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CHAPTER 1 - THE TOURISM SECTOR IN EUROPE
MAIN FEATURES

1. THE TOURISM SECTOR IN EUROPE: MAIN FEATURES

1.1. Recent trends 1995-2004

Europe is the most important tourism region, both as a destination and as a source. In spite of the steady fall in market share over the last ten years, as a consequence of the dramatic growth of very dynamic regions like Asia (especially South Asia), its tourism flows have still increased in absolute terms from 1995 to 2000 and then fluctuated in the following four years. In any case, Europe continues to play a central role in the global tourism market.

Looking within Europe, however, a different trend emerges in western and southern countries in comparison to northern and eastern Europe over the period analysed. The first group of countries still leads the market, but has generally seen a fall in international demand. The second, however, has shown significant growth in both incoming and outgoing flows, much of this to and from the rest of Europe.

This section discusses the overall trends characterising the evolution of tourism in Europe, in terms of flows and economic transactions.

1.1.1. Tourism in Europe

Table 1.1 shows the trend and evolution of international tourism arrivals in Europe, in total and by area of Europe, from 1995 to 2004. A comparison is made between old Member States (EU-15), the EU-25 and the candidate countries (Bulgaria, Croatia, Romania and Turkey - "CC-4"), in terms of both absolute values and annual change rates. The market shares describe the distribution of international tourism arrivals among the different areas of Europe.

Table 1.1 - Evolution of tourism arrivals in Europe, in total and by area, 1995-2004

Arrivals (in 1 000)	1995	2000	2001	2002	2003	2004
EU-25 + CC-4	172 944	234 117	225 290	230 972	228 264	229 559
EU-25 ¹	170 712	228 617	219 138	224 398	220 996	221 994
EU-15 ¹	162 343	217 697	207 866	207 087	203 181	202 135
CC-4 ²	2 232	5 500	6 152	6 574	7 268	7 565
Annual change rate (%)	1995	2000 ¹⁾	2001	2002	2003	2004
EU-25 + CC-4		6.2	-3.8	2.5	-1.2	0.6
EU-25		6.0	-4.1	2.4	-1.5	0.5
EU-15		6.0	-4.5	-0.4	-1.9	-0.5
CC-4		19.8	11.9	6.9	10.6	4.1
Market share %	1995	2000	2001	2002	2003	2004
EU-25 + CC-4	100.0	100.0	100.0	100.0	100.0	100.0
EU-25	98.7	97.7	97.3	97.2	96.8	96.7
EU-15	93.9	93.0	92.3	89.7	89.0	88.1
CC-4	1.3	2.3	2.7	2.8	3.2	3.3

Note: (*) average annual growth rate (%) 1995-2000

1) For 1995-2001 excluding CZ, EE and LT, for 1995 excluding CY, for 1995-2004 excluding MT. 1995 includes 1996 data for DK, 1998 data for IE and estimation for SE. 2002-2004 include estimations for IE. 2004 includes 2003 data for BE, EL, IT, LV, HU and UK.

2) 1995, 2000-2004 exclude RO and TR. 2004 includes 2003 data for RO.

With about 222 million international arrivals in 2004, tourism in the EU-25 saw a slight recovery in comparison to 2003 (+0.5%).

Looking at the period from 1995 to 2004, the EU-25 shows an up-and-down trend. A very good performance was recorded by the area in the second half of the 90s (from 170.7 million in 1995 to 228.6 million in 2000, +6.0% on average each year), driven by the exceptional results of the year 2000 (good economic situation, the Holy Year in Italy, the Expo in Hannover/Germany, etc.). A fall of -4.1% took place between 2000 and 2001, followed by a new growth in 2002 (+2.4%), probably due to the consequences of September 11, which stimulated a growth of short-haul travels within Europe. This good performance was partially eroded in 2003 (-1.5%), because of the economic situation in some of the major generating countries, together with the effects of the conflict in Iraq.

Comparing the evolution of the EU-25 overall with that of the EU-15, we can see that the old Member States showed a downward trend, especially from 2001 onwards. After an expansion similar to that in the EU-25 as a whole from 1995 to 2000 (+6.0% average annual growth rate), they recorded a steady decrease in the first few years of the 21st century (-4.5% in 2001, -0.4% in 2002, -1.9% in 2003, -0.5% in 2004). In particular, they seemed to benefit less than the new Member States from the increase in short-haul travel within Europe in 2002. In addition, they suffered more from the unstable economic situation in 2003, probably due to the higher costs of local tourism services in comparison to eastern countries.

The EU-15 countries accounted for about 91% of total international tourism flows in the EU-25 in 2004. This was lower compared to previous years, and implies that the new Member States (especially those in eastern Europe) made up at EU-25 level for the decline in international tourism experienced by the old Member States.

