin, we have put in a separate column in TSA Table 4. We also have no source of information on Flemish visitors (same-day as well as overnight visitors) who travel to Wallonia, Brussels or abroad for business purposes. Hence, we cannot quote any expenditure figures for these groups of tourists. Only the air transport costs are quoted, on the assumption that the ratio of tourism consumption within this supply equals 100%. In Table 6, we use this 100% ratio for both passenger air transport and the services offered by travel agencies, tour operators and guides. Although there is little to no information in the available sources with regard to tourism expenditures on these products, it is quite obvious that these expenditures are tourism expenditures. Therefore, we have worked the other way round and assumed a total tourism consumption of the supply, which we have next redistributed over the various groups of tourists in TSA Tables 1 and 2.

TSA Table 4 displays the total tourism consumption, for which we have first combined the tourism expenditures compiled in TSA Tables 1 and 2. As shown in Table 1, we obtain a total expenditure of EUR 3.3 billion yielded by inbound tourism (i.e. tourists from Wallonia, Brussels and abroad) in the Flemish Region in 2012. For domestic tourism, i.e. Flemish tourists, we obtain a total expenditure of EUR 7 billion. We need to add to this the tourism consumption expenditures of second-home residents, which we estimate at approximately EUR 766 million, to see the total of EUR 11.1 billion on tourism expenditures.

There are other forms of tourism consumption besides tourism expenditures which should be included in the TSA. Firstly, the value of the accommodation in private holiday homes can be estimated on the basis of the KITS and the "Vlaanderen Vakantieganger" studies. In total, an estimated rental value of approximately EUR 339 million has been entered in the TSA 2012. Secondly, for the calculation of social transfers (to culture, transport and tourism), we have examined the 2012 budgets of the Government of Flanders and we estimated the budget of the authorities of the five Flemish provinces (based on extensive analysis of those budgets in 2010). Since only the transfers or subsidies from which the individual tourist draws benefits can be included in TSA Table 4 according to the RMF, we have screened each item on the various budgets against this condition. In total, an amount of over EUR 657 million in subsidies is included in the TSA 2012.

Table 2: TSA TABLE 4: Internal tourism consumption in the Flemish Region in 2012 (in euro and based on 2012 prices).

| EXPENDITURES | TOURISM EXPENDITURES | | | | OTHER COMPONENTS OF TOURISM CONSUMPTION | | | TOTAL |
|--|---------------------------------|----------------------------------|--|-------------------|--|--------------------|--------------------|-----------------------|
| | TSA TABLE 1: Inbound Tourism | TSA TABLE 2: Domestic Tourism | Second-home residents + groups of friends, family and acquaintances | | Accommo- dation in second homes | Subsidies | Durable goods | |
| | | | Seaside | Other | | | | |
| 1 Accommodation services | 583.307.049 | 478.366.335 | - | - | 339.118.660 | - | - | 1.400.792.044 |
| 2 Food and beverages services | 746.937.947 | 823.362.602 | 269.493.995 | 17.585.755 | - | - | - | 1.857.380.300 |
| 3 Passenger transport services by land (rail+road+water) | 116.472.879 | 494.157.370 | 28.338.850 | 4.485.436 | - | 260.291.718 | - | 903.746.253 |
| 4 Air passenger transport services | 1.170.277.038 | 1.364.658.357 | - | - | - | 3.631.679 | - | 2.538.567.074 |
| 5 Services of travel agencies, tour operators and guides | 4.145.756 | 2.970.803.482 | - | - | - | - | - | 2.974.949.238 |
| 6 Cultural , sports and recreational services | 97.549.357 | 129.763.448 | 1.548.180 | 1.388.349 | - | 363.560.647 | - | 593.809.981 |
| 7 Remainder participation fee | 29.792.004 | 129.066.085 | - | - | - | - | - | 158.858.088 |
| 8 Other | 534.890.979 | 667.275.869 | 399.959.774 | 43.038.821 | - | - | 657.530.712 | 2.302.696.156 |
| TOTAL | 3.283.373.009 | 7.057.453.549 | 699.340.799 | 66.498.361 | 339.118.660 | 627.484.044 | 657.530.712 | 12.730.799.133 |

Finally, we have included the value of durable tourism consumer goods, i.e. products purchased for tourism purposes and for lasting use, such as skiing or camping equipment, caravans and camper vans. On the basis of the Enriched Crossroads Bank for Enterprises, the Bel-first database of Bureau Van Dyck and the Household Budget Survey, we were able to estimate the expenditures incurred by tourists for these products. We estimate the total value at approximately EUR 657 million in 2012.

Overall, tourism consumption in the Flemish Region totalled EUR 12.7 billion in 2012.

1.2. TSA TABLE 5: TOURISM SUPPLY IN THE FLEMISH REGION 2012

TSA Table 5 must hold data which provides more information about the supply of tourism groups of services produced in the Flemish Region, expressed in basic prices, irrespective of whether these are ultimately used for tourism purposes or not. We also display the intermediate consumption and the added value generated by tourism producers.

The data in TSA Table 5 have all been gathered from the regional Input-Output Tables (IOTs) and the regional Supply and Use Tables (SUTs). The figures, which were supplied to us by the Belgian Federal Planning Bureau (FPB)² and are available at the level of the A-118 branch of activity, pertain to 2007, which implies that all relevant figures within the 2007 IOT needed to be converted to 2012 prices.

The RMF 2008 uses NACE and CPA codes to outline the branches of activity and the products coming under the tourism sector in detail. We have tried to align these codes with those from the supply table of the IOT. Since the TSA requires a higher level of detail for some data on branches of activity than can be supplied by the IOT, we have encrypted some variables from the IOT on the basis of decentralised statistics from the Belgian National Office for Social Security (NOSS)³. This database supplies information on the number of employees at five-digit level on the basis of NACE codes. Although we are fully aware of the fact that the use of allocation keys is not the most ideal working method⁴ this is the only method we can use for lack of better information to break down a monetary aggregate to a five-digit level. In consultation with the members of the Steering Group, we decided to align the year of the data provided by the Belgian National Office for Social Security (NOSS) with that of the IOT (in this case, 2007) and to examine the situation as on 30 June. We have also used the NOSS statistics to single out the tourism products.

The result of this exercise is displayed in Table 3. The interpretation of the figures will be dealt with later when discussing the results of TSA Table 6. Details on the allocation keys which have been applied to the IO codes for obtaining the data on tourism-related branches of activity and tourism industries can be found in the final report of the TSA 2012 (De Maesschalck & Weekers, 2014).

² This IOT was prepared by the FPB, under orders of OVAM (Public Waste Agency of Flanders) with the aim of preparing Flemish environmental IOTs. The FPB pointed out that the figures from the IOT and SUT must be handled very carefully, since they were obtained from a fairly mechanical allocation, by means of which the ratios of the respective regions have been defined on the basis of allocation keys rather than on observed figures.

³ By "decentralised", we mean that, where appropriate, the number of employees of a branch of the company situated at a location different from that of the head office is attributed to this other location. In the "centralised" statistics, all employee numbers are assigned to the head office, regardless of where these employees work.

⁴ The Belgian National Accounts Institute (NAI) applies a similar method for the regionalisation of some macro-economic aggregates.

