

# **COMMISSION OF THE EUROPEAN COMMUNITIES**

COM(93) 345 final

Brussels, 1 September 1993

## **FINAL REPORT FROM THE COMMISSION TO THE COUNCIL, THE EUROPEAN PARLIAMENT AND THE ECONOMIC AND SOCIAL COMMITTEE**

on the implementation of Council Decision 90/665/EEC of 17 December 1990  
regarding a two-year programme (1991-1992) for developing  
Community tourism statistics

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## INTRODUCTION

Conscious of the economic, social and cultural importance of tourism as a factor of integration, the Community institutions, since the early eighties, have on several occasions underlined the need for a Community action aiming to facilitate, improve and contribute to the development of tourism<sup>(1)</sup>.

In June 1984 and March 1985 the European Council, within the framework of the "People's Europe" discussion, invited the Community institutions to give special attention to tourism, as this was considered to be particularly important for Community citizens<sup>(2)</sup>. The role of tourism in the completion of the internal market was stressed, later on, by the competent Ministries at their informal meetings on May and September 1988; this role was recognized by the Council who declared 1990 as the European Tourism Year<sup>(3)</sup>. In November 1990, the Ministries asked the Commission to put forward guidelines for a Community action programme on tourism.

The European Parliament, the Economic and Social Committee, as well as the Commission have clearly underlined that the essential prerequisite for Community action to support tourism is a thorough knowledge of the basic statistics and the problems of tourism, without which its potential cannot be properly explored or developed<sup>(4)</sup>. Thus the Community's role in publishing statistics, opinion surveys and information on tourism, has also been recognized<sup>(5)</sup>.

Since 1987, the Commission has worked on developing tourism statistics. These works have favoured the collection and analysis of statistical information on tourism, the elaboration of an annual publication, and cooperation with the WTO and the OECD.

However, the comparability of existing data is rather weak and in certain cases the data is non-existent. In parallel, the need for greater transparency, comprehensive information and cost/benefit analysis led the Commission in 1990 to propose to the Council a specific decision.

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(1) "Initial guidelines for a Community policy on tourism", COM (82)385 final in OJ C 115 of 30.04.1984, related Opinion and report of the Economic and Social Committee in OJ C 358 of 31.12.1983.

Resolution of the European Parliament on "Community" Policy on Tourism in OJ C 10 of 16.01.1984.

Commission communication to the Council on "Community action in the field of tourism", Com (86) 32 final in OJ C 114 of 14.05.1986; Resolution of the European Parliament in OJ C 7 of 12.01.1987.

(2) Council Resolution on "Community Policy on Tourism" in OJ C 115 of 30.04.1984.

(3) Council Decision of 21 December 1988 on an action programme for a European Tourism Year, in OJ L 17 of 21.01.1989.

(4) Opinion and report of the Economic and Social Committee on initial guidelines for a Community policy on tourism (cit. supra).

Commission communication to the Council on "Community action in the field of tourism", Com (86) 32 final (cit. supra).

(5) Resolution of the European Parliament on the facilitation, promotion and funding of tourism in the European Community, in OJ C 49 of 22.02.1988.

In its Decision of December 17th, 1990<sup>(6)</sup>, the Council confirmed the opportunity to carry out at Community level actions to develop a Community frame of reference for the compilation of tourism statistics, by harmonizing the concept and methods used by the Member States.

With a view to achieving this objective the actions set out in the Council Decision within the framework of a two year programme (1991-1992), are as follows:

1. analysis and evaluation of the long-term needs of the main users (Community Institutions, National Administrations, International Organizations and economic operators) with regard to tourism statistics;
2. collection and dissemination of existing data on tourism;
3. analysis of the systems that exist in the Member countries and those used by International Organizations;
4. preparation of a Community methodological framework for the compilation of Community tourism statistics.

Article 6 of the Decision states that the "Commission shall present to the Council :

- (a) by 31 May 1992, an interim progress report;
- (b) by 31 December 1992, a report evaluating the outcome of the work referred to in Article 3 and the conclusions prompted by the report as to the development of the information system required for Community tourism statistics after 1992, including a list of priorities".

The interim report was forwarded to the Council and to the European Parliament in July 1992<sup>(7)</sup>.

This document represents the second report according to article 6 (b). It covers activities, developed within the framework of the Council Decision 90/665/EEC, carried out during the period January 1991 to December 1992.

In the following nine chapters there is an overview of the work carried out, details of the approach chosen for each of the actions within the framework of the Council Decision, an analysis of the results and further development proposed.

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(6) OJEC N° L 358, 21.12.90, p. 89

(7) CEC, SEC(92) 1465, 16.07.92

## 1. GENERAL FRAMEWORK

The main problem concerning tourism statistics at both Community and international level is the lack of comparability between information produced by the twelve Member States. Generally countries produce data for their own needs, according to national priorities, using their own methods and definitions. Differences still occur in the basic concepts such as classifications, definitions, period of reference.

The lack of comparability between national statistics results in a lack of reliability for statistics at Community level, which seek to reflect and measure precisely the tourism domain.

The structural difficulty of monitoring the multifaceted economic and social realities in which tourism occurs, already present at national level, becomes more acute when trying to observe the phenomenon from a European perspective.

The need to establish a coherent system of statistics on tourism at Community level and the need, heightened by the completion of the single market, for reliable, rapid and comparable statistical information for all users, and notably of decision-makers improving the business environment of the tourism sector, inspires the Council Decision and the approach chosen by the Commission and Member States for implementing it.

