

- **Monthly tables - latest trends (ETC)**
- **Measuring and benchmarking seasonality**
- **Comparing the guest mix of destinations**
- **Analysis of tourism intensity**
- **Market volume and growth analysis (,Portfolio A.‘)**
- **Shopping barometer (ECM)**
- **Visitors to attractions and sites**
- **Webanalytics**
- **MyTourMIS**
- **Outlook (possible developments for the next years)**
- **Summary and feedback**

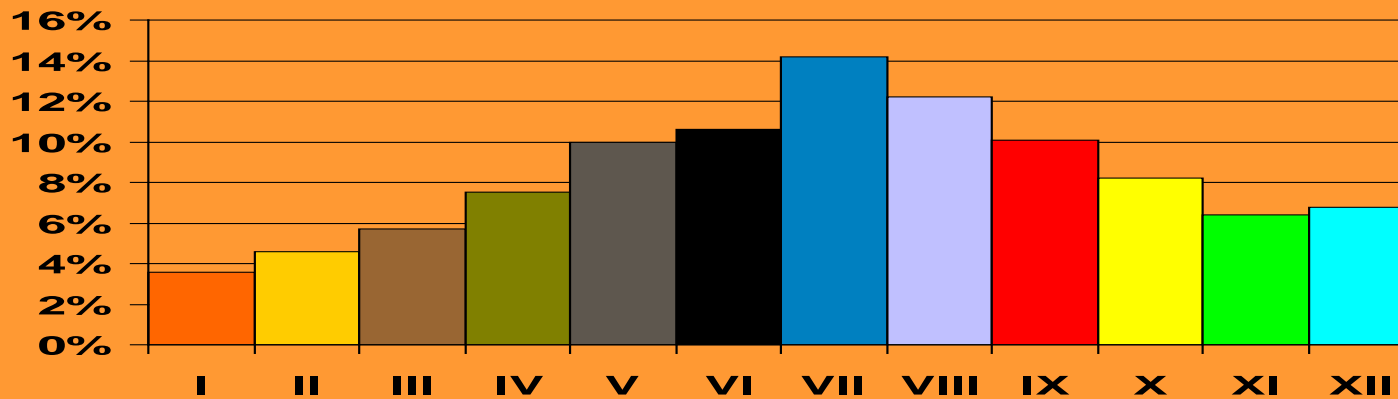
Latest Trends (ETC)

Measuring and comparing seasonality in European destinations

- **Seasonality: The systematic intra-year variation in visitation caused by exogenous factors:**
 - Natural (e.g. climate)
 - Institutional
 - caused by the markets of origin (e.g. timing of school holidays)
 - caused by the destination (e.g. regular mega-events)
 - Calendar effects (e.g. Easter)
- **Problems:**
 - The need to **optimize the use of tourism infrastructure** such as roads to accommodate high flows during certain periods
 - Seasonality **increases the risk of high unemployment** during the low seasons
 - In dryer regions the issue of **water scarcity** is of particular concern

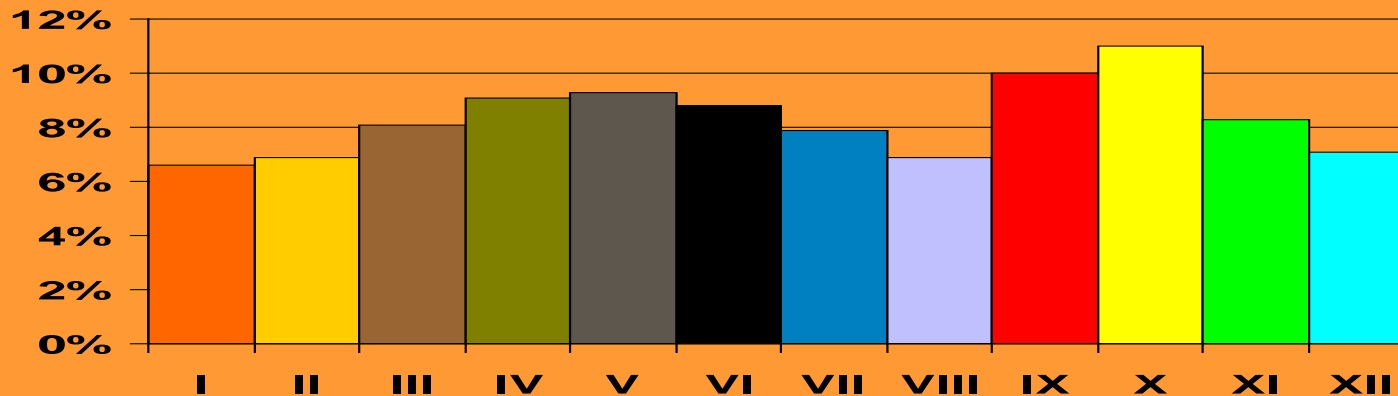
- **Product**
 - Development of new offers, events, packages, ...
- **Pricing**
 - Providing discounts for periods with less demand
- **Promotion**
 - When and how intensively we will promote the tourism products
- **Placement**
 - Which geographic region/market should be promoted
 - Which segments (e.g. young adults, families, business people)