On the other hand, the countries showing the best performance over the period analysed, even with low absolute figures, were the candidate countries Bulgaria, Croatia, Romania and Turkey. They recorded an average growth rate of +19.8% per year between 1995 and 2000 (from 2.2 to 5.5 million), and flows continued to increase during the first years of the 21st century. Consequently, their market share rose from 1.3% in 1995 to 3.3% in 2004.

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Looking at overnight stays (Table 1.2), international tourism nights spent in the EU-25 followed the same trend as arrivals from 1995 to 2001, however at a lower rate (+5.9% on average from 1995 to 2000, -0.1% in 2001). In 2002, nights recorded another decrease (-1.6%) even though arrivals grew (+2.4%), revealing a decrease in the average length of stay (from 4.1 to 3.9 days). In 2003 and 2004, the drop in nights was higher than that for arrivals (-1.6% in 2002, -1.8% in 2003), showing again a slight fall in the duration of stay.

Table 1.2 - Evolution of tourism nights in Europe, in total and by area, 1995-2004

Nights spent (1 000)	1995	2000	2001	2002	2003	2004
EU-25 + CC-4	688 172	927 990	931 540	918 611	905 303	907 058
EU-25 ¹	672 150	894 037	893 201	878 878	862 785	863 376
EU-15 ¹	615 387	824 529	820 265	807 581	790 835	786 721
CC-4 ²	16 022	33 953	38 339	39 733	42 519	43 682
Annual change rate (%)	1995	2000 ^a	2001	2002	2003	2004
EU-25 + CC-4		6.2	0.4	-1.4	-1.4	0.2
EU-25		5.9	-0.1	-1.6	-1.8	0.1
EU-15		6.0	-0.5	-1.5	-2.1	-0.5
CC-4		16.2	12.9	3.6	7.0	2.7
Market share %	1995	2000	2001	2002	2003	2004
EU-25 + CC-4	100.0	100.0	100.0	100.0	100.0	100.0
EU-25	97.7	96.3	95.9	95.7	95.3	95.2
EU-15	89.4	88.9	88.1	87.9	87.4	86.7
CC-4	2.3	3.7	4.1	4.3	4.7	4.8

Note: (*) average annual growth rate (%) 1995-2000

1) 1995, 2000 and 2001 include estimations for EE. 2003 and 2004 include estimations for IE. 2004 includes 2003 data for BE, EL, IT, LV, HU, PT and UK.

2) 1995, 2000-2004 exclude TR. 2002-2004 include estimations for RO. 2004 includes 2003 data for HR.

The same evolution as for arrivals was noted for international nights spent in the EU-15 countries, which accounted for about 87% of total nights in Europe (EU-25 + CC-4) in 2004. Nights in the EU-15 countries recorded a larger decrease in comparison to arrivals for 2002 and 2003 (2002: -1.5% compared to -0.4% for arrivals; 2003: -2.1% compared to -1.9% for arrivals), indicating a slightly shorter duration of stay (falling from 3.9 to 3.8 days). As with tourism flows, the good performance of the new Member States explains why nights in the EU-25 as a whole were stable in 2004 in comparison to the EU-15 (+0.1% as against -0.5%).

Candidate countries continued their positive trend, doubling their market share in Europe in the period analysed (from 2.3% to 4.8%). Nights showed a steady increase (+16.2% on average) from 1995 to 2000 and also between 2002 and 2004, though at a lower rate than arrivals. This showed a decrease in the average length of stay (from 7.2 days in 1995 to 6.2 in 2001 and to 5.8 in 2004).

Looking at the economic transactions generated by international tourism, tourism receipts showed an even better performance from 1995 to 2004 than tourism flows. This means that the European destination countries managed to increase their profits from tourism (Table 1.3).

Table 1.3 - Evolution of tourism receipts in Europe, in total and by area, 1995-2004

Receipts (mio. Euro)	1995	2000	2001	2002	2003	2004
EU-25 + CC-4	139 638	223 702	226 027	226 878	225 279	237 476
EU-25	135 037	213 747	215 430	216 465	211 780	222 467
EU-15	125 516	194 812	195 938	199 076	195 648	205 111
CC-4 ¹	4 601	9 955	10 597	10 413	13 499	15 009
Annual change rate (%)	1995	2000 ^a	2001	2002	2003	2004
EU-25 + CC-4		9.9	1.0	0.4	-0.7	5.4
EU-25		9.6	0.8	0.5	-2.2	5.0
EU-15		9.2	0.6	1.6	-1.7	4.8
CC-4		16.7	6.4	-1.7	29.6	11.2
Market share %	1995	2000	2001	2002	2003	2004
EU-25 + CC-4	100.0	100.0	100.0	100.0	100.0	100.0
EU-25	96.7	95.5	95.3	95.4	94.0	93.7
EU-15	89.9	87.1	86.7	87.7	86.8	86.4
CC-4	3.3	4.5	4.7	4.6	6.0	6.3

Note: (*) average annual growth rate (%) 1995-2000

1) Excluding HR.