Conscious of the progress made in defining a new European Economic Area, since 1990, within the framework of the second joint meeting of EEC-EFTA Directors General of Statistical Offices and the Commission it was agreed to associate EFTA countries with the development of the programme on tourism statistics.

Thus participation in the EC "Working Group on tourism statistics", whose secretariat is provided by the Commission and which includes representatives from the competent national authorities, was extended to the EFTA countries' delegates.

Nineteen European countries already work together on tourism statistics.

The Working Group also invited observers from the Organisation for Economic Co-operation and Development (OECD) and the World Tourism Organisation (WTO) Secretariats, with the aim of implementing the whole programme in synergy with these organisations already involved in tourism statistics.

This broad-ranging group, moreover, facilitates and strengthens international cooperation in developing the methodology and definitions for statistics on tourism.

In order to achieve the development of a common frame of reference for the compilation of Community statistics on tourism, four specific actions were identified in the two-year programme, following moves to harmonise the concepts and methods used by Member States.

The Commission ensured the coordination of the action plan, both through close cooperation with participating countries within the framework of the Working group - which has met six times in the two years - and through the four small-scale Task-Forces which were set up on to analyse and further develop technical matters, following the guidelines given by the Working Group.

The direct follow-up of the tourism statistics programme ensured by the broad and active participation of the Member States, notably at the meetings scheduled, in addition to facilitating cooperation and transparency in the implementation of the actions carried out to date, provides a strong impetus to the progress of the work underway.

Nevertheless the tight deadline fixed by the Council and the limited financial resources available have directly influenced the work.

The action plan set out by the Council focuses upon basic steps closely linked together and all part of an ongoing process designed to achieve the aim referred to above, therefore the measures specified in the Decision have been implemented in parallel.

For each action, a defined output was foreseen, fully comprehensible as such and, at the same time, part of the general exercise of defining the information system required for Community tourism statistics after 1992.

## 2. USERS' NEEDS EVALUATION

The analysis of the priority long-term needs of the main users of statistics on tourism plays a crucial role as a basis on which any future development of Community tourism statistics should be established.

The success of the system to be designed depends principally on its capacity to satisfy the real demand for information.

The immediate objective of evaluating users' needs consists of structuring the demand for statistical information which can monitor tourism and its many facets from a European and global perspective according to the order of priorities given by the main users.

Those needs for information which satisfy a purely local interest are thus excluded from the analysis, since these fall within the exclusive competence of national authorities.

In this context the Commission stressed the definition of a pyramidal system of information when establishing the system. This should reflect the long term-needs following completion of the single market, while also taking account of the resulting burden on, and advantages for, providers of statistics.

In order to ensure the widest possible consultation of interested users and to cover the entire spectrum of users of tourism statistics, the Working Group identified a typology of users to be consulted and an instrument of consultation which provided guidelines for the collection of users' needs.

A consultation process involving over one thousand main users, in both the public and private sectors, was undertaken; at national level by all EC member States and by EFTA countries and at international level by the Commission, including the Community Institutions, professional associations, other international organisations such as the Council of Europe, OECD, WTO.

Reports were produced by the participating countries and sent to the Commission between June and September 1991.

A significant number of replies have been received by the Commission from its Services, the European Parliament, the European Investment Bank, various international professional associations, and the European consumers' association.

The draft report summarizing the results of the consultation on user needs has been discussed with the delegates of the participating countries during the joint EEC/EFTA meeting of the Working Group on tourism statistics held in Luxembourg on February 13th and 14th 1992.

The final version of the report on user needs drafted by the Commission takes into account the remarks and suggestions made by the national authorities and by other users consulted following a written procedure which was also established by the Commission.

The analysis of user needs presented covers both demand and supply-side information, as well as the interaction of tourism with its general environment: this involves an analysis of the main factors influencing tourism demand and an analysis of the impact of tourism on the economy as a whole.

To complete the users' requirement, the analysis includes specification on the methods of data collection considered to be of most interest and on the form in which the data should ultimately be presented and disseminated.

Users were asked to rank their needs in priority order, justifying their priorities, and identifying whether, according to their activity, the statistical information required represents:

- data essential to improve the operation of the organisation (high priority);
- additional data important to the running of the organisation (medium priority);
- useful background information (low priority).

Within the framework of an action which has no precedent, the inputs given by the users, whose diversity in respect of their legal status, function and sphere of action illustrates the breadth of the consultation carried out by the participating countries and by the Commission, have reflected this variety and have been supplied at various levels of detail.

Despite the difficulties of conducting such a broad consultation process and of synthesising responses coming from the various actors taking part in this domain of activity, horizontal by definition, the Working Group agreed that the quality of the analysis of user responses is sufficient for there to be confidence in the conclusions which have been drawn from them.

The final report drawn up by the Commission and forwarded to the participating countries is intended as a working report which includes :

- the methods used for the collection and analysis of information needs;
- an overview of the priorities identified by the different users consulted with respect to the indicators selected and the management and dissemination of related data;
- an analytical summary by country and by homogeneous group of international users of the needs expressed;
- conclusions based on the results of user consultation, to be considered when defining a frame of reference for developing tourism statistics after 1992. :

## **Main results**

Despite the difficulty of taking into account all the needs expressed in relation to the various users consulted, which differ in legal status, function and sphere of action, the summary of the results, presented below and in tabular form on the following pages, gives an overall picture of the major needs for tourism statistics considered as a priority by the main users.

