



COMMISSION OF THE EUROPEAN COMMUNITIES

Brussels, 17.1.2001
COM(2000) 826 final

**REPORT FROM THE COMMISSION
TO THE COUNCIL, THE EUROPEAN PARLIAMENT,
THE ECONOMIC AND SOCIAL COMMITTEE AND
THE COMMITTEE OF THE REGIONS**

**on the implementation of Council Directive 95/57/EC
on the collection of statistical information in the field of tourism**

TABLE OF CONTENTS

Foreword.....	3
I. Introduction	3
II. Implementation of the Council Directive	4
2.1 Development of an information system on tourism statistics	4
2.2 Data collection and treatment.....	5
2.3 Dissemination of results	6
2.4 Methodological follow-up.....	6
2.5 Legal framework	7
III. Progress by section of the Directive.....	7
3.1 Capacity of collective tourist accommodation: local units on national territory.....	8
3.2. Occupancy in collective accommodation establishments: domestic and inbound tourism.....	9
3.3. Tourism demand: domestic and outbound tourism (excluding day-trips).....	11
IV. Overall assessment	14
V. Future outlook	14
Annex 1. Legal framework	16
Annex 2. Summary table by country and by section of the Directive.....	17
Annex 3. Financial contribution to Member States	24

FOREWORD

1. This report refers to the implementation of Council Directive 95/57/EC¹ on the collection of statistical information in the field of tourism.
2. Chapter II of the report summarises the actions undertaken during the period 1996-1999 in terms of development of an information system, data collection, methodological follow-up and legal framework. The table in Annex 1 supplements the information about the legal framework.
3. The progress by section in Member States following the structure of the Directive is described in Chapter III. Developments during the period 1996-1999 are included. The summary table in Annex 2 supplements the information presented in this chapter.
4. Chapter IV introduces considerations of a general nature concerning the overall assessment of the implementation of the Directive. The result is a positive assessment. Nevertheless, there is an analysis and discussion of certain problems, in particular those relating to the consolidation of the progress achieved in implementing the Directive, delays in data transmission from some Member States to Eurostat and delays in assessing in-depth the quality and reliability of the results.
5. A future outlook is made in chapter V. It recommends continuing the implementation of the Directive; particularly to concentrate on examining the quality, reliability and comparability of the data, encourage regular data transmission and increase the dissemination of the results.

I. INTRODUCTION

The Council Decision 90/665/EEC of 17 December 1990² initialised the work on tourism statistics at Community level by identifying four main actions to be carried out, namely; the analysis and evaluation of the long-term needs of the main users with regard to tourism statistics, the collection and dissemination of existing data on tourism, the analysis of the systems that exist in Member States and in international organisations, and the preparation of a methodological reference framework for compilation of Community tourism statistics. Further development work conducted by the Commission on tourism statistics has been supported by the Council Decision 92/421/EEC of 13 July 1992³ on a Community action plan to assist tourism.

The needs of the users in the private and public sector for reliable and comparable statistics on tourism demand and supply at Community level available at short notice (as expressed in the results of the implementation of the Decision 90/665/EEC), led to the development of the Council Directive 95/57/EC of 23 November 1995 on the collection of statistical information in the field of tourism. The aim of this Directive is to establish an information system on tourism statistics at Community level. To this end, Member States shall carry out the collection, compilation, processing and transmission of harmonised Community statistical

¹ OJ L 291, 6.12.1995, p. 32.

² OJ L 358, 21.12.1990, p. 89.

³ OJ L 231, 13.08.1992, p. 26.

information on tourism supply and demand. The Directive indicates that Member States shall take all the measures necessary to make the Community information system operational in adapting their national systems of tourism statistics to the technical requirements specified in the annex of the Directive.

The Community provided in an initial phase of the implementation process a financial contribution to the expenses incurred by the Member States in adapting the national systems to the Directive. This contribution was limited in time. It was aimed at facilitating experimentation with, or implementation of, collection methods and systems meeting the statistical information requirements indicated in the Directive. When this financial contribution expired, Member States should be in a position to transmit regularly to the Commission, according to the transmission deadlines specified in the Directive, the requisite information according to the methods and systems put in place.

Article 8 of Council Directive 95/57/EC provides that the Commission shall present to the European Parliament, the Council and the Economic and Social Committee a report on the experience acquired in the work carried out pursuant to this Directive after data have been collected over a period of three years. Data collection started in 1997 (covering the first reference period 1996) and has now been collected for three years. This report is presented in accordance with this provision. It provides an overall view of the progress of the various actions undertaken by the Commission and the Member States, an initial assessment of the results obtained and proposals for pursuing the implementation process.

II. IMPLEMENTATION OF THE COUNCIL DIRECTIVE

The Directive has implied several actions undertaken by Member States and the Commission (Eurostat) to prepare for the new data set to be collected, treated and disseminated. In Eurostat this has implied in particular the design and implementation of a new information system at Community level, regular data collection with standardised questionnaires, aggregation and dissemination of EU-totals, following the methodological developments in Member States and allowing for an exchange of experiences in order to achieve comparable statistics, and finally establishing implementing measures in a legal context to ensure the appropriate implementation of the Directive in Member States. The following actions have been carried out during the period 1996-1999. The table in Annex 1 supplements the information about the legal framework.