However, it has to be highlighted that data on receipts are not perfectly comparable with that of nights, because they also include revenues from same-day trips and from tourism in private accommodation, which are not counted in Eurostat data on nights spent. Comparable data will be available when the creation of Tourism Satellite Accounts is completed. At country level, international tourism receipts from same-day visitors and international tourists in private accommodation usually have a very low influence on total receipts.

The EU-25 as a whole earned about EUR 222.5 bn in 2004, an increase of 5.0% compared to 2003. This growth offset the decrease in 2003 (-2.2%), following a fairly stable phase at the beginning of the 21st century (+0.8% in 2001 and +0.5% in 2002) and strong expansion during the second half of the 90s (+9.6% on average each year). The result for 2003 is mainly due to the increased pressure on prices, along with the strength of the Euro, which led to a drop in receipts across all regions except the CC-4.

The EU-15 area, which accounted for about 92% of total international receipts in the EU-25 as a whole, followed the same trend, recording EUR 205 bn in 2004. However, the best performance between 1995 and 2004, though at lower absolute values, was seen in the candidate countries, with the one exception of 2002, when they were the only area to record a decrease (-1.7%). Their market share rose from 3.3% in 1995 to 6.3% in 2004.

The comparison between receipts and nights (Tab. 1.2) shows that in the last two years the CC-4 recorded a growth in receipts, which was considerably higher than that of nights (2003: +29.6% compared to +7.0% for nights; 2004: +11.2% compared to -2.7% for nights). This can presumably be explained by both an increase in receipts from same-day trips and in the average receipt per night spent in the area.

Turning to international tourism expenditures (Table 1.4), their evolution is fairly similar to that of receipts in the period analysed.

Table 1.4 - Tourism expenditure of European residents, in total and by area, 1995-2004

Expenditures (mio. Euro)	1995	2000	2001	2002	2003	2004
EU-25 + CC-4	132 851	213 234	218 215	219 605	219 008	226 703
EU-25	131 472	210 337	215 253	216 630	216 049	223 437
EU-15	127 804	201 192	205 129	206 668	206 631	212 889
CC-4 ¹	1 379	2 897	2 962	2 975	2 959	3 266
Annual change rate (%)	1995	2000 ^a	2001	2002	2003	2004
EU-25 + CC-4		9.9	2.3	0.6	-0.3	3.5
EU-25		9.9	2.3	0.6	-0.3	3.4
EU-15		9.5	2.0	0.8	0.0	3.0
CC-4		16.0	2.2	0.4	-0.5	10.4
Market share %	1995	2000	2001	2002	2003	2004
EU-25 + CC-4	100.0	100.0	100.0	100.0	100.0	100.0
EU-25	99.0	98.6	98.6	98.6	98.6	98.6
EU-15	96.2	94.4	94.0	94.1	94.3	93.9
CC-4	1.0	1.4	1.4	1.4	1.4	1.4

Note: (*) average annual growth rate (%) 1995-2000

1) Excluding HR.

Expenditure by tourists of the EU-25 countries on their trips abroad amounted to 223.4 billion in 2004, with a strong increase from 1995 to 2000 (+9.9% on average per year), a reasonable performance in 2001 (+2.3%), virtual stability in 2002 (+0.6%) and stagnation in 2003 (-0.3%).

The increase in 2004 (+3.4%) was driven mostly by the boom in outbound tourism in the new Member States. Expenditure by residents of the EU-15 countries, which accounted for about 95% of total expenditure of the EU-25 residents as a whole, nonetheless also grew by 3.0% in the same year.

An analysis of economic transactions to and from each major area of Europe reveals those areas where the tourism balance is positive (i.e. tourism receipts exceed tourism expenditure) compared with those where the balance is negative (i.e. tourism expenditure exceeds tourism receipts). Looking at the EU-25 as a whole, receipts came to more than 99% of expenditure in 2004 (Figure 1). In the old Member States, however, this share was about 96%. That means that the new Member States recorded a high level of receipts, fuelled by inbound tourism. The same applies to the candidate countries. Their receipts exceeded by 4.6 times their expenditures in 2004, which means that they

