



MEASURING TOURISM AT SUB-NATIONAL LEVEL – A REVIEW OF SELECTED OECD COUNTRY INITIATIVES


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Why is it important?

- ✓ The economy-wide effects of tourism are significant with important variations from one destination to another
- ✓ Policy and industry needs for information at the local level are important
- ✓ Knowledge and experience is very disparate and rarely allow comparisons with regions and with national data
- ✓ Robust information is lacking, undermining a good understanding of the local context


==> the objective of the OECD project is to raise awareness on statistical initiatives aiming at better measuring tourism at sub-national level. The aim is not to develop a new methodology.





What are the key challenges?

The challenges to develop effective qualitative and quantitative information on tourism at subnational level are numerous:

- ✓ Governance for the development of tourism statistics, engaging all players and securing funding
 - ✓ define the statistical information needs, in partnership with the main industry players
 - ✓ ensure that institutional and human capacity for the development of tourism statistics is available and durable over time
 - ✓ determinate the boundaries of the territory to be observed
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What about the regional tourism satellite account (RTSA)?

- ✓ The Tourism Satellite Account is a solid conceptual basis to support the measurement of tourism at regional level with tools such as RTSA.
- ✓ But there are practical limitations to RTSA development:
 - Resources and statistical capacities to drive RTSA development
 - The institutional will is required
 - The quality of tourism statistical data at regional level
 - The developmental, practical and costs implications are important
 - The RTSA does not necessarily provide what policy makers want in terms of tools for impact analysis on tourism
- ✓ The RTSA remains often an irregular project.
 - Many countries and regions are looking for simpler models



Initiatives reviewed by OECD cover a wide range of measurement areas

- Benchmarking the success and competitiveness of destinations and regions
- “Tourism Dependency Ratios” by region for enterprise, employment, turnover, demography and income
- Enterprise demographics and expenditure at regional level
- Tourism employment and economic impacts (total and direct only) at regional level
- tourism spending and high yield visitors
- evolution of tourism towards sustainability at regional level



Lessons to be drawn

- ✓ Large samples and long-term time series are a unique way to deliver robust regional data (e.g. Australia regional tourism profile builds on major TRA surveys)
- ✓ Building on large existing databases also reduces the cost of compiling the data to a marginal level (e.g. Ireland tourism enterprise analysis builds on business demography statistics)
- ✓ There is a lot to be gained from optimising the information from all data sources available at regional level and to build more on private data sources (e.g. UK tourism intelligence model) and methodology (e.g. Swiss benchmarking of destinations and competitiveness)



Lessons to be drawn

- ✓ Ad-hoc methods uniquely based on new surveys are more complex to manage over time, more costly and tend to produce less robust figures
- ✓ New technologies offer huge potential to disseminate statistics in a more interactive and visual way, thus better serving the wide diversity of users at regional level (e.g. i-tourism maps in Austria, New Zealand regional tourism indicators, Andalusia sustainable tourism indicators)
- ✓ Some initiatives require a major statistical effort, and are difficult to sustain over time given their complexity (multiple sources, high level of disaggregation), cost, change in capacity, etc. (e.g. regional tourism satellite account)



Lessons to be drawn

- ✓ Big data is certainly a new avenue being explored by several countries (e.g. New Zealand uses of electronic card transaction data, Japan regional tourism economic survey)
- ✓ Where based on robust data and reliable methodological assumptions, economic impact models provide a flexible and open way of producing statistics, in particular to measure the total economic impact of tourism on the regional economy, or the impact of specific events on regional tourism (e.g. Alberta Demand Economic Impact Model using Statistics Canada and Econometric Research Limited data sources)



Final report by the OECD

- ✓ The final report is to be released by OECD Tourism Committee early 2015. it will include additionnal details on the methodology, the key results obtained by these initiatives, the governance of these projects and their relevance to other countries and transferrability
- ✓ For more information, please contact alain.dupeyras@oecd.org
- ✓ To find out more: www.oecd.org/cfe/tourism
- ✓ To access OECD tourism data: <http://dotstat.oecd.org/>



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EXPENDITURE IN AUSTRALIA'S TOURISM REGIONS

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AUSTRALIA'S REGIONAL TOURISM STATISTICS

