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METHODS OF THE REGIONAL ECONOMIC IMPACT ASSESSMENT OF TOURISM: ACHIEVEMENTS AND CHALLENGES. THE EXAMPLE OF POLAND

Summary

The article aims to (1) discuss Poland's experience in developing tools of the economic impact assessment of tourism, at both the national and regional levels, (2) indicate the achievements and (3) draw attention to further challenges resulting from the occurrence of new competition developments in the tourism market, particularly in the small and medium-sized enterprise sector. A comprehensive way to estimate the contribution of tourism to the economy is the so-called tourism satellite account (TSA) and its regional equivalent, i.e. the regional account. The paper also raises the issue of a reliable estimation of such cash flows as – less leakage – actually remain in the region and the problem of estimating the impact of new and dynamically growing business models, e.g. Airbnb, Uber, Homeaway, Roomorama, Onefinestay, Couchsurfing, etc.

Key words: tourism impact, tourism satellite account, sharing economy, third sector in tourism.

JEL codes: L83

Introduction

It is difficult to assess the economic effects of tourist traffic, to determine the output of goods and services produced, provided and developed in order to satisfy the needs of visitors as tourism is not a homogeneous part of the national economy, therefore it evades standard economic statistics. In both Polish and foreign statistics the goods and services purchased by visitors are recognised as components of the production of various sections of economic activities, which complicates the assessment of the contribution of tourism to the economy, both at the national and regional levels (Dziedzic, Kachniewska, Skalska 2015). The information value and the methodological bases for the application of measures such as the contribution of tourism expenditure to the balance of payments

or to GDP are limited and unsatisfactory, therefore various efforts are being made to find tools allowing to fully capture the importance of tourism to the economy. A comprehensive way of estimating the contribution of tourism to the economy is the preparation of the so-called tourism satellite account (TSA). It aims to obtain information on the economic activity relating to tourism and to ensure its comparability with the results of other economic sectors. It allows to calculate a variety of economic aggregates for the country as a whole (production, consumption, employment, tourism value added, tourism GDP), being a good and ever-more valued tool for describing the tourism economy. However, the TSA results for the country are hardly satisfactory for the regional or local authorities which increasingly appreciate the importance of tourism to their regional economies and, since they adopt active economic development policies, also expect reliable tools for the measurement of the effects of their actions. An additional challenge is to reliably estimate such cash flows as – less leakage – actually remain in the region.

The article aims to discuss Poland's experience in developing tools of the economic impact assessment of tourism, at both the national and regional levels, indicate the achievements and draw attention to further challenges resulting from the occurrence of new competition developments in the tourism market, particularly in the small and medium-sized enterprise sector.

Tourism expenditure survey

One of the most often used and the simplest methods of measuring the contribution of tourism to the national (regional) economy and to its specific sectors is to estimate the value and structure of expenditure by visitors and to identify the profile of those surveyed. It is understandable and justified for the regional authorities to seek such knowledge: regions make decisions concerning economic development orientations, regions implement investment policies and regions are directly affected by all the consequences of changes in the tourism market; therefore they are in need of tools allowing them to monitor the above-mentioned phenomena. Learning the level and structure of expenditure by visitors is also necessary to economic entities operating in the region for marketing purposes, mostly in order to establish the visitors' profile and to analyse the relationships between the propensity of consumers to spend money on various tourism-related items and their socio-demographic and psychographic characteristics. As a consequence, enterprises engaged in tourism activities wish to identify and choose their priority and most advantageous market segments. Therefore, the knowledge of the levels and patterns of spending by tourists is necessary to both the local authorities forced to continuously evaluate the importance of tourism to the region and to economic entities active in tourism in their choosing the markets to operate in. Analyses

of expenditure by consumers of tourism services must be combined with tourist traffic surveys and carried out simultaneously since the starting point in the estimation of tourism demand in the region is knowing the level and structure of such traffic; data on the number of visitors are the indispensable input to estimate the flows of 'new cash' into the regional economy.

The economic effects of visitor spending include not only the emergence of new demand in the region, but also the inflow of new capital (and/or retaining local capital in the region). Both phenomena facilitate job creation, which in consequence should boost incomes. In turn, increased personal income and greater turnover of business entities mean higher receipts from taxes for local budgets. According to previous research on the subject, tourism stimulates economic growth, creates additional economic activity, activates other sectors (e.g. construction, industry, agriculture, services), influences the real estate market, inspires or frequently even forces the development of infrastructure.