Figure 1 - Balance of tourism receipts and expenditure, 1995 and 2000-2004

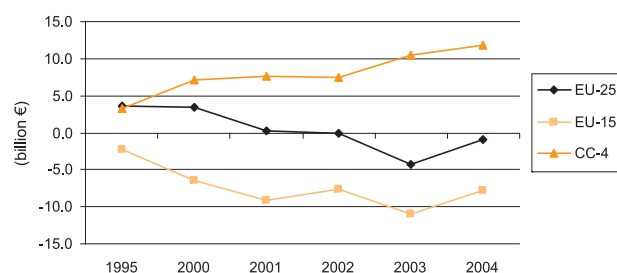


Table 1.5 - Top 10 generators of outbound tourism in the EU-25, 1998-2004 (nights spent)

Rank	Country		Nights spent - outbound (1 000)		Annual average change rate % 1998-2004	Market share %	
	1998	2004	1998	2004		1998	2004
	TOTAL EU-25 ¹		1 717 510	2 015 279	2.7	100.0	100.0
	Total top 10		1 519 658	1 845 724	3.3	88.5	91.6
1	1	DE	776 500	820 291	0.9	45.2	40.7
2	2	UK	295 564	387 906	4.6	17.2	19.2
4	3	FR	129 182	151 882	2.7	7.5	7.5
3	4	NL	128 198	145 195	2.1	7.5	7.2
5	5	IT	92 626	97 316	0.8	5.4	4.8
6	6	BE	68 697	69 773	0.3	4.0	3.5
	7	SE	:	47 788	:	:	2.4
9	8	ES	28 891	45 777	8.0	1.7	2.3
	9	PL	:	41 312	:	:	2.0
	10	CZ	:	38 484	:	:	1.9

(1) 1998 excludes CZ, EE, CY, LV, LT, HU, MT, PL, SI, SK and SE. 2004 includes 2003 data for DK and IE, 2002 data for EL and excludes HU and MT.

were mainly destinations of international tourism.

1.1.2. Leading generators of tourism

Turning now to the most important countries of origin, table 1.5 presents the leading generators of international tourism in the EU-25 in 1998 and 2004, in terms of nights spent on outbound trips of at least 1 night. The ranking is based on the data for 2004. The comparison with 1998 shows how the ranking has changed over time and reveals which countries have strengthened their position and which have lost ground over the last six years.

In terms of nights spent abroad, the top 10 countries have only slightly increased their share since 1998. With about 1.85 million nights in 2004, as against just over 1.5 million nights in 1998 (+3.3% on average each year), they accounted for about 92% of total nights abroad within the EU-25. Germany ranked first, with more than 820 million nights in 2004 (40.7% of the EU-25 total), as against 776 million in 1998 (45.2%). The United Kingdom held second place with a strong rise in the number of nights abroad (+4.6% on average each year): overnight stays rose from about 296 million in 1998 to about 388 million in 2004, corresponding to 17.2% and 19.2% of the EU-25 total. France came in third place with about 152 million nights spent on outbound trips in 2004 (7.5% of the EU-25 total), as against 129 million in 1998 (7.5%), representing an increase of 2.7% per year on average.

The Netherlands ranked fourth, with about 145 million nights in 2004, which represented an average increase of 2.1% in comparison to 1998 and a small reduction in its market share from 7.5% to 7.2%. Italy and Belgium followed, showing a slight growth in nights abroad (averaging +0.8% and +0.3%, respectively). However, their share of the EU-25 total declined in the period analysed (Italy from 5.4% to 4.8% and Belgium from 4.0% to 3.5%). As for Spain, it ranked eighth in 2004, showing a strong increase in nights spent abroad (from about 29 million to almost 46 million, or +8.0% on average each year). Consequently, its market share rose from 1.7% to 2.3%.

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Looking at the top 10 countries of origin by total international tourism expenditure, the ranking has remained almost unchanged. However, as already mentioned for receipts, data on expenditure may not only be related to that of nights, because they also include expenditure for same-day trips and for tourism in private accommodation, which are not counted in Eurostat data on nights spent.

Table 1.6 - Top 10 tourism spenders of the EU-25, 1998-2004 (tourism expenditure, excluding transport)

Rank	Country	International tourism expenditure (mio. Euro)		Annual average change rate % 1998-2004	Market share %	
		1998	2004		1998	2004
	TOTAL EU-25	164 738	223 437	5.2	100.0	100.0
	Total top 10	151 555	199 551	4.7	92.0	89.3
1	DE	48 604	57 056	2.7	29.5	25.5
2	UK	29 881	45 582	7.3	18.1	20.4
3	FR	15 896	23 023	6.4	9.6	10.3
4	IT	15 707	16 492	0.8	9.5	7.4
5	NL	9 716	13 210	5.3	5.9	5.9
7	BE ¹	7 886	11 274	6.1	4.8	5.0
6	AT	8 496	9 772	2.4	5.2	4.4
9	ES	4 470	9 125	12.6	2.7	4.1
8	SE	6 816	8 153	3.0	4.1	3.6
10	DK	4 083	5 864	6.2	2.5	2.6

1) BLEU for 1998.

