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Recent Trends and Future Developments in EU Tourism Statistics

Michail.Skaliotis@ec.europa.eu

Information Society and Tourism Statistics

Outline of the presentation

- **Tourism statistics: the legal framework**
- **Monitoring sustainable tourism: recent initiatives by Eurostat**
- **Indicators in the Final Report of the Tourism Sustainability Group**
 - ✓ **Some reflections**
 - ✓ **Short term availability and feasibility**

Current legislation on tourism statistics: **Council Directive 95/57/EC** of 23/11/1995

Contents

- ✓ **Capacity data** (number of establishments, bedplaces, etc.)
- ✓ **Occupancy data** (arrivals, nights spent, occupancy rates)
- ✓ **Tourism demand data** (household or border surveys)

Some minor updates in the past decade

- ✓ **To include changes in the tourism market**
 - ✓ **To cover the enlarged European Union** (2004 and 2006)
- ⇒ **Major update is indispensable to be up-to-date with changing user needs and changes in the tourism market**

New tourism statistics legislation: main objectives of the revision

- ✓ ***Adapt to new or changed user needs***
 - improved timeliness
 - update list of variables
 - change data collection frequency
 - ✓ ***Further harmonisation of variables and methods***
 - improvement of comparability and completeness
 - ✓ ***Tourism Satellite Accounts (TSA)***
 - include some basic elements necessary for TSA compilation
- ⇒ **Timing: co-decision in 2008-2009; first reference year 2010 or 2011**

Monitoring sustainable tourism: recent initiatives by Eurostat

- ✓ **Methodological work on measuring sustainable development of tourism, including a manual on indicators (report by Statistics Sweden) - 2005**
 - ⇒ Main outcome: a set of 20 potential core indicators

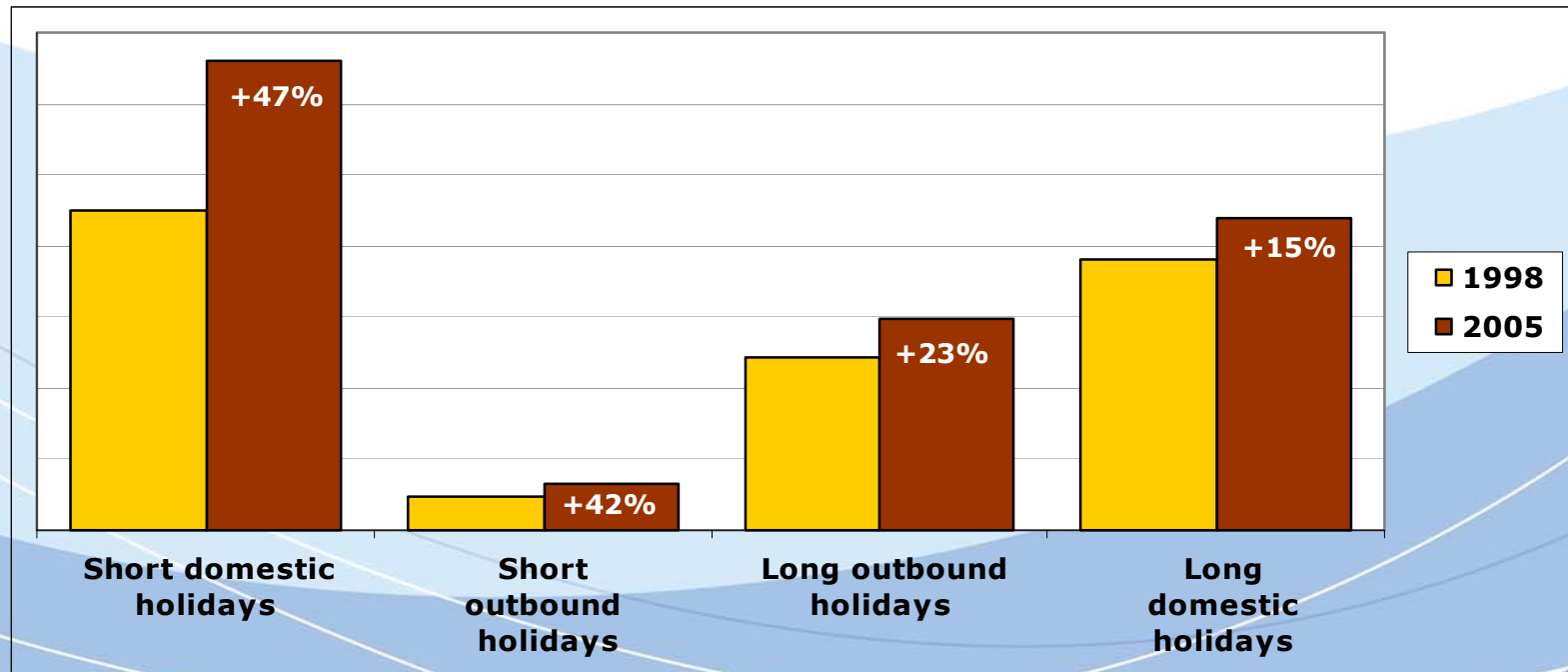
- ✓ **Evaluation of the feasibility and the relevance of these 20 indicators by Eurostat and NSIs - 2006**
 - ⇒ Main outcomes:
 - Data availability in the report was very 'optimistic'
 - Most indicators perceived as being relevant
 - Some definitions need improvement or fine-tuning
 - About 5 indicators readily available

Monitoring sustainable tourism: **recent initiatives by Eurostat** (continued)

- ✓ **Involvement in other Commission initiatives – 2006**
(Denman report, TSG Final Report, ...)