2.1 Development of an information system on tourism statistics

One of the initial actions undertaken by Eurostat was the design and establishment of a new information system on tourism statistics, in accordance with the contents and structure of the Directive. An Access based tool was developed, which allows for the storage, treatment and calculation of data, as well as possibilities for an easy extraction into Excel tables. The system became operational during 1997.

The classification plan for the production database on tourism statistics, "TOUR", was created fully in line with the Directive. It allows for eight main dimensions, namely *Declaring territory* (national and regional level), *Indicator* (the variables), *Measurement* (currency, %), *Unit* (unit, thousands, millions), *Activity* (type of establishment), *Purpose* (holiday, business), *T-info* (various breakdowns, e.g. by gender, age, transport used) and *Partner* (country of origin/destination).

The information system was created also with the possibility to store statistics linked to tourism, such as balance of payments (travel and passenger transport items), employment in hotels and restaurants and economic statistics.⁴ At present the "TOUR" database contains 49 different tables with more than 400,000 figures in total. Of these there are 29 specific Directive tables and these represent around 350,000 figures. Time series range from 1980 to present, with a large increase of data availability starting from 1996 and 1997 when the new Directive tables were introduced.

2.2 Data collection and treatment

Linked to the establishment of an information system on tourism statistics was the launching of a regular data collection, following the transmission deadlines as specified in the Directive (article 7). This article indicates that for monthly and quarterly data, transmission of provisional results from Member States to Eurostat should be done not later than three months after the end of the reference period, and for final results not later than six months. For annual data, provisional results should be transmitted to Eurostat not later than six months after the end of the reference period, and for final results not later than 12 months.

In order to facilitate the transmission of data between Member States and Eurostat 29 standard transmission tables were created, following the structure of the Directive. These tables specify how the data should be tabulated in fixed rows and columns in order to allow for efficient and automatic treatment of the figures in the Eurostat information system.

The standardised transmission tables provided the basis for the creation of electronic questionnaires (in Excel format), which were distributed to the Member States and should be used when transmitting data to Eurostat. A special programme, TADI (Tourism Automatic Data Input), has been developed by Eurostat to be able to automatically read the questionnaire files received from data suppliers into the information system on tourism "TOUR". Concerning data transmission most of the files are transmitted electronically, either via the Eurostat transmission tool "STADIUM", which allows for an easy identification of received files, or via e-mail.

The procedure for treatment of data has several phases. Firstly, a general validation is done, detecting specifically data format problems. Secondly, a more detailed validation is effectuated, with the aim at controlling the contents, the breakdown, the totals, comparison with previous series, etc. This phase is currently lengthy and time-consuming and there are plans to automatise it to a larger extent in order to permit for plausibility, cross-table and other controls in a quicker and more efficient way. Finally, various calculations are being undertaken (e.g. EU aggregates, conversion into Euro, calculation of different ratios). Throughout the data treatment procedure regular contacts are made with data suppliers in Member States.

⁴ This data collection is based on the following legal acts: Council Regulation (EC, EURATOM) No 58/97 of 20 December 1996 concerning structural business statistics (OJ L 14, 17.1.1997, p.1); Council Regulation (EC) No 1165/98 of 19 May 1998 concerning short-term business statistics (OJ L 162, 5.6.1998, p. 1); Council Regulation (EEC) No 3711/91 of 16 December 1991 on the organisation of an annual labour force sample survey in the Community (OJ L 351, 20.12.1991, p.1); Council Regulation (EC) No 577/98 of 9 March 1998 on the organisation of a labour force sample survey in the Community (OJ L 77, 14.03.1998, p.3).

Eurostat has during 1999 introduced a procedure for monitoring data transmission delays. This enables to identify, by country and by transmission table, the latest available data, eventual gaps in time series, taking into account requested derogations. At present, this is handled in a manual way and is therefore very time-consuming and difficult to up-date with high periodicity, but this should be automatised in short and thus allow being up-dated more regularly.

2.3 Dissemination of results

Data collected in the frame of the Directive has been regularly disseminated since 1997. In particular, "Tourism in Europe - Key figures" has been published on a yearly basis (in May or June) including data from the previous three years on the capacity of collective tourist accommodation, utilisation of bed-places, resident and non-resident guest flows and travel receipts and expenditure.⁵ Other publications are a Statistics in Focus on tourism, published in February 1999, including recent tourism trends for 1997 and 1998.⁶ Tourism statistics is also regularly used in other, more general Eurostat publications, such as "Eurostat Yearbook", "Europe in Figures", "Eurostatistics" and "Monthly Panorama of European Business".

The tourism domain in the Eurostat reference database "New Cronos" was completely restructured in 1998 to reflect the contents and structure of the Directive. This has allowed a wide range of users to have access to the statistics via the Eurostat Datashop network. Data suppliers in Member States and European institutions have free access to this database.

Part of the planned regular dissemination programme on tourism statistics is an annual edition of "Tourism statistics Yearbook" (CD-ROM) and "Tourism in Europe - Trends", a more analysis-oriented publication on tourism supply and demand covering the previous four years. Some estimations of missing data have been calculated for dissemination purposes, but more work is needed to carry out this exercise on a regular basis in order to ensure timely up-dates.