### Users' Needs for Supply side statistics

Six sectors were considered by the users to be of high priority for tourism supply : accommodation, conferences and congresses, travel agencies and tour operator activities, information and communication, and non profit making organisations.

Data considered by users to be of medium priority includes the following sectors: restaurants and bars, health activities, renting of transport equipment, renting of sports and leisure equipment, financial and insurance activities, and finally retail business.

For all the sectors mentioned above, the variables which are considered to be the most important to users relate to information on infrastructure in respect of the capacity (number of rooms, number of beds, number of places, number of seats, number of visitors, number of kilometres) and of the turnover and value added.

A second group of variables were considered to be of medium priority: data on employment (qualification level of employees, occupation rate, wage and salary levels, breakdown of employees by full-time, part-time and seasonal employment), financial information (costs, receipts and profits, costs and returns on investments, subsidies and private sponsorship, taxes) and information relating to customers (number, frequency of travel and socio-economic characteristics, nationality).

### Users' Needs for Demand side Statistics in general

Overall, users expressed an interest in obtaining data relating to the three markets for tourism (the holiday market, the market for day visitors and the market for business travel), with an emphasis on information concerning long and short stays within the holiday market.

The variables considered essential by the users are associated to the three types of market.

For the holiday market, the highest priority variables are: volume of tourism and nights spent, visitor patterns, use of travel agencies and tourist organisations, expenditure of visitors, non participants (people that do not take holiday), main motive of the trip, destination and variables on groups.

For the day visitors market, the essential variables are: the volume and expenditure, duration and destination of the trip, types of activities and motives, profile of travellers.

For the business travel a high priority is assigned to the variables on travel patterns, the volume of travel (nights spent), the expenditure, the profile of travellers and the use of travel agencies.

Variables relating to holiday planning and holiday habits are considered of medium priority for the holiday market. Variables relating to non participants of the day visitors market are regarded as low priority.



### Users' needs for particular statistics on factors influencing tourism demand and measuring the impact of tourism

The factors influencing tourism on which information is requested with high priority are: changes in income and the level of prices, major changes in transport infrastructure and in the environment (climate, pollution, etc;).

Users expressed a strong interest in two types of information concerning the effects of tourism on the economy: the importance of tourism in terms of employment (direct and indirect) and the contribution of tourism to national income and taxation revenue.

The users also mentioned a second group of variables which were considered to be significant : reinvestments made to maintain the quality of infrastructure, imports and exports in the balance of payments and the need to incorporate tourism into the National Accounts and input/output tables.

### Methods of data collection

The geographic unit requested by users was to obtain information at both national and regional level. As far as the periodicity of data availability , users expressed their need to have annual data; but for certain key indicators, both monthly and quarterly availability of data was deemed important.

With regards to the mode of data collection, it was felt that an exhaustive census was required to collect supply side tourism statistics, while a representative sample is mainly preferred for statistics on tourism demand.

Regarding the type of statistical unit to be used, equal interest has been shown for: the enterprise, the household, the individual and groups of tourists.

### Data management and data transmission

Two forms of data transmission media are of essential importance to users: paper and floppy disk. On-line exchanges were also accorded preference.

Overall, the presentation of data in the form of tables accompanied by analytical comments was considered important to the majority of users. Raw data was deemed less appropriate.

## USERS' NEEDS FOR SUPPLY SIDE STATISTICS

Activities		
	SECTORS	SUB-SECTORS
<b>HIGH PRIORITY</b>	Accommodation	Hotels and motels Rented rooms and houses Holiday villages Camp-sites Youth hostels and mountain refuges Second homes (incl. time shares) yachts
	Conferences and Congresses	Conferences and Congresses
	Travel agencies and tour operators	Travel agencies Tour operators Tourists assistance activities
	Transports	Railways Roads (tour buses etc.) Air Water
	Information and communication	Audio visual media News agency activities
	Non profit organisations	Offices for tourist information Cultural services Sporting and recreational facilities of public use
<b>MEDIUM PRIORITY</b>	Restaurants, bars	Restaurants, bars
	Health activities	Sports Sauna Spas Beauty and health farms
	Renting of transport equipment, renting of sports and leisure	Renting of transport equipment, renting of sports and leisure
	Financial and insurance industry	Financial intermediation Insurance related to tourist activities
	Retail business	Leisure goods but also non leisure goods
<b>LOW PRIORITY</b>	Amusements	Fun-fair and amusement park activities Gambling and betting activities Visitor attractions

### Variables

Information on infrastructure ( Capacity (rooms, beds, seats, number of kilometres etc.) , and turnover/value added.

Employment (full-time, part-time, seasonal, salaries, qualification etc.).

