

*Capacity building programme on  
tourism statistics 2008-2009 : Workshop*  
1-4 April 2008, Vienna (AT)

## Measuring domestic tourism in Europe

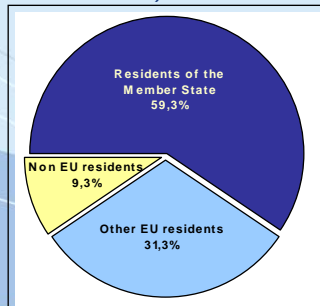
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Tourism statistics

## Outline of the presentation

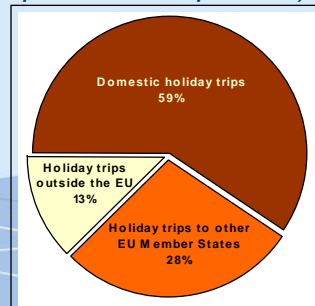
- Domestic tourism in the EU: some facts & figures
- Current legal framework for tourism statistics
- Needs and objectives of a revision of the legal basis
- Revisions relevant for measuring domestic tourism
- Sources used for collecting statistics on domestic tourism

## Domestic tourism: facts & figures ... *most important market and destination*

**Nights spent in collective accommodation in the EU - 2005**  
(share of residents, share of other EU Member States' residents, share of non-EU residents) - 2005



**Holiday trips (4 nights or more) by EU residents - 2005**  
(share of domestic holiday trips, holiday trips within the European Union and holiday trips outside the European Union) - 2005



## Current legal framework: Council Directive 95/57/EC

### Contents

- ✓ Capacity data (collective accomm. establishments)
- ✓ Occupancy data (collective accomm. establishments)
  - *all statistics on arrivals and on nights spent are available for **residents and non-residents separately***
- ✓ Tourism demand data (household or border surveys)
  - *all statistics on tourism intensity, trips, nights spent, means of transport, means of accommodation, duration of the trip and expenditure are available for **domestic and outbound trips separately***

## Current legal framework: **Council Directive 95/57/EC** *(continued)*

### Some minor updates in the past decade:

- ✓ To include changes in the tourism market
- ✓ To cover the enlarged EU (2004 and 2006)
- ⇒ Major update is indispensable to be up-to-date with changing user needs and changes in the tourism market
- ⇒ Revision process is planned to end in 2009 with the adoption of the Regulation on Tourism Statistics (first reference year: 2010)

## New tourism statistics legislation: **main objectives of the revision**

- ✓ **Adapt to new or changed user needs**
  - update list of variables
  - change data collection frequency
  - improved timeliness
- ✓ **Further harmonisation of variables & methods**
  - improvement of comparability and completeness
- ✓ **Tourism Satellite Accounts (TSA)**
  - probably too immature to be fully included in the Regulation
  - but ... include basic elements necessary for TSA compilation (expenditure, non-rented accommodation, same-day visits, etc.)

## New tourism statistics legislation issues relevant for domestic tourism

- **Better coverage of *smaller rented accommodation* and of *non-rented accommodation***
  - ✓ **Supply side statistics:**
    - better comparability via a *harmonised threshold*
    - annual estimates for *smaller rented accommodation*
  - ✓ **Demand side statistics:** data on rented *and* non-rented accommodation for all domestic trips
- ➔ *Of particular importance for capturing domestic tourists, who are relatively more inclined to choose these types of accommodation*

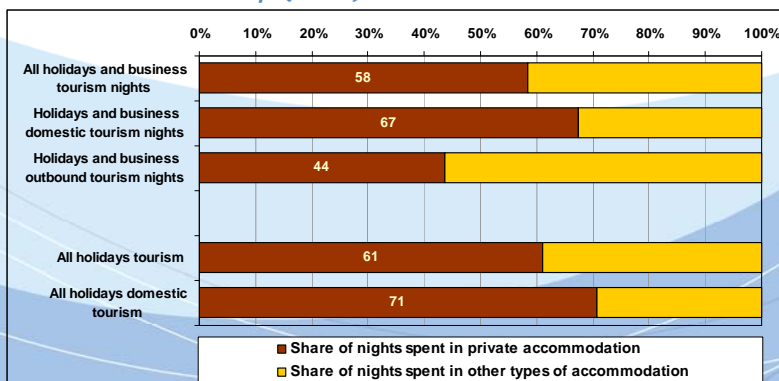
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## Share of nights spent in "private" accommodation, in all nights spent by residents of the EU on trips, by purpose and by destination of the trip (2006)



Source: Eurostat, Tourism Statistics

Note: "Private" accommodation: rented rooms in family houses, dwellings rented from individuals or agencies, owned dwellings, accommodation provided without charge by relatives or friends, etc.)