2.4 Methodological follow-up

Following the adoption of the Directive, it was agreed by the Eurostat Working Group on tourism statistics to produce a progress report showing the methodological developments in the Member States on implementing the Directive. The progress report should be up-dated regularly, allow for comparisons between countries and provide the basic monitoring tool for the Directive implementation process. Thus, the progress report aims to fulfil two objectives: firstly, to monitor the progress made by the Member States concerning the implementation of the Directive on tourism statistics; secondly, to improve knowledge and exchange experiences and best practices between Member States about data collection methods and existing statistical systems on tourism.

The progress report is in line with Article 8 of the Directive, which stipulates that Member States shall provide the Commission at its request with all the information necessary to evaluate the quality, comparability and completeness of the statistical information as well as details of any subsequent changes in the methods used. Member States have provided Eurostat with information to prepare the progress report through completed questionnaires on existing data collection systems in the EEA countries and the reports made by the Member States in relation to their contractual obligations to Community funding. The report has been

⁵ "Tourism in Europe - Key figures 1997-1998", (1999), Eurostat. "Tourism in Europe - Key figures 1996-1997", (1998), Eurostat "Tourism in Europe - Key figures 1995-1996", (1997), Eurostat.

⁶ "Inbound tourism flows rising in Europe", (1999), Statistics in Focus, Eurostat.

up-dated on a regular basis and Member States have been asked to verify, modify and complete the information.

In 1996 a practical manual on the application of Eurostat methodological guidelines on tourism statistics was produced.⁷ This manual provides the basic concepts, guidelines for collection and survey design in order to comply with the Directive.⁸ In 1998, as part of the implementing measures of the Directive, the definitions of the variables were established. Moreover, work has also been done on drafting technical manuals on methodological issues considered particularly difficult in the implementation process, for example data collection on business tourism. In addition, Eurostat has also elaborated a technical manual on harmonised data collection on private tourist accommodation, since this represents an important part of the supply of tourist accommodation in many Member States. To further encourage the exchange of experiences between Member States in the implementing process of the Directive, a methodological workshop was organised in 1999. The workshop allowed for the identification of common problems relevant for the implementation of the Directive and proposals for concrete actions to be taken to further proceed in the implementation process.

2.5 Legal framework

Concerning the procedures for implementing the Directive, the following measures to be decided upon within the Statistical Programme Committee procedure (articles 11 and 12 of the Directive), have been established: the definitions to be applied to the data collection characteristics (article 3), the detailed rules for data transmission procedures (article 7) and the derogations to be granted to Member States (article 10).⁹

Further implementing procedures within the Statistical Programme Committee procedure will concern accuracy requirements and the harmonised processing of systematic biases (article 4), processing of data (article 6) and dissemination of the results (article 9). (See also Annex I of this report)

III. PROGRESS BY SECTION OF THE DIRECTIVE

The implementation of the Directive, to which contracts between Member States and the Commission have provided a financial contribution, has led to several adaptations, changes and methodological implications of different character for the national statistical systems in the EEA countries. With the financial assistance provided in the frame of the contracts, the EEA countries have developed their national tourism statistics, with the aim of guaranteeing and where necessary consolidating the data collection and transmission to Eurostat. Apart from the direct impact of the financial contributions there has in many countries also been an indirect effect in stimulating the allocation of own resources to consolidate the national statistical system, especially in the perspective of carrying out data collection on a regular basis. Work has been undertaken to extend existing surveys, introduce new surveys where

⁷ "Applying the Eurostat methodological guidelines in basic tourism and travel statistics", (1996), Working document, Eurostat.

⁸ This practical manual is in line with the Community Methodology on Tourism Statistics, published 1998 by the European Commission, giving a broad methodological framework for collection of tourism statistics.

⁹ Commission Decision (1999/35/EC) of 9 December 1998 on the procedures for implementing Council Directive 95/57/EC on the collection of statistical information in the field of tourism (OJ L 9, 15.1.1999, p. 23)

necessary, harmonise definitions and methods, and other changes to comply with the Directive requirements.

3.1 Capacity of collective tourist accommodation: local units on national territory

3.1.1 Extending the coverage of existing registers on accommodation establishments

In order to improve their quality of the statistics produced, many countries have worked on extending the coverage of their existing registers on tourist accommodation establishments.

Belgium worked on compiling an inventory of the different types of accommodation and linking their accommodation register with other administrative sources, notably the general business register. This has led to a better coverage of the accommodation types at NUTS III level and to more detailed information.

France has worked on extending the register of classified hotels to gather also a complete list of hotels classified 0 stars.

The Netherlands has worked on completing and updating their existing register as well as building up a register to cover all accommodation establishments according to the requirements of the Directive.

Ireland has worked on creating a new tourism accommodation register consisting of all units, unique to either the business register of the Central Statistical Office or that of the Irish Tourist Board. In the past, the only existing register was that of the Tourist Board which covered only the approved accommodation sector.

Austria has also set up a tourism satellite register on tourist accommodation establishments, which is linked to the general business register.

Italy as well has worked on setting up a tourism satellite register based on the existing tourism accommodation register and linked it to the general business register (ASIA).

In the case of the United Kingdom, work has involved improving the existing tourism accommodation registers of the regional tourist boards to provide data at NUTS III level, and controls and crosschecks ex-post are being undertaken with the general business register of the Office for National Statistics.

