The Feasibility of a Virtual Tourism Observatory for Europe

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Presentation Outline

• Vision for the VTO
• What sort of collaboration model?
• The Project Approach
• The Policy, Research and Data Frameworks
• The Database development and web ‘front end’
• Ongoing and Future Work
What is the EC vision for a future Virtual Tourism Observatory?

- A statistical database for informed, evidence-based policy making.
- The analysis section of the Observatory is expected to deliver regular reports.
- The policy watch section will monitor policy developments in the Member States.

“The Virtual Tourism Observatory is meant to become a central source of information for policy makers, tourism stakeholders and researchers. It will provide reliable, comparable and up-to-date information. It will identify trends and developments in the tourism industry and will provide explanatory analysis”.

The challenge is to ensure that users are motivated to engage or collaborate with the VTO.
Vision for the VTO

- A repository for up to date information about the tourism sector in Europe encompassing data, policy and research
- Managed and hosted by DG-ENTR on the Europa website
- Potential to develop collaborative working through the VTO User Community
- Drawing on existing data and information with scope to facilitate the presentation of national and regional level information
A Vision for the VTO

• User friendly interface with easy download facilities, user defined content and analysis tools
• Robust data framework and metadata structures for data and documents that allow the system to be expanded
• Scope for inclusion of other sources of information, e.g. OECD, UNWTO, member states data, sustainability indicators
• Potential vehicle for presentation of TAC Member States Reports
A vision for the VTO

• Schematic representation of the VTO
What should an observatory do?

• “An observatory should be outward looking, have a strong focus in data and research presentation without necessarily providing interpretation of this information (which is often left to the user). An observatory may provide linkages to relevant policy activity in the field and be used to inform the policy making process but it is not usually the purpose of an observatory to steer a particular policy agenda”.

• The VTO is not a knowledge network but does share some of the characteristics of KNs – there is potential for the VTO to develop collaborative working, e.g. through project working
What sort of Collaboration?

Spectrum of Interests:

- **Broad**
  - **Open/General**
    - Observatories
      - Examples: INTO, Cluster Observatory, VTO
  - **Formal Networks**
  - **Information networks**

- **Narrow**
  - **Closed/internal**
    - **Thematic networks**
      - Examples: ABTA, ETOA, HOTREC
    - **Strategic alliances**
    - **Trade Associations**
  - **Multiple (External)**
    - **Networks of experts**
    - **Communities of practice**
      - Examples: ENAT, Eunest, InRouTe

Organisations:

- **Single (Internal)**
  - Knowledge Management Networks
- **Multiple (External)**

Examples: Largely internal and will vary between organisations.
Project Methodology

• Phase 1: Data and Information Gathering
  • User Needs Survey
  • Data Sources Survey
  • Survey of Existing Observatories and experts
  • Policy, data, and research frameworks

• Phase 2: Analysis of data and information
  • Includes Gap analysis and derived variables

• Phase 3: Database Development and web “front end”

• Phase 4: Future Management Strategies
Building the framework

• The three main themes of the VTO – data, research and policy were developed into a framework for the database development based on identifying user needs through survey work and secondary analysis.

• We know consider these in more detail.
Survey of User Needs

- We have sought potential users’ views on how data, research and policy issues should be presented in the VTO

- the survey focused on the following:
  - What data/information is currently used and how important?
  - What are the important themes/issues?
  - What are the gaps?
  - How should data/information be presented?
  - What are the priorities?
Response to the Survey

296 completed responses were received in total from 41 different countries (sample frame: 1,200 contacts)
The Policy Framework

• Tourism Policy Priority Areas/Issues:
  Growth and competitiveness
  Performance of markets
  Seasonality
  Enterprise performance and support
  Innovation and ICT
  Employment and labour supply
  Skills and training
  Quality and standards
  Climate change and resource efficiency
  Transport and access
  Social inclusion/ accessibility
  Natural and cultural heritage
  Area development, diversification, regeneration
  Delivery structures
  Budgets and funding

These Policy issues have been assessed against key data variables to identify information that informs these issues.
User Requirements for Policy

What are the tourism policy themes in your region/nation that are of most importance to your organisation?

- Improving the competitiveness of tourism
- Tourism innovation
- National tourism sector development strategies
- Sustainable and responsible tourism development
- Seasonality of tourism
- Regional development policies
- Policies towards specific tourism niche markets
- The quality of tourism jobs
- Cultural development policies
- Policies towards specific overseas markets (e.g. BRIC)
- Transport policy development
- Accessible tourism

Legend:
- Extremely Important
- Important
- Neither important or not important
- Not important
- Don’t know
Policy Priorities

- Competitiveness
- Sustainability
- Data issues
- Policy watch
- Development
- Social impact
- Integrated policies
- Niche tourism
- Markets
- Marketing
- Policy library
- Weblinks
- Seasonality
- Sub-national
- Independent analysis
- Co-operation and exchange
- Cultural tourism
- Innovation
- Employment
- Good quality analysis
- Accommodation
- SMEs
- Policy impact
- National strategies
- Diversification
- Economic impact
- Transport
- Cross border
- Comparisons
- EU policies
- Policy alerts
- Environmental impact
- Barriers
Key Policy Areas

