UNWTO Network of Sustainable Tourism Observatories (INSTO)
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Discussion Round
Issue Area 2 & 4: Economic Benefits and Seasonality
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Contribution by EUROSTAT

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Tourists need to take decisions... and so do policy makers.
Right balance between **economic** sustainability versus **environmental**, **societal** and **heritage** sustainability?
Policy questions relate to

- **Economy and labour market**
  - Growth, employment
  - Contribution by industry and by 'generating market'
  - Who benefits from tourism (origin and destination), competition between destinations

- **Environment**
  - Transport (CO2 emissions), infrastructure
  - Noise, non-sustainable over-tourism, seasonality
  - Pressure on local communities (vs. benefits...)
  - Preservation of heritage
Data gaps relate to

- Geographical granularity
- Temporal granularity
- Indicators on impact

⇒ **Mid to longer term approach**
  - Invest in new data sources & methods; but slow progress
    - MNO data, IoT, smart surveys, etc.

⇒ **Short term approach**
  - Optimising traditional statistics
Employment in tourism industries in the EU (2017)

- **All people employed in non-financial business economy: 36%**
  - **Women:** 59%
  - **Part-time:** 24%
  - **Young people (15-24):** 13%
  - **Foreign citizens:** 16%
  - **Temporary contracts:** 23%
  - **In job for less than a year:** 23%

Note: Tourism industries include NACE divisions H51 (Air transport), I55 (Accommodation) and N79 (Travel agency, tour operator reservation service and related activities).
Investing in better regional data

→ traditional sources

→ innovative sources & methods

Source: Eurostat Unit E-4 (unreleased data)

2015 – Number of nights spent at hotels
Investing in tourism satellite accounts

- Capacity building, workshops, training
- Data gathering (voluntary basis)
- Awareness raising, visibility, publications (Nov 2019)
- Next actions?
Investing in tourism satellite accounts

- Some take-aways from recent TSA data (voluntary basis)

Don’t underestimate the economic weight of same-day excursions!

- Account for 33% of the EU tourism economy

Source:
Eurostat (data based on 18 countries representing 61% of EU tourism)
Investing in tourism satellite accounts

Some take-aways from recent TSA data (voluntary basis)

... in particular in domestic tourism

same-day visitors account for 43% of domestic tourism expenditure
Investing in tourism satellite accounts

Some take-aways from recent TSA data (voluntary basis)

- Never mind focusing on foreign markets only!
- Domestic tourism accounts for 69% of the EU tourism economy

Source:
Eurostat (data based on 18 countries representing 61% of EU tourism)
Addressing changing user needs

Adapting the legal framework for tourism statistics

Commission Delegated Regulation amending the existing legal basis (Regulation 692/2011) published on 9 October 2019
Addressing changing user needs

- Adapting the legal framework for tourism statistics

- Main innovations:
  - Better geographical & temporal granularity for accommodation data:
    - NUTS3 (before: NUTS2)
    - Coastal/non-coastal jointly with degree of urbanisation
    - Accommodation data on selected European cities (± 300)
    - NUTS2 data at monthly level (⇒ seasonality)
  - Faster availability of monthly accommodation data
  - Revised questionnaires for tourism demand (e.g. questions on use of platforms for booking accommodation)
Addressing changing user needs

- Better measuring arising phenomena
- Buzzword of the past decade = collaborative economy?
- Some observations (2012-2017, tourism demand):
  - Stays at hotels grew by 3.6% (stable market share)
  - Stays at ‘other rented accommodation’ (this includes apartments) grew by 4.9% and increased their market share (from 30 to 34%)
Measuring the collaborative economy

- Service providers were traditionally “hard to find”
  - Small players, family businesses, non-professionals
  - Not in tourism registers or business registers
  - But in the past relatively unimportant for total figures

- The rise of platforms gives more visibility to these players
  - Easier to enter the market => growing market share
  - But via the platforms they now leave a *digital footprint*, which opens new possibilities to measure

- Discussions on scoping and measurement ongoing
  - Important component: direct talks with major international platforms
Seasonality in tourism demand (EU residents)

Monthly share of trips and nights spent of EU residents, EU-28, 2017 (% of the 12 months)

→ 33% of nights in July & August
→ 50% of nights between June & September
Seasonality in tourism demand (EU residents)

Trips of EU residents by month of departure and destination, EU-28, 2017 (Millions)

→ More pronounced for domestic trips
Seasonality in tourism demand (EU residents)

Distribution over the year of trips of EU residents by purpose of the trip, EU-28, 2017 (%)

→ Different pattern for business trips
Seasonality in tourism demand (EU residents)

Peak month for tourism nights of EU residents, 2017 (% share on the 12 months)

→ Tourism nights often concentrated in one main holiday month
Some important action points

⇒ From data on tourism flows to data on economic impact

⇒ Getting data faster and more granular

⇒ Promptly respond to a changing environment

Catalyst

⇒ New data sources and methods to exploit the digital footprint of tourists & service providers
Thank you for your attention!

Eurostat data & publications are available free of charge from the Eurostat website.

Just released: Eurostat Regional Yearbook (including a chapter on tourism)