Table 3: TSA TABLE 5: The Production accounts of tourism industries and other industries in the Flemish Region in 2012 (in euro and based on 2012 prices).

| | | TOURISM INDUSTRIES | | | | | | | | | | | TOTAL | OTHER INDUSTRIES | GENERAL TOTAL (at basic prices) |
|---|--|----------------------------------|--|---------------------------------|---|--------------------------------|------------------------------|---------------------------------|---|---|--|--|-----------------------|------------------------|---------------------------------|
| | | 1a Accommodation for visitors | 1b Accommodation second homes (Coast) | 2 Food and beverage industry | 3 Road and railway passenger transport | 4 Water passenger transport | 5 Air passenger transport | 6 Transport equipment rental | 7 Travel agencies, tour operators and guides | 8 Cultural, recreational and sports industry | 9 Retail trade souvenirs and sports | 10 Organisation conventions + shows | | | |
| 1 | a) Accommodation services | 1.017.583.201 | 0 | 302.301.179 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1.319.884.380 | 61.282.908 | 1.381.167.289 |
| | b) Accommodation - second homes seaside | 0 | 317.753.193 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 100.198 | 317.853.391 | 2.481.925.970 | 2.799.779.361 |
| 2 | Food and beverages services | 237.631.661 | 0 | 5.372.252.171 | 2.300.226 | 0 | 0 | 0 | 0 | 55.688.927 | 162.132 | 0 | 5.668.035.117 | 634.501.691 | 6.302.536.807 |
| 3 | Passenger transport services by land | 0 | 0 | 0 | 2.288.408.925 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2.288.408.925 | 297.448.939 | 2.585.857.864 |
| 4 | Passenger transport services by water | 0 | 0 | 0 | 0 | 76.615.032 | 0 | 0 | 0 | 0 | 0 | 0 | 76.615.032 | 543.006.887 | 619.621.919 |
| 5 | Passenger transport services by air | 0 | 0 | 0 | 0 | 0 | 2.123.458.984 | 0 | 0 | 0 | 0 | 0 | 2.123.458.984 | 391.226.179 | 2.514.685.163 |
| 6 | Transport equipment rental services | 0 | 0 | 0 | 53.943.564 | 2.152.448 | 0 | 1.773.526.838 | 13.430.373 | 0 | 1.768.757 | 0 | 1.844.821.979 | 653.069.063 | 2.497.891.042 |
| 7 | Services of travel agencies, tour operators and guides | 0 | 0 | 0 | 77.876.678 | 0 | 0 | 0 | 2.215.963.731 | 0 | 0 | 0 | 2.293.840.409 | 580.133.502 | 2.873.973.911 |
| 8 | Cultural , sports and recreational services | 7.694.381 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1.604.682.441 | 0 | 0 | 1.612.376.822 | 866.355.485 | 2.478.732.307 |
| 9 | Retail sale souvenirs and sports | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 3.262.419 | 0 | 3.262.419 | 199.965.774 | 203.228.192 |
| 10 | Organisation of conventions and trade shows | 0 | 0 | 276.143 | 0 | 0 | 0 | 35.491 | 0 | 0 | 20.975 | 2.526.176 | 2.858.784 | 140.705.184 | 143.563.968 |
| 11 | Other | 38.016.193 | 2.556.056.206 | 806.806.762 | 391.824.004 | 526.406.265 | 407.798.713 | 361.964.556 | 33.594.366 | 448.146.486 | 251.075.445 | 163.477.780 | 5.985.166.776 | 466.264.943.456 | 472.232.110.232 |
| TOTAL OUTPUT (basic prices) | | 1.300.925.436 | 2.873.809.399 | 6.481.636.255 | 2.814.353.397 | 605.173.744 | 2.531.257.698 | 2.135.526.885 | 2.262.988.470 | 2.108.517.854 | 256.289.727 | 166.104.154 | 23.536.583.018 | 473.096.565.037 | 496.633.148.055 |
| INTERMEDIATE CONSUMPTION (purchase prices) | | 652.337.578 | 676.575.045 | 4.186.589.043 | 1.428.009.502 | 506.211.784 | 2.113.779.124 | 1.134.693.221 | 1.942.450.575 | 1.195.641.866 | 118.985.648 | 101.761.041 | 14.057.034.428 | 285.894.004.510 | 299.951.038.938 |
| GROSS VALUE ADDED (basic prices) | | 648.587.858 | 2.197.234.354 | 2.295.047.212 | 1.386.343.895 | 98.961.959 | 417.478.573 | 1.000.833.664 | 320.537.895 | 912.875.988 | 137.304.078 | 64.343.113 | 9.479.548.590 | 187.202.560.527 | 196.682.109.117 |

1.3. TSA TABLE 6: ECONOMIC IMPORTANCE OF TOURISM IN THE FLEMISH REGION IN 2012

TSA Table 6 combines the information from the previous TSA Tables. We have also added information on imports and taken taxes, subsidies and trade and transport margins into account in order to be able to convert the supply at basic prices to consumption at purchase prices. Through linking the total supply of a particular product (calculated in TSA Table 5) to the total tourism consumption of this product (collected in TSA Table 4), the **tourism ratios per product** could be calculated. Through applying these ratios in turn to the supply data in each branch of activity, we could calculate the share of the output consumed by tourists per sector. This is referred to as the **tourism share of the supply**.

These tourism ratios and tourism shares allow us to calculate three important indicators for the Flemish Region in 2012:

- **The Gross Value Added by tourism industries:** this indicator designates the value added generated by the tourism industry, regardless of whether this supply is consumed by tourists or non-tourists. Hence, the value added by non-tourism related branches of activity is not taken into account, although these may also supply products purchased by tourists. The Gross Value Added by tourism industries in the Flemish Region in 2012 can be read from TSA Table 5: The total value added output by tourism-related branches of activity accounts for **EUR 9.5 billion or 4.8% of the total Value Added in the Flemish Region in 2012**.
- **The Direct Gross Value Added by Tourism:** this indicator designates the value added generated by both tourism-related and other branches of activity, but only for the share which is actually purchased by tourists in these sectors. So the production by the tourism-related branches of activity which is not consumed by tourists, is disregarded. The Direct Gross Value Added by Tourism in the Flemish Region in 2012 can only be derived from TSA Table 6 and is equal to **EUR 4.6 billion or 2.3% of the total value added in the Flemish Region in 2012**. More than two-thirds of this amount, i.e. EUR 3.2 billion is generated as Value Added for tourism consumption in tourism-related branches of activity. The Value Added for the tourism share in other branches of activity is equal to EUR 1.4 billion.
- **The Direct Gross Domestic Product:** This indicator adds to the direct gross value added by tourism, the tourism share of taxes less subsidies on products and imports, which also can be found in TSA-Table 6. The direct Gross Domestic Product in the Flemish Region in 2012 equals to **EUR 5.2 billion or 2.3% of the total gross domestic product in the Flemish Region 2012**.

If we look at the relative importance of the various tourism industries in the total Direct Gross Value Added by Tourism in the Flemish Region, we notice that the hotel and catering industry (Table 5) is particularly important, accounting for no less than 20% of the Value Added by the tourism industry share within tourism consumption. Restaurants and cafés do even better, with a share of 28%. Passenger transport by road, rail and water represents 18% of the value added by the tourism-related branches of activity within tourism consumption. Passenger transport by air accounts for 13%, followed by the travel agencies and tour operators sector (10%) while cultural, recreational and

sports companies are responsible for 8% of the EUR 3.2 billion of the Tourism Direct Gross Value Added generated by tourism industries. The remaining two tourism industries, i.e. the retail sale of sports and souvenirs (0,03% of the VA of the tourism industries) and the organisation of conventions and trade shows (0,06% of the VA of the tourism industries) have a very small share.

Table 5: Tourism Direct Gross Value Added in the Flemish Region in 2012 (based on 2012 prices), by industry.

| | Value added by tourism consumption = Direct Gross Value Added by Tourism | |
|--|---|--|
| | TOURISM INDUSTRIES EUR 3.2 billion = 100% | ALL INDUSTRIES EUR 4.6 billion = 100% |
| Accommodation for visitors | 20,2% | 14,0% |
| Accommodation related to second homes | 1,8% | 1,3% |
| Food and beverages industry | 28,4% | 19,7% |
| Road, rail and waterway passenger transport | 17,8% | 12,3% |
| Air passenger transport | 13,2% | 9,1% |
| Travel agencies, tour operators and guides | 10,1% | 7,0% |
| Cultural, recreational and sports industry | 8,3% | 5,8% |
| Retail sale of sports and souvenirs | 0,03% | 0,02% |
| Organisation of conventions and trade shows | 0,06% | 0,04% |
| Other industries | Not applicable | 30,8% |

If we also consider the other industries, we notice that non-tourism industries are responsible for 33.9% of the Tourism Direct Gross Value Added. The shares of the tourism sectors are somewhat lower now, but the mutual ratio of importance remains the same. The relative importance of the different branches of activity in the total of the Gross Value Added of tourism industries is less relevant, since this indicator only takes into account production in these branches of activity and disregards consumption by tourists. We therefore do not discuss these in detail. Still, the figures can easily be derived from TSA Table 5, presented in Table 3 of this Summary.