In 2004, the leading countries accounted for more than 89% of total expenditure spent abroad by visitors of the EU-25 countries. Although the amount of money spent by the main countries increased from 1998 to 2004 (from EUR 151.6 billion to 199.6 billion), their share of the total declined (from 92.0% in 1998 to 89.3% in 2004), meaning that expenditure by emerging countries of origin was growing at a higher rate.

Germany ranked first, with more than EUR 57 billion in 2004 (25.5% of the EU-25 total), as against 48.6 billion in 1998 (29.5%). The United Kingdom came second with a strong rise in expenditure abroad (+7.3% on average each year). Its international expenditure rose from EUR 29.9 billion in 1998 to EUR 45.6 billion in 2004, and its share of the EU-25 total from 18.1% to 20.4%. France held third place, with about EUR 23.0 billion (10.3% of the EU-25 total), as against 15.9 billion in 1998 (9.6%), corresponding to an increase of 6.4% on average per year. Italy came fourth, followed by the Netherlands, Belgium and Austria. It is interesting to note that expenditure by Spanish tourists abroad boomed. In 2004, they spent EUR 9.1 billion (4.1% of the EU-25 total) as against 4.5 billion in 1998 (2.7%). This represented an annual average growth rate of +12.6%.

1.1.3. Leading tourism destinations

Turning to the most important tourism destinations, table 1.7 classifies the top 10 countries of the EU-25 area according to nights spent by non-residents in 1995 and 2004. The ranking is based on the data for 2004. The comparison with 1995 shows how the ranking has changed over time and reveals which countries have strengthened their position and which have lost ground over the last nine years.

Table 1.7 - Top 10 tourism destinations in the EU-25, 1995-2004 (nights spent by non-residents)

Rank	Country	Nights spent of non-residents (1 000)		Annual average change rate % 1995-2004	Market share %	
		1995	2004		1995	2004
	TOTAL EU-25¹	672 150	863 376	2.8	100.0	100.0
	Total top 10	578 374	744 623	2.8	86.0	86.2
2	1 ES	107 605	209 931	7.7	16.0	24.3
1	2 IT	113 001	139 653	2.7	16.8	16.2
3	3 FR	87 548	104 178	2.0	13.0	12.1
5	4 AT	63 840	68 270	0.7	9.5	7.9
4	5 UK	76 523	67 134	-1.6	11.4	7.8
7	6 DE	35 285	45 374	2.8	5.2	5.3
6	7 EL	38 227	40 407	0.7	5.7	4.7
9	8 NL	19 736	25 386	2.8	2.9	2.9
8	9 PT	22 241	24 870	1.4	3.3	2.9
10	10 IE	14 368	19 420	3.4	2.1	2.2

1) 1995 includes estimations for EE. 2004 includes 2003 data for BE, EL, IT, LV, HU, PT and the UK.

In 2004, the ten leading tourism destinations in the EU-25 accounted for about 86% of total nights spent by non-residents in the EU-25. Their share has remained stable over the last nine years. With about 210 million nights in 2004, Spain was the main tourism destination in the EU-25, ahead of Italy with 139.7 million (16.2%). It recorded an average growth of +7.7% each year, its share rising from 16.0% to 24.3% of the total number of nights spent in the EU-25. France ranked third with about 104.2 million nights (12.1%) as against 87.5 million in 1995 (13.0%), representing an increase of 2.0% on average each year. Austria was fourth with 68.3 million inbound nights in 2004 (63.8 million in 1995), performing better than the United Kingdom, which recorded a decrease in incoming nights (from 76.5 million to 67.1 million, -1.6% on average per year). The other top countries were Germany (45.4 million international nights in 2004), Greece (40.4 million), the Netherlands (25.4 million), Portugal (24.9 million) and Ireland (19.4 million). Of the last three countries, Ireland and the Netherlands recorded the most growth, with nights spent by non-residents increasing, respectively, by +3.4% and +2.8% on average per year.

Looking at international tourism receipts (Table 1.8), the ranking changes slightly. In terms of the percentage share, the top 10 destinations are also somewhat less dominant: their share of receipts is below their share for nights, representing in 2004 about 84.3% of total receipts in the EU-25 (as against 86.7% in 1995).