In the case of Iceland, work has involved completing and updating its existing accommodation register, particularly building up a register for other collective accommodation establishments such as sleeping bag accommodation, youth hostels, accommodation in private homes and highland lodges.

Norway has worked on improving their existing register on hotels and similar establishments.

3.1.2 Building up new registers on collective accommodation types

In order to cover all the types of collective accommodation covered by the Directive, a number of countries have had to build up totally new registers for certain types of accommodation.

This is notably the case of Spain and Portugal, which have built up a register of tourist apartments (holiday dwellings).

Ireland has built up a register on non-approved bed and breakfast establishments.

France has worked on building up a register on non-classified hotels.

3.1.3. Revising the definitions and classification breakdown of collective accommodation

Many countries have worked on revising their existing classification of accommodation establishments, the structure of their database and the surveys in order to comply with the Directive.

This is notably the case for Austria, which before included rented houses and flats (holiday dwellings) under hotels and similar establishments, and is now including them under other collective accommodation.

Iceland has worked on doing a total review and modification of its classification of accommodation types in order to be compatible with the Directive. This has led to a total revision and reorganisation of Iceland's accommodation database, and existing information has also been revised according to the classification breakdown of the Directive.

Italy has been working on the classification of the collective accommodations making an inventory of all the existing establishment types at regional and provincial level. New establishment types, such as bed and breakfast and farmhouse accommodation are now specifically classified according to Eurostat guidelines.

Norway as well has been working on examining carefully the dividing lines between the different accommodation types to establish its tourism accommodation breakdown in line with the Directive.

3.2. Occupancy in collective accommodation establishments: domestic and inbound tourism

3.2.1 Adapting and extending existing surveys

Adapting the geographical breakdown of non-residents

Many countries have worked on revising and extending their existing questionnaires on guest flows in accommodation establishments to cover all the countries listed in the geographical breakdown of non-residents, e.g. Austria, Denmark, Spain, Greece, France, Italy, Netherlands, Iceland, Norway and Sweden.

Introducing the collection of new variables

Many countries have worked on adapting their existing survey to collect additional information in their questionnaires.

In Denmark work involved extending the existing Danish hotel survey to collect information on the net use of bed-places as from January 1996, and concerning arrivals in camping sites an agreement has been made with the Danish Camping Sites Association to produce reliable estimates for this variable. Indeed, for many countries this exercise has involved collaboration with the professional associations involved. Greece, Finland and Spain have extended their existing hotel statistics surveys to collect information on the gross use of bed-places places.

Luxembourg extended from 1998 the data collection to include also the number of bed-places and the net and gross utilisation of bed-places.

Netherlands has worked on a system for estimating arrivals and overnight stays at pitches on extended or permanent lease.

In the case of the United Kingdom, where information on guest flows in accommodation establishments is collected by the demand side approach, the variable arrivals was introduced into the existing survey.

In the case of Iceland, the existing questionnaire on guest flows in accommodation establishments has been extended to include also the variable arrivals since 1995. From January 1997 Liechtenstein started to collect data on the number of bed-places in camping sites.

3.2.2. *Setting up new surveys, designing new questionnaires*

In order to cover all the types of collective accommodation covered by the Directive, a number of countries have had to set up totally new surveys and design new questionnaires.

Portugal and Spain have started new surveys on holiday dwellings.

France has worked on setting up a new survey to collect information on guest flows in 0 star hotels, and on the elaboration of a questionnaire for this purpose.

Greece has revised and extended its existing surveys and questionnaires on guest flows in accommodation establishments to meet all the information requirements of this section of the Directive.

Ireland launched in January 1997 a new sample survey and questionnaire on guest flows in accommodation establishments based on the Central Statistical Office's new tourism accommodation register. This new survey was launched in January 1997.

Italy has worked on restructuring and simplifying its existing monthly survey on tourist flows in accommodation facilities with the aim to alleviate the response burden on local tourist authorities and substantially reduce the time required for transmission to ISTAT. The new survey started in January 1997.

In the case of Sweden, a new survey on guest flows in holiday dwellings has been set up.

The United Kingdom has created an occupancy survey which has involved harmonising and enhancing the various occupancy surveys run by the National and Regional Tourist Boards.

In Iceland work has involved restructuring the monthly survey on guest flows in accommodation establishments to extend the regional breakdown to NUTS II level.

3.2.3. *Data processing, quality and timeliness*

To meet the data quality requirements and transmission deadlines of the Directive many countries have worked on technological and methodological improvements.

Technological improvements

Italy has worked on redesigning and improving existing computing procedures for data capture and processing (e.g. automatic control of errors), as well as elevating the burden on respondents, by simplifying their data collection process. ISTAT now receives micro-data from territorial bodies by e-mail or by other telematic tools. This is part of the Eurostat SERT project (Statistiques d'Entreprises et Reseaux Telematiques), which aimed at sending data through telematic network for part A and B of the Directive from tourist establishments to territorial bodies and then to ISTAT. ISTAT has used the standard RDRMES to send/receive the data from/to the regional institutions and the hotel enterprises.

France, for managing data on non-classified hotels, has developed a computer programme capable of drawing up the sample of the hotels to be surveyed, processing and compiling the data received, calculating the occupancy rates and producing estimates for non response as well as those not surveyed.