When analysing the regional economic impact of tourism, it is worth remembering both tourists and same-day visitors (trippers). In economic and marketing terms, it is highly desirable to break down the flows of travellers into the two groups due to their different effects on the local economy, different types of infrastructure necessary to provide services to such persons and different marketing activities involved.

An important problem in the estimation of the impact of tourism expenditure on the regional economy, and difficult to solve at that, is to take account of the receipts from tourism events/package tours. Whereas it is possible to examine tourist traffic and consumer spending by visitors directly in the area concerned and such an analysis allows a rather easy estimation of the share of regional revenue such spending accounts for, the issue of expenditure made in the tourists' usual environment and then transferred to local businesses in respect of payment for their services remains to be solved. Such expenditure is usually hidden in package tours purchased by visitors which necessarily need an estimated disaggregation. It is an uneasy exercise, for two reasons: (1) visitors are usually unable to provide information on the shares of specific types of services (e.g. accommodation, transport, food and beverage serving, entertainment, etc.) in the package tour price, (2) event organisers and tour operators are not obliged to submit such data. Package tours are often composed of various complementary services and no tourist buying such a package (a tour or a leisure stay of several days) in his or her usual environment has any knowledge on the breakdown of the price paid into particular types of costs: which part is allocated to the purchase of services in the region of origin (e.g. the operators' margins or transport) and what proportion is spent on the services provided at the destination: accommodation, food and beverage serving, entertainment, the intermediaries' margins, etc. The starting point of the procedure for an estimated disaggregation of package tour prices should

be the identification of the products/services included in the package tour concerned and then the establishment (estimation) of the level of expenditure concerning such components. This can be done in a variety of ways, e.g. on the basis of prices of similar services sold outside such tours, following a survey of tour operators on the cost structure of and the margins on the package tours offered, or on the basis of a survey of visitors who may be asked to indicate the types of services included in their package tours and to estimate the costs involved.

Tourism satellite account

The establishment of the level of spending by tourists in the region is not satisfactory from the point of view of estimating the economic impact of tourism. The information value of such data is limited, therefore other, more comprehensive methods must be sought. One of them is the so-called tourism satellite account (TSA) whose methodology was developed by the UNWTO, the OECD and Eurostat and it is recommended by the European Commission to be applied in the Member States (TSA 2010). Its objective is to separate the part of production in the national economy corresponding to the demand attributable to tourist traffic, to fully assess the economic activity relating to tourism and to ensure its comparability with the results of other economic sectors. For all this to be possible, it is necessary to incorporate the TSA methodology into the system of national accounts, providing for the possibility of functional analysis of phenomena such as tourism. The TSA methodology enables a comprehensive analysis of the phenomenon of tourism, but it assumes the application of concepts identical with those used in the national accounts and the consistency of the statistics used with data from other studies (e.g. the balance of payments) (Dziedzic et al. 2015). The introduction of the TSA in the countries concerned entailed adjustments with regard to tourism statistics, e.g. the standardisation of tourism-related concepts (e.g.: visitor, tourist, usual environment, resident, non-resident, tourism expenditure).

The calculation of a full version of the TSA may provide both important macroeconomic aggregates concerning tourism (such as the level of tourism consumption, total tourism production, value added, employment, the level of investment or the contribution of tourism to GDP) and detailed data on the structure of tourism consumption facilitating a broader description of the activities of visitors as consumers. Furthermore, the TSA allows to demonstrate how tourism demand is satisfied by domestic supply and imports or to prepare detailed accounts of the production of tourism industries, including data on employment; it also shows the links of tourism with other economic activities and capital formation. It is consistent with the supply and use tables in the national accounts which may be compiled at current or constant prices.

A significant advantage of the TSA is the possibility to link economic data with factual data on tourism such as the number of trips (or visits), the length of stay, the purpose of the trip, the means of transport, etc., which helps to better describe economic variables and increases the usefulness of the TSA. Another important merit is the possibility to carry out detailed analyses of selected products or demand segments (Dwyer et al. 2010).

The tourism satellite account presents a comprehensive picture of the tourism economy in statistical terms, which makes it a possible tool for setting its development orientations and monitoring the results. However, making use of the TSA in the economic impact assessment of tourism encounters considerable difficulties connected with the availability of statistics. The preparation of the TSA for a specific calendar year depends on the availability of data from the national accounts, compiled and published with a lag of 3 years, plus such data always need an added degree of detail. As a result, a full tourism satellite account for Poland is prepared with a significant time lag in relation to the reference year, which reduces its usefulness as a tool supporting the current tourism policy. In order to shorten that period, a simplified TSA methodology has been developed (Dziedzic et al., 2015).