As with nights, Spain ranked first, with EUR 36.4 billion, as against EUR 19.5 billion in 1995 (with an annual average growth of +7.2%). Its market share rose from 14.4% to 16.4%. It came ahead of France, where receipts grew from EUR 21.1 to EUR 32.8 billion, corresponding to an increase of 5.1 % on average each year. However, it has to be considered that the amount of receipts is to a certain extent also influenced by the development of cross-border same-day trips and nights in private accommodation as well as by increasing prices per night.

Table 1.8 - Top 10 tourism earners in the EU-25, 1995-2004 (tourism receipts, excluding transport)

Rank	Country	International tourism receipts (mio. Euro)		Annual average change rate % 1995-2004	Market share %		
		1995	2004		1995	2004	
1995	2004						
	TOTAL EU-25	135 037	222 467	5.7	100.0	100.0	
	Total top 10	117 120	187 518	5.4	86.7	84.3	
3	1	ES	19 473	36 377	7.2	14.4	16.4
1	2	FR	21 064	32 833	5.1	15.6	14.8
2	3	IT	20 946	28 645	3.5	15.5	12.9
4	4	UK	15 632	22 728	4.2	11.6	10.2
5	5	DE	13 771	22 234	5.5	10.2	10.0
6	6	AT	9 883	12 341	2.5	7.3	5.5
10	7	EL	3 146	10 348	14.1	2.3	4.7
7	8	NL	5 021	8 307	5.8	3.7	3.7
8	9	BE ¹	4 475	7 398	5.7	3.3	3.3
9	10	PT	3 709	6 307	6.1	2.7	2.8

1) BLEU for 1995.

Although Italy held the second place in terms of international nights it only ranked third as regards receipts (12.9% of total receipts in the EU-25 in 2004). This means that Italy recorded a smaller expenditure per night compared to France, or registered more cross-border same-day trips. As for the United Kingdom, receipts continued to increase (from EUR 15.6 billion to 22.7 billion, +4.2% on average each year) despite a fall in international tourism nights. That shows that international tourists who chose to go there either spent more in 2004 than in 1995, or the number of same-day trips has increased between 1995 and 2004. However, it should be remembered that inflation and, in the case of non-Eurozone countries, exchange rates may influence the absolute values of tourism receipts. The same effect was noted in Greece, Germany and the Netherlands, where receipts rose more than overnight stays. In Greece, for example, international receipts grew by +14.1% each year from 1995 to 2004, while nights were fairly stable over the same period (+0.7%).

1.1.4. Hotel capacity

Following the general overview of international tourism developments in different areas of Europe, it is interesting to see whether the trends in hotel accommodation supply have followed the same pattern.

As seen in tables 1.9 and 1.10, accommodation capacity has been slightly decreasing in terms of establishments while a clear trend cannot be seen in terms of bed places.

In terms of figures, the EU-25 as a whole had 197 000 hotels and similar establishments in 2004, as against 195 000 in 1995 (average growth of +0.1 % each year - see table 1.9). Over the same period, bed places rose from 9.2 million to 10.5 million, with an average annual growth rate of +1.5%. This positive trend was somewhat dented by a decline of 3.7% between 2002 and 2003 (Table 1.10).

Most hotel accommodation was concentrated in the old Member States (around 95% of establishments and 92% of bed places). Bed places there showed a lower growth in comparison to the EU-25 as a whole over the period analysed.

Table 1.9 - Hotels and similar establishments: Recent trends in the number of establishments, in total and by area, 1995-2004

Establishments (in 1 000)	1995	2000	2001	2002	2003	2004
EU-25 + CC-4	201	208	207	208	206	204
EU-25 ¹	195	201	200	201	199	197
EU-15 ¹	190	192	191	191	189	187
CC-4 ²	6	7	7	7	7	7
Annual change rate %	1995	2000 ^a	2001	2002	2003	2004
EU-25 + CC-4		0.7	-0.5	0.5	-1.0	-1.0
EU-25		0.6	-0.5	0.5	-1.0	-1.0
EU-15		0.2	-0.5	0.0	-1.0	-1.0
CC-4		3.1	0.0	0.0	0.0	0.0
Market share	1995	2000	2001	2002	2003	2004
EU-25 + CC-4	100.0	100.0	100.0	100.0	100.0	100.0
EU-25	97.0	96.6	96.6	96.6	96.6	96.6
EU-15	94.5	92.3	92.3	91.8	91.7	91.7
CC-4	3.0	3.4	3.4	3.4	3.4	3.4

Note: (*) average annual growth rate (%) 1995-2000

1) 2004 includes 2003 data for BE, FR, IE, IT, LV, PT and UK.

2) 2004 includes 2003 data for HR. 2002-2004 include estimations for RO and TR.