Gini coefficient



LÜBECK

Gini=0.207



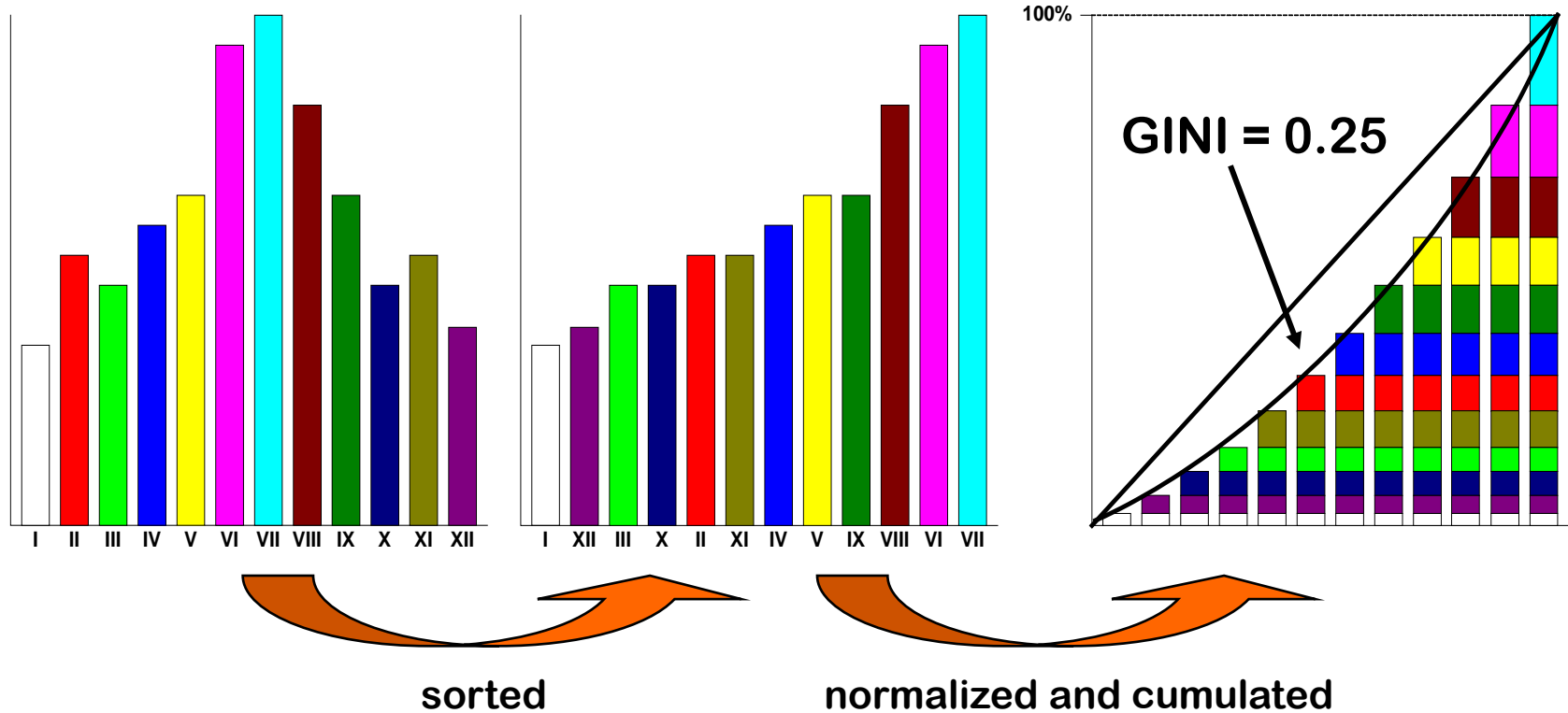
MADRID

Gini=0.088

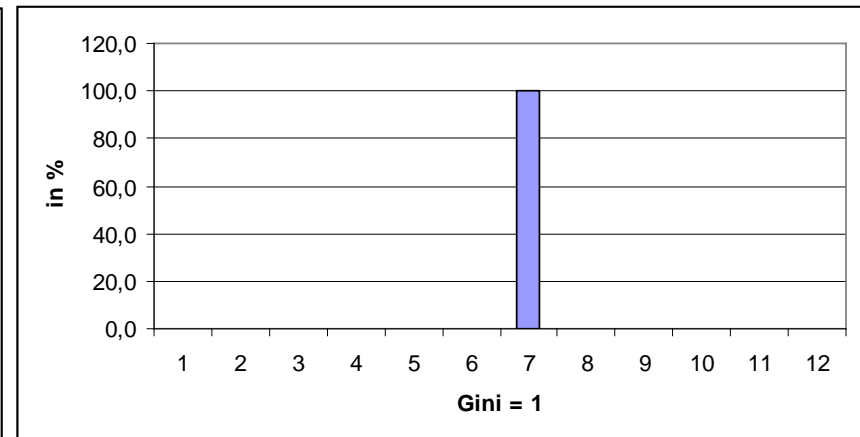
