

9th INTERNATIONAL FORUM ON TOURISM STATISTICS

Annex 1: Core themes of discussion

The 9th Forum will focus on five major themes. The purpose of the Forum is to examine current and future developments relating to these themes and their relevance for decision-making by government and enterprises. The aim is to ensure that the conclusions drawn from discussions lead to new improvements to tourism-related statistics and information in terms of, for example, ease of use, comparability and availability.

Session 1: Changes in tourism behaviour and demand

The aim is to get insight in future developments in the tourism market, knowing that tourism is a phenomenon driven by the demand side.

Significant factors related to the tourism behaviour which will have an impact on changes in the tourism-related economy, are demography, globalisation and environmental awareness. Firstly, the demographic growth observed in many regions of the world and the changing demographic composition in other parts of the world (e.g. the ageing society) will have an effect on the type of trips but also on the level of participation in tourism. Secondly, the globalisation of both the economy and information makes countries and people more interconnected. The information society does not only affect the way citizens choose or book their holidays, but also causes (or caused) a revolution in the tourism industry which in turn influence the tourist behaviour, e.g. short-stay city tourism via low-cost carriers. Thirdly, the increased attention for the environment is expected to directly and indirectly affect the tourism behaviour. The first refers to changes in means of transport used or destinations chosen, the latter refers to steps taken by authorities which change the cost structure (e.g. via taxes) or the offer (e.g. via better protection of cultural heritage).

This session wants to look at national or interregional analyses describing major trends in tourist behaviour and demand in the past and elements providing an indication of future trends in demand.

<p><i>Key issues:</i> demographic changes; changing or emerging markets; sustainable development and means of transport used.</p>

Session 2: The behaviour and performance of enterprises in the tourism sector

Enterprises in the tourism sector have to adjust to this changing demand and adopt particular economic behaviours and strategies. As in other sectors, they must contend with globalisation and international competition as well as with the constant development of new information technologies. In addition, the tourism sector is also characterised in many countries by the co-existence of a large number of small enterprises alongside major international groups.

Although sometimes neglected by official statistics, the knowledge of the sector, its enterprises and the expected evolutions – for instance structural aspects of the tourism industry such as market shares of different types of accommodation - are of high relevance for the decision-makers in the sector. Moreover, the knowledge of the sector and its enterprises also contributes to understanding the structure and evolutions in the tourism-related labour market, in terms of seasonality, skills level of the jobs and offer-versus-demand efficiency of this segment of the labour market.

The aim of this session is to describe the main characteristics of enterprises in the tourism sector in terms of their economic performance and development paths and to outline the major trends which might provide an insight into the development of the major branches in the tourism sector such as accommodation, tour operators and travel agencies.

Key issues: structure of tourism industries; characteristics of tourism enterprises with a focus on the small and medium enterprises; employment.

Session 3: Selected measurement issues related to visitor surveys

The final set of topics will be decided after having received the papers or summaries for this Session, looking at both the quality and the possibilities to form a more or less consistent session touching only one or two topics. The title of the session can then be finalised accordingly.

Many aspects of tourism cannot be captured exclusively from administrative sources or from business-related information (e.g. coming from accommodation establishments). Therefore, tourism demand side surveys are a very important component of an integrated system of tourism statistics. Such information can be collected from a visitor when entering or leaving the country (so-called border surveys), at specific tourist attractions or ex-post via traditional household surveys. Each of these survey tools has its advantages and disadvantages, but certain measurement issues occur regardless of the survey type used, be it for reasons of recall bias, for reasons of sensitiveness of the information asked, or for reasons of coverage (sampling frame or sample).

This session wants to focus on such methodological difficulties that particularly affect tourism demand surveys (e.g. composition and representativeness of the sampling frame) and specific measurement issues related for instance to the measurement of same-day visits or the estimation of tourist expenditure. These two topics mentioned by means of example are not only important for the comprehensiveness of tourism statistics but are also highly relevant for related fields of statistics such as the Balance of Payments.

Key issues: innovative approaches to data collection; expenditure; same-day visits.

