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EUROPEAN TRAVEL COMMISSION

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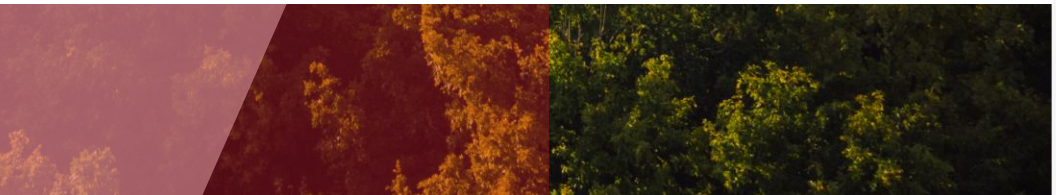
TOURMIS WORKSHOP



Part II Analysis and Reporting Features

Austrian National Tourist Office
www.tourmis.info

19th TourMIS Workshop

September 12-13, 2024

Analysis and Reporting Features

1. Examples and new tables & features
    1. Basic analysis
    2. Longitudinal analysis
    3. Benchmarking
2. Measuring seasonality
3. The Connectivity of Railroads in Europe

14:45 coffee break

European Countries
ETC-X0: Latest trends

Trends in Important Markets
January - June 2023

Market	Arrivals (1)	Bednights (1)	(2)
Austria	24.2	27.3	8/10
Canada	68.2	76.4	8/10
Switzerland	25.1	25.1	9/11
China	215.9	157.2	8/10
Germany	25.5	24.5	9/11
Denmark	12.4	8.8	9/11
Spain	32.6	30.8	9/11
France	22.1	20.6	9/11
India	74.4	63.2	6/8
Italy	45.2	38.0	9/11
Japan	192.6	135.5	8/10
Netherlands	17.9	15.8	9/11
Norway	37.2	30.9	8/10
Poland	46.6	33.1	8/10
Sweden	24.0	21.2	9/11
Russia	17.5	-9.4	8/10
United Kingdom	40.6	35.9	9/11
United States	45.9	44.0	8/10
Australia	169.6	165.7	8/10
Brazil	60.5	58.6	8/10

Trends in Total Europe
January - June 2023

Market: Total foreign

Destination	Def	Arrivals absolute	% p.y.	Def	Bednights absolute	% p.y.
Austria	AA	14,436,346	29.9	NA	55,949,808	23.8
Cyprus	AT	1,613,690	32.1			
Denmark				NA	11,736,797	11.2
Estonia	AA	717,037	27.5	NA	1,460,524	30.6
Finland	AA	1,135,131	41.6	NA	2,662,601	31.0
Monaco	AG	155,498	7.1	NG	244,011	7.5
Netherlands	AA	9,445,000	43.5	NA	26,135,000	45.2
Norway				NA	4,430,629	16.6
Serbia	AA	893,362	30.0	NA	2,506,864	22.6
Slovakia	AA	925,363	57.2	NA	2,111,464	52.8
Slovenia	AA	1,758,199	39.2	NA	4,225,330	32.2
Sweden				NA	6,606,144	17.8
Turkiye	AV	19,618,196	19.9			
Total (3)		**50,697,822**	**32.8**		**118,069,172**	**26.5**

Notes
(1) Mean value of latest reported change rates
(2) Arrivals/Bednights = Number of destinations TourMIS could calculate a change rate
(3) Change in market volume (based on absolute values)

Information based on absolute data, if not available, relative data entered by data inputters

Measuring seasonality in European destinations

Causes of seasonality in tourism

- **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)

- **Challenges**
  - 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

Actions to overcome seasonality

- **Product**

  Development of new offers, events, packages, ...