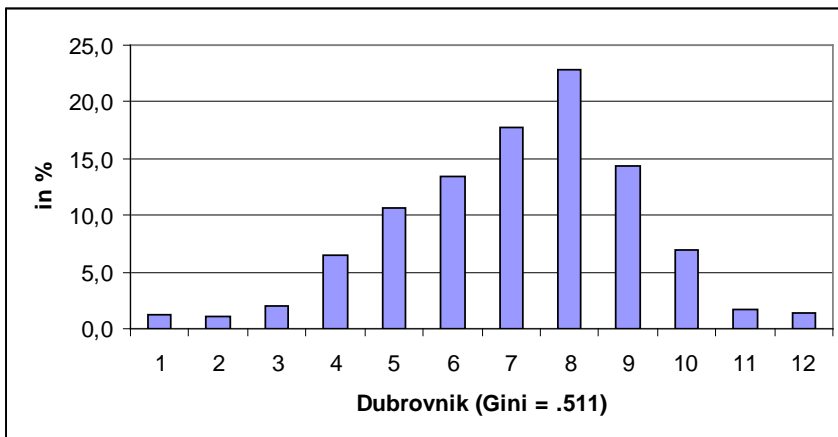
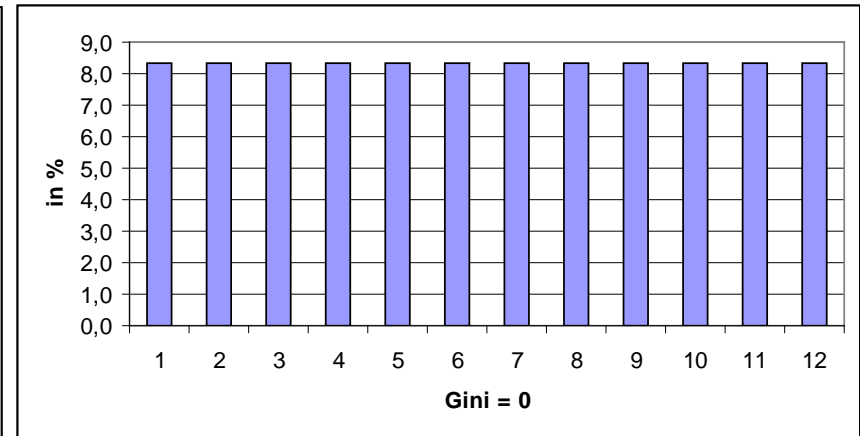
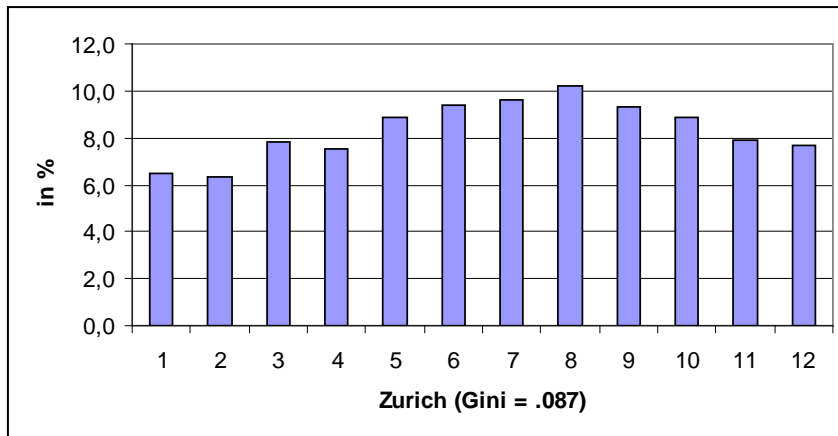
The Gini coefficient