- ✓ **Short *Statistics In Focus* publication**
"Are recent evolutions in tourism compatible with sustainable development?" - 2007
 - ⇒ Topics included:
 - Growth of the number of trips (long versus short, domestic versus abroad)
 - Tourism intensity versus employment opportunities
 - Transport modes for holiday trips

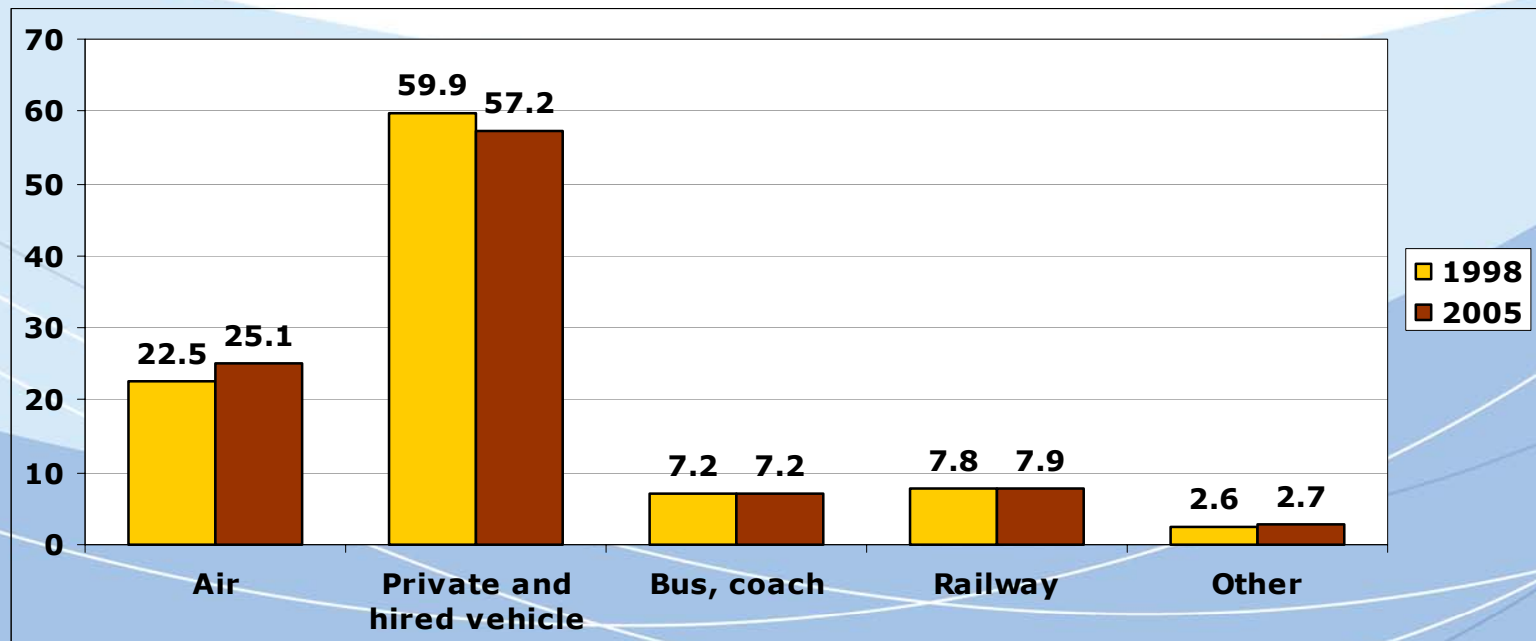
Evolution of the number of holiday trips, *by type* 1998-2005, aggregated data based on 11 Member States



Source: Eurostat (Tourism Statistics)

Evolution of modes of transport used for holiday trips of 4 nights or more

1998-2005, aggregated data based on 13 Member States, as percentage of all holiday trips



Source: Eurostat (Tourism Statistics)

Top 10 regions in tourism intensity

2005, top 10 regions, tourism nights in hotels and similar establishments per local resident and difference between regional and national unemployment rate (in percentage points)

<i>Region (at NUTS2 level)</i>	<i>Tourism intensity</i>	<i>Regional vs. national unemployment rates</i>
Illes Balears (ES)	51	-2.0
Provincia Autonoma Bolzano-Bozen (IT)	44	-5.0
Notio Aigaio (EL)	42	-0.5
Tirol (AT)	39	-1.7
Algarve (PT)	33	-1.4
Ionia Nisia (EL)	31	-1.3
Salzburg (AT)	26	-2.0
Provincia Autonoma Trento (IT)	22	-4.1
Kriti (EL)	21	-2.7
Canarias (ES)	20	2.5