1.4. TSA TABLE 7: EMPLOYMENT IN THE TOURISM SECTOR WITHIN THE FLEMISH REGION IN 2012

Various sources have been exploited in order to gather data on employment. For wage and salaried employment, we have relied on the decentralised National Office for Social Security statistics, while we have used the data supplied by the RSVZ (National Institute for Social Insurances for the Self-employed) and the census of the affiliated persons/companies liable to compulsory social insurance for self-employment in particular. The data on working students are also derived from the National Office for Social Security, although these still need to be processed to obtain the average number of working students, if we want to take a snapshot of the number of jobs, as we have done for the other source data. We would like to refer to the detailed report in Dutch on employment in the tourism sector for 2008 and 2010 (Weekers, 2013b) for extensive information on the methodological background.

The overall **employment in the tourism sector in the Flemish Region in 2012** can be split up into 127,508 wage and salaried jobs, 47,496 self-employed and self-employed helper jobs and 2,768 student jobs. Working students are particularly active in this sector with 13.2% of all student jobs supplied by the tourism sector. Wage and salaried jobs within the sector represent 5.8% of overall wage and salaried employment while self-employed and self-employed helper jobs take a share of 7.8% of overall self-employment.

As regards the shares of the **distinct sub-sectors** within the tourism sector, there are but minor differences between the regions. The bulk of the jobs in tourism is supplied by restaurants and cafés, viz. 39% of wage and salaried jobs and no fewer than 70% of self-employed jobs and 81% of student jobs. The relatively large share of self-employed jobs within the restaurant and café sector can partly be explained by the fact that we do not have information on all the self-employed within the tourism sector, which accounts for their share being larger than in actual fact. This is also true for the culture, sports and recreation sub-sector, which represents 25% of self-employment in tourism, besides 17% of wage and salaried and 8% of student jobs. Passenger transport is also an important job provider in the tourism sector supplying 27% of tourism wage and salaried jobs, but only 0.5% of tourism student jobs. The remaining sub-sectors take shares of 10% or less.

As regards **gender differences** in tourism employment, there is a slight predominance of male employment with 57% and 59% men among the wage-earners and self-employed/self-employed helpers respectively. This predominance is reflected in every sub-sector of self-employed jobs, with the hotel and food and beverage industry employing 56% men and the culture, sports and recreation sub-sector topping the league with 63% to 71% male employment. With 80%, wage and salaried employment within the passenger transport sector accounts for the highest amount of male employment. Men also have a slight edge over women in the culture (53.1%), sports and recreation (53.3-5%) and the restaurant and café (50.1%) sectors. The accommodation sector and the travel agencies are the only sectors with a clear female predominance with 61% tot 71% of wage and salaried employment taken by women.

Split out by working schedule, there is a slight predominance of full-time employment (51.5%), 41.4% working part-time and 7,1% working according to a special schedule in the tourism sector. The last group is made up of seasonal and temporary workers, who are employed through temporary contracts. The high proportion of part-time employment can be explained by the preponderance of part-time employment in the restaurant and café subsector. A slight predominance of part-time jobs can also be observed in the second homes segment within the accommodation sector. In the rest of the subsectors, full-time employment is preponderant. 67% of self-employed jobs in tourism can be qualified as main-profession jobs, 27% as secondary-profession jobs while the remainder 5% are exercised by individuals who stay in employment beyond their retirement age. Main-profession jobs are predominant in the hotel and catering industry in particular.

TABLE 6: TSA TABLE 7: Overall employment of wage-earners, self-employed and working students in the tourism sector in the Flemish region, by gender and working schedule in 2012

| | WAGE EARNERS | | | | | | | SELF-EMPLOYED AND SELF-EMPLOYED HELPERS | | | | | | | WORKING STUDENTS | |
|---|--------------|-------------|-------------|-------------|-------------|----------------|---------------|---|-------------|-------------|--------------|----------------|-------------------|---------------------------------|------------------|---------------------------------|
| | % male | % female | % Full time | % Part-time | % Other | Totaal of jobs | Total of FTE | Total in jobs (local government) | % male | % female | % Main prof. | % Secun. prof. | % Post-retirement | TOTAL of jobs (excl. directors) | | TOTAL of jobs (incl. directors) |
| Accommodation | 38,7 | 61,3 | 54,3 | 39,0 | 6,7 | 11.454 | 8.149 | 164 | 55,6 | 44,4 | 77,2 | 17,9 | 4,8 | 1.535 | 2.129 | 220 |
| Hotels and motels | 42,3 | 57,7 | 60,5 | 32,6 | 6,9 | 8.140 | 6.116 | | | | | | | | | 144 |
| Other short-journey accommodation | 29,8 | 70,2 | 38,9 | 54,7 | 6,4 | 3.314 | 2.033 | | | | | | | | | 76 |
| Second homes accommodation (in seaside municipalities) | 26,8 | 73,2 | 43,2 | 56,8 | 0,0 | 1.080 | 703 | 8 | | | | | | | | 2 |
| Sale and rental of real estate | 32,7 | 67,3 | 40,8 | 59,2 | 0,0 | 49 | 34 | | | | | | | | | 0 |
| Administration and brokerage of real estate | 26,5 | 73,5 | 43,4 | 56,6 | 0,0 | 1.031 | 670 | | | | | | | | | 2 |
| Food and beverages | 50,1 | 49,9 | 30,9 | 55,0 | 14,1 | 50.258 | 26.719 | 0 | 55,6 | 44,4 | 77,2 | 17,9 | 4,8 | 23.978 | 33.255 | 2.247 |
| Restaurants, fast food bars, snackbars, fish and chips stands | 50,9 | 49,1 | 32,6 | 54,2 | 13,3 | 41.532 | 23.051 | | | | | | | | | 1.961 |
| Cafés, discotheques, dance halls etc; | 46,2 | 53,8 | 23,0 | 59,2 | 17,8 | 8.726 | 3.668 | | | | | | | | | 287 |
| Passenger transport | 79,8 | 20,2 | 73,4 | 25,7 | 0,8 | 34.591 | 30.025 | 0 | | | | | | | | 14 |
| Rail passenger transport | 91,3 | 8,7 | 79,2 | 20,8 | 0,0 | 9.964 | 9.585 | | | | | | | | | 8 |
| Road passenger transport | 83,2 | 16,8 | 72,5 | 26,9 | 0,5 | 14.055 | 11.508 | | | | | | | | | 2 |
| Other passenger transport, not registered before | 82,5 | 17,5 | 61,0 | 33,8 | 5,2 | 4.051 | 3.207 | | | | | | | | | 4 |
| Waterway passenger transport | 70,2 | 29,8 | 80,1 | 19,9 | 0,0 | 141 | 126 | | | | | | | | | 0 |
| Air passenger transport | 51,2 | 48,8 | 72,4 | 27,6 | 0,0 | 4.600 | 4.000 | | | | | | | | | 0 |
| Rental of transport equipment | 56,3 | 43,7 | 78,8 | 20,8 | 0,4 | 1.780 | 1.599 | | | | | | | | | 0 |
| Travel agencies, tour operators, booking offices etc. | 29,2 | 70,8 | 66,9 | 33,0 | 0,1 | 4.426 | 3.814 | 468 | | | | | | | | 1 |
| Culture services | 53,1 | 46,9 | 66,4 | 33,1 | 0,5 | 6.073 | 5.108 | 3.603 | 70,9 | 29,1 | 34,0 | 61,6 | 4,4 | 6.134 | 6.964 | 30 |
| Production, exploitation, management and services pertaining to creative and performing arts | 54,6 | 45,4 | 68,2 | 31,0 | 0,8 | 3.894 | 3.330 | | | | | | | | | 24 |
| Museums and monument care, botanical and zoological gardens etc. | 50,5 | 49,5 | 63,0 | 36,9 | 0,1 | 2.179 | 1.778 | | | | | | | | | 6 |
| Services for sport and recreation | 53,5 | 46,5 | 58,5 | 38,5 | 3,0 | 7.113 | 5.388 | 4.331 | 63,0 | 37,0 | 56,2 | 34,2 | 9,6 | 4.389 | 5.148 | 191 |
| Rental of sports and camping material | 73,1 | 26,9 | 70,2 | 27,9 | 1,9 | 104 | 90 | | | | | | | | | 0 |
| Management and exploitation of sports centres and other sports act. | 50,2 | 49,8 | 54,3 | 44,2 | 1,5 | 4.399 | 3.273 | | | | | | | | | 90 |
| Fairground attractions, theme parks and other amusement | 57,1 | 42,9 | 66,6 | 29,1 | 4,3 | 883 | 713 | | | | | | | | | 31 |
| Gambling and betting, recreational parks and other recreational act. | 59,1 | 40,9 | 64,3 | 29,6 | 6,1 | 1.727 | 1.313 | | | | | | | | | 69 |
| Retail sale of country specific, typical tourism goods Sports and camping articles, souvenirs and handcrafted products | 44,7 | 55,3 | 59,2 | 40,8 | 0,0 | 2.804 | 2.284 | 0 | | | | | | | | 58 |
| Non tourism typical companies: Organisation of congresses and fairs | 51,9 | 48,1 | 73,1 | 23,7 | 3,2 | 1.135 | 950 | 0 | | | | | | | | 4 |
| TOTAL TOURISM SECTORS | 56,9 | 43,1 | 51,5 | 41,4 | 7,1 | 118.934 | 83.140 | 8.574 | 59,1 | 40,9 | 67,3 | 27,3 | 5,3 | 36.036 | 47.496 | 2.768 |
| Part of tourism sectors in overall employment | 6,2 | 5,5 | | | | 5,9 | 4,8 | 4,8 | 7,9 | 9,7 | 8,8 | 9,0 | 5,3 | 8,5 | 7,8 | 13,2 |