Measure of statistical dispersion. The Gini can be approximated

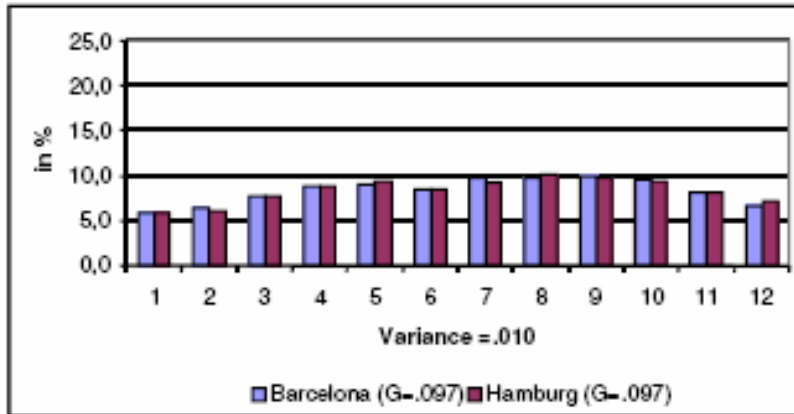
with trapezoids:
$$G^* = 1 - \sum_{i=1}^{12} (X_i - X_{i-1}) \times (Y_i + Y_{i-1})$$



Measuring seasonality (Gini coefficient)

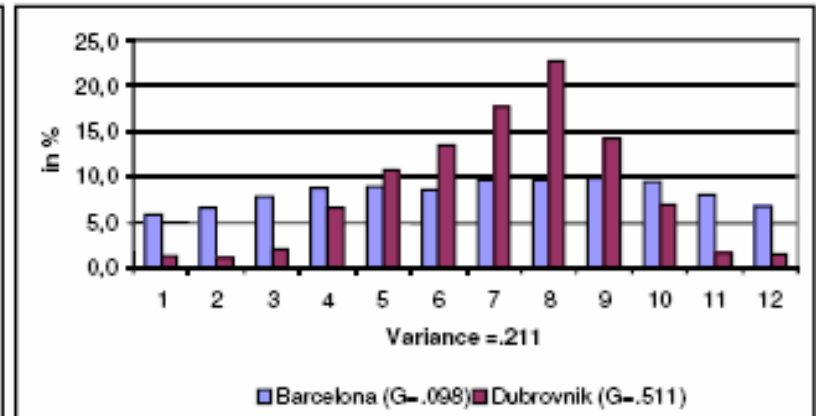
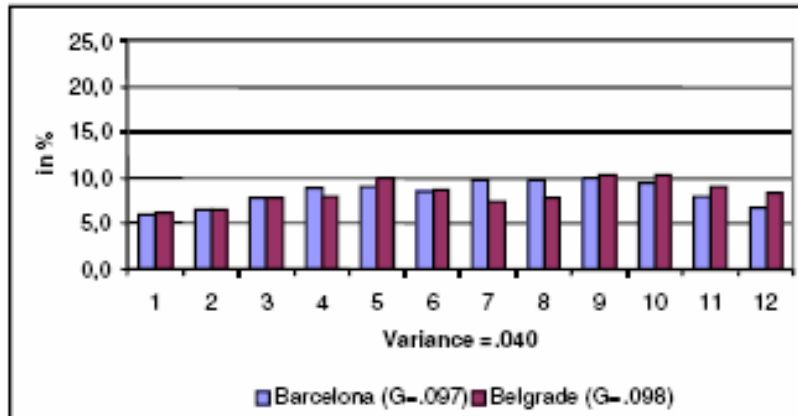


Similarity of seasonal patterns



$$d = \sqrt{\sum_{i=1}^{12} (x_i - y_i)^2}$$

Similarity of seasonal patterns of two destinations. Multiple destinations?