Table 1.10 - Hotels and similar establishments: Recent trends in bed places, in total and by area, 1995-2004

Bed places (in 1 000)	1995	2000	2001	2002	2003	2004
EU-25 + CC-4	9 973	11 189	11 404	11 671	11 310	11 495
EU-25 ¹	9 164	10 348	10 533	10 769	10 374	10 515
EU-15 ¹	8 617	9 634	9 817	9 986	9 593	9 695
CC-4 ²	809	841	871	902	936	980
Annual change rate %	1995	2000 ^(*)	2001	2002	2003	2004
EU-25 + CC-4		2.3	1.9	2.3	-3.1	1.6
EU-25		2.5	1.8	2.2	-3.7	1.4
EU-15		2.3	1.9	1.7	-3.9	1.1
CC-4		0.8	3.6	3.6	3.8	4.7
Market share %	1995	2000	2001	2002	2003	2004
EU-25 + CC-4	100.0	100.0	100.0	100.0	100.0	100.0
EU-25	91.9	92.5	92.4	92.3	91.7	91.5
EU-15	86.4	86.1	86.1	85.6	84.8	84.3
CC-4	8.1	7.5	7.6	7.7	8.3	8.5

Note: (*) average annual growth rate (%) 1995-2000

1) 2004 includes 2003 data for BE, FR, IE, IT, PT and UK.

2) 2004 includes 2003 data for HR. 2002-2004 include estimations for RO and TR.

That means that the major part of the growth was generated by the new Member States.

Candidate countries showed the largest expansion in hotel accommodation supply, especially from 2000 onwards. Bed places rose by 3.4% each year, representing about 8.5% of the total supply in Europe in 2004 (8.1% in 1995).

Looking at the evolution in the average size of hotels (bed places per establishment) in the different areas of Europe, hotels in the EU-25 had on average 47.0 bed places in 1995, 51.5 in 2000 and 53.4 in 2004, revealing a continuing fragmentation in accommodation supply, dominated by small and medium-sized establishments. In the old Member States, the average size was slightly smaller still: 45.3 bed places in 1995, 50.2 in 2000 and 51.8 in 2004. On the other hand, the candidate countries had larger establishments with about 135 bed places each, confirming the strong presence of international hotel chains.

1.2. Key drivers

The evolution of international tourism discussed in the previous section is affected by a number of factors whose impact is in some cases difficult to understand merely by looking at the statistical data on tourism arrivals, nights and expenditures.

In recent years, the extreme volatility of the international socio-economic and political scene and a number of significant events in many countries have had a major impact on tourists' decision-making and holiday behaviour.

In this section, a summary is given of the most important positive and negative factors that have shaped the development of international tourism in Europe over the last three years (2002-2004). These factors are grouped into five main categories:

- Political factors
- Economic factors
- Social, health and weather factors
- Market and accessibility factors
- Technology factors

Besides cyclical trends, it is also worthwhile looking at some structural factors in the background that influence the evolution of tourism in the medium and long term.

The demographic trend in Europe is characterised by a steady growth in the number of elderly people (65 years and over), who will account for about a quarter of the total population in 2010 (16.2% in 1999), and by an increase in the number of singles and young couples without children. The elderly tourists of today are normally more interested in travel than past generations of the same age. They are usually more active and have the money and time available for travel, off-season as well. This not only implies a propensity to spend longer periods at tourism destinations that they consider provide pleasant living conditions ('residential tourism') but also a higher holiday frequency per year. This partly applies as well to singles and 'empty nesters', i.e. couples whose children have left home. Although their travel decisions are affected by working time, they can plan their holidays more freely during the year than families who depend on school holidays.

Comparing the different European regions, the new Member States have a younger population than the old ones. In 2004, residents aged 24 years or less accounted for about 32% of the total population on average, as against 28% in the EU-15 (Eurostat 2005). Although the new Member States are basically destinations of tourism flows, the effect of the population structure will probably be seen in the travel behaviour of these countries in the not too distant future.

Political factors

After September 11 and the breakout of wars in Afghanistan and Iraq, policy and security issues became more important for travel behaviour.

In 2002, the perception of risks guided travel decisions to a significant extent. The European market suffered a loss of tourism demand from overseas but saw reinforced intra-regional flows, with a "substitution effect" between tourism destinations. European tourists generally changed their travel plans by shifting towards destinations closer to home and preferring travel by road and rail to air travel. Last minute bookings saw a dramatic increase and leisure tourism recorded a better performance than business tourism.

In the following years, the persistence of conflicts in the Middle East, the spread of terrorism in Europe and Asia (Istanbul, Indonesia, etc.) and particularly the attacks on the countries involved in the war in Iraq (Madrid, 2004) contributed to an ongoing high degree of uncertainty and tension. Intra-regional tourism (i.e. within Europe) continued to play a considerable role in comparison to interregional tourism (to and from Europe).