The main part of the TSA consists of the comparison of appropriately structured tourism consumption with similarly structured supply in the national economy. As a supplement of the main part of the TSA, it provides information on employment, fixed assets, collective consumption and factual data describing the supply and demand sides of tourism. In accordance with the principles of the national accounts, the production account includes activities of residents of the economy concerned within the economic territory of the country.

An important element of the TSA methodology is to define its scope with regard to the demand and supply sides. As for the demand side, it is assumed that it consists of consumer spending by visitors in accordance with the definitions of 'visitor' and 'tourism expenditure' (i.e. those are amounts paid for consumption goods and services purchased by visitors or for their benefit in connection with a specific tourism trip)¹. On the supply side, the TSA takes into account four types of products and the corresponding types of economic activities:

- tourism characteristic,
- country-specific tourism characteristic,
- tourism connected,
- other.

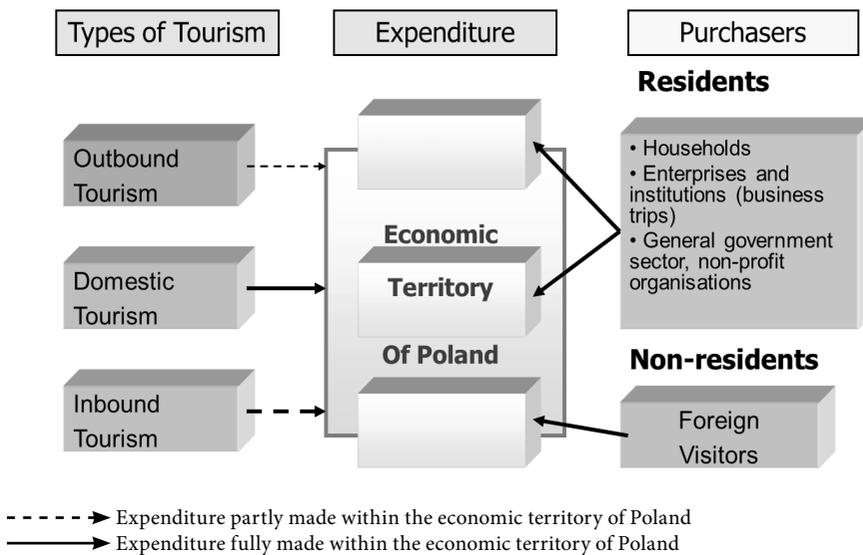
¹ Capital investment related to the development of tourism supply is not analysed in the main part of the TSA, nor is it taken into account in the calculation of the contribution of tourism to value added and to GDP in the economy. The analysis of investment constitutes a separate module of the TSA.

According to the UNWTO definition (UN 2010), tourism characteristic products are those that satisfy at least one of the following criteria:

- the product concerned represents a significant share of tourism expenditure,
- a significant share of the supply of the good or service is purchased by visitors,
- the absence of the product would considerably affect tourism demand even where it does not represent a significant share of that demand.

The list of tourism characteristic products may be extended to include products whose importance in other countries is limited, but they play a significant role in a specific tourism economy. Decisions on extending the list of tourism characteristic products are made by the teams preparing TSAs for individual countries. As regards Poland, in recent years such a status was given to medical and rehabilitation services provided during tourism trips (e.g. as part of spa products). The types of tourism and the groups of purchasers included in the TSA are shown in figure 1.

Figure 1. The demand side of the TSA: the types of tourism and the groups of purchasers