Information on consumers (number, frequency of travel, profile )

Financial information (investment, profits, return on investment, subsidies and private sponsorship, taxes)

### USERS' NEEDS FOR DEMANDE SIDE STATISTICS

	TYPE OF STATISTICS	VARIABLES
HIGH PRIORITY	Holiday market	Volume of tourism, nights spent Variables on visitors patterns Use of travel agencies and tourist organisations Expenditure of visitors by type of expenditure Non participants Main reason for holiday Type of destination Variables on groups
	Day visitors	Home, outbound and inbound ( volume and expenditure) Destination Type of activities and motives Profile of participants Duration of trip, distance travelled
	Busines travel	Variables on travel patterns Volume of travel, nights spent Expenditure Profile of travellers (employment details) Use of travel agencies
MEDIUM PRIORITY	Holiday market	Variables related to holiday planning Holiday habits
LOW PRIORITY	Day visitors	Non-participants

### USERS' NEEDS ON MAIN FACTORS INFLUENCING TOURISM DEMAND AND ON IMPACT OF TOURISM

	TYPE OF STATISTICS	VARIABLES
HIGH PRIORITY	Main factors influencing tourism demand	Changes in income Price level Important changes in transport infrastructure Environment
	Impact of tourism	Economic significance in terms of employment, balance of payments Cost of maintaining the quality of infrastructure, government investment etc. Integration of tourism in the national accounts, input-output tables
MEDIUM PRIORITY	Main factors influencing tourism demand	Demographic situation (smaller size of family, more elderly people)

### 3. COLLECTION AND DISSEMINATION OF EXISTING DATA ON TOURISM

Collection and dissemination of existing statistical information on tourism is one action which has been carried out by the Commission since 1988. Information in the past has been rather limited to certain indicators covering tourism supply side statistics, and this has not met all the needs expressed by the various users.

In the framework of the Council Decision on tourism statistics a specific effort has been made in order to improve collection and dissemination of existing data.

Taking into account users' needs, methodological developments and existing statistical actions, the Commission has worked on four different levels :

- to consolidate and structure available information as provided by national official sources;
- to elaborate a common system of data collection with WTO and OECD;
- to introduce magnetic and electronic media for facilitating collection and dissemination of information;
- to improve the quality and quantity dissemination through publications.

#### 3.1 Information system development

The EC and EFTA Member States have supplied the Commission with all existing information available at national level. The information has been provided on different media and forms, including annual and monthly replies to the Eurostat Tourism questionnaires and national publications.

The Commission has organised the data received from the EC and EFTA Member States in an information system under the name "TOUR". This information system contains mainly tourism supply side data covering :

- Tourist accommodation
- Resident and non-resident guest flows in accommodation establishments
- Non resident guest flows in accommodation establishments (by country of residents)
- Accommodation capacity and occupancy rates
- Other Tourist activities (e.g.: restaurants, travel agencies, museums, etc.)
- Employment in accommodation establishments and other tourist activities
- Arrivals of non-residents visitors at the borders (by country of residence)
- Tourist expenditure
- Trends in certain tourist consumer prices
- Balance of payments

Figures are nevertheless not available for all Member States on all the above mentioned items.

An inventory of the data received is continuously being updated in order to monitor the developments within the data set of each of the EC and EFTA Member States. The "TOUR" information system is managed and controlled on a continuous basis, and checks are carried out to verify and correct figures when errors are detected.

The emphasis has now been placed to broaden the collection of supply side tourism statistics and to collect also tourism demand side indicators.

### **3.2 Cooperation with international organisations for data collection**

Action for a common system of data collection is also under way between the Commission, the OECD and the WTO. This initiative by the Commission has been highly welcomed by the EC and EFTA Member States.

This action has been discussed in detail by the Commission with the interested organisations. The first stage of the work was to compare the existing Tourism questionnaires operated by the organisations, and in the light of the methodological work pursued by the Commission and WTO's recommendations, a harmonised set of classifications is being developed in order to establish a common questionnaire. The results have been presented to the National Statistical Institutes and their comments have been taken into account. Once this stage has been finalised, the technical formalities for the presentation of a common questionnaire will be established according to the response needs of the organisations. In the final stage, a common computer software facility will be developed for the purpose of establishing an international exchange system.

The results of this project will present numerous advantages. Firstly, a joint tourism questionnaire will reduce the work load for the National Statistical Institutes by avoiding duplication of work, and rationalising data collection for the international organisations. Secondly, the establishment of a coherent and compatible system of data collection will improve both the quality and comparability of tourism statistics at international level. Moreover, such an action will further strengthen international cooperation.

### **3.3 Introduction of magnetic and electronic media**

Tourism data is now also in the process of being collected and disseminated through magnetic and electronic media, such as disc, CD - ROM, and "on-line" systems.

The Commission has developed a multidimensional software programme which is both compact and simple to use. This programme is called CUB.X, and has been applied to Tourism Statistics. This programme enables the user to manipulate multiple arrays of statistical data. The programme is multifunctional. Data can be viewed as desired, can be exported onto standard PC packages, and data can be inputted to update or revise the data within the matrices. The programme applied to Tourism Statistics has been presented and forwarded to the EC/EFTA Member States, so that they may test the programme in their home environment.

The initial aim for application to tourism statistics is to facilitate the exchange of information between the EC and EFTA Member States. In 1993 it is envisaged that the Member states will have become sufficiently accustomed to the CUB.X software programme so that it will replace the present Commission Tourism questionnaire (paper format) for data collection at a European level. This will enable the Commission to manage the collection and exchange of statistical data on Tourism at the European level with greater efficiency. Likewise, this procedure will allow also the interchange of diskettes containing the most recent data on Tourism between the reporting countries.

The information available in the "TOUR" information system has also been transferred on to the Commission reference data base "ACUMEN". This means that all Commission users' have direct "on-line" information on Tourism statistics at E.E.A level.

The information in the "TOUR" information system is also being prepared for transfer on to CD-ROM. This will be available to the general public in 1993.

#### 3.4 Dissemination through publications

Specific efforts have been made to:

- reduce the time taken to publish the Annual statistics report in respect of the period of reference and making data available also on magnetic media, rather than only on paper;
- publish of short-term trends;
- provide readily accessible annotated figures and information on the structure and evolution of the tourism industry.

