

Annex 7. Côte d'Azur tourism Observatory: confrontation and reconciliation of sources

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One of the first observatories to be set up in France in the mid 80s, the French Riviera Tourism Observatory aims at producing reliable statistics and information on tourism, endeavoring to make the most of every available source of information, within their own limits and strengths.

Particularity of the area, at the crossroads of territorial units and destination management

The missions defined for a regional tourism Observatory can vary according to the carrying institution and the local context. However, basically its *raison d'être* will be to produce the official data, to fill a wide range of needs : knowledge, measure, intelligence, analysis, etc... In the French Riviera Côte d'Azur, the Observatory was set up and developed by the Comité régional du tourisme in Nice, which administrates tourism on the sole territory of the county of Alpes-Maritimes, encompassing (on the basis of a partnership agreement), the Principality of Monaco. This is a unique position, as this regional institution extends its activities over a sub-regional territory, corresponding to NUTS3 level, but including the territory of a sovereign state within what is defined as the "destination". However, the density of tourism supply as well as the importance of tourism in the economy both justify this territory as the most adequately observed geographical and economical perimeter, the NUTS2 PACA region being a much wider, diversified and non homogeneous tourism territory, lacking technical, human and financial means to properly satisfy information needs of all local territories. Moreover, the efficiency of observation processes is higher when there is proper correspondence between these three space types : 1/ the territory which constitutes the « tourist destination », 2/ the administrative territory and its tourism observation tool 3/ the operational frame to organize surveys and statistical tools (neither too small, for organization or cost reasons, nor too large, for heterogeneity, sampling or representativeness issues).

Construction process of a regional system of tourism statistics

Several critical steps had to be followed in order to create an efficient information system :

Step 1 : identification/assessment of available sources

Considering the limited budgets usually available, it is advantageous to check, at an early stage, the existence of sources liable to be mobilized and integrated into the system. These surveys must be long-lasting (renewed from one year to the next), with regular output (on a monthly or yearly basis), founded on reasonably transparent methodologies (assessable, adaptable, even evolutionary), and with possible regional extraction, with, if necessary, required sample extensions. If these requirements are not met, it is difficult to construct from them a sustainable tourism information system. The choice of the source surveys must be carefully examined, with well supported assessment of their reliability, consistency, robustness, and long-term operation.

National, even regional surveys can be used, but often their objective does not respond to local measurement needs in a satisfying way. This link, nevertheless, has to be searched and established, whenever possible, for comparability reasons. The Côte d'Azur tourism observatory is linked to two national surveys : national accommodation surveys (hotels and campsites) and SDT (French tourism demand survey). It was not possible, unfortunately, to link it to the

national survey on foreign tourism (EVE survey « Enquête Auprès des Visiteurs de l'Étranger »), mainly for methodological reasons. The national sample used is not representative of regional tourist flows, and, for instance, the airports side of the survey only includes 4 to 5 half-days of surveys each month (around 15 hours in total) at Nice Côte d'Azur airport (second in France after Paris) and this sample is simply not strong or representative enough to capture the reality of air visitors to the region in all its diversity.

Step 2 : construction of a sustainable comprehensive methodology and system

Once exogenous sources have been selected, it was necessary to design one or two new tools to found the system of statistics. That means setting up one or two new “pillar surveys” to cover up a large perimeter of observation through 2 or 3 major segments. In the case of Côte d'Azur, these fields were selected : air visitors leaving from Nice airport (Visavion survey), and a complementary survey on non hotel establishments (tourism residences). For these pillar surveys, the aim is to make these tools as robust and representative as possible. This was done through several parallel processes, for each survey, with a constant search for quality. For instance, data from the hotel survey needed to be improved, with the correction of data based on real verified availability of rooms. In the national survey, the file contains information on hotel rooms theoretically available, but the real availability of rooms is only correctly known for respondents, and not precisely known for non respondents, that is to say more or less half of the existing hotels. The observatory has determined that monitoring precisely this information is critical and impacts on the true results. For that reason, a verification of data on opening/closing dates and real number of rooms for rent is conducted for every hotel, leading to a correction of hotel rooms supply and consequently on the number of arrivals and overnights. Regarding the national SDT survey on domestic demand, the “integration” process was designed and applied, to make these data totally compatible and coherent with other surveys. This process includes marginal corrections on the number of hotel nights (from the hotel survey), reframing of the statistical universe covered, and replacement of information on air visitors by more robust data from the Visavion survey.

The critical point is to allow coverage overlapping in the main surveys. Transport surveys include all accommodations and accommodation surveys include all means of transport. The crossed comparison of data is therefore possible, segments volumes can be better estimated, each source survey being integrated in a global system. Major segments are estimated through several sources, allowing validation and/or marginal corrections to make volumes fit into the frame.

In the national system of statistics, this coherence reaching process is not yet properly conducted. There are inconsistencies between volumes measuring the same segments but based on different sources. For instance the volume of nights estimated through accommodation surveys is not made consistent with the volume of nights estimated through visitor surveys or household surveys.

It is also important to base the statistical system on the most adequate tools. For instance, quantifying business tourism through household surveys will not provide satisfying results, whereas this will be more easily done through airport surveys.

Step 3: ongoing improvement process

Survey results are systematically compared to other results, trying to make them, as much as possible, compatible and coherent, at least for the measurement of main segments volumes : domestic and foreign stays and overnights, split by motivation of stay, main accommodation, and

arrival transport means. This is important since all further analysis and measurement operations will be based and calibrated on these volumes.

Some adjustments can be made. For instance, accommodation surveys do not exclude non tourists which should not to be considered as such since they are in their usual environment. This could be seen as marginal, but it may be enough to account for differences in results across surveys. Therefore, an attempt can be made to estimate these intra-territory stays and deduce them from the survey results. Another example is the correct estimation of length of stays in tourist accommodations. Usually, when we compare these ratios from the accommodation surveys (2.7 nights in Côte d'Azur hotels and residences) to those collected directly from the visitors, an important gap will appear (4-5 nights declared). To make statistics compatible and coherent, the reason for this gap must be properly understood and taken into account. It may be caused by a change of hotel during the stay, by stays made over two consecutive months with two arrivals reported by the hotel instead of just one, by the mentioned issue of intra-territory stays, often limited to one night, etc...

Whenever a new source becomes available, efforts are made to check comparability and if necessary revise previous estimates. For instance, in the summer of 2012, an experiment was conducted with Orange (French telecom company) to quantify the number of tourist and excursionists arrivals by country of origin. On one side available statistics were used to assess the relevance of the tourist flows observed through mobile telephones, but on the other side mobile phones data will possibly be used to correct some previous estimations in the statistics, as the length of stays by countries of origin. At the same time, this new methodology will probably be adopted as the source to measure excursionists, for which no other available source had proved adequate.

Some critical findings

Initially, a stable notion of the observed territory must be defined, as well as which territory will be considered as belonging to the "usual environment", and which areas will need extracted local data

No single source is self sufficient or perfect, and every tool should be used according to its own strengths (where it proves most efficient).

Existing and new pillar surveys should be used in combination, to cover up a sizable share of the global demand, and estimate from them, through ratios, the non covered segments
Supply and demand approaches are to be pursued in parallel, as a way to improve and reconcile data

Reconciling sources is as important as producing new information or sources, and may often lead to methodology improvements

FURTHER LINKS

<http://www.cotedazur-touriscope.com>

<http://www.revue-espaces.com/librairie/5066/observation-tourisme.html>

http://www.revue-espaces.com/carnet/754.vece_patrick.html

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