Ireland has built up totally new database programmes capable of storing, managing and controlling the extensive sets of data that is now being collected with regards to the new accommodation register, the new survey on accommodation statistics and the new household survey on tourism demand.

Netherlands has developed a programme on electronic data gathering (questionnaire on diskette to be filled in by the respondents).

Sweden has also worked on improving computing procedures, including the design of a new programme to improve imputation for estimates for non-response, as well as introducing electronic questionnaires for collecting data from the Swedish Camping Sites Association.

Norway has developed a new computer system for data processing and quality control, as well as procedures for imputing missing data for non-respondents.

Methodological improvements

Italy has started to use a new system to estimate provisional data, namely a method of imputation of missing data (average firm method).

France has taken measures to optimise the sample sizes, to improve the precision of the results by a better definition of the stratification criteria, as well as modifying the collection frequency (monthly/quarterly) in relation to the variable.

To speed up the entire process of data handling, Netherlands has changed its data collection approach from a cut-off integral population approach to a stratified sample population approach with a grossing up method by making use of advanced imputation techniques.

3.3. Tourism demand: domestic and outbound tourism (excluding day-trips)

3.3.1 Adapting and extending existing surveys on tourism demand

When possible, countries have built on their existing systems and adapted their existing surveys to meet the requirements of the Directive. This has meant in general increasing the frequency of the surveys, extending the questionnaires to cover all the variables of the Directive, and in some cases enlarging the sample size.

For Austria, this meant running an additional “Microcensus - Travel habits of Austrians” survey on annual tourism demand (previously only conducted every three years) and extending the questionnaire.

Spain has worked on adapting and revising its existing survey ‘Vacaciones de los españoles’ which resulted to be a new survey called ‘FAMILITUR’. The work involved modifications in the questionnaire and methodological changes.

In the case of France, the outcome of the analysis of the existing household panel survey on the “Travel habits of the French” showed that there was positive response to the most of the data required by the Directive, except those concerning information on tourism expenditure. The sample size consists of 20,000 monthly interviews by postal questionnaire (the sample size has been doubled recently). After a trial test period in which questions on tourism expenditure were introduced into this existing survey, which was deemed to provide unsatisfactory results, France has worked on setting up a specific survey on tourism expenditure.

Italy has worked on adapting the existing “Holidays taken by Italians” sample survey (conducted every three years) to the requirements of the Directive. The “Holiday Survey 1996” was carried out in connection with the yearly “multi-purpose” survey and collected information on leisure trips of four or more consecutive nights. Italy has also been testing the feasibility of collecting information on tourism expenditure through the monthly household consumption survey.

For the Netherlands, which has been conducting a “Continuous Holiday Survey” since 1980, the work involved revising and extending this survey to collect information on business trips. The revised survey was sent out for the first time in March 1996. Portugal had conducted in the past an annual survey on the “Holidays of the Portuguese” to which substantial revisions have been made to change its scope, its frequency and introduce new variables in accordance with the Directive. In 1996 a pilot survey was conducted and a regular quarter survey launched in 1997.

Finland has conducted a regular holiday survey since 1991. To meet the requirements of the Directive a new periodicity was adapted and the questionnaire was revised and extended to cover many variables not previously covered concerning outbound tourism, domestic tourism in private accommodation (visits to relatives and friends) and business travel. The revision of data contents of the ‘Finnish Travel Survey’ was carried out in 1995-1997 and the quarterly survey was launched in 1996. Because of a changed survey design in the Labour Force Survey (based on EU regulation) limiting the possibilities to use the same sample base for other surveys, the data collection of the Finnish Travel survey will be carried out with a new survey design starting in 2000.

Sweden has undertaken several studies on methodological issues in order to extend and adapt the tourism demand survey currently conducted by the Swedish Tourist Authority to the requirements of the Directive.

Work in the United Kingdom has involved implementing a number of adjustments to the existing “UK Travel Survey” (which provides data on domestic tourism). Notably, information on holiday trips of four or more nights have implied extensions and changes to the questionnaires and pilot work was done in January 1997 to capture information covering 1996. The existing International Passenger Survey (IPS) provides data on outbound tourism and after an initial assessment of its ability to meet the data requirements of the Directive, an

expenditure trailer was conducted in 1997/1998 under which a sub-sample of respondents was asked about expenditure in great detail. Other work undertaken to improve the IPS has been the targeting of rare sub-groups, meaning shifting the filter towards these groups to better catch their behaviour.

3.3.2 *Setting up new surveys*

A few countries had never in the past conducted surveys on domestic and outbound tourism. This is the case notably of Greece, Luxembourg, Ireland and Iceland.

Greece conducted its first annual survey on holidays of four or more consecutive nights by Greek residents in December 1995, and in 1997 launched its first quarterly survey to collect information on holiday and business trips of one or more consecutive nights away from home.

Luxembourg conducted its first pilot survey during the first half of 1996. This pilot survey covered leisure trips undertaken in 1995. From the experience gained from the pilot survey, the data collection method and frequency for the regular survey was improved and after a first pre-test survey in November 1996, the regular quarterly survey was launched at the end of the first quarter of 1997.

Ireland designed its quarterly survey called 'National Household survey' in 1997; covering domestic and outbound tourism.

Iceland conducted its first "Travel Survey" in 1996.

For other countries their existing systems did not provide sufficiently adequate tools to collect the data as required by the Directive, thus new surveys had to be set up.