SOURCE: Data supplied by the National Office for Social Security, the National Institute for Social Insurances for the Self-employed and processed by the Research Centre of the Government of Flanders

By setting the output or expenditure data (TSA Table 5 or 6) against the employment data, we can calculate **the number of jobs per 1 million euro of output** or expenditures. If we take the whole tourism sector into consideration, we find that a total of 7.6 direct jobs are generated per 1 million euro of output or expenditures, of which 5.4 are wage and salaried jobs, 2 are self-employed and self-employed helper jobs and 0.1 are student jobs. This is an average figure, which is clearly higher than the average figures for all branches of activity taken together (5.7 jobs in total). The average conceals the differences between the sub-sectors. If we take a closer look at the tourism sub-sectors, we find that some sub-sectors yield fewer than 6 jobs per 1 million euro of output or expenditures, viz. passenger transport and travel agencies and tour operators and guides. The accommodation or retail sectors, by contrast, generate 11.2 direct jobs per 1 million euro of turnover, which even increases to between 13 and 16 jobs per 1 million euro of output or expenditures in the restaurant and café and in the culture and recreation sectors.

We can also apply the shares of the tourism sector (from TSA-Table 6) on employment and hence, calculate **tourism employment**. For this calculation, only that part of employment which is estimated to account for the part of the output purchased by tourists, is taken into consideration. Following this reasoning, we include 33% of employment in tourism sectors of activity and 0.75% of employment in non-tourism sectors of activity. The addition of both numbers yields nearly 58,000 tourism jobs in wage or salaried employment for the Flemish region, or 2.6% of all wage or salaried jobs in the Flemish region. We obtain a total of 20,000 self-employed tourism jobs or a share of 3.3% while student jobs account for 5.1% of tourism jobs.

2. RESULTS OF THE ESTIMATION OF THE TSA FOR THE BRUSSELS-CAPITAL REGION AND THE FLEMISH REGION + BRUSSELS-CAPITAL REGION TOGETHER

After developing the TSA for the Flemish Region, we also estimated the results of a TSA for the Brussels-Capital Region. We were able to obtain some of the figures at fairly short term through our choice not to break down a large part of the information into details but to include them merely in an aggregate form instead. This is the case for TSA Tables 1 and 2, which measure tourism consumption. Moreover, we did not calculate the figures to be added in TSA Table 4, but estimated these on the basis of the Flemish TSA. As regards the supply, we were able to make use of the regional IOT for the Brussels-Capital Region, which was again made available by the Federal Planning Bureau. TSA Table 5 has thus completely been calculated and not based on estimations. The activities of companies pertaining to accommodation in second homes are the only thing aspect which has been left out.

On the basis of this TSA Table 5, the **Gross Value Added by tourism industries in the Brussels-Capital Region** could be calculated. This amounts to **EUR 3.5 billion or 5.6%** of the total Gross Value Added in the Brussels-Capital Region. When we combine these figures with the data from the TSA of the Flemish Region, we obtain the sum of the Gross Value Added by tourism industries in both regions, equalling EUR 13 billion or 5.0% of the Gross Value Added of both regions. For the Flemish Region alone, we had earlier obtained a figure of EUR 9.5 billion or 4.8%.

Further, all previously collected information was combined in TSA Table 6. This way, the **Direct Gross Value Added by Tourism in the Brussels-Capital Region** could be calculated. This amounts to **EUR 2.6 billion or 4.2%** of the total Gross Value Added in the Brussels-Capital Region. When we combine these figures with the data from the TSA of the Flemish Region, we obtain the sum of the Direct Gross Value Added by Tourism in both regions, equalling EUR 7.2 billion or 2.8% of the total Gross Value Added in both regions. For the Flemish Region alone, we had earlier obtained a figure of EUR 4.6 billion or 2.3%.

Finally, we were also able to calculate the the **Direct Gross Domestic Product in the Brussels-Capital Region**. This amounts to **EUR 2.7 billion or 3,9%** of the total Gross Domestic Product of the Brussels-Capital Region. When we combine these figures with the data from the TSA of the Flemish Region, we obtain the sum of the Direct Gross Domestic Products in both regions, equalling EUR 7.9 billion or 2.7% of the total Direct Gross Domestic Product in both regions. For the Flemish Region alone, we had earlier obtained a figure of EUR 5.2 billion or 2.3%.

TSA-Table 7 also gives an overview of **employment in the tourism sector in the Brussels Capital Region** for 2012, which totals 51,316 wage or salaried jobs, 5,917 self-employed and self-employed helper jobs and 268 student jobs. Working students in particular favour this sector with 11.45% of the student jobs supplied by the tourism sector. Wage and salaried jobs within the sector represent 8.3% while self-employed and self-employed helper jobs take a share of 6.3%. The breakdown into sub-sectors, gender and working schedule in the Brussels Capital region is to a great extent concurrent with that in the Flemish region.

3. BENCHMARKING OF ECONOMIC INDICATORS FOR TOURISM IN THE FLEMISH REGION AND THE BRUSSELS-CAPITAL REGION

In order to correctly interpret the above-mentioned figures and percentages, it is important to compare them with figures from other industries and other countries. Firstly, the Gross Value Added by tourism industries is discussed, followed by the Direct Gross Value Added by Tourism, the Direct Gross Domestic Product and the employment.