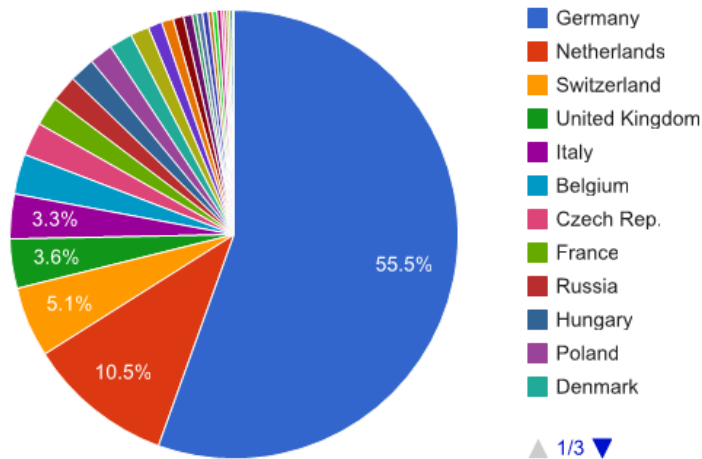


Comparing the guest mix of destinations

Diversity of guest mix

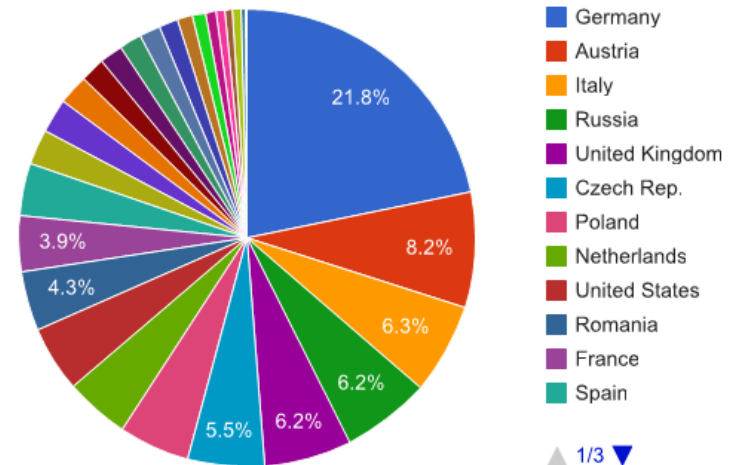
Assumption: A high diversity of guest mix spreads the risk of negative economic developments in single markets

Average length of stay of a market in all ETC destinations - Bednights (preferred definition) 2012



Austria (Gini = 0.792)

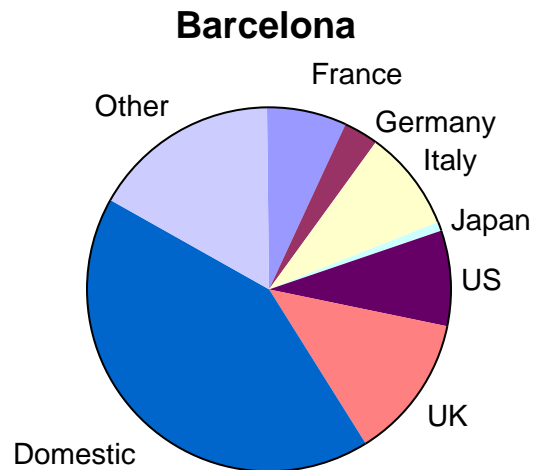
Average length of stay of a market in all ETC destinations - Bednights (preferred definition) 2012



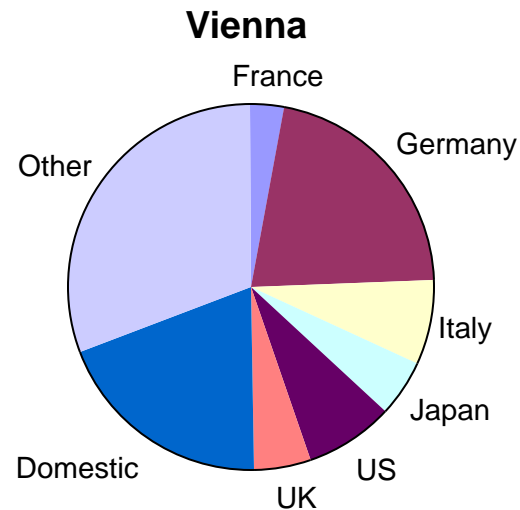
Hungary (Gini = 0.525)