In Belgium, for example, an inventory and analysis of existing information on tourism demand was made, and considering that most of the information was not harmonised, the Statistical Office deemed it necessary to organise a new survey on annual tourism demand (four or more consecutive nights) in 1996.

In the case of Denmark, which in the past only had conducted very few annual surveys on domestic and outbound tourism, it was decided to develop a completely new quarterly survey. This survey has been set up as from January 1996 and covers both long and short trips (both quarterly and annual data).

Germany conducted in the past annual surveys on holiday trips of its residents, but this was stopped in 1990. Thus, to comply with the Directive a completely new quarterly survey covering all the data characteristics on tourism demand (both quarterly and annual data) was launched in 1997.

Norway conducted its first quarterly "Travel Survey" within the framework of the general "Omnibus" survey in 1997.

For some countries the need to set up new surveys concerned the collection of quarterly data on holiday and business trips of one or more consecutive nights away from home.

This is the case of Austria, which first launched a pilot survey on business and professional tourism in December 1995, and then launched its first regular quarterly survey on holiday and business trips of one or more nights in 1997.

Belgium and Italy also launched a pilot survey on holiday and business trips of one or more consecutive nights in 1997.

IV. OVERALL ASSESSMENT

Actions and work currently carried out to implement the Directive can now be considered as fully operational and fairly advanced, carried out under conditions which can be considered as relatively satisfactory. Data availability and timeliness have increased considerably since the adoption of the Directive. Common definitions have been applied and data is therefore more comparable.

It is nevertheless too early to draw definite conclusions from the experience of implementing the Council Directive, since the transition period for quarterly data collection is still not finished. During 1996 piloting work was undertaken and in 1997 the actual regular data collection started, but there were many countries which asked for derogations during the transition period.

The availability of Community funding in the initial phase of the implementation process of the Directive has enabled Member States to undertake a certain number of adaptations to their systems of tourism statistics and implement the Directive quicker than would otherwise have been possible.

The implementation of the tourism Directive has enabled, or should enable, the system of tourism statistics to be directed towards the needs of users at Community and national level.

Note must however be taken of a certain number of considerations which may influence future decisions. These concern, in particular, the following aspects:

- Some delays have been observed in Member States' data transmission to Eurostat. This makes quick dissemination to users more difficult.
- Delays in examining and ensured the quality, reliability and comparability of the data. There is a need to examine the application of definitions and classifications more in detail. The lack of human and financial resources required to assess in-depth the results communicated by the Member States have so far enabled that this assessment is not yet fully completed.

V. FUTURE OUTLOOK

The Community system of tourism statistics faces important challenges in the coming years, e.g. enlargement, more sophisticated user needs on tourism statistics (tourism employment, importance of tourism in the economy, tourism satellite accounts, measure the degree of competitiveness of tourism businesses, etc.), incorporation of the environmental dimension in policy areas linked to tourism (sustainable development of tourism), consideration of the role of the tourism sector in rural and regional development, technological development of new tools for data collection, etc. Consequently, it would be appropriate to ensure and maintain, and if possible develop further, the existence of an information system on tourism statistics at

Community level, which would facilitate the development of tourism statistics to meet the needs of users.

Future actions should concentrate on continuing the implementation and consolidation of the Directive and examining the quality, reliability and comparability of the data, the application of definitions and classifications, comparisons of different data sources, work on mirror statistics and increase the timeliness and dissemination of the results. Moreover, links to other statistics should be examined, e.g. employment, passenger transport, balance of payments, business statistics, prices and national accounts, in order to utilise existing data sources more efficiently. Furthermore, work on the implementation of tourism satellite accounts could be considered, since this would allow obtaining a measurement of the importance of tourism in the economy and on the employment, and for which the Directive would constitute an important information source.

The work on reflecting on future actions in the framework of the Directive and possible extensions of the legal act should be in line and co-ordinated with the Commission's policy on tourism's job creation potential, which was initialised in the report of the High Level Group on Tourism and Employment¹⁰. The report underlined the importance of valid information, considering that "the aim of ensuring timely, reliable and comparable information, there is the need to exploit existing EC instruments such as the Eurobarometer, to up-grade them in relation to business needs, and to ensure greater synergies on complementary actions, through public-private co-operation".

The European Commission Communication of 28 April 1999 "Enhancing Tourism's Potential for Employment"¹¹ responded to the High Level Group report and to the request of the Council of Ministers to focus on the link between tourism and employment¹². In the communication the need for a "knowledge driven" European tourism strategy was emphasised, "which would encourage businesses, public authorities and other interested parties to better exploit existing information, acquire and develop know-how, develop new processes, and learn from best practices".

Facilitating the exchange and dissemination of information, notably through new technologies, is one of the four areas emphasised in the Council Conclusions on Tourism and Employment of 21.6.1999. As a follow-up to the Council Conclusions four working groups were set up, one of them focusing on information. The aim of this working group is to identify the information needs and means to provide access to information. Statistics was regarded as one of the most important means of information within the working group. The work within this framework is expected to provide further elements to the discussion of more sophisticated user needs on tourism statistics.

¹⁰ Conclusions and recommendations of the High Level Group on tourism and employment, European Commission - DG XXIII, October 1998.