Source: Eurostat (Tourism Statistics)

Indicators in the Final report of the TSG some reflections by Eurostat

- **A very comprehensive list of 50 indicators, covering many dimensions of sustainability**
- **Focusing at indicators at *destination level***
 - ⇒ *difficult to collect comparable data for different destinations, which can jeopardize the indicators' relevance*
- **Not always linked to the tourist season**
 - ⇒ *risk that indicators at annual level 'average out' the effect of the presence of tourists*
- **Many indicators will be difficult (impossible?) to compile**

Indicators in the Final report of the TSG short term availability or feasibility

- **10 to 15 of the TSG indicators may be 'readily' available from Eurostat sources:**
 - Tourism statistics (current and/or future legislation)
 - Other domains (urban audit, environmental statistics, business statistics, labour market statistics, etc.)
- **Weaknesses:**
 - Sometimes with slightly different **definition** or **scope**
 - The subset of available indicator does not cover all **dimensions** of sustainable and competitive tourism
 - **Geographical breakdown** often limited to national level or NUTS2 regions)

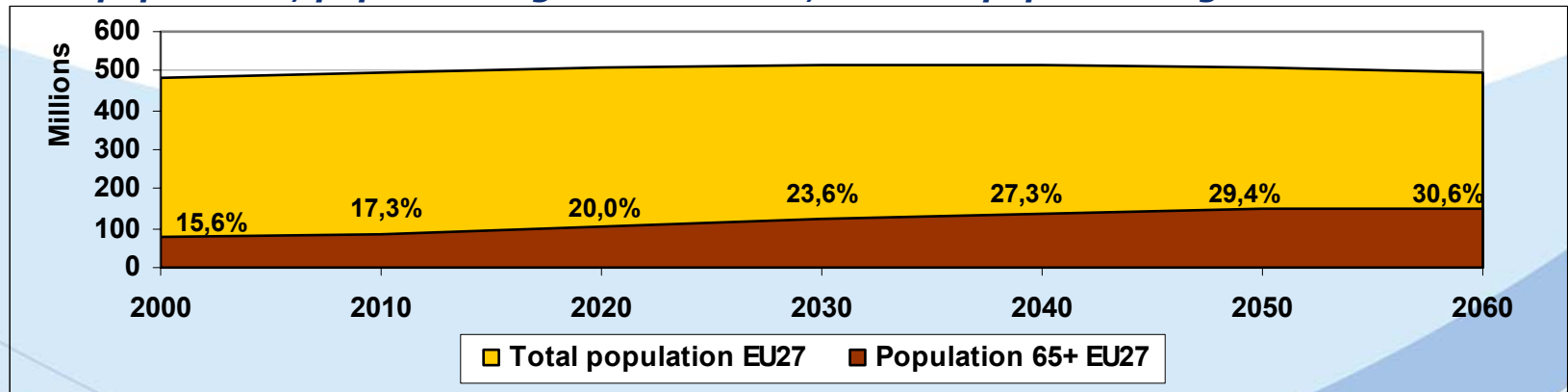
Indicators in the Final report of the TSG **short term availability or feasibility** (continued)

- **Strengths:**
 - **Coverage and comparability:** official statistics are collected in a harmonised, comparable way in all Member States
 - **Availability and continuity:** official statistics are collected with regular intervals (monthly, quarterly, annually) over a long period of time
 - **Cost efficiency and burden of indicator compilation:** use of data that is already available to derive indicators on sustainable tourism
 - **Integration:** data can be linked to other sources within the European Statistical System

Example: ageing of the society & impact on tourism

Projections 2000-2006, EU27

Total population ; population aged 65 or more ; share of population aged 65 or more



Source: Author's own estimates

- Constant participation rate: number of tourists aged 65 or more could **double** over the next 50 years
- Annual increase with 0,65% in the participation rate: number of tourists aged 65 or more could **triple** over the next 50 years
- But: participation rate for 65+ may increase faster than overall rate
- **Share of older tourists** could grow from about **1 in 6** to **1 in 3**, with a big impact on the tourism supply (accessibility, seasonality, ...)

Some Concluding Remarks

- **Current developments in Official statistics are encouraging: *TSA*s, *Legal Framework*, *Methodological Work on Measuring Sustainable Development of Tourism*, continuous involvement in other major exercises like the *TSG* and international comparisons of sustainable development in general, etc.**
- ***In parallel* to the development of *Indicators' Frameworks*, Official Statistics should further develop their analytic capability in areas relevant to tourism sustainability**
- **More focus needed in issues of *long-term sustainability* of tourism: *anticipation* (not only *observation*)**

Further information

Contact

Eurostat - Unit F6 - Information Society & Tourism Statistics

- ⇒ **Michail Skaliotis** (@ec.europa.eu)
 - head of unit
- ⇒ **Christophe Demunter** (@ec.europa.eu)
 - head of tourism statistics

Further information on tourism statistics

- ⇒ <http://ec.europa.eu/eurostat/tourism>