Capacity Building Programme on Tourism Statistics 2008-2009
Workshop IV – Vienna (AT), 18-20/11/2009

Revised classification framework for types of accommodation & 2010-2012 project on automated data collection for accommodation statistics

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Structure of presentation

i. The current classification framework

ii. Weight of private accommodation

iii. Revised classification framework

iv. ESSnet on “automated data collection and reporting in accommodation statistics”
The current classification framework

COLLECTIVE versus PRIVATE accommodation

- **Collective tourist accommodation establishments**
  
  “An accommodation establishment that provides lodging for the traveller in a room or some other unit, but the number of places it provides must be greater than a specified minimum for groups of persons exceeding a single family unit and all the places in the establishment must come under a common commercial type-management, even if it is non-profit making”

- **Private tourist accommodation**
  
  “The remaining types of tourist accommodation that do not conform to the definition of “establishment”

Main shortcomings

- **Vague definitions**
  
  - “number of places greater than a specified minimum”
  - “a single family unit”
  - “commercial-type management”

- **Vague distinction between collective and private**
  
  grey zone of smaller tourist accommodation establishments

- **Different interpretations** across Europe have put the **completeness** and **comparability** of the data at risk
The current classification framework

**Collective tourism establishments**
- Hotels and similar establishments
- Tourist campsites
- Holiday dwellings
- Other collective accommodation n.e.c.
- Specialised establishments

**Private tourism accommodation**
- Rented accommodation (rented rooms in family houses; dwellings rented from private individuals or professional agencies)
- Secondary residence (owned dwellings)
- Other types of private accommodation (incl. accommodation provided without charge by relatives or friends)

Weight of private accommodation

**IRTS 2008, paragraph 3.44**

“Countries lacking an exhaustive control of travelers at national borders often use, as a substitute, surveys of guests staying at collective accommodation. The users of these surveys without complementary operations to correct coverage shortfalls should bear in mind some limitations: first of all, not all visitors stay at collective accommodation, and those who do not might have very different patterns of behavior than those who do. Second, a visitor while on a trip might stay in more than one collective accommodation, resulting in an overestimation of the number of visitors and an underestimation of the total duration of the trips.”
Weight of private accommodation

Limitation to collective accommodation

... can result to misleading conclusions

example: analysis of the recent crisis
(first half 2009 compared with first half 2008)

- number of nights spent in hotels and similar est.): -7.4%
- number of holiday trips made: +0.5%
- number of nights spent: +0.4%

Tourism activities remained stable, but probably in different (cheaper?) types of accommodation

... and can puts completeness at risk

Weight of private accommodation

Holidays trips (4 nights or more), broken down by type of accommodation
(aggregate data based on 19 MS for which full data is available for 2007 or 2008, plus Croatia)

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Domestic</th>
<th>Outbound</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collective tourism establishments</td>
<td>46%</td>
<td>32%</td>
<td>69%</td>
</tr>
<tr>
<td>Hotels and similar establishments</td>
<td>31%</td>
<td>18%</td>
<td>53%</td>
</tr>
<tr>
<td>Tourist campsites</td>
<td>6%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Holiday dwellings</td>
<td>6%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Other collective accommodation</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Specialised establishments</td>
<td>1%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Private tourism accommodation</td>
<td>54%</td>
<td>68%</td>
<td>31%</td>
</tr>
<tr>
<td>Rented accommodation</td>
<td>13%</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Secondary residence</td>
<td>9%</td>
<td>13%</td>
<td>3%</td>
</tr>
<tr>
<td>Other types of private accommodation</td>
<td>32%</td>
<td>40%</td>
<td>18%</td>
</tr>
</tbody>
</table>
Weight of private accommodation (demand)

Holidays trips (4 nights or more), broken down by type of accommodation

Weight of private accommodation (supply)

Structure of the use of accommodation, by type of accommodation and origin of the visitor
(data for 3 countries; own calculations, for IE and HU based on additional data provided by the CSO and KSH respectively, for ES based on published data)
The revised classification framework

RENTED versus NON-RENTED accommodation

IRTS 2008, paragraph 3.36

“Short term accommodation might be provided either on a commercial (market) basis, that is as a paid service, even when the value charged to the user might be subsidized, or on a non-commercial (non-market) basis, that is, as a service provided by family, friends or relatives, without charge, or on own-account (owner-occupied vacation homes). [...]”