#### The Tourism Yearbook

Annual statistics have been published since 1987. The Tourism Yearbook contains all the data available in the "TOUR" information system. The last report was published in March 1992 in two bilingual editions (French and English, Spanish and German) and includes data on Tourism up to 1990. The updated edition for 1991 is in the process of being finalised for publication at the beginning of 1993.

#### Monthly Statistics

Tourism Statistics are now also included in a monthly publication, first produced in January 1992 on Services, Transport and Tourism. This publication is trilingual (English, French and German) and contains statistical tables and graphics with short commentaries analysing the data.

As far as tourism is concerned, each month information about the overnight stays of residents and non-residents in hotels and similar establishments, and in supplementary accommodation, and about the balance of payments for travel and passenger transport is published.

For 1993, the data presented for tourism will be enlarged to cover transport of passengers by air and border flows for some countries where information is available. It is also envisaged to give additional statistical information relating to the tourism methodology and definitions.

### Tourism in Europe

A first response to the need for a better knowledge of the sector was the publication "Tourism in Europe, Trends 1989", published in 1991 and available in all the official languages. This initiative was undertaken in the framework of the European Year of Tourism.

In order to meet the growing interest of all partners involved in tourism, the Commission, in collaboration with the EC and EFTA Member States, is currently elaborating a new edition entitled "Tourism in Europe (1990-1991)". This publication, which includes easily readable annotated graphs and tables, will present a comprehensive coverage of the structure of the Tourism sector in Europe over the past ten years, recent trends and possible future developments. It will be edited in three languages (English, French and German) and will be available for distribution at the beginning of 1993.

In the first part of the publication an overview of the European situation is given with some references to worldwide tourism flows. An analysis of the future trends and perspectives envisaged is also included. In the second part, the analysis by country (EC-EFTA Member States) includes information on: key indicators, tourism supply, evolution and structure of demand, impact of tourism, specific forms of tourism particularly important for the country of reference.

## 4. ANALYSIS OF EXISTING STATISTICAL SYSTEMS

A report has been drafted which provides an analysis of existing statistical systems and methodology for the collection of data on Tourism in the EC and EFTA Member States. The report covers information concerning both tourism supply and demand and reviews the statistical systems used by the WTO and OECD for the purpose of comparing methodological practices at world level.

The report has been drafted in stages, in line with the timetable laid down in the Decision for the completion of the analysis of tourism methodology.

Information on the tourism methodology used in EC/EFTA member countries was provided in the form of "raw" documentation and structured reports and through both formal and informal meetings and consultation.

The broad consultation with Member States undertaken at each stage has given the opportunity to finalize the structure of the report and to improve the quality of the information on national statistical practices.

After a preliminary synthesis of methods used by Member States the Working Group decided that more detailed information would be supplemented with responses to an annotated questionnaire. The final draft report was sent for comments to EC/EFTA participating countries in April 92 and was presented in its final version at the Working Group meeting on Tourism Statistics held in October 1992. At this meeting the report was formally approved by all Member States.

The main objective of the analysis of existing statistical systems has been to identify those areas of tourism methodology and data collection in which a degree of harmonisation is appreciable in countries comprising the EEA. This objective has been met. At the same time, the study has also shed light upon areas in which a wide variety of statistics on tourism are collected, using several different methods and presenting information on different variables. Despite the utility of these data, they are not readily comparable at the European or international level.

The analysis has focused upon five main fields of statistics:

- Border statistics
- Accommodation statistics
- Other supply-side statistics
- Statistics on the Travel Habits of residents
- Statistics on the Value of International Tourism.

#### Statistical Coverage

Although the extent of the detail of the statistics collected by EC/EFTA member countries is far from homogeneous, it is interesting to note the number of countries which cover the different types of data covered in the "Analysis of Statistical Systems and Methodology for the Collection of Statistics on Tourism in EC & EFTA Member Countries". No data were received from Iceland or Liechtenstein, which takes the total of EC/EFTA reporting countries to 17.

- Border statistics are collected by (13 of the 17) countries (Austria, Denmark, Finland, France, Germany, Greece, Ireland, Italy, the Netherlands, Portugal, Switzerland and the United-Kingdom).
- Accommodation statistics are collected by all the EC/EFTA countries (Austria, Denmark, Finland, France, Germany, Greece, Ireland, Italy, the Netherlands, Portugal, Switzerland and the United-Kingdom).
- Other Supply-side statistics are gathered by 15 of the 17 countries (Austria, Belgium, Denmark, France, Germany, Greece, Italy, Luxembourg, the Netherlands, Norway, Portugal, Spain, Sweden, Switzerland and the United-Kingdom).
- Data on the Travel Habits of Residents are recorded by 13 of the 17 countries (Austria, Belgium, Denmark, Finland, France, Germany, the Netherlands, Norway, Spain, Sweden, Switzerland and the United-Kingdom).
- Statistics on the Value of International Tourism are also collected by 15 of the 17 countries (Austria, Belgium/Luxembourg Economic Union, Finland, France, Germany, Ireland, Italy, Luxembourg, the Netherlands, Norway, Spain, Sweden, Switzerland, United-Kingdom).

In general, we can say that statistics on tourism appear to be well covered by the Member States. This however fails to convey the lack of harmonisation in the statistical methods used to collect these data and ultimately, their comparability at the international/ European level.



