

## **Session 3**

# **Analysing and Understanding Domestic Tourism within a Destination Perspective**

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- The importance of domestic tourism within a destination perspective
- The relevance of domestic tourism at supra-national level: the European perspective
- The need of tailored demand analyses at sub national level
- Excursionism and itineraries as crucial issues for destinations: general remarks and a case study

- **Increasing complexity of the competitive environment and decreasing possibility to control and foresee markets and demand are among the crucial factors tourist destinations, both emerging and already established have to face.**
- **Efficient and effective management will depend on a precise knowledge of actual and potential demand.**
- **Within this context, while international tourism has been objective of relevant efforts to analyse its characteristics and its economic importance, domestic tourism remains one of the most neglected and under-researched categories in tourism analysis (Ritchie and Crouch, 2003).**
- **One of the main reasons for that is linked to the economic evidence of the two typologies.**

# Domestic vs. international tourism

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**Economic importance of international tourism: being the related consumption similar to exports to the destination country, its effects have to be added *in toto* to the national production system, contribute to the increase of the Balance of Payment assets and provide foreign exchange earnings.**

**Domestic tourism consumption, on the contrary, is part of residents' final demand and its effects have to be considered only for the additional activities undertaken by residents in their quality of tourists (in other words excluding the consumption that they should have done anyway as residents).**

**In reality, domestic tourism too generates an increase in production which would not otherwise have taken place:**

- **It stimulates activities which would have taken place anyway, but which are transferred from one area (the origin area) to another (the destination area).**
- **So, in many countries this latter element guarantees the important effect of transferring income from richer areas of the country to less well-off areas.**
- **Finally, during economic crises when the propensity to long-to-medium haul travel decreases, it can contribute to the destination performances by substituting international tourism.**

- First destination/origin in the world
- Political and economic complexity of the European system (12-15-25-27-29)
- Strong identity of each country and powerful position of regions (devolution process)
- Powerful and mature debate on economic development conditions: sustainability, quality, consumer rights, governance
- Consolidated and mature tourism development
- Broad differentiation of tourism typologies/purpose of visit (from cultural to rural, from MICE to cruises, from itinerant tourism to excursionism) and consumption behaviour

## Total nights spent in Europe (Eurostat, 2008)

| Nights        | EU27 2000           | EU27 2006           | Average growth rate |
|---------------|---------------------|---------------------|---------------------|
| Residents     | 56.5%               | 58.8%               | +1.2%               |
| Non-residents | 43.5%               | 41.2%               | +1%                 |
| Total         | 100%<br>(2.154.379) | 100%<br>(2.304.499) | +1.1%               |

**Residents share > 70%: Germany (85%), Netherland, Poland, Finland, Sweden, Norway**

**Residents share < 40%: Bulgaria, Estonia, Greece, Cyprus, Latvia, Luxembourg, Malta, Austria, Slovenia, Croatia, Iceland, Liechtenstein**

**Residents living in the Benelux countries, the Baltic States, Denmark, the United Kingdom, Ireland, Slovenia and German-speaking countries prefer to spend trips of 4-nights or more abroad (percentages range from about 53% for Latvia to almost 100% for Luxembourg)**

**Residents of Southern European countries (Greece, Spain, France, Italy and Portugal ), Finland and other new Member States, prefer to spend holidays in their own country, with figures ranging from 53% for Slovaks to 89% for Greeks (Eurostat, Panorama, 2008 edition).**

**Furthermore, looking at the development from 2000-2006, domestic trips for holiday purposes showed the highest increase of 9.9% both in a country where domestic tourism dominates (Greece) and in another where outbound tourism is prevalent (Austria). Good growth has been recorded also in other important tourist destinations countries as Spain (+5.2%) and Italy (+2.5%).**

If Europe may be interpreted as a tourist destination, also at this level it is important to discuss if the existing framework of data on domestic tourism is able to represent and interpret the complexity above underlined.

Comparison between origin and destination flows and expenditure remains a crucial step in order to achieve the Eurostat's quality components "relevance, accuracy, timeliness and punctuality, accessibility and clarity, comparability, and coherence".

**The inadequacy of information and/or the lack of reliable data on volume, expenditure, dynamics and characteristics of visitor flows are considered to be one of the main hindrances to the development of suitable strategies for destination management:**

- **Visitor statistics related to the main attractions only record the total volume of individuals entering the attraction itself, without any distinction by nationality, typology (e.g. tourists and same-day visitors), motivation or organisation of the visit**
- **Data collected at the accommodation establishments only record tourists in registered hotel and non-hotel accommodation. People visiting friends and relatives and, above all, excursionists are generally omitted.**
- **National surveys on travel behaviour do not allow any in depth local analysis on the critical issues above underlined.**

**The in depth analysis of domestic tourism demand can contribute effectively to a multiplicity of strategic issues:**

- **systematic and non-systematic mobility patterns,**
- **preservation vs fruition of natural and cultural resources,**
- **alternative use of free time**
- **etc..**

**Ad hoc tailored surveys, for their being non systematic and their lacking of homogeneity in the methodology applied, do not facilitate comparison.**

**Comparison and homogeneity might be reached if a national survey on domestic tourism is implemented, but in this case its responsiveness to the sub-national needs has to be evaluated on the basis of a few aspects:**

- The different interpretation of the concept of “domestic” when the sub-national level is considered. The role of some components changes according to the territorial scale: residents in other areas become similar to international tourists for the area under consideration;
- The sample usually adopted for national surveys couldn't allow the adequate analysis of the phenomenon at local level and a cost-benefit analysis couldn't justify the enlargement of the sample so that to be representative at any required sub-national level
- The impact of excursionism on the local supply needs to be analysed in a more precise way than at national level, in particular taking into account the usual environment and the interface with outdoor recreation practices

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## **Use of free time**

**the study of “domestic tourism” to a destination, in particular in terms of excursionist flows involves, and is interconnected to, the analysis of the use of free time and then to the specification of the differences between tourism – leisure – outdoor recreation, for which the definition of “usual environment” is determinant.**

## **Mobility**

**One of the main areas of interaction between daily visits, tourists and residents is mobility:**

- Visitors need, on one hand, fast and efficient transport services to reach the destination (accessibility) and, on the other hand, integrated and flexible transport supply within the destination (urban mobility).**
- The needs of visitors and residents are almost coincident as regards accessibility while can be different as regards local transports (flexible vs. rigid pattern).**

**Thank you for your attention!**

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