- **Pricing**

  Providing discounts for periods with less demand

- **Promotion**

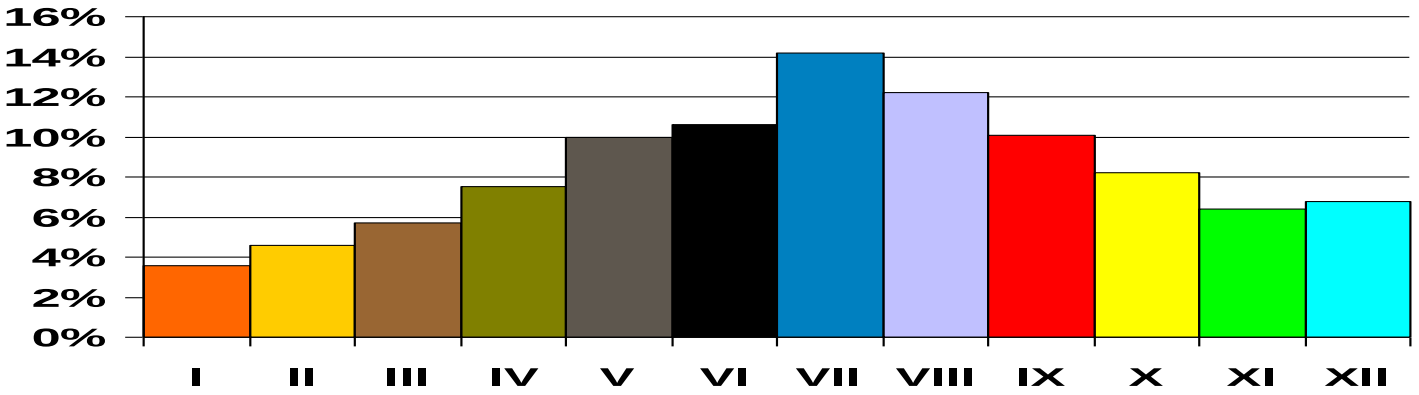
  When and how intensively we will promote the tourism products

- **Placement**

  Which geographic region/market should be promoted

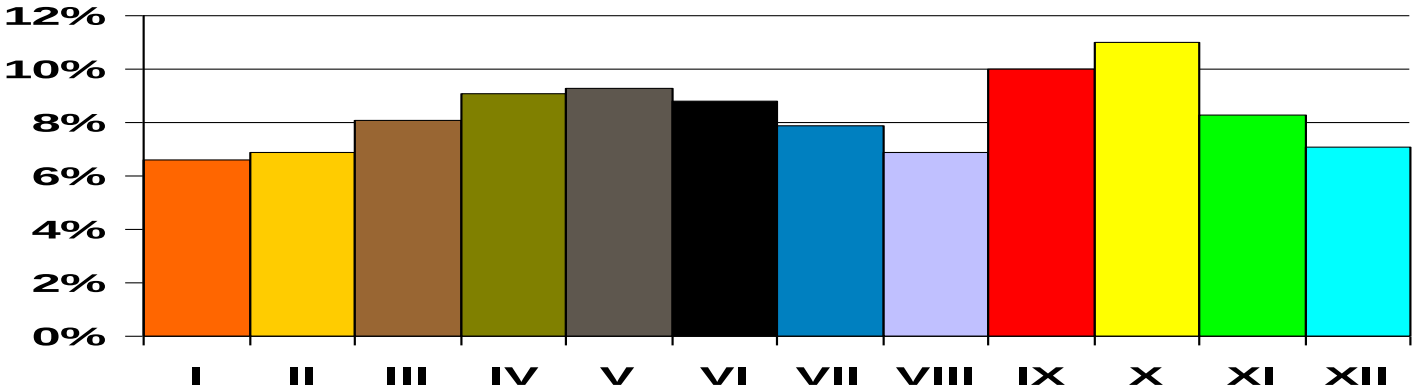
  Which segments (e.g. young adults, families, business people)