3.1. GROSS VALUE ADDED BY TOURISM INDUSTRIES

The Gross Value Added by tourism industries in the Flemish Region amounts to EUR 9.5 billion or 4.8% of the total Gross Value Added in the Flemish Region. For the Brussels-Capital Region, we obtained a figure of EUR 3.5 billion or 5.6% of the total Value Added in the Brussels-Capital Region. If we add the figures from both Regions together, we obtain at a total of EUR 13 billion of Gross Value Added by tourism industries or 5.0% of the total Gross Value Added in both regions together. We compare these percentages with the share of other industries in the Value Added in the Flemish Region and with the share of the tourism industry in the Gross Value Added in other countries.

According to the RMF, the tourism industry can be defined as a group of (parts of) different industries (see Table 5). Therefore, although **comparison with other branches of activity** is possible, we need to keep in mind that the parts of these other branches of activity may be included in the

tourism total. If we list up the share of various sectors in the total Value Added in the Flemish Region, we see that the share of many sectors scores lower than 4.8%. In the industries group, there are only three sectors with a share of more than 2% in the total Value Added, i.e. the metal industry (2.2%), the food, beverages and tobacco industry (2.5%) and the chemicals industry (2.9%). The total Value Added by the sector for the generation and distribution of electricity, gas and water (2.6%), by the information and communication sector (2.4%) or by the entire financial sector (3.5%) is also lower than that of the tourism sector. The share of public administrations, defence and social security (5.2%) in the Value Added is comparable to that of the tourism sectors while Education (6.5%) and the construction industry (6.6%) score slightly higher. Groups consisting of various larger sub-sectors, i.e. all services related to the exploitation of and trade in real estate (9%), business services (14%) and wholesale and retail trade (14%), invariably have a share in the Value Added which is much higher than that of tourism.

A comparison with other countries in which a TSA has yet been prepared, is another way of evaluating this figure. With a percentage of 4.8%, the Flemish Region has a good average and scores higher than New-Zealand, Lithuania, Romania and the Netherlands. Further, we score slightly lower than Canada, Denmark, Hungary and Australia. The Brussels-Capital Region scores higher and slightly increases the total share for both regions. Countries that have a higher share in the value added are Poland, Slovenia and the United Kingdom. The typical tourism destinations, such as Portugal, Austria, Cyprus and Spain have an even higher share in the value added. Estonia and Ireland also surprise through their remarkably high score.

Table 7: Share of the Value Added by tourism industries in the total Value Added, calculated on the basis of TSA Table 6 in various countries

| Share of tourism industries in the Gross Value Added | | | Share of tourism industries in the Gross Value Added | | |
|--|------|-------------------|--|------|-------------------------|
| | Year | Source | | Year | Source |
| New-Zealand | 2 | UNWTO, 2010 | Brussels-C. Region | 5,6 | 2012 |
| Lithuania | 2,8 | Eurostat, 2009 | Poland | 6,2 | 2002 Eurostat, 2009 |
| Finland | 3,8 | UNWTO, 2010 | Slovenia | 6,2 | 2003 UNWTO, 2010 |
| Romania | 4,3 | UNWTO, 2010 | United Kingdom | 6,2 | 2011 Office N. S., 2013 |
| The Netherlands | 4,6 | UNWTO, 2010 | Portugal | 8,1 | 2004 Eurostat, 2009 |
| Flemish Region | 4,8 | | Austria | 8,2 | 2007 Eurostat, 2009 |
| Czech Republic | 4,9 | Czech S. O., 2014 | Germany | 9,3 | 2010 BMWi, 2012 |
| Latvia | 5 | OECD, 2012 | Slovakia | 9,4 | 2009 OECD, 2012 |
| Flemish + Brussels R. | 5 | | Estonia | 17,7 | 2004 Eurostat, 2009 |
| Canada | 5,1 | UNWTO, 2010 | Ireland | 19,6 | 2000 Eurostat, 2009 |
| Denmark | 5,2 | Eurostat, 2009 | Cyprus | 20,5 | 2007 Eurostat, 2009 |
| Hungary | 5,2 | Eurostat, 2009 | Spain | 22,3 | 2004 UNWTO 2010 |
| Australia | 5,6 | Tour.R.A., 2013 | | | |

SOURCE: see table, editing SVR

3.2. DIRECT GROSS VALUE ADDED BY TOURISM

The Direct Gross Value Added by Tourism in the Flemish Region amounts to EUR 4.6 billion or 2.3% of the total Value Added in the Flemish Region. For the Brussels-Capital Region, we obtained EUR 2.5 billion or 4.2% of the total Value Added in the Brussels-Capital Region. If we add the figures from both Regions together, we obtain a total of EUR 6.9 billion of Direct Gross Value Added by Tourism or 2.8% of the sum of Value Added in both regions.

If we **compare** the Flemish and Brussels percentages **with those of other countries**, we must again be cautious, for a slight difference in method can yield huge differences in the final share in the Direct Gross Value Added by Tourism. Despite these differences, Table 8 shows that the percentages for most countries vary between 1.8% and 3%. The Flemish figure of 2.3% is close to the percentages of the Denmark, Czech Republic, Australia and Sweden. The figure for both the Flemish and the Brussels-Capital region of 2.9% is close to the shares of Lithuania, the Netherlands and the United Kingdom (2,8%) and Ireland, Switzerland (2,9%) and Latvia (3,1%). The share of the Brussels-Capital Region is 4,2%. Countries with higher shares are typical tourism destinations such as Cyprus, Mexico, Spain, Austria, New-Zealand and Portugal.

Table 8: Share of tourism in the Gross Value Added, calculated on the basis of TSA Table 6 in various countries.

| Share of tourism in the Gross Value Added | | | | Share of tourism in the Gross Value Added | | | |
|---|------------|-------------------------|---------------------------|---|---------------------|--|--|
| | Year | Source | | Year | Source | | |
| Finland | 1.8 | 2001 Eurostat, 2009 | Switzerland | 2.9 | 2005 UNWTO, 2010 | | |
| Poland | 1.8 | 2002 Eurostat, 2009 | Ireland | 2.9 | 2000 Eurostat, 2009 | | |
| Canada | 2.2 | 2002 UNWTO, 2010 | Latvia | 3.1 | 2009 OECD, 2012 | | |
| Romania | 2.2 | 2001 UNWTO, 2010 | Slovenia | 3.9 | 2003 UNWTO 2010 | | |
| Slovakia | 2.3 | 2009 OECD, 2012 | Estonia | 4 | 2004 Eurostat, 2009 | | |
| Flemish Region | 2.3 | 2012 | Brussels-C. Region | 4.2 | 2012 | | |
| Denmark | 2.5 | 2006 Eurostat, 2009 | Germany | 4.4 | 2010 BMWi, 2012 | | |
| Czech Republic | 2.6 | 2011 Czech S. O., 2014 | Portugal | 4.6 | 2004 Eurostat, 2009 | | |
| Australia | 2.7 | 2012 Tour.R.A., 2013 | New-Zealand | 5 | 2007 UNWTO, 2010 | | |
| Sweden | 2.7 | 2007 UNWTO, 2010 | Austria | 5.9 | 2010 LAIMER, 2012 | | |
| Lithuania | 2.8 | 2010 OECD, 2012 | Spain | 6.5 | 2004 UNWTO 2010 | | |
| The Netherlands | 2.8 | 2007 UNWTO, 2010 | Mexico | 8 | 2009 OECD, 2012 | | |
| United Kingdom | 2.8 | 2011 Office N. S., 2013 | Cyprus | 8.7 | 2007 Eurostat, 2009 | | |
| Flemish + Brussels R | 2.8 | 2012 | | | | | |

SOURCE: see table, editing SVR

3.2. DIRECT GROSS DOMESTIC PRODUCT BY TOURISM

The Direct Gross Domestic Product by Tourism in the Flemish Region amounts to EUR 5.2 billion or 2.3% of the total Domestic Product in the Flemish Region. For the Brussels-Capital Region, we obtained EUR 2.7 billion or 3.9% of the total Value Added in the Brussels-Capital Region. If we add the figures from both Regions together, we obtain a total of EUR 7.9 billion of Direct Gross Value Added by Tourism or 2.7% of the sum of the Domestic Product in both regions.

