D. Providers of transport services

In this section:

- D.1. Passenger transport by air
- D.2. Passenger transport by rail (except sightseeing)
- D.3. Passenger transport by water (except sightseeing)
- D.4. Passenger land transportation (excluding rail and sightseeing)
- D.5. Vehicle rental without operator
- D.6. Sightseeing services by water, train or land

6.76. Transportation is an extremely important component of tourism. By definition, movement from one place (the usual environment) to another (outside the usual environment) is a necessary criterion for identifying a tourism activity. Most transport activities undertaken by visitors are provided by transport or related businesses but not all: The visitor might travel by their own means, or through private transport provided by friends or relatives (e.g., motor car/bicycle, plane or boat). It may even be the case that the visitor walks to the destination (not common) or travels by horse or by using other nonmechanized means.

6.77. ISIC industries that are relevant to the provision of transport services to visitors are classified under classes: 4911 ("Passenger rail transport, interurban"), 4922 ("Other passenger land transport"), 5011 ("Sea and coastal passenger water transport"), 5021 ("Inland water passenger transport"), 5110 ("Passenger air transport") and 7710 ("Renting and leasing of motor vehicles"). As other ISIC transport industry categories relate to the transportation of freight, they are not included.

6.78. It is important to make the distinction between transportation to or from a destination, and transportation within a destination. These two types of transportation have very different characteristics and are perceived differently in the context of tourism analysis perspective. In the case of transportation to or from a destination, it is important to establish the residence of the transport provider. This will affect how the expenditure on such transportation is treated. The expenditure could be included in domestic, inbound or outbound tourism or, possibly, excluded altogether. In relation to transportation within the destination, this is not such an issue, as providers of this type of transportation are usually – although, increasingly, not always – resident in the reference economy.

6.79. It should be noted that class 4911 ("Passenger rail transport, interurban") includes only longdistance travel. This could entail international or domestic transport, which would normally involve visitors travelling to or from a destination or possibly between destinations. However, the other ISIC categories listed in the previous paragraph 6.76 can encompass long and shortdistance travel, including travel to and from within a destination. Readers are referred to ISIC, Rev.4 for detailed descriptions of the types of transport included within these categories.

6.80. Some forms of transport may be provided as a secondary activity by businesses; however, this is not very common in most countries. A more significant issue is the inclusion of transport in packages and, as often, the main component of some packages. Expenditure surveys of visitors must aim at identifying the transport (and other) components of packages, although this can be difficult and may require estimation or modelling.

6.81. In many countries, transport providers can be relatively small in number, especially in relation to longdistance transport. Most such commercial transport activity is provided by businesses that can be identified readily and easily and that are included in a country’s business register. For longdistance transport, there is usually a relatively small informal component. However, for shortdistance transport, such as that within cities, public transport may be dominated by a very large number of small operators. Some operators may operate only one vehicle and their business may be familyrun. In some countries, they are highly regulated and identified with relative ease from official registers, for survey purposes. However, in other countries, they may be very poorly regulated and operate within what is virtually an informal sector. In this case, estimates will need to be made of their activity, based on estimates of the total numbers of such vehicles, the total numbers of passengers carried and the proportion of those passengers that are visitors.

6.82. A relatively small number of transport providersairlines, for example can, in some cases, create a challenge in terms of the confidentiality of data. Where, for example, there are only two or three providers of air services, the businesses concerned might be reluctant to provide data from fear that publication of the results could permit identification of figures, even in cases where the results were published only in aggregated form. Under such circumstances, it may then be necessary to combine the data for different transport modes before publication, e.g., the data for air transport and those for land transport. Obviously, this could reduce the value of the data; however, such an approach may still be necessary.

6.83. The sort of data that are required are the data normally collected for all industries for National Accounts (including TSA) purposes, usually by the NSO. As this has been noted in paragraphs 6.6 and 6.70, it will not be discussed further here. However, in some countries, extra activity data similar to those collected for accommodation and food and/or beverage establishments may be required, for example, on numbers of vehicles and capacity utilization, number of passengers carried and numbers of vehicles rented and duration of rental. These data items are described in IRIS 2008 (para. 6.45) as:

- Longdistance public transportation:
  - Number of vehicles for road transport/aircrafts, vessels, for air and water
  - Number of available seats
  - Number of passengers transported
  - Capacity utilization
  - Number of passengerkilometres/miles produced

- Rental of vehicles:
- Number of vehicles (cars, vans, caravans, boats, yachts, etc.) available for rent without operator
- Number of vehicledays available for rent in a given period (month, year)
- Number of vehicledays actually rented

6.84. The collection of such data may be carried out through inclusion of extra questions in the normal economic activity surveys, or through a separate sample survey of those establishments focusing on these data items only.

6.85. As measuring the supply of passenger transport services to visitors requires the specific and separate study of each mode of transport, the different modes are discussed in more detail below.