Gini coefficient



LÜBECK

Gini=0.207



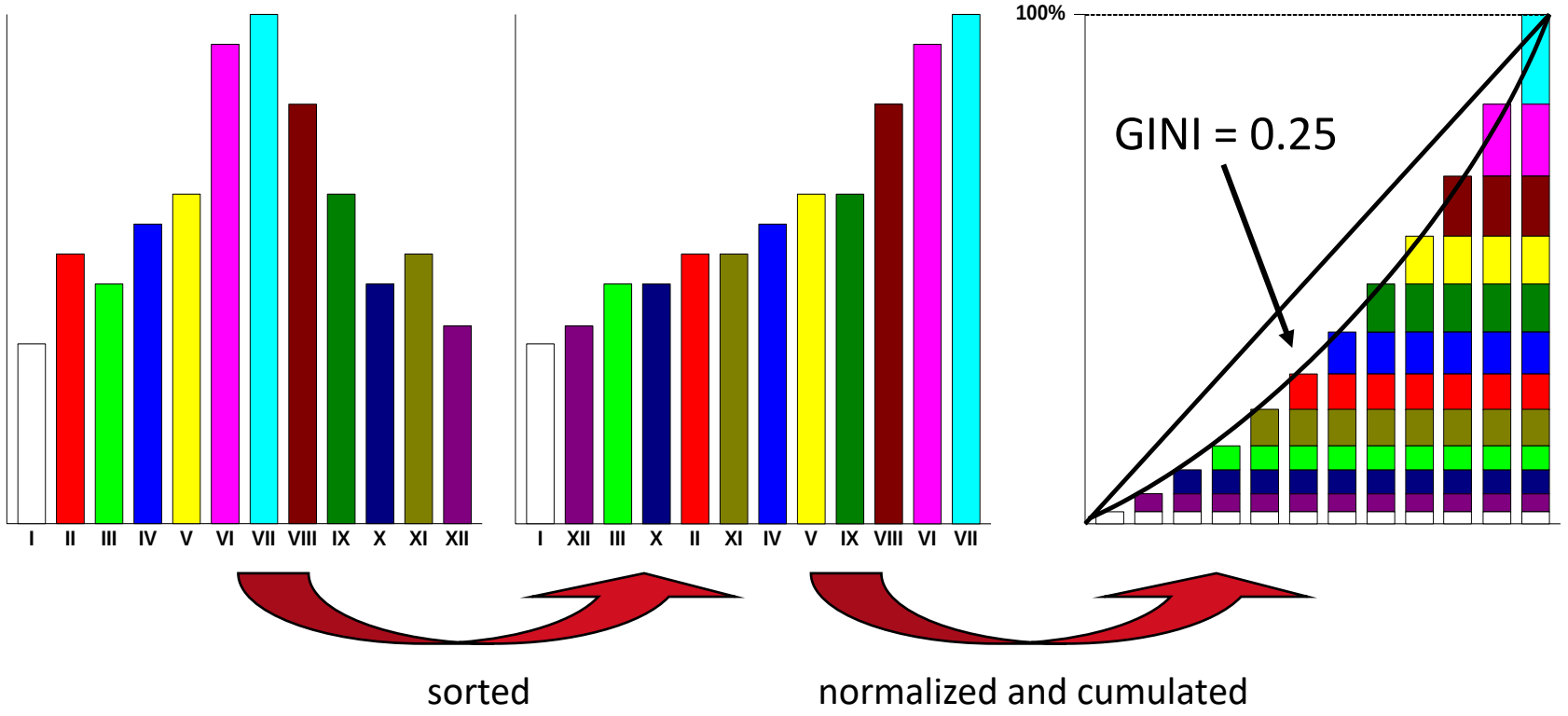
MADRID

Gini=0.088

Gini coefficient

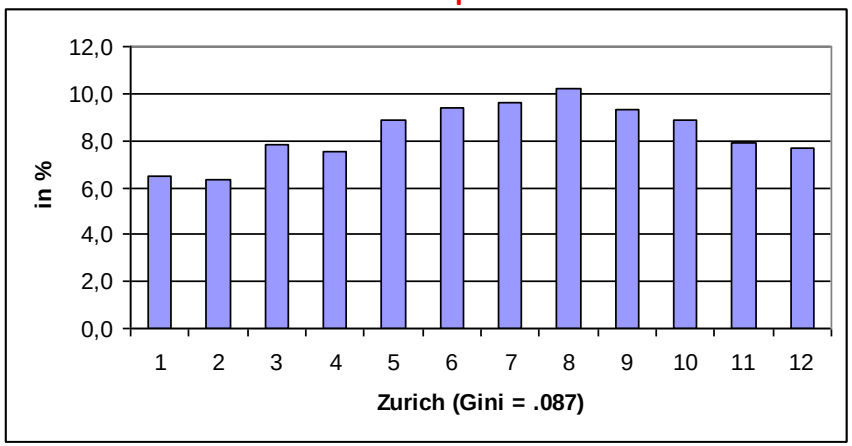
Measure of statistical dispersion. The Gini can be approximated with trapezoids:

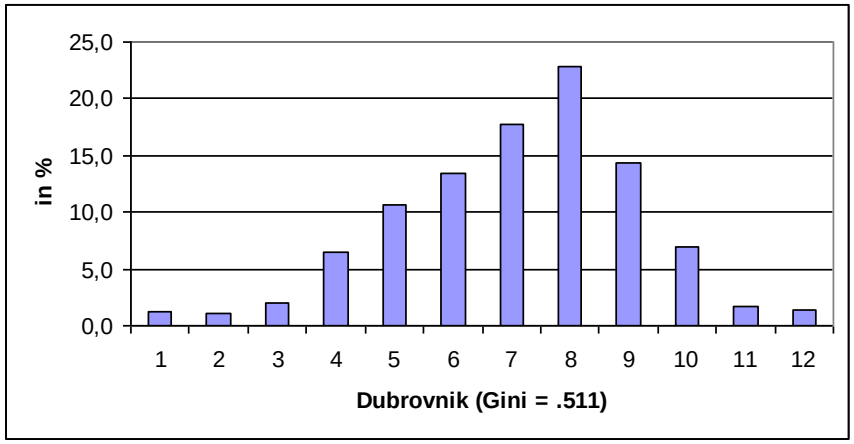
$$G^* = 1 - \sum_{i=1}^{12} \left(X_i - X_{i-1}\right) \times \left(Y_i + Y_{i-1}\right)$$



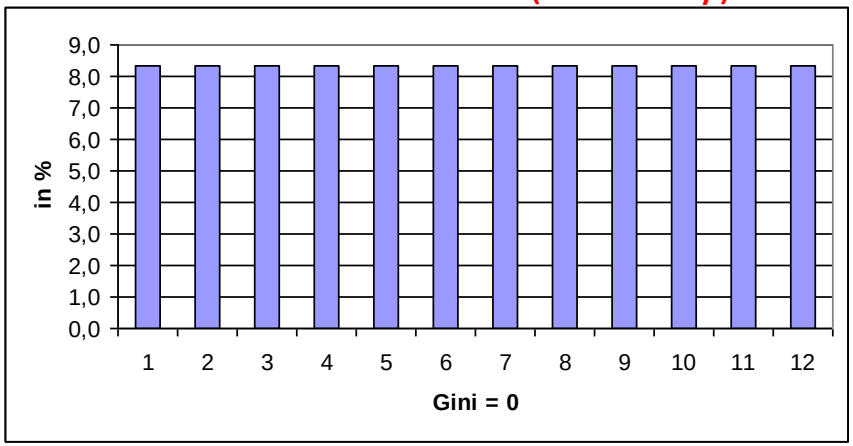
Measuring seasonality

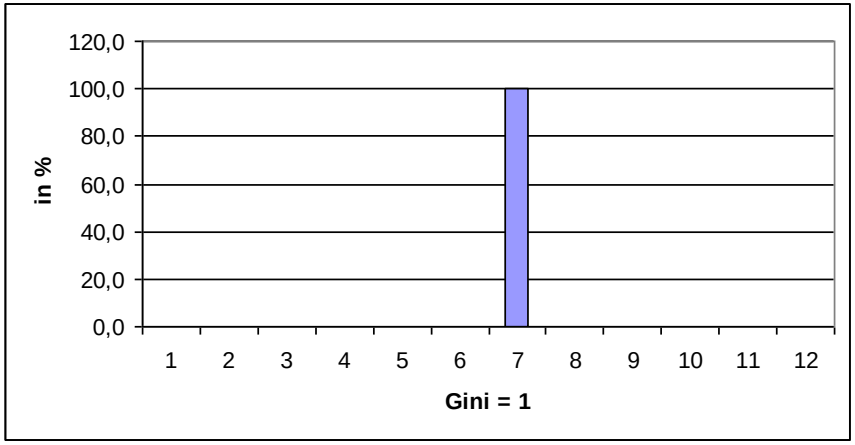
Examples



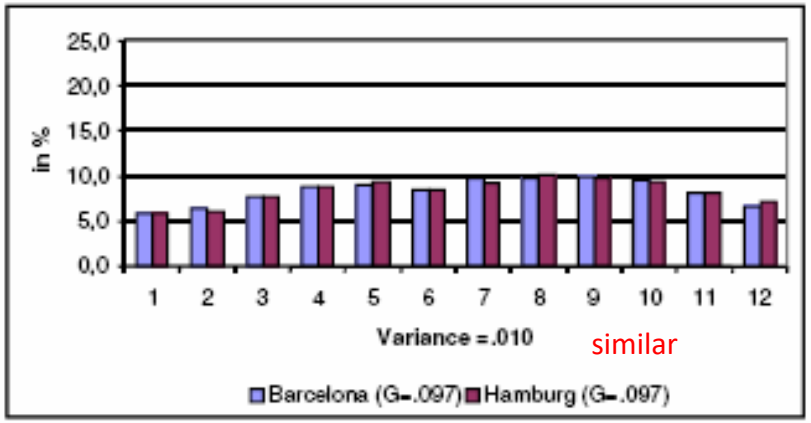


Extreme situations (in theory)