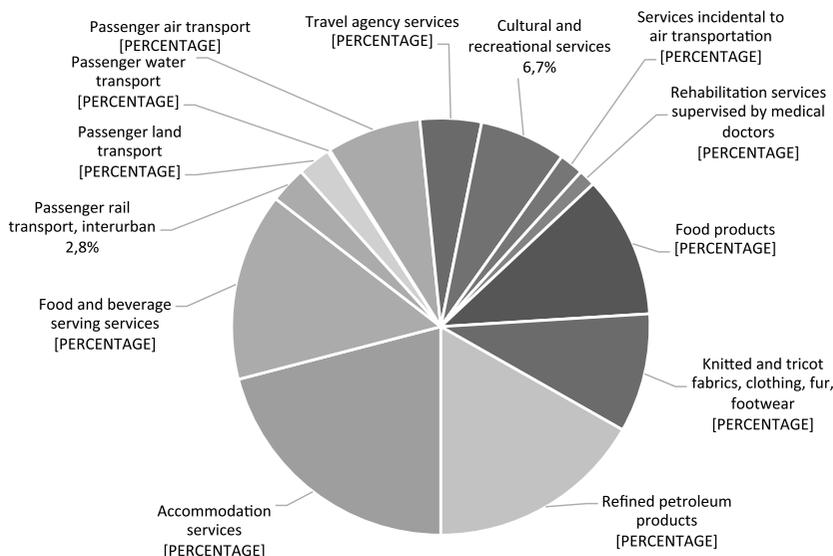


Source: own study based on the TSA 2002.

The tourism satellite accounts for Poland have been prepared since 2000, with the most recent edition of the TSA referring to 2012. In accordance with the calculations made, total tourism consumption within the economic territory Poland in 2012 was estimated at PLN 55.5 billion PLN, of which the consumption of residents accounted for PLN 15.6 billion, i.e. ca. 28.2%. It is

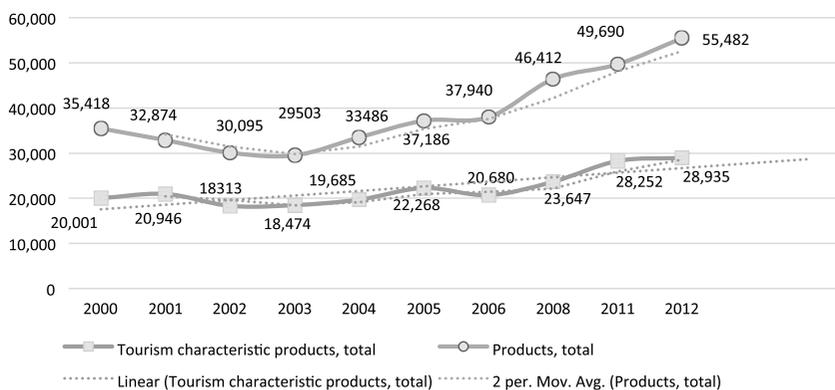
worth noting that in 2012 expenditure on tourism characteristic products represented 52.2% of the total figure. The structure of domestic tourism consumption by type of products is shown in figure 2, whereas the rates of change in 2000–2012 are illustrated in figure 3 and figure 4.

Figure 2. Total domestic tourism consumption by type of products (2012)



Source: like in Figure 1.

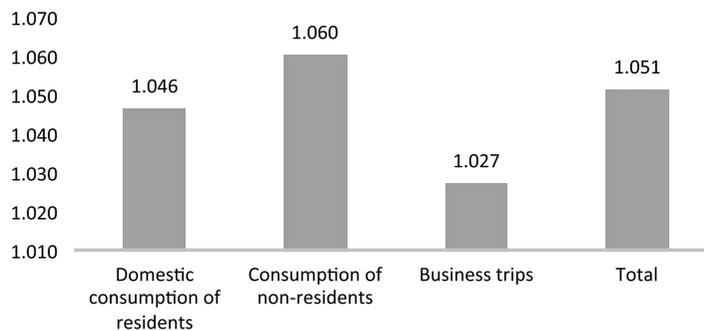
Figure 3. Tourism consumption in 2000–2012 by main groups of products (PLN million; on a net basis, current purchasers' prices)



Source: own study on the basis of the editions of the tourism satellite account for Poland for 2000, 2001, 2002, 2003–2004, 2005, 2006, 2008, 2011, 2012.

A higher rate of growth in total consumption in relation to tourism characteristic products (fig. 3) indicates a fall in the share of tourism characteristic products in favour of the rising importance of tourism connected products and of other products, primarily resulting from the great importance of purchases for own use made by tourists and same-day visitors from the neighbouring eastern countries. This trend has been observed since 2004 and it is reflected in the compound annual growth rate: in 2000–2012 the figure for total tourism consumption was 5.1%, whereas for tourism characteristic products – 4.2%. In turn, fig. 4 demonstrates that in 2000–2012 the most buoyant growth concerned the tourism consumption of non-residents, the most sluggish increase was found in the case of business trips of residents.