If we **compare** the Flemish and Brussels percentages **with those of other countries**, we must again be cautious, since we use the methodology of TSA-Table 6 as basis and a slight difference in method can yield huge differences in the final share. On top of that a lot of information on shares of Direct Gross Domestic Product by tourism is provided by the WTTC (World Travel and tourism Council), and is not based on TSA-calculations. Those figures are estimations. Despite these differences, we can see that the shares of the Flemish Region (2.3%) and of both regions together (2,7%) are within a very large group of countries, of which the share of gross domestic product by tourism is between 2% and 3%. There are a lot of European countries that have a lower share of gross domestic product by tourism than the Flemish region: Romania, Lithuania, Denmark, Luxemburg, Serbia and Poland. Finland, Japan and Ukraine have the same share than the Flemish Region. Further, the share of the

Czech Republic, Switzerland, Latvia, Australia, The United States, Ireland, the Netherlands and South-Africa are close the share of both the Flemish and Brussels Capital Region together. Countries with a share higher than 3%, but lower than the 3.9% of the Brussels Capital Region are Sweden, Germany, Norway, the United Kingdom, Bulgaria, France and Italy. Although tourism is expected to be important in those last countries, we find much higher shares in typical tourism countries such as Spain, Portugal, Egypt, Greece, Cyprus, Croatia and Malta.

Table 9: Share of tourism in the Gross Domestic Product in various countries.

| Share of tourism in the Gross Domestic Product | | | | Share of tourism in the Gross Domestic Product | | | |
|---|------|--------|------------|---|--------|------|------------|
| | Year | Source | | Year | Source | | |
| Romania | 1,5 | 2010 | OECD, 2014 | Sweden | 3 | 212 | OECD, 2014 |
| Lithuania | 1,8 | 2013 | WTTC, 2014 | Germany | 3,2 | 2000 | OECD, 2010 |
| Denmark | 1,9 | 2006 | OECD, 2010 | Norway | 3,3 | 2009 | OECD, 2014 |
| Luxembourg | 1,9 | 2013 | WTTC, 2014 | United Kingdom | 3,5 | 2013 | WTTC, 2014 |
| Serbia | 1,9 | 2013 | WTTC, 2014 | Bulgaria | 3,7 | 2013 | WTTC, 2014 |
| Canada | 2,1 | 2012 | OECD, 2014 | France | 3,7 | 2008 | OECD, 2010 |
| Poland | 2,1 | 2005 | OECD, 2010 | Italy | 3,7 | 2012 | OECD, 2014 |
| Belgium | 2,2 | 2013 | WTTC, 2014 | Brussels Capital Region | 3,9 | | 2012 |
| Finland | 2,3 | 2007 | OECD, 2010 | Turkey | 4,5 | 2013 | WTTC, 2014 |
| Japan | 2,3 | 2012 | OECD, 2014 | Estonia | 4,7 | 2009 | OECD, 2014 |
| Ukraine | 2,3 | 2013 | WTTC, 2014 | Slovenia | 4,9 | 2009 | OECD, 2014 |
| Flemish Region | 2,3 | 2012 | | Spain | 5,7 | 2013 | WTTC, 2014 |
| Slovakia | 2,6 | 2010 | OECD, 2014 | Austria | 5,8 | 2012 | OECD, 2014 |
| Czech Republic | 2,7 | 2011 | OECD, 2014 | Hungary | 5,9 | 2008 | OECD, 2014 |
| switzerland | 2,7 | 2011 | OECD, 2014 | Iceland | 5,9 | 2009 | OECD, 2014 |
| Flemish + Brussels Region | 2,7 | 2012 | | Egypt | 6,1 | 2011 | OECD, 2014 |
| Australia | 2,8 | 2012 | OECD, 2014 | Greece | 6,4 | 2013 | WTTC, 2014 |
| Latvia | 2,8 | 2013 | WTTC, 2014 | Cyprus | 6,7 | 2013 | WTTC, 2014 |
| United States of America | 2,8 | 2012 | OECD, 2014 | Portugal | 9,2 | 2010 | OECD, 2014 |
| Ireland | 2,9 | 2000 | OECD, 2010 | Croatia | 12,1 | 2013 | WTTC, 2014 |
| The Netherlands | 2,9 | 2010 | OECD, 2014 | Malta | 13,5 | 2013 | WTTC, 2014 |
| South-Africa | 2,9 | 2011 | OECD, 2014 | | | | |

SOURCE: see table, editing SVR

3.3 EMPLOYMENT IN THE TOURISM SECTOR

Although it is best to discuss the distinct forms of employment separately, we will start by adding them together⁵ in order to compare the result of this calculation with similar calculations abroad. If we add up all forms of employment, we obtain a total of 235,000 jobs for the Flemish region and the Brussels Capital Region taken together, which equals 6.6% of the aggregate number of jobs in the Flemish and Brussels Capital region. The Brussels Capital region accounts for a higher share (8.1%) than the Flemish region (6.3%).

If the share which employment in the tourism sector takes in overall employment in the Flemish region and in the Flemish region and Brussels Capital Region taken together, is **compared with that in other countries**, we again find that we score better than average. With a share of 6.3% for the

⁵ We actually shouldn't add these figures together, since these are distinct forms of employment. Still, this is international common practice in which we should indulge if we are to compare our figures with those from other countries. We have moreover made an attempt at making the figures as uniform as possible so that all figures regarding jobs can be considered as snapshots, i.e. the values of employment in the distinct forms of employment on a specific day of the year.

Flemish region and 6.6% for the Flemish region and the Brussels Capital Region taken together, we clearly score better than a lot European countries (Denmark, the Czech Republic, the Netherlands, Switzerland, Croatia and Poland), but also higher than countries like Canada, Japan, South-Africa of Australia. Further, countries with a share that is a bit lower than the Flemish share of employment are Iceland, Bulgaria, Finland, the United Kingdom, Slovakia, Italy and Norway. With the tourism sector representing 8.1% of overall employment, the Brussels Capital Region, which is but a city region, scores even higher than France, Greece, Austria Germany and Portugal. Shares higher than In the typical tourism destination countries such and Spain, Egypt and Malta tourism has a higher share in employment.

TABLE 10: The share which employment in the tourism sector takes in overall employment in the distinct European countries which filled in TSA-table 7.