- Less ambiguous distinction
  - presence/absence of a monetary transaction
  - whether or not an economic unit

The revised classification framework

- Context: the revision of the legal basis for tourism statistics in the EU, having as objectives (a.o.):
  - Improving the completeness
  - Clearer definition (and better coverage) of so-called private accommodation
  - Improving the consistency between demand & supply side

- In the proposal for a Regulation: internal tourism broken down into
  - Capacity and occupancy of tourist accommodation establishments
  - Tourism nights spent in non-rented accommodation
The revised classification framework

- **“Tourist accommodation establishment”**
  "refers to a local kind-of-activity unit [...], providing as a paid service, though the price might be partially or fully subsidised, short-term or short-stay accommodation services as described in NACE Rev. 2 groups 55.1 (hotels and similar accommodation), 55.2 (holiday and other short-stay accommodation) and 55.3 (camping grounds, recreational vehicle & trailer parks)"

- **“Non-rented accommodation”**
  "shall include accommodation provided without charge by family or friends and accommodation in owner-occupied vacation homes, including time share properties"

The revised classification framework

- **Demand side versus supply side**
  - **Rented accommodation**
    - a. Hotels or similar accommodation
      
      [= NACE 55.1]
    - **Campsites, caravan or trailer park**
      
      [= NACE 55.3]
    - c. Other rented accommodation (health establishments, youth hostels, marinas, etc)
      
      [~ NACE 55.2 (‘holiday and other short-stay accommodation’), but also other NACE classes outside the scope of 55.1 (f.i. ‘operation of recreational transport facilities, e.g. marinas’ in NACE 93.29)]
The revised classification framework

- **Demand side *versus* supply side** (continued)
  - Non-rented accommodation
    - d. Own holiday home
    - e. Accommodation provided without charge by relatives or friends
    - f. Other non-rented accommodation

where Member States can’t compile **data on nights spent in non-rented accommodation** (e.g. because of the lack of a frontier survey), Eurostat will make estimates using the partner data from other countries demand side statistics as an alternative/proxy to surveying inbound tourism.

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**ESSnet on Automated data collection**

**Introduction**

- **Title**: “Automated data collection and reporting in accommodation statistics”
- **Timing**: mid 2010 to end 2012
- **Scope**: EU Member States and EFTA countries
- **Structure**: cooperation network/partnership of NSI’s, coordinated by one of the partners, with financial support (grants) from the EC (Eurostat)
- **Budget**: ± € 1 million
BACKGROUND

- **Problem statement:** need for re-engineering of the production process of statistics
  - increasing demands by users who want more timely data
  - but... call to reduce the administrative burden

- **Inspiration:** 9th International Forum on Tourism Statistics
  - country presentations on national experiences (Spain, Finland)

AIMS AND OBJECTIVES

- Reduce burden for businesses and administrations
- Improve timeliness
- Enhance international comparability and quality
- Feedback (statistical analysis) to reporting units

❖ **Ultimate objective** is to develop a system which can generate statistical information automatically from the management information system(s) used by tourist accommodation establishments
**Expected output (deliverables)**

- **Description of common XML-files**
- **Development of software applications which can generate the content of the XML-files directly from the hotels’ management system**
- **Development of automated data analysis and automated feedback-reporting**

**Cost-benefit analysis**

- **Costs**
  - Largely covered by ESSnet grants (preliminary budget: € 1 million)

- **Benefits**
  - **For the reporting units**: less burdensome reporting obligation and the possibility of receiving feedback reports
  - **For the administrations**: more efficient data collection (less manual entry of data, less reception costs, etc.)
  - **For the users**: faster availability of statistical data (timeliness, punctuality)
ESSnet on *Automated data collection*

In what phase are we now?

- The project is on the table of the Eurostat management board
- Discussion in the Strategic Development Group of the Business Statistics Directors Group (25/11/'09)
- Dedicated workshop during the forthcoming Working Group on Tourism Statistics (14-15/12/'09)
- Calls for interest to be launched early 2010

Further information

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Data

- All data & publications are available on the Eurostat website