Figure 4. Compound annual growth rate of tourism consumption (2000–2012)



Source: like in Figure 3.

New challenges

RTSA

The tourism satellite account in the format discussed above is a good and ever-more valued tool for describing the tourism economy for the country as a whole, but it is not satisfactory for the regional or local authorities, e.g. those at the NUTS-2 (voivodship) level. Due to the increasingly appreciated importance of tourism to the regional economy, the regional and local authorities, in adopting active development policies, also expect reliable tools for the measurement of the effects of their actions, including for the estimation of economic aggregates such as are available at the national level: tourism consumption and its structure, tourism value added, employment or investment related to tourism supply. It is not an easy task since from the point

of view of economic effect measurement tourism is a complex phenomenon, with a number of specific features, which makes it difficult to recognise tourism within standard systems of economic statistics at the regional level. Measures similar to the concepts adopted in the TSA for the country as a whole are also taken with regard to regions. It is based on the equivalent of the TSA, i.e. the regional tourism satellite account (RTSA). Whereas both international and national experiences in the TSA calculation are already significant, in Poland an attempt to compute the first regional tourism satellite account was not made until 2014–2015. The pilot project was implemented for the Ministry of Sport and Tourism with regard to the Mazowieckie voivodship and the main purpose was to make the RTSA a tool describing in real terms the developments in the region, at the same time being strictly consistent with the parameters determined for the country as a whole.

A vital problem related to the preparation of the RTSA is the absence of a developed uniform methodology. The starting point can only be general theoretical studies and published experiences of other countries assuming that it is possible to incorporate the RTSA into the national accounts and linking it with the TSA.

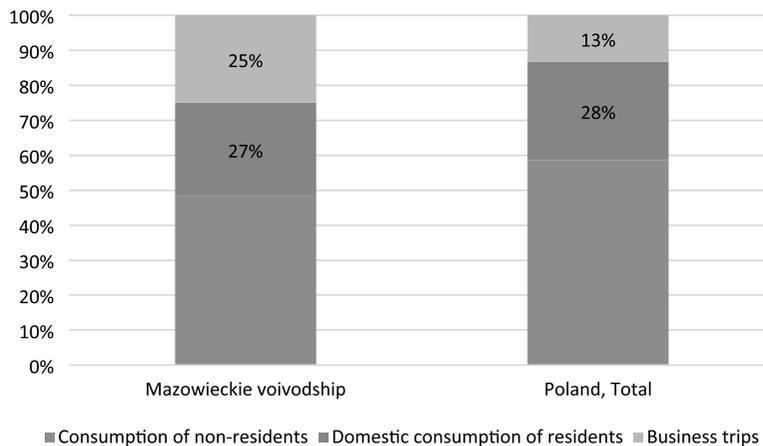
In the discussion on detailed solutions to be applied in the RTSA there are two main approaches to the calculation of specific components of the RTSA, including tourism consumption: top-down and bottom-up. The former consists in an appropriate estimated disaggregation of data for the national level, whereas the latter assumes the use of original data collected at the regional level. The selection of either is ultimately determined by the availability of statistics and the preparation of the full version of the RTSA on the basis of the bottom-up approach is only possible in certain countries, mostly federations (e.g. Canada).

Similarly to the TSA, also with regard to the RTSA the basis for further calculations is the estimation of tourism consumption and its structure. In accordance with the methodology adopted in Poland, regional tourism consumption should concern three groups of consumers: (1) the inhabitants (residents) of the voivodship travelling within its area; in the TSA for Poland it is the equivalent of the domestic consumption of residents; (2) the inhabitants (residents) of other regions of Poland visiting the the Mazowieckie voivodship; (3) foreign nationals. Similarly to the TSA, tourism consumption in the region (in the case concerned – in the voivodship) should include household consumption from personal incomes of visitors, expenditure related to business trips (intermediate consumption) and the consumption of the general government sector and of non-profit institutions.

An important element of the Polish RTSA methodology, distinguishing it from that of the TSA, is the division of tourism-related activities and the corresponding products into the ‘based’ and ‘network’ categories. This is strictly

connected with the characteristics of tourism consumption – with regard to the former category it is the consumption of visitors to the voivodship, in the latter consumption is estimated for the enterprises based in the voivodship but selling their products across Poland and abroad. It concerns transport businesses and travel agencies. The adoption of such a solution enables full assessment of the contribution of tourism to the economy of the voivodship. It results from activities of enterprises providing goods and services to visitors and based in the voivodship. In the case of ‘based’ activities (accommodation, food and beverage serving, culture and recreation, retail trade), their production depends on the demand of visitors to the region, whereas there is no such limitation with regard to ‘network’ activities. The inclusion of the two groups of activities in the RTSA requires an appropriate interpretation of the results concerning tourism consumption. It also assumes different approaches to their estimation. In the case of ‘based’ activities, regional data should be available, whereas for ‘network’ activities the top-down approach was adopted.