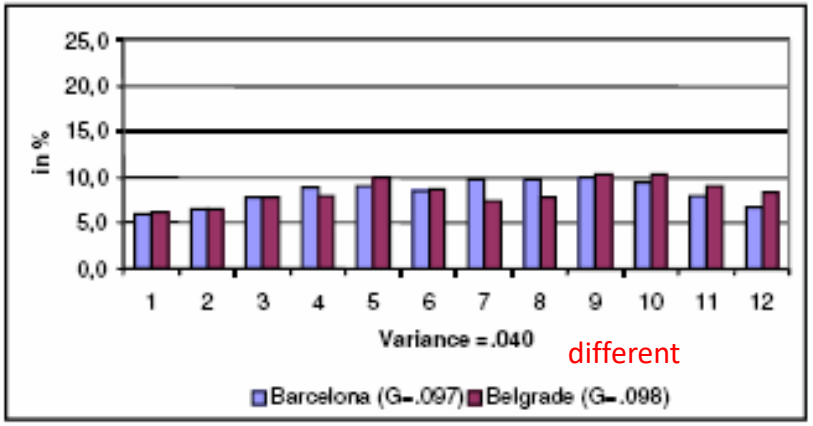
Similarity of seasonal patterns



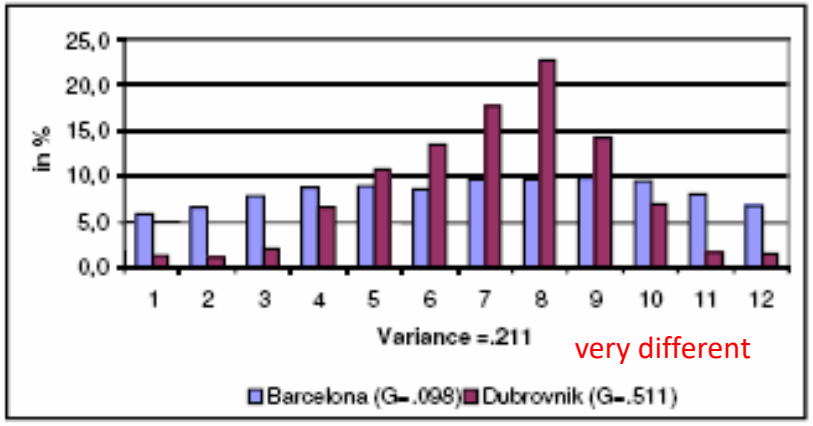
similar

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

Similarity of seasonal patterns of two destinations. Multiple destinations?



different



very different

The connectivity of railroads in Europe

Working Group Members

Magnus Hessbo, *Visit Stockholm*
Lone Alletorp Callard, *Wonderful Copenhagen*
Alba Lajusticia, *Barcelona Tourism*
Sophia Quint, *Visit Berlin*
Petra Tschöll, *Vienna Tourism Board*
Pauline Froger, *CityDNA*
Karl Woeber, *Modul University Vienna*
Jason Stienmetz, *Modul University Vienna*
Bozana Zekan, *Modul University Vienna*
Kimberley Marr, *Modul University Vienna*

Travel by rail gaining importance

- 2021 “European Year of Rail” EU Action Plan
- 2022 “DiscoverEU” campaign (European Year of Youth)
- Sustainability: for efficient and green mobility
- Post COVID-19: relaunching transport and tourism
- New Train Routes: EU connectivity initiatives
- Intermodal integration & Digitalisation