¹¹ OJ C 178, 23.6.1999, p. 3

¹² Council of (Tourism) Ministers of 26th of November 1997.

ANNEX 1. LEGAL FRAMEWORK

Adopted:

Year	Decision	OJ	Contents (article in parenthesis refers to the Directive)
1998	1999/35/EC	L 9, 15.1.1999	Annex 1: Definitions of variables (article 3) Annex 2: Standard data transmission tables (article 7) Annex 3: Derogations granted to Member States (article 10)

Planned:

Year	Contents (article in parenthesis refers to the Directive)
2001	Annex 1: Accuracy requirements and the harmonised processing of systematic biases (article 4) Annex 2: Processing of data (article 6) Annex 3: Dissemination of the results (article 9)

ANNEX 2. SUMMARY TABLE BY COUNTRY AND BY SECTION OF THE DIRECTIVE

Below follows tables by section of the Directive and by country on the main statistical tool (survey, register) developed or introduced to comply with the requirements of the legal act (second column). The other columns show data availability and data freshness (as of situation 20.3.2000) in terms of data tables transmitted from Member States to Eurostat. See below the explanation of marks noted for data availability and data freshness:

Data availability

- 0: no data (no table is transmitted)
- 1: weak availability (less than 30% of tables)
- 2: medium availability (30-60% of tables)
- 3: good availability (60-80% of tables)
- 4: excellent availability (more than 80% of tables)

Data freshness

Delay in reference periods

monthly/quarterly/annual

- 1: weak 8+/3+/2+
- 2: medium 4-7/2/1
- 3: good 0-3/0-1/0

Capacity of collective tourist accommodation: local units on national territory

Country	Main statistical tool (survey, register) developed or introduced	Data availability	Data freshness
		(annual)	(annual)
Belgium	"Survey on tourism and hotels" (*): a linkage between accommodation register and administrative sources has been established.	4	3
Denmark	---	4	3
Germany	---	4	3
Greece	---	4	3
Spain	"Tourist accommodation survey" (*): in 1996 it was extended to cover holiday dwelling and a new register was established.	4	3
France	Data collection on tourist capacity (*): it was extended to include the Directive's variables, hotels register was extended to include 0 star hotels and a new register of non-classified was built.	4	3
Ireland	A new survey on accommodation establishments was launched in 1997, based on the new tourism accommodation register.	4	3
Italy	The two census surveys "Capacity of hotels survey" (*) and "Capacity of other collective establishments survey" (*) were revised in 1996. The satellite register on tourism establishments has been linked to the business register.	4	3
Luxembourg	"Accommodation statistics" census survey (*): extended since 1998 to include the number of bed-places	4	3
Netherlands	"Accommodation statistics" survey (*): adopting stratified sample population approach, developing electronic data gathering, extending and updating the existing register on accommodation establishment.	2-3	1-2
Austria	"Tourist Accommodation/beds" survey (*): rented houses and flats excluded form hotels and similar establishments	4	3

Portugal	"Accommodation statistics" census surveys (*): extended to cover holiday dwellings; a new register on holiday dwellings has been set up.	4	3
Finland	---	4	3
Sweden	"Accommodation statistics" census survey (*): new system for data collection; adapting geographical breakdown.	4	3
United Kingdom	Improving the existing tourism accommodation registers of the regional tourist boards.	4	3
Iceland	"Accommodation statistics" census survey (*): the existing register was completed and updated; the classification of accommodation types has been totally reviewed and modified.	4	3
Norway	"Accommodation statistics" census survey (*): the register on hotels and similar establishments has been improved.	4	3

Note:

(*): Survey existing before the Directive

---: No changes

Occupancy in collective accommodation establishments: domestic and inbound tourism

Country	Main statistical survey developed or introduced	Data availability		Data freshness	
		(ann.)	(mon.)	(ann.)	(mon.)
Belgium	---	4	4	3	2-3
Denmark	<p>"Danish Hotel Survey" (*): adapting geographical breakdown and collecting net use of bed-places;</p> <p>"Danish Camping Survey" (*): adapting geographical breakdown and estimating arrivals;</p> <p>"Danish Youth Hostels Survey" (*), and "Holiday Dwellings Survey" (*): adapting geographical breakdown.</p>	4	4	3	3
Germany	---	4	3	3	3
Greece	"Accommodation statistics" census (*): creation of a new register on collective accommodation; collection of gross net use; and adapting geographical breakdown and questionnaire.	3	4	2-3	1
Spain	<p>"Tourist accommodation survey" (*): in 1996 it was extended to cover occupancy in holiday dwelling (pilot survey).</p> <p>In 1998 the survey was extended to collect information on gross use of bed-places; and adapting geographical breakdown.</p>	3	4	3	3
France	Data collection on occupancy (*): adapting geographical breakdown. A new survey on guest flows in 0 star hotels was launched in 1997.	3	4	3	3
Ireland	"National accommodation survey": new survey on guest flows in accommodation establishments launched in January 1997.	4	2	1-2	1
Italy	The monthly census survey, "Tourist flows in accommodation facilities" (*) has been restructured and simplified; geographical breakdown has been adapted; new system to estimate provisional data.	4	4	3	1-2
Luxembourg	"Accommodation statistics" census survey (*): extended since January 1998 to include data on the net and gross use of bed-places.	4	4	3	1