Figure 5. Total tourism consumption by group of purchasers: the Mazowieckie voivodship and Poland, 2012

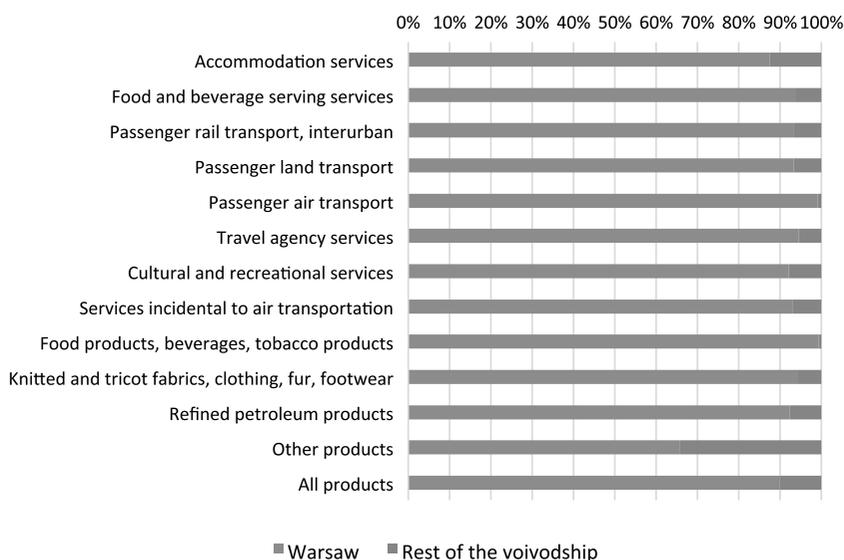


Source: RTSA for the Mazowieckie voivodship 2012.

The preparation of the first, experimental RTSA for the Mazowieckie voivodship allowed to gain experience that will be useful in improving the methodology and its implementation with regard to other regions. As regards the demand side of the account, whereas the conceptual arrangement of the issue of tourism consumption at the level of NUTS 2, i.e. for the voivodship, is consistent with TSA methodology for the country as a whole and raises no major objections, it is difficult to empirically estimate consumption, in terms of both quantity and value, due to the strict requirements with regard to the scope

and the degree of data disaggregation. It must be emphasised that the available surveys of tourism consumption provided no direct information necessary to the preparation of the RTSA for the voivodship. For the year 2012 the broadest scope of information could be obtained from the surveys of arrivals of foreign nationals, of the participation in tourism of the residents of Poland (IT survey) and of household budgets; other elements involved estimation. It is also worth noting that in the case of a region with a dominating large agglomeration or a strong tourism destination it is very difficult to further disaggregate estimated data in order to separate the importance of that central element and it requires carrying out meticulous regional studies. In the case of the Mazowieckie voivodship this was only possible with regard to the consumption of non-residents (cf. fig. 6).

Figure 6. Consumption of tourism products in the Mazowieckie voivodship by place: non-residents



Source: like in Figure 5.

The assessment of leakage outside the region

The analysis of the local economic effects of tourism requires the estimation of not only the total value and structure of new cash flowing into the local economy, but also of cash retained in the region. Contrary to what it may seem, it is no easy exercise. The starting point must necessarily be the estimation of three cash flows: (1) the inflow of new cash to the region in respect of visits of those residing outside its area (both foreign nationals and Polish residents

arriving from outside the region, e.g. from another voivodship); (2) cash retained in the region in connection with the use of tourism services by local inhabitants rather than buying them outside its territory; (3) the leakage of cash outside the region in respect of the necessary tourism-related purchases (e.g. hotel procurement, purchasing souvenirs produced outside the region). With regard to the last cash flow, one must consider the need to estimate not only the value of 'imported' (whether from foreign countries or from the rest of the country) goods and services, but also of production factors (e.g. labour, capital) brought to the region from outside its territory, the assessment of the level of profits transferred outside by 'alien' investors, taxes remitted outside the region and sums withdrawn from circulation in the form of savings, etc. Therefore, it is an attempt at evaluating the degree to which the residents of the region benefit from tourism and the extent of benefits for external entities. The results of such estimations are not equally favourable for all the regions. In areas largely dependent on imports of goods and services the sum of cash retained in the region may be significantly lower than that initially spent by visitors.