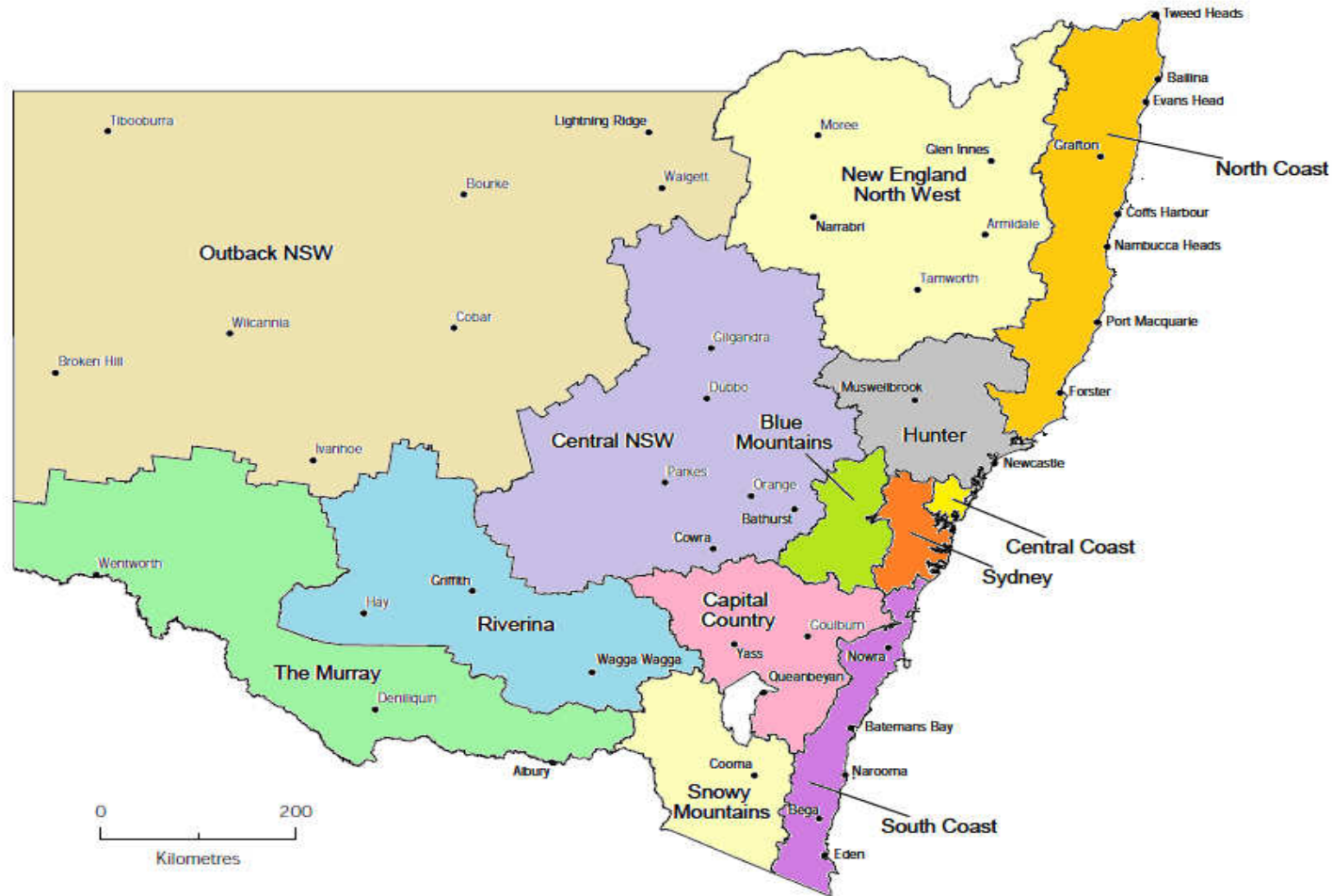


- International Visitor Survey
 - Surveys 40,000 international visitors as they depart Australia, annually (benchmarked to arrivals population)

- National Visitor Survey
 - Surveys 120,000 Australians via phone interview, annually (benchmarked to arrivals population)
 - Measures domestic overnight trips, domestic day trips and outbound trips

- Destination Visitor Survey
 - Surveys visitors within a particular destination
 - Measures a range of indicators, depending on the focus of the particular study

AUSTRALIA HAS 84 TOURISM REGIONS



INTERNATIONAL REGIONAL VISITOR EXPENDITURE



- Two types of expenditure data are collected:
 - expenditure for the respondent's entire journey
 - expenditure at a randomly selected location

- There are four major expenditure classes:
 - expenditure on domestic airfares
 - expenditure on travel packages
 - expenditure on accommodation, food and beverages
 - all other expenditure

DOMESTIC REGIONAL VISITOR EXPENDITURE



- There are four major expenditure classes:
 - expenditure attributable to the respondent's home region
 - expenditure on airfares and other long distance fares
 - expenditure attributable to the destination region or regions
 - expenditure on long trips.