Netherlands	"Accommodation statistics" survey (*): adopting stratified sample population approach, developing electronic data gathering, extending and updating the existing register on accommodation establishment, estimating arrivals at stays at pitches at extend of permanent lease.	4	4	2-3	1
Austria	"Arrivals and overnight stays" survey (*): rented houses and flats excluded from hotels and similar establishments and adapting geographical breakdown.	4	4	3	1
Portugal	New survey on guest flows in holiday dwellings.	4	4	3	3
Finland	"Accommodation statistics" census survey (*): extended to cover gross use of bed-places.	4	4	3	3
Sweden	"Accommodation statistics" census survey (*): new system for data collection; the geographical breakdown has been adapted; holiday dwellings with at least 5 cottages or 20 bed-places have been included.	4	4	3	1
United Kingdom	"International Passenger Survey" (*): a number of adjustments have been made to the questionnaire and its accommodation trailer in order to comply with the Directive. "UK Occupancy Survey": has been adapted from the various occupancy surveys run by the National Tourist Boards.	4	4	3	3
Iceland	"Accommodation statistics" census survey (*): it has been extended to cover also the variable arrivals since 1995. The monthly survey on guest flows in accommodation establishments has been restructured: regional breakdown and geographical breakdown has been completed, periodicity has been revised.	4	4	3	1
Norway	"Accommodation statistics" census survey (*): questionnaires for hotels and similar establishments and for camping sites have been revised to include the world geographical breakdown.	4	4	3	3

Note:

(*): Survey existing before the Directive

---: No changes

Tourism demand: domestic and outbound tourism (excluding day-trips)

Country	Main statistical survey developed or introduced	Data availability		Data freshness	
		(ann.)	(quar.)	(ann.)	(quar.)
Belgium	New annual "Survey on holidays taken by Belgians in 1996" (4 nights or plus). New ad hoc quarterly survey on short and long trips.	2	4	3	3
Denmark	New quarterly survey since Jan. 1996.	2	4	3	1
Germany	New quarterly survey launched in 1997.	2	4	3	2-3
Greece	New annual survey on holidays of four nights or more was launched in 1995. New quarterly survey on long and short holidays was launched in 1997.	4	4	2	1
Spain	The survey "Vacaciones de los espagnoles" was adapted to comply with the Directive and became FAMILITUR.	2	2	2	1
France	"Survey on travel habits of the French" (*): it has been extended to include data on tourist expenditure.	0	0	-	-
Ireland	The new quarterly survey, "National household survey" was launched in 1998.	1	0	1	-
Italy	The Multipurpose household survey (*) was expanded in 1996. A new quarterly survey was set up in 1997 covering annual data for holidays of 4 nights or more. A quarterly sample survey was launched in 1997 ("Travel and holidays") covering quarterly data on holiday and business trips of one or more consecutive nights.	2	3	3	1
Luxembourg	A first pilot survey on leisure travel was launched in 1996. The first regular quarterly survey was launched at the end of the first quarter of 1997 (quarterly and annual data).	4	4	2	2
Netherlands	"Continuous Holiday Survey" (*): revising and extending the survey to include business trips data collection.	0	0	-	-

Austria	"Microcensus - travel habits of Austrians" survey (*): annual basis instead of every three years. A pilot survey on business and professional tourism was launched in 1995. A regular quarterly survey on holidays and business trips was launched in 1997.	2	1	3	1
Portugal	"Holidays of the Portuguese" (*): scope, frequency and questionnaire have been revised to meet Directive's requirements.	0	3	-	3
Finland	"Finnish Travel Survey" (*): the periodicity has been adapted; the questionnaire has been revised and extended to cover outbound and domestic tourism characteristics (short and long travels) and business trips.	4	4	2-3	3
Sweden	Methodological studies have been undertaken in order to extend and adapt the existing survey.	4	4	1	1
United Kingdom	"United Kingdom Travel Survey" (*) on domestic tourism: the questionnaire has been adapted and extended to include holiday trips of 4+ nights; work has been designed to maximise harmonisation and compatibility between the various sources used. "IPS" (*) providing data on outbound tourism: an expenditure trailer was conducted in 1997-98.	3	4	3	3
Iceland	The first survey on travel habits of Icelanders was carried out in 1996.	2	3	1	1
Norway	The first quarterly Travel Survey was carried out in 1997.	0	0	-	-

Note:

(*): Survey existing before the Directive

---: No changes

ANNEX 3. FINANCIAL CONTRIBUTION TO MEMBER STATES

Country	First contract (ECU)	Second contract (ECU)	Total (ECU)
Belgium	70,000	130,000	200,000
Denmark	70,000	130,000	200,000
Germany	350,000 (*)		350,000
Greece .	70,000	130,000	200,000
Spain	120,000	230,000	350,000
France	120,000	230,000	350,000
Ireland	70,000	130,000	200,000
Italy	120,000	230,000	350,000
Luxembourg	20,000	40,000	60,000
Netherlands	70,000	130,000	200,000
Austria	40,000	130,000	170,000
Portugal	70,000	130,000	200,000
Finland	40,000	130,000	170,000
Sweden	40,000	130,000	170,000
United Kingdom	120,000	230,000	350,000
Iceland	40,000	70,000	110,000
Norway	40,000	70,000	110,000

(*) One contract