

Methodological approaches for measuring the economic impact of the tourist attractions & museums sector in Wallonia



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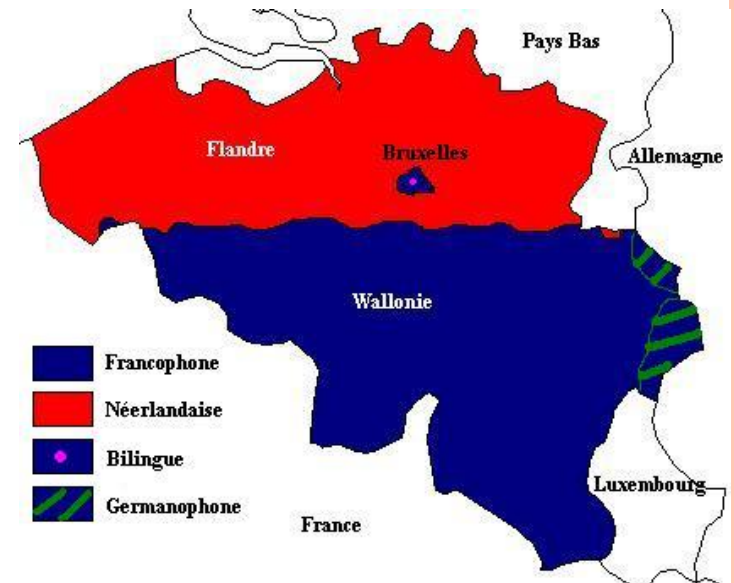
Tourism in Wallonia represents:

- 110.000 beds
- 11 million overnight stays
- 11 million visitors in tourist attractions/museums

➔ 6,12% GDP & 50.000 jobs

Different sources:

- TSA
- National Statistical Institute
- Walloon statistical Institute
- Directly by the operators



2 joint studies on tourist attractions & museums sector

○ A specific « museums » strategy:

- **Study 2012:** quantitative & qualitative approaches used in the museum sector in the Wallonia-Brussels Federation
 - 350 museums questioned
 - 12 topics
- **Study 2016:** multiple subsidies in museums
 - Heritage-Culture-Tourism Cooperation Agreement
 - 90 museums questioned
 - data on economy & employment asked



2 joint studies on tourist attractions & museums sector

○ A « tourist attractions & museums » working group:

- Study 2012: Evolution of visitor numbers in tourist attractions/museums
 - 222 sites analyzed
 - years: 2004-2012
 - Damning conclusions
- Study 2014: Practices in tourist attractions/museums
 - 28 sites questioned
 - 5 topics analyzed
 - toolkit on good management created



2 joint studies on tourist attractions & museums sector

○ A « tourist attractions & museums » working group:

- Study 2015-2016: Economic impact analysis in tourist attractions/museums sector
 - 260 sites questioned
 - 3 objectives
 - ongoing



The economic impact analysis

□ 3 objectives:

- to collect 2014-2015 financial data, on a face-to-face basis, from the attractions which are included in the WTO analysis;
- to plan for an automated data collection and processing system;
- to process, interpret and communicate the results of the analysis.

□ 1 person engaged to collect data directly in the attractions/museums (220 sites to visit)



The economic impact analysis

□ Collect on: Data from the financial count published at National Bank

Revenue	Expenses
1. Sales revenue	1. Purchases
Visits (entrance fees, etc.), HoReCa (restaurants, cafés, self-service cafeterias, etc.), shop, rental income, other	1.1. Purchases associated with visits (fuel, etc.) , with HoReCa, shops, other
2. Subsidies	2. Operating expenses
2.1. Investment subsidies	2.1. Depreciation
2.2. Employment subsidies	2.2. Staffing costs
2.3. Promotional subsidies (CGT, AWEX, etc.)	2.3. Marketing, promotion, etc.
2.4. Operating subsidies (FWB, CGT, Province, Commune, etc.)	2.4. Operating expenses (power, etc.)
2.5. Other subsidies (one-off projects, etc.)	2.5. Others
3. Other operating revenue	3. Other operating expenses (land-use fees, etc.)
3.1. Sponsorship	
3.2. Others (sale of equipment, etc.)	
Operating results	
4. Financial revenue	4. Financial expenses
5. Extraordinary revenue	5. Extraordinary expenses
Profit before tax	



The economic impact analysis

□ Limitations:

- durability of the method;
- annual variations;
- the comprehensiveness and reliability of expenses;
- the impact of special events;
- the huge influence of several attractions;
- the participation of all the attractions/museums



Conclusions

- First time studies conducted in Wallonia
- Useful for political decision makers and tourism organisations
- Results added to similar studies (accommodation) to provide an overall picture of tourism economy
- Results provide information for the TSA in particular



THANKS FOR YOUR ATTENTION

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