Analyzing the similarity of guest mix

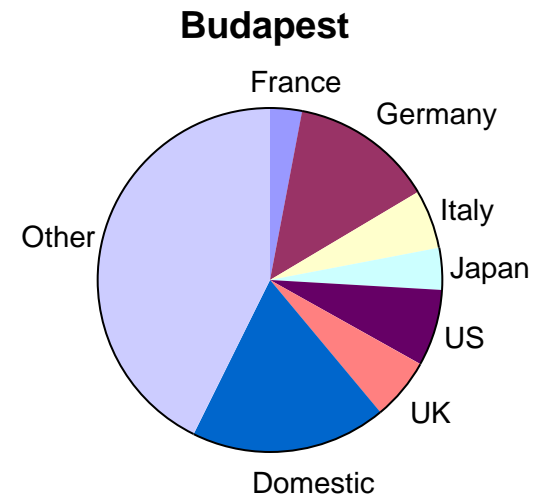
Assumption: The comparison (variance) of guest mix shares defines a destination's exposure to interregional competition



$V = 0.364$



$V = 0.193$



New: Analysis of Tourism Intensity

Market volume and market growth analysis & Portfolio visualization

To find the right (optimal) mix of target markets

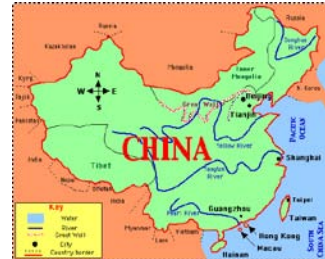
Implications for strategic (long-term) decisions and for the budget allocation process (e.g. where should we invest?)

2 basic questions:

- What makes a market attractive?
- What are our chances in attracting visitors from a particular market?

What makes a market attractive?

1. Size/volume



2. Growth/Prospects



- **Market volume and market growth indicators**
 - # of travellers/arrivals/bednights or spendings
 - either measured at the country of origin (source market) or in all destinations (e.g. total bednights in all destinations)

What are our chances in attracting visitors from a particular market?

„Market chance indicators“

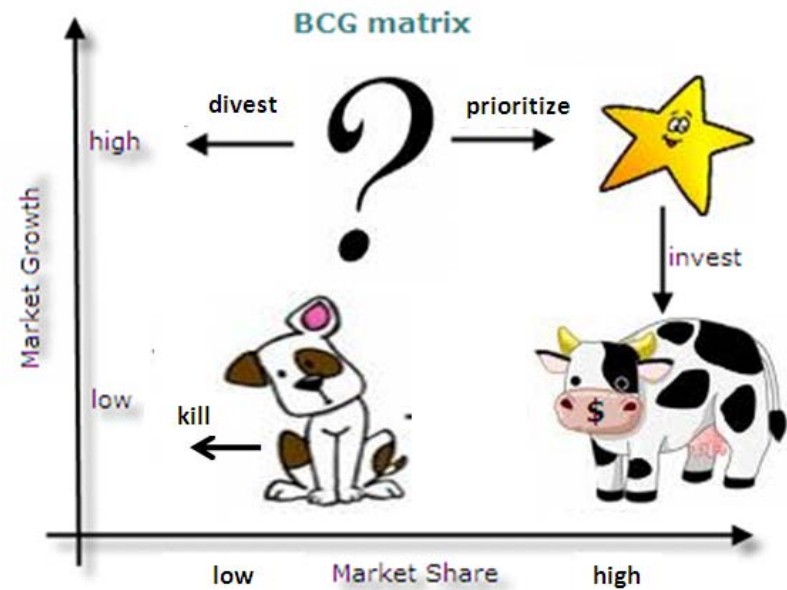
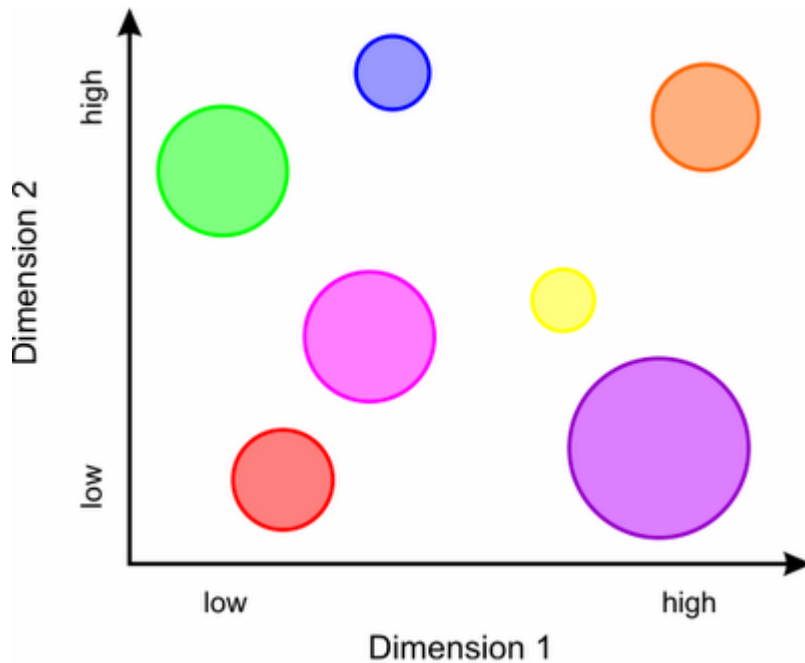
- **Destination awareness**
 - Knowledge, preference and sympathy towards a destination
- **Relative price level**
 - Comparison between prices of tourism goods and travel budget of travellers
- **Level of distribution**
 - Availability of a destination within the generating country's distributional system of tour operators and travel agents and online reservation systems
- **Competitive pressure**
 - Advertising budget invested by all competitors in a market
- **Travel distance**
 - Average financial input to cover travel distance