When using tourism demand surveys, it is worth remembering its wider economic influence on the region, the contribution to creating a sort of a flywheel causing economic effects, arising from tourism expenditure, on other activities (services, trade, transport, the development of infrastructure, etc.). It is referred to as a broader, 'multiplier' influence of tourism on the region. This approach primarily assumes the interrelation of local business entities; the more the local industry tourism is integrated with other sectors of the regional economy and the less it relies on activities of external entities, the greater the impact. Therefore, the level of the multiplier effect depends on the size and structure of the local economy surveyed. It can be assumed that urbanised regions, large cities are usually characterised by higher multiplier levels (lesser 'leakage' flows), whereas small towns and rural areas – by lower levels. The differences concern not only the size of the region in question, but also the type of tourism and the degree of its reliance on regionally produced goods and services.

Assessing the level of 'leakage' involves additional, in-depth analyses; however, it may be assumed that the economic effect of tourism is limited where the region concerned is unable to provide basic production factors (skilled labour, investment capacity, capital, food), i.e. where tourism demand cannot be satisfied by regional producers – if they are not capable of supplying the necessary goods and services, those will be sourced from outside producers.

The above remarks lead to the conclusion that the knowledge of the number of visitors or of their expenditure is no guarantee of a reliable assessment of the impact of tourism on the local economy. An equally important, if not more important issue is the estimation of the share of visitor expenditure allocated to local products and services: the larger the share, the more favourable the

influence of tourism on the regional economy. It also concerns retail trade and the whole supply chain: the more local sellers are engaged in receiving and serving tourists, the higher the margins retained in the region and the greater the actual economic effects of tourism on the region. One may draw a more general conclusion, not necessarily consistent with the common expectations and stereotypical opinions on the role of tourism in the local economy: small, underdeveloped regions are unable to derive adequately large and expected benefits from tourism if they cannot encourage visitors to purchase local products. The realisation of this should trigger initiatives aimed at improving the quality of local products and services indirectly accompanying tourism, not only those directly related to it.

The third sector in the tourism economy

Since the 1990s in Poland, as in the whole of Europe, the non-profit sector has been gaining in economic importance as a supplier of various types of health care, social, educational as well as tourism services (e.g. PTTK in Poland). Despite the absence of an unequivocal and widely accepted definition of third-sector entities, in general those are social enterprises oriented towards social change (the alternative economy, the cooperative movement, the sharing economy), job creation (fighting against unemployment, measures for professional reintegration) and local socio-economic development. An important challenge to a comprehensive assessment of the regional economic impact of tourism is to evaluate the economic effects of activities of third-sector entities and then to include in the TSA and in regional accounts their contribution to tourism GDP. It is a difficult task since the lion's share of third-sector entities remain outside the system of public statistical surveys, therefore their regional economic impact is not taken into consideration. It is possible to use the assessment of the economic effects of the third sector (including the value added of voluntary work) in the TSA where those are linked with the national accounts methodology applied by the national statistical offices and can be attributed to tourism activities.

From the point of view of the impact of third-sector entities on the tourism economy, it is necessary to fully assess their economic functions, particularly with regard to their operating revenue and funding sources, employment, the scope and value of the services supplied (also of public, social welfare services and of services provided to social groups at risk of exclusion), their innovation readiness and take-up of EU funds. A significant challenge is to include the economic effects of the sector in regional accounts since it is, in the nature of things, embedded in local needs and local socio-economic development. It is also worth mentioning important and socially desirable non-economic functions of non-governmental organisations active in tourism: the supply of

public services, voicing and taking action for group interests, social innovation, the redistribution of empowerment and being embedded in local communities.