In terms of both physical flows of tourists and the variables and indicators relating to the statistical unit considered, the coverage of the surveys and censuses carried out by the reporting countries varies considerably.

For "Border Statistics" France, Germany, Ireland, Italy, Spain and the UK record border crossings by both resident and non-resident tourists and/or visitors. The remaining reporting countries (Austria, Denmark, Finland, Greece, the Netherlands, Portugal and Switzerland) collect data only on the number of non-residents crossing national frontiers. Moreover, the type of border at which these data are recorded may involve a single national frontier (e.g road traffic borders for Switzerland) or all types of national and regional borders i.e road, rail, sea, inland waterway and air (Portugal, for example, collects data on non-resident border crossings at road, rail, sea and air borders at both the national and regional levels).

The most comprehensive data series are available for accommodation statistics. Of the 17 member countries of the EC and EFTA who replied to the questionnaire on tourism methodology, 16 provide data on the number of establishments, bedrooms and bed-places for main and supplementary categories of lodgings available to tourists (hotels, motels, guest houses, inns, camp-sites and youth hostels). The significant amount of data available and the regularity of data collection (generally monthly), provide a sound basis for the development of supply side statistics on tourism.

On the demand side, data on the travel habits of residents offers information on long stays (4+ overnight stays) and short stays (1-3 overnight stays) for the most part. Data is also collected on same day travel (excursions), business travel and visits to relatives and friends, though these are not as well established in national methodology as long and short stays. The WTO Ottawa Conference on International Travel and Tourism of June 1991, recognised the importance of measuring same day travel and business travel, which are significant not only in terms of tourism consumption (expenditure), but provide the basis for forecasts which may influence supply-side decisions (e.g investment in the construction of conference facilities in hotels).

Socio-economic data on the visitor or tourist in relation to travel habits are also included in the analysis. This information allows us to identify the age, sex, profession and residence of the person(s) travelling and the specific destinations and activities chosen so that visitor "profiles" can be built up. At present, these data rarely include a qualitative assessment of the trip made, even though for users of tourism statistics in marketing and promotion this information is of considerable importance for planning strategies.

While much of the information contained in the analysis of statistical systems and methodology for the collection of data on tourism in EC and EFTA Member countries is taken from national administrative sources, the report also points out the private-public sector partnerships which exist in certain countries (Denmark, the Netherlands, Germany etc.). The use of "official" organisations often ensures a greater degree of data compatibility and comparability between European countries, since these bodies tend to operate in a similar way. Nevertheless, by consulting or working directly with the industry a clearer image can be provided of the factors directly influencing operators within the tourism industry (as has been the case with the study on User Needs for Tourism Statistics), as well as easing resource and time constraints placed upon National Administrations. Given the aim of harmonising the methodology for tourism statistics so that data are both reliable and comparable, it is important that organisations in both domains work together to reduce burdens on enterprises, eliminate duplication and develop the sources and means of information gathering on a common basis.

### Definitions

The definitions used by the majority of EC and EFTA countries with respect to domestic and international visitors, travellers, tourists, residents and non-residents, are compatible with those agreed in the World Tourism Organisation and, therefore, allow comparisons of national and international tourism flows.

In the case of accommodation statistics, however, some countries (Denmark, Germany, Norway) only collect data on establishments which have a minimum number of rooms or bed-spaces. Other countries also mention the provision of certain facilities additional to that of lodging tourists in the definition of accommodation establishments (e.g. room service). In Austria, data on accommodation establishments are collected only for those "Tourism Communities" where there are more than 3000 tourist nights per year. This often limits the scope of the statistics gathered and can cause problems of comparison with other countries where such criteria are not considered.

Definitions relating to "same day travel" also vary among the Member States. In this case minimum and maximum distances and times are added to the general definition ("a round trip taken within a period of 24 hours which does not involve an overnight stay at the place visited").

The increasing tendency of tourists to take shorter and more frequent trips/holidays, implies the need to review and extend existing definitions to incorporate these into the existing methodology. Definitions of same day travel, business tourism and tourism involving stays in specific locations (rural areas, on farms, at spas etc;) and/or as a result of "cultural" or environmental factors will also need to be formulated if tourism practices are to be accurately reported in future.

### Frequency

Generalisations about the frequency of tourism data collection cannot be readily made. Most countries provide data at least annually for the 5 subject areas indicated above, especially when these are derived from existing statistical registers (on the number of enterprises or employees, or for the Balance of payments Travel account). Monthly data are also collected by several countries. If panels are used (as in the Netherlands), further variations in the frequency of data collection may be introduced, since these are normally consulted at intervals during the year which are determined by the country in question.

## 5. DEVELOPMENT OF A METHODOLOGICAL FRAMEWORK FOR THE COMPILATION OF COMMUNITY STATISTICS ON TOURISM

The development of a frame of reference for tourism statistics at European level is seen to have several main benefits :

- to maximise the benefit to users by ensuring the comparability and reliability of statistical information by providing guidelines on definitions, classifications and methods on data collection;
- the existence of comparable data by different countries will stimulate the use and exchange of statistical information by developing appropriate tools of analysis which can support decision making;
- for the providers of information the framework will offer a practical working document as a basic harmonisation tool for developing official European statistics and as guidance for all other providers of information.

Tourism is a complex phenomenon, characterized by rapid changes and by huge segmentation on the demand side as well as on the supply side.

Since tourism is an industry which touches most economic sectors, the development of a methodological framework for the analysis and production of statistics involves numerous problem-areas. Therefore very broad and different approaches can be established.