Strategic Key Performance Indicators

- **Market volume** is an absolute number describing the volume of tourism generated by a particular market
- **Market growth rate** is the percentage change of the market volume (in %)
- **Absolute market share** is the ratio when comparing the performance of a particular destination with the overall market volume (in %)
- **Relative market share** is the ratio of the market share of a particular destination compared to the market share of the leading destination (or the second best destination if the destination of evaluation is the market leader)
- **Guest mix share (= importance value)** is the proportion of bednights sold of a particular market compared to the overall number of bednights recorded in a tourism destination (in %)

Market growth-share matrix

Visualization



Examples on TourMIS

„Market volumes and shares of selected destinations“

- **Regional Level**
 - Portfolio analysis of Austrian provinces
- **City Level**
 - Portfolio analysis of cities in Europe
- **National Level**
 - Portfolio analysis of countries in Europe

The ECM Shopping Barometer

- **Objective**
 - To shed light on the costs differential existing across cities in Europe, collecting publicly available data for a specific set of items among those commonly consumed by visitors.
 - The final goal of the project is to rank destinations according to their costliness and to gain a deeper insight on visitors' perception of their experience in a city.
- **Problems**
 - What prices to collect?
 - Comparability of services and a prices
- **Sample size**
 - 2012: 10
 - 2013: 38
 - 2014: 28

- **Guidelines (Manual) – Prices should:**
 - reflect the final price (i.e. include VAT and eventual tourists taxes)
 - refer to the regular price for individual's consumption (discounts for groups or special categories are not considered)
 - are collected from businesses in the city center
 - are collected in the local currency (converted into Euro)
 - are collected at a specific time of the year, but refer to a one-year period
- **The shopping bundle covers the main service categories required by tourists at the destination**

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The ECM shopping barometer

16 items

Local transport	Taxi from airport to city centre (1 person including luggage)	If the city has more than one airport, the researcher has to select the airport recognized as the one where the majority of international guests arrive. The name of the airport has to be specified in the notes.
	Train from airport to city centre (1 ticket, 2nd class) OR public transport bus from the airport to the city center (1 ticket, regular)	
	1 day ticket for the local public transport	
Food and Beverage	Price for a business lunch of 3 courses, no drinks, in the restaurant of a 4-star hotel in the city centre	The restaurant can be part of one of the hotels contacted for the room rates.
	Price for a dinner of 3 courses, no drinks, in the restaurant of a 4-star hotel in the city centre	
	Price of a classic pizza, Margherita with 2 toppings, for 1 person	Price collected at a Pizza Hut in the city centre
	A Coke, 0,33 l, in a Pizza Hut restaurant in the city centre	If a 0,33 l Coke is not available, the price should refer to a medium size Coke (or other soft-drink).
	A Beer, 0,33 l, in a Pizza Hut restaurant in the city centre	If a 0,33 l beer is not available, the price should refer to a medium size beer.
	Big Mac meal at McDonalds in the city center	The price refers to a Big Mac menu, including 1 Big Mac, french fries and one drink at a regular price (no special offers)
	Espresso in the lobby bar of a 4-star hotel	The bar can be part of one of the hotels contacted for the room rates.
Entertainment	Regular price for 1 ticket for the opera, 1 adult, no reductions.	The opera should be a classical piece. The seat should be in the parterre, 5th row in the middle.
	Regular price for 1 ticket for a classical concert, 1 adult, no reductions.	
	Regular price for the entrance to the biggest/main museum (permanent collection), for 1 adult, no reductions.	The price should refer to the regular entrance fee and should not be collected on days with special offers.
	Regular price of 1 ticket for the hop-on hop-off sightseeing bus, 1 adult, no reductions	If the hop-on hop-off bus is not available, another similar sightseeing tour (e.g. tourist train) can be used and specified in the notes.
	Zoo, entrance of 1 adult, no reductions.	If the zoo is not available a similar attraction can be used (e.g. Tropicario, Mini Europe).