- Improving the competitiveness of tourism
- Actions towards Sustainable Tourism
- Innovation in the tourism sector
- The seasonality of tourism
- National and regional tourism policy

- Which leads to theme analysis…
## Theme 4
### The seasonality of tourism

#### Links to other policy areas
Growth and Competitiveness, Performance of Markets (see section C2)

#### Potential Indicators
- School / Work Holiday Patterns (All indicators sourced from appendix C1.4)
- Second + Holidays & breaks
- Seasonality - Good Practice
- Availability of monthly data
- Indicators of seasonal smoothing
- Seasonality of Employment

#### Datasets
Most of the indicators for this theme are produced on an ad-hoc basis either nationally or locally.

Labour force survey data available quarterly could provide some insights into the seasonal nature of employment in tourism.

Quarterly employment data is included in the database development in section D of the report.

Monthly data from Eurostat on Arrivals and Nights spent in accommodation, together with occupancy rates could be an important source of information for seasonality and this is included in the database development in section D of the report.

#### Comparability
Comparability of data on employment and occupancy rates and arrivals at accommodation is good at the EU level.

#### Data gaps & limitations
Data on school and second holidays would be of use and good practice and experience in analysing the impacts of tourism sustainability would be of use in the policy/research watch area of the VTO.

#### Summary of current situation
There is already substantial data included in the database development that informs the area of seasonality. Developing further links to good practice and research/policy material in the area would be a further step for the VTO moving forward.
## The Research Framework

### Review of Research Sources

<table>
<thead>
<tr>
<th>Main Research Themes</th>
<th>Research Sub-Themes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic Competitiveness</td>
<td>Destination Competitiveness and Management</td>
</tr>
<tr>
<td></td>
<td>ICT, the Internet &amp; Mobile Technology</td>
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<td></td>
<td>Skills and Human Capital</td>
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<td>The Economic Context</td>
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<td>Environmental Pressures</td>
<td>Climate Change</td>
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<td></td>
<td>Sustainable Destinations</td>
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<td></td>
<td>The Impact of Oil and Energy</td>
</tr>
<tr>
<td>Tourism Measurement and Modelling</td>
<td>Statistical Approaches to Measurement at National Scale</td>
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<td></td>
<td>Modelling and Impact Assessment</td>
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<tr>
<td></td>
<td>Sub-National Measurement:</td>
</tr>
</tbody>
</table>
User Requirements - Research

How interested is your organisation in having access to research on the following topics?

- Market profiles and trends
- Socio-economic impact of tourism
- Innovation in tourism (products and approaches)
- Factors affecting economic competitiveness
- Analysis of geographical areas similar to yours
- Methodologies for economic impact and forecasting
- Statistical developments and approaches
- Environmental impact of tourism
- Technological trends
- Analysis of the impact of major events
- The pedagogy of tourism (teaching and learning)
- Resources and other constraints

Legend:
- Extremely interested
- Interested
- Neither interested nor uninterested
- Not interested
- Don’t know
Research Priorities
Final Themes

• Tourism Trends
• Economic Impact and competitiveness of tourism (incorporating ‘volume and value’)
• Innovation in the Tourism Sector
• Social impacts of tourism
• Environmental impacts of tourism
The Data Framework

- Identifying potential sources of data around a set of key topic areas - informing the database construction
- Metadata standards and a simplified set of metadata requirements developed
- Refinement of the Tourism ‘data map’ taking account of policy priorities identified
User Requirements - Data

five tourism data variables which are considered extremely important by over 60% of respondents and these are as follows:

• Overnight inbound tourism (numbers and spend)
• Origin of inbound visitors
• Economic data on tourism industries
• Overnight domestic tourism visits (numbers and spend)
• Tourism employment data
Database and Web Development

• Selected datasets included in a VTO ‘demonstration site’
• Additional data included in separate database files for use by EC
• Gap analysis carried out
• Metadata developed and included in demonstration site (this applied to research and policy material)
### BASIC TOURISM TYPES
- Domestic
- Inbound
- Outbound

### BASIC VARIABLES
- Number of Nights
- Number of Trips
- Expenditure
- Accommodation Capacity
- Number of Visitors
- Number of Arrivals

### GEOGRAPHIES
- National
- Sub-Regional
- Regional
- Non NUTS Geography
- Single Location
- Origin – Destination

### TSA & SIMILAR
- GDP
- Employment
- Value of Tourism

### “CHALLENGING” DATA
- Incomplete Data
- Tourism & Non Tourism Datasets
- Non Statistical Information
- Heritage Sites Locations

### CHARACTERISTICS
- Trip Characteristics
- Visitor Characteristics
- Worker Characteristics
- Job Characteristics

### CONSIDERATIONS
- Seasonality (Monthly and / or Quarterly)
- Markets (by Home Location)
- Markets (by Visitor Characteristic)
- Data for rates etc (e.g. population, area)

### DATA SOURCES
- Eurostat
- Non Eurostat
- Nat Stats Orgs
- UN / OECD etc
- Industry Orgs
- Sub-National Orgs
- Funding Information
- Organisation Details
- Sustainable tourism indicators
- Qualitative Data
- Other, e.g. safety