| Share of employment in the tourism sector in overall employment | | | | Share of employment in the tourism sector in overall employment | | | |
|---|------|--------|-----------------|---|--------|------|----------------|
| | Year | Source | | Year | Source | | |
| Denmark | 2,3 | 2011 | OECD, 2014 | Italy | 5,6 | 2012 | OECD, 2014 |
| Brazil | 2,9 | 2010 | OECD, 2012 | USA | 6,2 | 2006 | UNWTO, 2010 |
| Estonia | 3,1 | 2011 | OECD, 2014 | Norway | 6,3 | 2009 | OECD, 2012 |
| Serbia | 3,2 | 2010 | OECD, 2012 | Flemish Region | 6,3 | 2012 | |
| Japan | 3,3 | 2011 | OECD, 2014 | Flemish + BrusselsC Region | 6,6 | 2012 | |
| Canada | 3,4 | 2012 | OECD, 2014 | France | 7,1 | 2012 | OECD, 2014 |
| Czech Republic | 3,4 | 2006 | Eurostat, 2009 | Greece | 7,1 | 2012 | OECD, 2014 |
| The Netherlands | 3,7 | 2010 | OECD, 2012 | Austria | 7,5 | 2012 | OECD, 2014 |
| Switzerland | 4 | 2011 | OECD, 2014 | Germany | 7,6 | 2010 | BMWi, 2012 |
| Sweden | 4,1 | 2007 | UNWTO, 2010 | Portugal | 8 | 2008 | OECD, 2012 |
| Chili | 4,2 | 2012 | OECD, 2014 | Brussels Capital Region | 8,1 | 2012 | |
| Lithuania | 4,4 | 2010 | OECD, 2012 | Roemenia | 8,3 | 2001 | UNWTO, 2010 |
| South-Africa | 4,5 | 2011 | OECD, 2014 | Hungary | 8,4 | 2008 | OECD, 2012 |
| Australia | 4,7 | 2012 | Tour.R.A., 2013 | Latvia | 9 | 2004 | Eurostat, 2009 |
| Croatia | 4,8 | 2012 | OECD, 2014 | New-Zealand | 9,3 | 2010 | OECD, 2012 |
| Poland | 4,8 | 2002 | UNWTO, 2010 | Slovenia | 9,9 | 2003 | Eurostat, 2009 |
| Iceland | 5,2 | 2009 | OECD, 2012 | Argentina | 10,2 | 2012 | OECD, 2014 |
| Bulgaria | 5,3 | 2011 | OECD, 2014 | Spain | 11,5 | 2010 | OECD, 2012 |
| Finland | 5,4 | 2001 | Eurostat, 2009 | Egypt | 13 | 2011 | OECD, 2014 |
| United Kingdom | 5,4 | 2011 | OECD, 2014 | Ireland | 15 | 2011 | OECD, 2014 |
| Slovakia | 5,5 | 2009 | OECD, 2012 | Malta | 17 | 2010 | OECD, 2014 |

SOURCE: see table, editing SVR

REFERENCES

- BMWi, Federal Ministry of Economics and Technology (2012). The economic impact of Germany's Tourism Industry. Berlin: Federal Ministry of Economics and Technology
- CBS, Centraal Bureau voor de Statistiek (2009). *Toerisme in macro-economisch perspectief 2001-2006. Satellietrekening Toerisme*. Voorburg.
- Czech statistical office (2014). *Tourism Satellite Account Tables*. Czech statistical office. Geraadpleegd via: http://www.czso.cz/eng/redakce.nsf/i/tourism_satellite_account_tables
- De Maesschalck, P. & Weekers, K. (2014). De economische betekenis van toerisme in Vlaanderen. TSA 2012 voor het Vlaamse Gewest (incl. schatting voor het Brusselse Hoofdstedelijke Gewest, to be published.
- Eurostat, Statistical Office of the European Communities (2000). *Implementation Manual on Tourism Satellite Accounts*. Luxembourg.
- Eurostat, Methodologies and working papers (2009). *Tourism Satellite Accounts in the European Union, Volume 1-4*. Luxembourg.
- Laimer, P. (2012). *TSA Austria*. UNWTO Workshop – SCBP, 7-9 november 2012, Azerbaijan. Geraadpleegd via http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/pdf/austria_item8.1_eng.pdf
- NBTC (2010). *Onderzoek Inkomend Toerisme 2009: de buitenlandse toerist uitgelicht*. Leidschendam: Nationaal Bureau voor Toerisme en congressen.
- OECD, Organisation for Economic Cooperation and Development (1991). *Manual on Tourism Economic Accounts*.
- OECD, Organisation for Economic Cooperation and Development (2000). *Measuring the Role of Tourism in OECD Economies: the OECD Manual on Tourism Satellite Accounts and Employment*.
- OECD, Organisation for Economic Cooperation and Development (2010). *OECD Tourism Trends and Policies 2010*, OECD Publishing.
- OECD, Organisation for Economic Cooperation and Development (2012). *OECD Tourism Trends and Policies 2012*, OECD Publishing.
- OECD, Organisation for Economic Cooperation and Development (2014). *OECD Tourism Trends and Policies 2014*, OECD Publishing.
- Office for National Statistics (2010). *Travelpac 2010*. Office for National Statistics. Geraadpleegd via: <http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcM%3A77-252782>

- Office for National Statistics (2012). *Travelpac 2012*. Office for National Statistics. Geraadpleegd via: <http://www.ons.gov.uk/ons/rel/ott/travelpac/2012/index.html>
- Office for National Statistics (2013). *Tourism Satellite Account, 2010-2011: The Economic importance of Tourism..* Office for National Statistics. Geraadpleegd via: <http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tc%3A77-318475>
- Steunpunt Toerisme en Recreatie (2011). *Pilootonderzoek naar daguitstappen van de Belg : Finale rapportage 01/07/2010 - 30/06/2011*. Brussel: Toerisme Vlaanderen.
- Steunpunt Werk en Sociale Economie, *Vlaamse arbeidsrekening. Raming van het totaal aantal jobs. Nulmeting 2006*. Methodologisch rapport 5, p17-18
- Toerisme Vlaanderen (2006). *Reizen met kennis van zaken. Mice-onderzoek in Vlaanderen en Brussel : Toerismecahiers*. Brussel: Toerisme Vlaanderen.
- Toerisme Vlaanderen (2007). *De Vlaanderen-vakantieganger anno 2005: toerismecahiers*. Brussel: Toerisme Vlaanderen.
- Toerisme Vlaanderen (2012). *De recreatieve verblijfstoerist in de Vlaamse Regio's anno 2011- profiel, gedrag, motivatie en bestedingen*. Heverlee: Significant GfK.
- Toerisme Vlaanderen (2012). *De vakantieganger in commercieel logies aan de Vlaamse Kust 2011. Deel I: Globaal rapport*. Brugge: Westtoer.
- Toerisme Vlaanderen (2012). *Kunststedenonderzoek 2011*. Brugge: WES.
- Toerisme Vlaanderen (2013). *Toerisme in cijfers 2012*. Brussel: Toerisme Vlaanderen.
- Tourism Research Australia (2013). *State Tourism Satellite Accounts 2011-2012*. Canberra: Tourism Research Australia. Geraadpleegd via: http://www.tra.gov.au/documents/Economic-Industry/State_TSA_2011-12_FINAL.pdf
- UNSD, United Nations Statistics Division & WTO, World Tourism Organization (2008). *2008 International Recommendations for Tourism Statistics (IRTS 2008)*.
- UNSD, United Nations Statistics Division, WTO, World Tourism Organization, OECD, Organisation for Economic Cooperation and Development & Eurostat, Statistical Office of the European Communities (2001). *Tourism Satellite Account (TSA): Recommended Methodological Framework*.
- UNSD, United Nations Statistics Division, WTO, World Tourism Organization, OECD, Organisation for Economic Cooperation and Development & Eurostat, Statistical Office of the European Communities (2008). *2008 Tourism Satellite Account (TSA): Recommended Methodological Framework*.
- UNWTO, United Nations World Tourism Organization (2010). *TSA data around the world: worldwide summary*. Madrid: UNWTO.