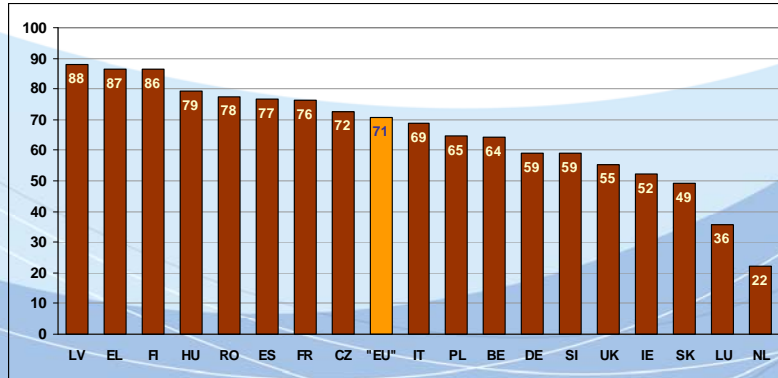
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Share of nights spent in "private" accommodation, in all nights spent by residents on domestic trips, by purpose and by destination of the trip, by country (2006)



Source: Eurostat, Tourism Statistics

Note: "Private" accommodation: rented rooms in family houses, dwellings rented from individuals or agencies, owned dwellings, accommodation provided without charge by relatives or friends, etc.)

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## New tourism statistics legislation issues relevant for domestic tourism (2)

### ■ Introduction of size classes

- ✓ **supply side statistics** will be broken down by size class of the accommodation establishments (hotels and similar establishments only)
- ✓ "size classes" defined on the number of **bedplaces** or on the number of **bedrooms**

→ *Domestic tourists are expected to choose the relatively smaller establishments when staying in rented accommodation*

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## New tourism statistics legislation issues relevant for domestic tourism (3)

- **Additional geographical breakdowns (supply side)**
  - ✓ Directive: breakdown by NUTS2 region
  - ✓ draft Regulation: new breakdowns by type of locality
    - **degree of urbanisation** of the municipality where the accommodation establishment is located (densely populated, intermediate, thinly populated) – as proxy for urban/rural
    - **maritime** versus non-maritime locality

## New tourism statistics legislation issues relevant for domestic tourism (4)

- **Additional geographical breakdowns (demand side)**
  - ✓ Directive: only country of residence of the respondent
  - ✓ draft Regulation:
    - **degree of urbanisation** of the municipality where the respondent lives - as proxy for urban/rural
    - **region of residence** (NUTS2)
    - **type of holidays** (every 3<sup>rd</sup> year): city, seaside, countryside, cruise ship, mountains, other.



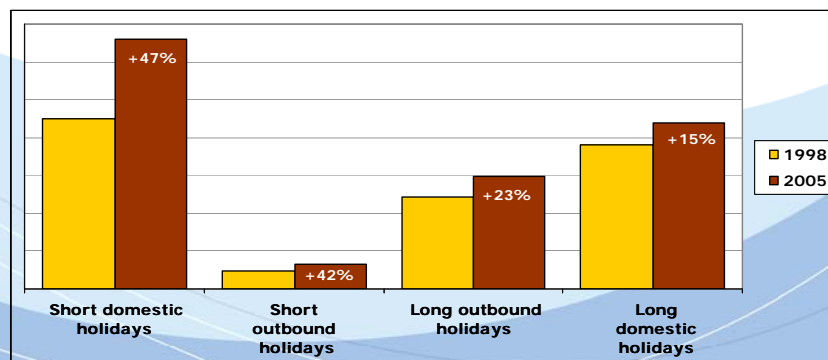
## New tourism statistics legislation issues relevant for domestic tourism (5)