Indicative VTO Datasets should attempt to highlight how the Observatory would cope the most important of these aspects of data.
# Linking Data and Policy Priorities

<table>
<thead>
<tr>
<th>Description</th>
<th>Measures</th>
<th>Breakdown</th>
<th>Policy Priority &amp; Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits, Expenditure by purpose - dom. day</td>
<td>Food</td>
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<tr>
<td>Visits, Nights, Expenditure by purpose - dom. overnight</td>
<td>Travel</td>
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<tr>
<td>Visits, Nights, Expenditure by purpose (inc Transit) - inbound</td>
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<tr>
<td>Activities undertaken, Purchases made - dom. day</td>
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<tr>
<td>Activities undertaken, Purchases made - dom. overnight</td>
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<tr>
<td>Visitor characteristics - dom. day</td>
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<tr>
<td>Visitor characteristics - dom. overnight</td>
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<tr>
<td>Visitor characteristics (inc nationality) - inbound</td>
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<tr>
<td>Visitor characteristics (inc nationality) - outbound</td>
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<tr>
<td>Points of arrival &amp; departure - inbound</td>
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<tr>
<td>Points of departure &amp; arrival - outbound</td>
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<tr>
<td>Detailed origin / destination data</td>
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<tr>
<td>Airport / port arrivals &amp; departures</td>
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<tr>
<td>Visits to attractions</td>
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<tr>
<td>Sport &amp; cultural events: ticket &amp; non-ticket spend</td>
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<tr>
<td>Occupancy data</td>
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<tr>
<td>Public &amp; Personal transport trips by mode and purpose</td>
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<tr>
<td>Employment inc. Employees / self employed / Part/Full-Time</td>
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<td>Tourism direct employment</td>
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<td>Tourism direct GVA, tourism ratios</td>
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<td>Tourism Satellite Account Tables</td>
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<tr>
<td>Value of tourism within regions</td>
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<tr>
<td>GVA - inc. Market Share of tourism industries</td>
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<tr>
<td>Compensation of employees</td>
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<td>Turnover</td>
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<tr>
<td>Number, size &amp; age of enterprises</td>
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<tr>
<td>Business births &amp; deaths</td>
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<tr>
<td>Mode(s) of travel - dom. day</td>
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<td>Mode(s) of travel - dom. overnight</td>
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<tr>
<td>Mode(s) of travel - inbound</td>
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<tr>
<td>Mode(s) of travel - outbound</td>
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<tr>
<td>Location(s) of visit - dom. day</td>
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<tr>
<td>Location(s) of visit - accommodation - dom. overnight</td>
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<tr>
<td>Location(s) of visit - accommodation - inbound</td>
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<tr>
<td>Accommodation type(s) - dom. overnight</td>
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<tr>
<td>Accommodation type(s) - inbound</td>
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<tr>
<td>Indicators of comparative quality competitiveness (e.g. “stars”)</td>
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<tr>
<td>Indicators of comparative price competitiveness</td>
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</tbody>
</table>
Web ‘front end’ – 1. Search
Web ‘front end’ – 2. Build tables/charts
Web ‘front end’ – 3. Mapping
Web ‘front end’ – 4. Dashboards

VTO - Dashboard

As you are not logged in to the VTO you are viewing the default dashboard. Please log in to view your personal dashboard.

Hotel Bed Occupancy - United Kingdom (NUTS5)
Bed Occupancy Rate (%)
Jun-2012
56.1%
Change on Previous Month: +10.9%

Holiday Trips by Transport - United Kingdom (NUTS5)
Domestic Non-Tourist - Total
2011
23,142,768 Euro
Change on Previous Year: -5.0%

Holiday Tourists - United Kingdom (NUTS5)
Number of Tourists
2011
29,998,000
Change on Previous Year: -2.1%
### VTO - Bed Occupancy Rate (%)

**Description:** Net occupancy rate of bed places in hotels and similar establishments. Source: Eurostat. Coverage: Jan-1 2007 to Jul-21 2012.

#### Pivot Table

To show a saved grid select a layout ([Bed Occupancy Rate (%) by Month]) and click **Chart**. To export the grid select a file type: **Excel** and click **Export**.

#### Sources of Data

<table>
<thead>
<tr>
<th>Month</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>June</td>
<td>52.0</td>
<td>53.0</td>
</tr>
<tr>
<td>July</td>
<td>53.0</td>
<td>53.0</td>
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<tr>
<td>August</td>
<td>51.7</td>
<td>51.7</td>
</tr>
</tbody>
</table>

**Notes:**
- The data includes all establishments that provide sleeping accommodation of at least 10 bed places.
- Occupancy rates are calculated based on the number of occupied bed places.
- The data is subject to changes due to updated sources and methodologies.

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**Source:** Eurostat

**Coverage:** Jan-1 2007 to Jul-21 2012
Next Steps

• Preparing video demonstrations of the website developed and then publication of report
• EC carrying on the development of the VTO using their own systems and web standards
Thank you for your attention

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