- Weekers, K. (2012). De economische betekenis van toerisme in Vlaanderen: eerste proeve van toepassing van methode van satellietrekeningen, in: *SVR - Methoden en technieken*, 2012 (2). Brussel: Studiedienst van de Vlaamse Regering.
- Weekers, K. (2013a). De economische betekenis van toerisme in Vlaanderen. TSA 2010 voor het Vlaamse Gewest (incl. schatting voor het Brusselse Hoofdstedelijke Gewest), in: *SVR - Methoden en technieken*, 2013 (1). Brussel: Studiedienst van de Vlaamse Regering.
- Weekers K. (2013b). De economische betekenis van toerisme in Vlaanderen. Tewerkstelling in de sector Toerisme in het Vlaamse en Brusselse Hoofdstedelijke Gewest in 2008 en 2010, in: *SVR - Methoden en technieken*, 2013 (2). Brussel: Studiedienst van de Vlaamse Regering.
- WES (2013). *Reisgedrag van de Belgen in 2012. Commerciële reizen in Vlaanderen, naar macroproduct*. Brugge: WES.
- WES (2013). *Reisgedrag van de Belgen in 2012. Eindrapport*. Brugge: WES.
- WES (2013). *Reisgedrag van de Belgen in 2012. Tabellenboek*. Brugge: WES.
- WES (2014). *Datasets MICE-onderzoek 2013 deelnemers Belgen en Buitenlanders*.
- Westtoer (2008). *Onderzoek naar gebruikers van vaste standplaatsen op kustcampings 2008*. Brugge: Westtoer.
- Westtoer (2010). *Dagtoerisme aan de kust 2009, een stabiele pijler van het kusttoerisme*. Brugge: Westtoer.
- Westtoer (2013). *Tendrapport KiTS Kust 2007-2012*. Brugge: Westtoer.
- Westtoer (2012). *Onderzoek naar het tweede verblijfsgebruik van vakantiewoningen 2011. Presentatie persconferentie 21/09/2012*. Brugge: Westtoer.
- WTTC, World Travel and Tourism Council/Oxford Economics (2012). *Methodology for producing the 2012 WTTC/ Oxford Economics Travel and Tourism Economic impact research*. Oxford: Oxford Economics.
- WTO, World Tourism Organization (1983). *Determination of the importance of tourism as an economic activity within the framework of the national accounting system*, report submitted to the General Assembly of the World Tourism Organization, New Delhi, 3 to 14 October 1983.
- WTO, World Tourism Organization (1999). *Tourism satellite account (TSA): the conceptual framework*, document submitted to the Enzo Paci World Conference on the Measurement of the Economic Impact of Tourism, Nice, 15 to 18 June 1999.

ATTACH: INDICATORS IN THE TSA 2008, TSA 2010 AND TSA 2012

1. Tourism expenditures in TSA-Tables 1, 2 en 4

| | 2008 (EUR billion and based on prices 2012) | 2010 (EUR billion and based on prices 2012) | 2012 (EUR billion and based on prices 2012) | Most important explanation for differences between TSA 2008 en TSA 2010 (figures in EUR billion) | Most important explanation for differences between TSA 2010 en TSA 2012 (figures in EUR billion) |
|--|--|--|--|--|---|
| TSA-Tabel 1: Inbound tourism | | | | | |
| FLEM. R. | 3,28 | 3,00 | 3,28 | -125 Wallon and Brussels overnight visitors -75 foreign same-day visitors | + 260 overnight business +60 same-day business |
| TSA-Tabel 2: Domestic tourism | | | | | |
| FLEM. R. | 5,69 | 6,39 | 7,06 | +600 new method travel agencies +120 Flemish overnight visitors | +630 Flemish same-day business visitors |
| TSA-Tabel 4: Internal tourism consumption | | | | | |
| FLEM. R. | 12,36 | 13,14 | 12,73 | +400 Table 1 en 2 +170 second-home residents +160 durable goods | +260 overnight business +60 second-home residents +65 subsidies transport -550 same-day business -180 durable goods |
| BRUS.-C. R. | 2,96 | 3,29 | 3,34 | + 180 same-day visitors + 100 overnight visitors | -340 same-day business +100 Belgian overnight business visitors +300 Foreign overnight business visitors |

2. Economic Indicators in TSA-Tables 5 en 6

| | 2008 | | 2010 | | 2012 | | Most important explanation for differences between TSA 2008 en TSA 2010 (figures in percentage points) | Most important explanation for differences between TSA 2008 en TSA 2010 (figures in percentage points) |
|---|---|-------------|---|-------------|--|-------------|--|---|
| | Absoluut (EUR billion and based on prices 2012) | % | Absoluut (EUR billion and based on prices 2012) | % | EUR billion and based on prices 2012) | % | | |
| TSA-Tabel 5: GVATI (Gross Value Added of the Tourism Industries) | | | | | | | | |
| F.R. | 10,2 | 5,2% | 9,5 | 4,8% | 9,5 | 4,8% | -0,4 new method second homes only seaside (-0,5) and adding new industries (+0,1) | / |
| B-C.R. | 3,5 | 5,5% | 3,5 | 5,6% | 3,5 | 5,6% | +0,1 adding new industries | / |
| F+ B-C. R. | 13,7 | 5,3% | 13 | 5,0% | 13 | 5,0% | -0,3 | / |

TSA-Table 6: TDGVA (Tourism Direct Gross Value Added)

| | | | | | | | | |
|-------------------|-----|-------------|-----|-------------|-----|-------------|---|---|
| F.R. | 4,5 | 2,3% | 4,6 | 2,4% | 4,6 | 2,3% | +0,1 new method in Table 5 and higher consumption in Table 4 | -0,04 (2,36 to 2,32) changing consumption |
| B-C.R. | 1,5 | 2,4% | 2,7 | 4,3% | 2,6 | 4,2% | +1,9 adding tourismratio 100% for organisation of conventions | -0,12 (4,27 to 4,15) changing consumption |
| F+ B-C. R. | 6 | 2,3% | 7,3 | 2,8% | 7,2 | 2,8% | +0,5 | -0,06 |

TSA-Table 6: TDGDP (Tourism Direct Gross Domestic Product)

| | | | | | | | | |
|-------------------|-----|-------------|-----|-------------|-----|-------------|---|---|
| F.R. | 4,7 | 2,3% | 4,9 | 2,4% | 5,2 | 2,3% | +0,07 new method in Table 5 and higher consumption in Table 4 | -0,03 (2,37 to 2,34) changing consumption |
| B-C.R. | 1,5 | 2,3% | 2,7 | 4% | 2,7 | 3,9% | +1,7 adding tourismratio 100% for organisation of conventions | -0,11 (3,98 to 3,87) changing consumption |
| F+ B-C. R. | 6,2 | 2,3% | 7,6 | 2,8% | 7,9 | 2,7% | +0,5 | -0,05 |

3. Indicators concerning employment in TSA-Table 7: number of jobs in the tourism industries

| | 2008 | | 2010 | | 2012 | | Differences between TSA 2008 en TSA 2010 (figures in percentage points) | Differences between TSA 2010 en TSA 2012 (figures in percentage points) |
|------------------------------|-----------------------|--------------|-----------------------|--------------|-----------------------|--------------|--|--|
| | # (number of jobs) | % | # (number of jobs) | % | # (number of jobs) | % | | |
| FLEM. R. | | | | | | | | |
| Wage earners | 126.000 | 5,8% | 131.000 | 6,0% | 128.000 | 5,8% | +0,2 | -0,2 |
| Self-employed | 30.000 | 5,2% | 45.000 | 7,6% | 47.496 | 7,8% | +2,4 | +0,2 |
| Students | 1.776 | 10,8% | 2.246 | 13,5% | 2.768 | 13,2% | +2,7 | -0,3 |
| Total | | 5,7% | | 6,4% | | 6,3% | +0,7 | -0,1 |
| BRUS-CAP R. | | | | | | | | |
| Wage earners | 54.000 | 8,7% | 51.000 | 8,2% | 51.300 | 8,3% | -0,5 | +0,1 |
| Self-employed | 2.900 | 3,4% | 5.700 | 7,4% | 5.917* | 6,3% | +4,0 | -1,1 |
| Students | 225 | 11,8% | 222 | 11,6% | 268 | 11,5% | -0,2 | -0,1 |
| Total | | 8,1% | | 8,1% | | 8,1% | = | = |
| FLEM. R.+ BRUS-CAP R. | | | | | | | | |
| Wage earners | 180.000 | 6,4% | 182.000 | 6,5% | 179.000 | 6,3% | +0,1 | -0,2 |
| Self-employed | 33.000 | 5,0% | 51.000 | 7,5% | 53.413 | 7,6% | +2,5 | +0,1 |
| Students | 2.000 | 10,9% | 2.500 | 13,3% | 3.036 | 13,1% | +2,4 | -0,2 |
| Total | | 6,2% | | 6,7% | | 6,6% | +0,5 | -0,1 |