- **Better coverage of short trips**

- ✓ all trips with overnight stays will be in-scope for the demand side statistics  
(in the Directive: focus on trips of at least 4 nights)

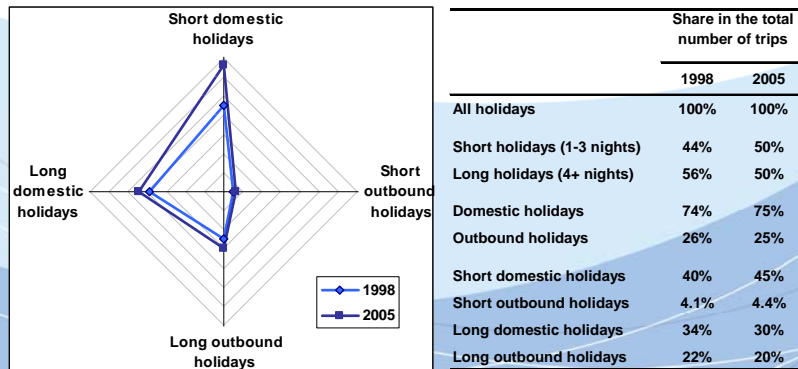
→ *Of particular importance for capturing domestic tourists, considering short trips will more often have a domestic destination*

## Evolution of the number of holiday trips, by type, 1998-2005



**Source:** Eurostat, Tourism Statistics, Statistics in Focus 1/2008, *Are recent evolutions in tourism compatible with sustainable development?*  
**Note:** aggregated data based on 11 Member States

*Evolution of the number of holiday trips and of their market share, by type, 1998-2005*



Source: Eurostat, Tourism Statistics  
Note: aggregated data based on 11 Member States

New tourism statistics legislation  
issues relevant for domestic tourism (6)

- **Inclusion of same-day visits**
  - ✓ estimates from the *demand* side
  - ✓ respondents will be asked for the *number of same-day visits* during the reference period, broken down by destination (domestic, outbound)
  - ✓ every 3rd year: estimates same-day visits expenditure
- ➔ *Of particular importance for capturing domestic tourism, considering the distance and time limits*



## New tourism statistics legislation some other changes

### ▪ Supply side statistics

- ✓ freshness of the data: shorter transmission deadlines
- ✓ set of core indicators to be transmitted after 8 weeks
- ✓ introduction of bedroom occupancy rate
- ✓ clearer reference to industry classification (NACE)

### ▪ Demand side statistics

- ✓ freshness of the data: shorter transmission deadlines
- ✓ transmission of micro-data (before: aggregated tables)
- ✓ more info on the visitor profile, the organisation of trips and the trip expenditure

## Statistics on domestic tourism in the EU main sources

### ▪ Accommodation statistics

- Residents spending overnight stays at (rented) accommodation establishments (formerly "collective" accommodation establishments)
- Cover the core sector of the tourism industry
- Relatively timely data
- Include business tourism
- Allow for detailed regional breakdowns

✎ *In most EU Member States the main or only source for statistics on capacity and occupancy*

## Statistics on domestic tourism in the EU main sources (2)

### ▪ Household surveys

- Residents reporting on their trips, including domestic trips
- Cover all trips, regardless of the type of accommodation
- Regional breakdowns often available nationally but not transmitted to Eurostat
- Often limited to persons aged 15 and over
- ↳ *In most EU Member States the main or only source for statistics on tourism demand*

## Statistics on domestic tourism in the EU other sources

### ▪ Visitor surveys

- Often in the form of border surveys or Departure/Entry info
  - by definition not suitable for measuring domestic tourism
  - in general not very useful in EU context (many border crossings, Schengen agreement, etc.)
- ↳ *Used in very few Member States (mainly the 'islands')*
- Visitor surveys at local level (cities, attractions, ...)
  - Difficult to provide harmonised, comparable information
- ↳ *Not used for official tourism statistics at European level*

## Further information

### Contact

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### Data

- ✓ All data is available on the Eurostat website, including estimates of employment in tourism (from LFS)
- ✓ Dedicated section on Tourism Statistics:  
<http://ec.europa.eu/eurostat/tourism>