Session 4: New approaches to data collection from the supply side

As is the case for most or all fields of statistics where data is collected from the economic actors, there is an increasing awareness of the respondent burden. Statistical offices try to reduce or control this respondent burden by finding more efficient ways of collection the primary information (e.g. e-surveys) from for instance the accommodation establishments. To obtain more information on e.g. tourism flows or tourism activities, data producers can make use of registers or other administrative sources and combine them with the survey data. Such sources can be general purpose sources (for instance to obtain more detailed geographical information such as urban versus rural tourism) or can be tourism-related sources (e.g. specific tourist taxes or eco-labels awarded to enterprises in the tourism sector). This session wants to contribute to exchanging national or regional practices that are not entirely linked to country or region-specific information systems and therefore have relevance for a larger group of tourism statisticians.

In addition, this session also aims at getting a better understanding of estimations methods for private or non-rental accommodation, to complete the statistics on collective accommodation. Indeed, a very significant share of tourists stays in private rented accommodation or free accommodation. To get a comprehensive insight into the total tourism flows into a country, estimates of these less visible types of accommodation are indispensable.

Key issues: data-linking; measurement of private accommodation; use of internet tools.

Session 5: Advanced usage of tourism statistics

One of the priorities on the international tourism statistics agenda, is the evaluation of the importance of tourism for a country's economy or labour market. Tourism Satellite Accounts (TSA) are an obvious and important example of derived and more advanced tourism statistics, based on the existing basic series. The aim of this session is to present practical examples of use of TSA for policy making or decision making in the tourism industry, or examples of how it might be expected to be used, and to illustrate its specific role and input with regard to other national tourism monitoring systems.

However, this session also wants to look at other applications of tourism statistics. National information systems relating to tourism, and in particular tourist surveys, occupy an unusual position in national statistical systems in that tourism, being a cross-cutting sector, provides us with information on a broad range of social behaviour and mobility patterns which few other sources address on a systematic or regular basis. The aim of this section is also to show how the observation of tourism activities and use of the tourism monitoring system can provide us with a wide variety of information which cannot be collected, or at least not easily, by the tools most commonly used by government statistical offices, information which is of interest and relates to many areas of action, particularly by government. Knowledge of tourist mobility provides information of interest to many areas of the transport sector. The spatial and temporal distribution of tourists has an impact in terms of territorial development, the organisation of services to the population, etc., not to mention their implications with regard to related ecological and environmental conservation concerns. Another example is the health sector, which is concerned by the consequences, in epidemiological terms, of tourists' choice of destination.

Key issues: Use of Tourism Satellite Accounts for policy and business analysis; contribution of tourism statistics to other domains and partnerships.

Annex 2: Guidelines for authors

The papers for the Forum should elaborate on the core themes mentioned in Annex 1 via two formats: “Research” or “Experience/Application”.

Research Papers

These papers will contain significant and original research results. Papers reporting and evaluating new methods, systems and models are encouraged, particularly where they employ realistic case analysis. They will be evaluated according to standard criteria including: originality, innovation, relevance, technical depth, clarity and potential practical impact and usage.
(Suggested length – up to 5 000 words)

Experience/Application Papers

These papers will present significant and original experiences in utilising statistical information in tourism. Reports about the application of statistics for the tourism industry will be particularly welcome. Criteria for papers in this section will include innovation, technical quality, clarity and the anticipated value of reported results to users.
(Suggested length – up to 5 000 words)

Paper Submission Procedures

All documentation submitted by authors should be drafted in English.

Abstracts should incorporate:

- Author(s) contact details (organisation, job title, address, phone, fax, email)
- Paper Titles (with indications of whether the category should be – Research Paper OR Experience/Application Paper)
- Session where the paper will be presented
- Paper Abstract (300 words maximum)
- Methodology
- User Value/Application Context
- Bibliography

Important dates

30 March 2008 Deadline for the submission of abstracts to the organising Committee

15 May 2008 Deadline for the review and selection of abstracts by the organising Committee

Prior to 31 May 2008 A note will be sent to selected authors/papers as well as to others.

5 September 2008 Deadline for submitting the full papers

10 November 2008 Deadline for registration

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