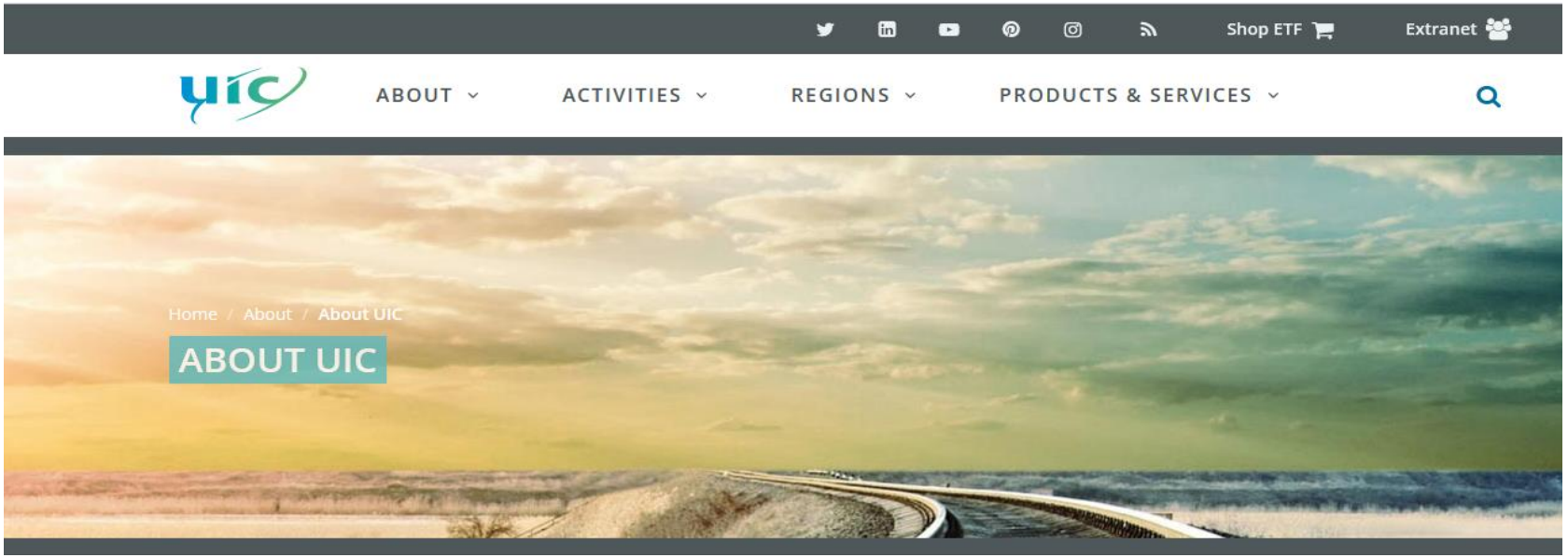
Rail still only represents 8% total travel within EU (measured in passenger km)

EC Action plan: double rail traffic by 2030, triple by 2050

Eurostat (2020) People on the move: Statistics on Mobility in Europe. 2020 edition.

Travel by Rail

- Measuring the tourism share of rail travel is difficult
- Replacement: Measurement of connectivity - quality of rail connections between tourism destinations and major markets in Europe
- International Union of Railways - MERITS database



The Connectivity of Railroads in Europe

- Acquisition of the MERITS database (all 2021 timetables) by CityDNA
- Review of the data material (completeness, information content)
- Data uploaded to TourMIS
- Aim: Analysis of direct connections between the most important European cities
  - Direct and indirect connections between (CityDNA) cities
  - Number of (international) trains
  - Average speed
- Reporting in the **City Travel Report ‘23**

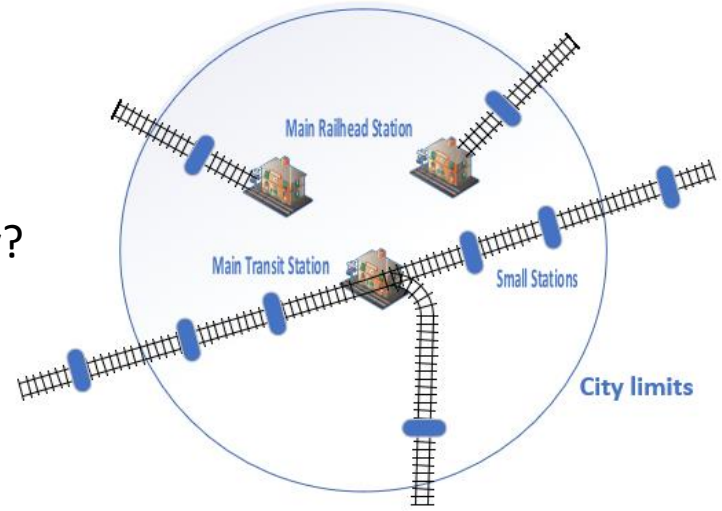
  by CityDNA

The MERITS Database

2021:

- Number of railway companies: 1,534
  - **195** (12.7%) **providers of passenger services**
- Number of trains: 639,389
- Number of departures: 8.7mn
- Number of stations: 24,001

- Which station belong to a particular city?
- Main train stations?



Seven reports in TourMIS

1. List of stations
2. Information on specific trains
3. Stations in cities
4. Arriving and departing trains by stations
5. Arriving and departing trains by city
6. Direct connections between cities
7. Direct connections between cities and markets

White paper (Manual) on who to use and interpret the Merits database on TourMIS