New business models in tourism

A separate and increasingly important group of entities operating in the social economy are informal ventures, frequently without a definite organisational and legal status. In this group it is worth indicating initiatives taken within the so-called sharing economy whose main idea and basis is sharing resources in order to make better use of them. Their forms vary, so does their scope of activities. For examples, in tourism they are represented by initiatives such as: *Airbnb*, *Homeaway*, *Roomorama*, *Onefinestay*, *Couchsurfing* or *Housetrip* (accommodation services), *Uber Taxi*, *BlaBlaCar* (passenger transport services), travel guide services and food- and beverage-serving services. All of them soon ceased to be just user communities and became new business models operating in a similar manner to large corporations, only that they are frequently not subject to the general organisational and financial restrictions, thus being conducive to creating unfair competition. On the other hand, within the sharing economy there are a number of local community initiatives, aimed at the exchange of goods, services or skills (e.g. consumer cooperatives, mostly forming in large cities).

The above-mentioned new business phenomena have not yet been defined with sufficient precision and their scope has definitely gone beyond the initial non-commercial initiatives whose guiding principle was to reduce consumption by better using the goods already in possession. Their assessments are not always positive and concerns are raised in the absence of a precise definition of their object and operating transparency and where they are not subject to the rules obligatory for economic operators. Despite various objections, solutions based on the sharing economy and exchange are becoming increasingly popular and their operators have been very successful in financial terms². According to PricewaterhouseCoopers, in 2025 the value of sharing-economy services in tourism will account for 50% of the total value of the industry, and such services are already a major threat to firms such as HomeAway, Priceline or TripAdvisor.

From the point of view of analysing the tourism economy, it is important not only to establish the impact of the new business models on the operation of hotels and other entities supplying tourism services or on the competitiveness in the tourism market³, but also to determine their influence on the local economy and the net flows into the economy generated by them.

² In 2014 the number of guests using Airbnb exceeded 30 million.

³ In 2015 research was undertaken in Poland on the price competitiveness of the services provided by Airbnb and cheap hotels (Skalska, Shcherbiak 2016).

Conclusions

An overview of the methods applied in Poland for the assessment of the regional economic impact of tourism allows to identify various achievements, e.g. many years of experience in tourism expenditure surveys and in the preparation of the TSA for the country as a whole, but at the same time it indicates a number of gaps and challenges facing researchers. Dynamic changes in the tourism market, including the emergence of new competition conditions, the growing role of the third sector and strong regionalisation trends in the economy, inspire to elaborate on the existing research topics and to raise various new ones. As regards the TSA as a tool for the assessment of the economic impact of tourism, it undoubtedly requires improving data completeness since all the important elements are not sufficiently presented in it. The above remark particularly concerns same-day trips and the so-called 'second homes'. The account should also be enriched by extending the scope of analysis to include estimated indirect and induced effects of tourism, the examination of leakage outside the region, a broader inclusion of collective consumption and the regionalisation of the account understood as the preparation of the TSA at the regional level. An important and pressing task is to make the accounts more up-to-date, both at the national and regional TSA, i.e. to shorten the time lag between the period of preparing the TSA and the reference year. The information value of the account, also in the regional version, must be also increased by including the role of the third sector and estimates concerning the impact of the so-called 'new economy', e.g. the sharing economy. However, removing the aforementioned deficiencies and filling in the gaps requires separate studies, which in turn involves the use of greater funds and institutional resources.

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Metody oceny regionalnego oddziaływania ekonomicznego turystyki: osiągnięcia i wyzwania. Przykład Polski

Streszczenie

Artykuł ma na celu: 1) omówienie doświadczeń Polski w opracowywaniu narzędzi oceny oddziaływania ekonomicznego turystyki zarówno na szczeblu krajowym, jak i regionalnym; 2) wskazanie osiągnięć i 3) zwrócenie uwagi na dalsze wyzwania wynikające z wystąpienia nowych przejawów konkurencji na rynku turystycznym, zwłaszcza w sektorze małych i średnich przedsiębiorstw. Kompleksowym sposobem oszacowania wkładu turystyki w gospodarkę jest tzw. rachunek satelitarny turystyki (ang. TSA) i jego odpowiednik regionalny, tzn. rachunek regionalny. Artykuł podnosi również kwestię wiarygodnego oszacowania takich przepływów pieniężnych, jakie – minus wyciek – w rzeczywistości pozostają w regionie, oraz problem szacowania wpływu nowych i dynamicznie rozwijających się modeli biznesowych, np. *Airbnb*, *Uber*, *Home-away*, *Roomorama*, *Onefinestay*, *Couchsurfing* itp.

Słowa kluczowe: wpływ turystyki, rachunek satelitarny turystyki, ekonomia dzielenia się, trzeci sektor w turystyce.

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