Visitors to attractions and sites

ECM Meetings Industry Project

www.tourmis.info/mice

Work in Progress

MyTourMIS

Setting: ,flexible period‘

Today: **September 11, 2014**

Juli 2014

2001 – 2012

January 2011 – August 2014

Some day in the future: e.g. **November 2014**

September 2014

2001 – 2012

January 2011 – October 2014

- **Additional tables and features**
- **Bulk download in xml or xls (via menu and API)**
- **Collecting data for cities outside Europe**
- **Collecting data on daily expenditures of tourists**
- **Integrating external data sources**
 - **Eurostat (nights and arrivals)**
 - **Economic indicators, exchange rates**
 - **Distances (GPS information of agglomeration centers)**

- **New tables**
 - Availability of tourism statistics in one market
 - Capacities: Showing longitudinal data
 - Attractions: Add number of opening days to tables that show visitor numbers
 - Attractions: Add additional input table for entering visitor numbers for multiple years (for one attraction)
 - Changing/standardizing the order of years in tables ('oldest' year – left column, 'newest' year – right column)

Proposing new tables

Drafting a new table Example: Average length of stay

Suggested label of table: Average length of stay in one ETC destination ¶

Destination = <to be selected> ¶

Type of Accommodation = <to be selected> ¶

Period = mm1/yy1 - mm2/yy2 <to be selected> ¶

¶

¶	Arrivals¶			Bednights¶			Avg-Length-of-Stay¶	
	mm1/yy1¶	mm1/(yy1-1)¶	% p.y.¶	mm1/yy1¶	mm1/(yy1-1)¶	% p.y.¶	mm1/yy1¶	mm1/(yy1-1)¶
	-¶	-¶		-¶	-¶		-¶	-¶
	mm2/yy2¶	mm2/(yy2-1)¶		mm2/yy2¶	mm2/(yy2-1)¶		mm2/yy2¶	mm2/(yy2-1)¶
	(absolute)¶	(absolute)¶		(absolute)¶	(absolute)¶		(days)¶	(days)¶
Market-A¶	¶	¶	¶	¶	¶	¶	¶	¶
...¶	¶	¶	¶	¶	¶	¶	¶	¶
Market-Z¶	¶	¶	¶	¶	¶	¶	¶	¶

Submit to tourmis@modul.ac.at

Bulk download in xml or xls via API/menu

<http://www.tourmis.info/cgi-bin/tmxml2.pl?c=N&m=UK&d=BER:VIE:AMS&t=2001:2009&r=s&p=a&f=0>

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Column A	Column B
Destination A	data
Content A	data
Market A	data
Time A	data
Time B	data
Time C	data
Market B	data
Time A	data
Time B	data
Time C	data
Content B	data
Market A	data
Time A	data
Time B	data
Time C	data
Market B	data
Time A	data
Time B	data
Time C	data
Destination B	data
Content A	data
Market A	data
Time A	data
Time B	data
Time C	data
Market B	data
Time A	data
Time B	data
Time C	data
Content B	data

....

Objectives:

- 1. Monitoring and comparing the daily expenditures of all and individual markets (domestic plus 59 foreign markets) for destinations who perform visitor surveys**

Focus: Average daily expenditures of tourists (excluding transportation to the destination) broken down by

- accommodation
 - food and beverages
 - entertainment
 - shopping
 - local transportation
 - other
- 2. Developing an econometric model which allows to estimate the direct economic contribution of tourism even if there is no or only incomplete data available for a particular destination**

Summary and Feedback