The main aspects taken into account when developing the methodology were:

- existing statistical systems in EC/EFTA Member States and international practices (especially by WTO and OECD);
- users' needs for statistical information on tourism.

It has been considered, since the beginning, that the methodology, even if not exhaustive, must be broad enough to provide a useful tool for most collection of data carried out by the public or private sector.

A step by step approach was adopted in order to improve the methodology supported by Task Force meetings and close co-operation with WTO and OECD taking into account the development of international definitions, which were being modified.

The first step was made during the meetings of the Working Group on Statistics on Tourism in January and February 1991 in selecting the key issues for methodology. EC/EFTA countries and the Commission were called upon to propose items requiring methodological development. The different subjects that arose are structured within the General Framework indicating the connection between them.

In Annex 1, the list of established subjects of common and basic interest is included.

Specific reports have been drafted on the different issues selected. They refer, notably, to: basic statistics on tourism supply and demand, emerging forms of tourism like cultural and rural tourism, indicators monitoring the economic and environmental impact of tourism.

A group of consultants from almost all the EC/EFTA countries has given strong support to the Working Group on Statistics on Tourism in finalising the studies.

Finally, the general framework on tourism statistics has been established by integrating the results of the user needs report, the analysis of statistical systems available in EC/EFTA countries and the outcome of the specific reports, already mentioned, covering the selected aspects of tourism.

The Working Group on Tourism Statistics agreed on the structure and main results of the report presenting the methodological framework in October 1992. The final report will be submitted for formal adoption by the Group in the meeting of February 1993. The global structure of the framework is included in Annex 2.

The methodological analysis, which constitutes a very significant acceleration in the progress of work carried out at international level on tourism statistics, cannot be considered exhaustive taking into account the characteristics of the analysis and the timetable imposed.

In the coming year it is envisaged to consolidate the work already done and to disseminate and discuss the results with all interested parties. The finalized manual shall therefore be supported by the adoption of a specific Recommendation which will add value to the methodological work undertaken at the European level.

## 6. COOPERATION WITH INTERNATIONAL ORGANIZATIONS

The need to build up a common methodological framework at international level is also underlined by the close cooperation set up with WTO and OECD secretariats at each step of implementation of the two-year programme

While taking into account the different status and the role played by each of the organization involved in this exercise, it has been possible to strengthen coordination and to develop new synergies through the working process established for attaining the common objective of a unique language on tourism statistics accepted worldwide.

A significant factor in this context was the participation, during the preparatory phase, of the Commission in the International Conference on Travel and Tourism statistics held in Ottawa in June 1991. The previous detailed analysis, within the EC-EFTA Working Group, of the documents on methods, definitions and classifications proposed to the Conference show the importance of the European contribution in this domain. The practical results of this cooperation, already visible in respect of the actions undertaken in the framework of the Council Decision, have given the possibility to maximize the impact of Community work even outside the Member States.

## **7. COMMISSION INTER-SERVICES ACTIONS**

The close cooperation set up also in this field among the Services of the Commission, since the elaboration of the Council Decision on tourism statistics, has been reinforced and further implemented by the common concertation on the specific actions envisaged for a better knowledge of the tourism domain.

A meeting was called by the Commission on June 1991 in order to inform its different services, directly or indirectly involved in the tourism domain, about the actions undertaken in this field with regard to statistics, as well as to take advantage of their suggestions and to organize the collection of user needs at the level of the Commission.

According to the conclusion of the meeting, at which 12 Directorate Generals were represented, it has been agreed to set up, within the Commission, an inter-service group among the users of tourism statistics (GUST), in order to better finalize the production of statistical information according to the development of Community activities which have an impact on tourism.

## **8. COOPERATION WITH THE EUROPEAN PROFESSIONAL ASSOCIATIONS**

A meeting was called by the Commission on March 15th, 1991 in order to present to the Professional Associations, (which are users and at the same time producers of statistics) the two-year programme and to find out all the opportunities that could maximize efforts to improve the quality of European tourism statistics.

The 15 Associations which took part in the meeting, representing all the sectors of activity involved in tourism, welcomed the approach of the Commission and warmly supported the development of close cooperation with the latter for implementing the statistical programme on tourism.

The results of the work carried out in the framework of the Council Decision were presented to the professional associations in the meeting called by the Commission on September 1992.

The better circulation of information on programmes and actions developed by both sides has therefore been ensured.

Despite the recognition of the Commission's work for the progress made in this field and for the transparency which has characterized its development, the professional association drew attention to the lack of reliable statistical information on tourism at European level which still exists.

Underlining the basis of the Community action in this field, representatives of economic operators called for the continuation of the work and for a more active role by the Commission in establishing the statistical information required.

The professional associations also considered as a necessity the continuation of the consultation process when implementing the methodological framework and any new data collection tools.

## 9. CONCLUSIONS

Consultations conducted during the period of implementation throughout the two-year programme have provided evidence of a unanimous consensus for the establishment of a coherent statistical system for tourism at European level.

The main users of statistics on tourism in the public and private sectors and at regional, national and international levels, have expressed a need for statistical information on tourism which is reliable, comparable and available at short notice in order that:

- they might improve upon the planning and implementation of strategies vis-à-vis the completion of the Single Market and the creation of the new European Economic Area; and
- assess the impact of specific measures in the field of tourism.

Users give priority to the following aspects:

- monitoring the main activities connected with tourism supply using structural and performance indicators;
- evaluating the micro and macroeconomic importance of tourism activities;
- analysing the structure of tourism demand generally including business tourism.