- Overnight trip expenditure is allocated in three steps

- Day trips is less complicated as there is only one destination region

THE LIMITATIONS OF REGIONAL EXPENDITURE

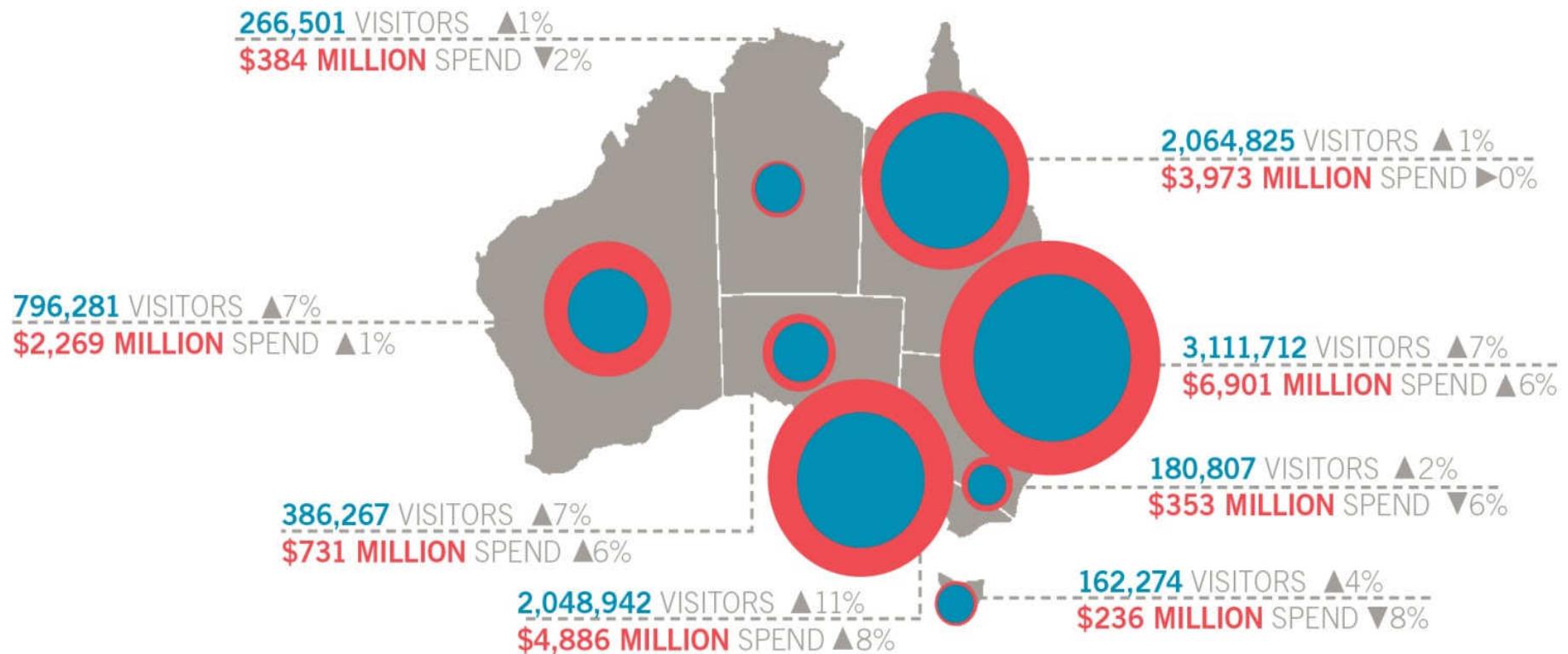


- The main limitation is sample size, specifically in low visitation areas. This leads to:
 - no random international expenditure for stops
 - more variability
 - high confidence intervals
- The limitations of the data are recognised, and data filters are employed
- In 2013-14, international expenditure was reportable for only 36 regions, with domestic expenditure reportable for 71

THE ADVANTAGES OF REGIONAL EXPENDITURE MODELLING



VISITOR NUMBERS AND SPEND BY STATE



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