The study undertaken of existing statistical systems and available data in the EC/EFTA Member States provides evidence that differences in methodology are linked to structural characteristics both in terms of the propensity to develop tourism and to geographical conditions. Differences in scope which also exist between the national systems do not necessarily reduce the effectiveness of joint working in terms of comparability of results.

The analysis of the methodology for tourism carried out during the course of the 1991-1992 work programme considerably increased the rate of progress achieved in other projects on tourism statistics undertaken at national and international level. Although the results of these projects cannot be considered exhaustive, they nevertheless provide the basis for developing a reference framework for statistics on tourism at the Community and European level.

The Commission has been approached by the various actors involved in tourism and requested to act as a driving force for developing tourism statistics.

The development of Community statistics on tourism has also been considered as being a priority by the Council in its Decision of July 1992 on a Community action plan to assist tourism<sup>(8)</sup>.

Without underestimating these requests, further Community activity envisaged in this field has to continue to be based on a pragmatic approach being consistent with the principle of subsidiarity. This implies the consolidation of work already undertaken and the development of flexible but coherent monitoring instruments which optimize the use of the existing statistical systems.

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(8) OJEC N° L 231, 13.08.92, p. 26

The actions for the development of the information system required for Community tourism statistics after 1992 have been defined on the basis of the results presented above and of the orientations given by the EC/EFTA Working Group on Tourism Statistics, as well as by the Directors-General of the National Statistical Offices and by the Tourism Management Committee.

In this light and taking into account the Statistical Programme of the European Communities 1993-1997, the following actions and objectives are envisaged:

\* **Completion and consolidation of the methodology for tourism statistics**

The links between the multiple actions currently underway should be developed in order to achieve greater synergy. The methodological manual including a general framework for the compilation of Community tourism statistics, already drafted, will be finalized and forwarded to the main providers and users of statistics. This work, considered as a major priority, shall be supported by a specific legal instrument such as a Recommendation.

A Recommendation is needed to fully consolidate the work carried out on the methodology and optimise the results obtained. It would also maximise the advantages gained by users by ensuring that facts and figures on tourism are comparable and reliable, and at the same time facilitate the introduction of methods of data collection by providing guidelines on the methods and definitions which should be used.

In order to ensure an appropriate exchange of views and experiences on the current development of tourism statistics, the Commission shall assist interested Member States in the organisation of international seminars which involve national authorities, experts, professional associations. In this context, major technical problems toward the establishment of harmonized tourism statistics shall be debated.

\* **Organising and adding value to existing data in order to disseminate harmonized statistics**

This presupposes the development of the necessary synergies between national and Community statistical projects relating to tourism. The aim is to streamline information gathering (passenger, transport, environment, household budget, employment, SME's, statistics on agricultural prices, balance of payments, etc.).

If the various information gathering methods at present in use are to be made consistent in practice, and if the multiplier effect inherent in the Community's action is to be exploited, thereby enabling Member States to optimize their current effort without having to make major changes in their national systems, an appropriate legal basis might be found. A Council Directive can provide a common framework to regroup the various actions which are being carried out at national level and channel efforts at present deployed in a fragmented way. The latter should cover both tourism supply and demand statistics, given the complementary nature of these two areas.

The above suggests that a cost/benefit analysis should be undertaken on harmonisation which could, alternatively, be realised in a series of successive phases.

**Around a core system of tourism statistics supported by a legal base, satellite actions or instruments shall be established by the year 2000. These actions should focus on the following :**

- **An extensive use and analysis of other existing statistics related to tourism such as employment, transport, national accounts, prices, service statistics, etc;**
- **An extensive use of new technologies to compile information (documentary data bases, geographical information systems, electronic transmission etc);**
- **The establishment of specific statistical instruments at European level in order to provide rapid information in the case of a crisis in tourism demand and to monitor the effects of specific actions concerning tourism (panel of enterprises or/and household/individuals etc.);**
- **The development of forecasting models.**



## **ANNEX 1**

The subject of analysis selected within the framework of the methodological work concerns:

### **Basic methodology :**

Tourism demand :  
short-long stays  
same day travel  
tourism and passengers transport

Tourism supply :  
accommodation  
other supply side statistics

### **Specific form of tourism :**

Rural tourism and regional aspects of tourism  
Cultural tourism

### **Statistics Related To Tourism (Impact) :**

Tourism and the balance of payments  
Prices, costs and tariffs in the tourism sector  
Tourism and the environment  
Employment and training

The above methodology is supplemented by the following actions to guide the producer/user of statistics :

General framework  
Key indicators  
A European integrated information system  
Hotel, restaurant and travel agencies within the framework of statistics on services  
Classifications

## **ANNEX 2**

The drafted "General Framework for the compilation of Community tourism statistics - Methodological manual", includes the following issues:

### **Tourism demand**

#### **Main segments in tourism demand**

Visits for holiday purposes

Same day visits for leisure purposes

Visits for business purposes

#### **Emerging specific issues**

Cultural tourism

Rural tourism

### **Tourism supply**

Accommodation statistics

Statistics on the supply of tourism products

### **Impact of tourism**

Economic systems

Satellite accounts

Balance of payments

Employement

Price indices on tourism

Environmental impact

### **Specific sectors strongly related to tourism**

Horeca

Tourism and passenger transport

### **Interactions on supply and demand**

### **Key figures**

### **Data management and dissimulation**