In the same year (2004), the enlargement of the European Union to include ten new countries (Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia) gave a new impulse to tourism to and from these areas. The future will see increased cross-border trade and cooperation between the new and old Member States and the further development of intra-regional tourism. The accession negotiations currently under way with other four countries (Bulgaria, Croatia, Romania and Turkey) should augment this trend.

Migration control has to some extent affected tourism within Europe. For example, visitor flows from Poland to other eastern European countries were constrained by visa problems. Likewise, tourism flows from Russia to some western European countries (e.g. Italy) were held back. However, most of the new EU Member States expect that entry procedures will be streamlined.

Another aspect to be taken into account is the regional "devolution" (i.e. decentralisation) in both old and new Member States (e.g. Italy, Portugal, Greece, Czech Republic, etc.), with the transfer of power from central to local government in, for example, the tourism sector. Although decentralisation has allowed regions within countries to develop their own tourism plans, it has also increased the fragmentation of roles and duties and led to a lack of coordination in key areas such as communication, marketing and promotion. The main consequence is the heterogeneous promotion of the country's image as a tourism destination and often the duplication or overlap of initiatives at regional level, which can have the effect of puzzling potential tourists.

Economic factors

In the last two years of the period under review, the evolution of economic markets was characterised by a "two-speed Europe".

In particular, the persisting weak economic situation in the Eurozone contributed to dampening expenditure, for example on tourism, and changing the consumption behaviour of western Europeans. Despite the hope of recovery in the second half of 2003, the recession in Germany and the stagnation in other neighbouring economies (e.g. Italy and France) persisted in 2004 as well.

On the other hand, the emerging European countries enjoyed their strongest growth since the beginning of the transition phase. The expansion was led by the Baltic states (Estonia, Latvia and Lithuania) and southern/south-eastern Europe (Bulgaria, Cyprus, Malta and Romania). As regards the Baltic states, even if their per capita GDP is still relatively low compared to that of western Europe, some economists predict that these countries could overtake most of eastern Europe and raise the living standards of their citizens in the coming decades. This will also lead to an expansion in outbound tourism, which is currently driven mainly by visits to friends and relatives within the same area of Europe.

Table 1.11 - Recent trends in GDP, in total and by area, 1995-2004

GDP (mio. Euro) (at current prices)	1995	2000	2001	2002	2003	2004
EU-25 + CC-4	7 081 261	9 331 009	9 661 675	10 045 305	10 209 385	10 713 843
EU-25 ¹	6 900 187	9 040 267	9 417 547	9 763 273	9 903 195	10 367 920
EU-15	6 670 975	8 665 145	8 994 983	9 315 722	9 460 023	9 890 587
CC-4	181 074	290 742	244 128	282 032	306 189	345 923
Annual change rate % (at constant prices)	1995	2000 (*)	2001	2002	2003	2004
EU-25 + CC-4		2.8	1.7	1.3	1.2	2.5
EU-25		2.8	1.8	1.1	1.0	2.4
EU-15		2.8	1.8	1.1	0.9	2.3
CC-4		2.9	-4.4	7.1	5.5	7.3
Market share % (at current prices)	1995	2000	2001	2002	2003	2004
EU-25 + CC-4	100.0	100.0	100.0	100.0	100.0	100.0
EU-25	97.4	96.9	97.5	97.2	97.0	96.8
EU-15	94.2	92.9	93.1	92.7	92.7	92.3
CC-4	2.6	3.1	2.5	2.8	3.0	3.2

Note: (*) average annual growth rate (%) 1995-2000

1) 1995 includes estimation for MT.

Looking at the figures, GDP at current prices rose in the EU-25 from EUR 6 900 bn in 1995 to EUR 10 368 bn in 2004 (Table 1.11). The largest part of GDP is concentrated in the old Member States, where it increased from EUR 6 671 bn to 9 891 bn over the same period. However, the share of EU-15 GDP in the EU-25 total declined from about 97% in 1995 to about 95% in 2004, confirming the dynamic growth of the new Member States. An interesting evolution was also seen in the candidate countries, where GDP at current prices rose from EUR 181 billion in 1995 to EUR 346 billion in 2004, accounting for about 3.2% of total GDP in Europe (2.6% in 1995).

In real terms (i.e. corrected for inflation effects), GDP in the EU-25 rose on average by +2.8% per year from 1995 to 2000. In the first few years of the 21st century, GDP continued to grow but at a lower rate (+1.8% in 2001, +1.1% in 2002, +1.0% in 2003). The large growth in 2004 (2.4%) is mainly the result of expansion in the new Member States.

As for the candidate countries, the beginning of the transition phase explains the boom in GDP from 2002 to 2004 (+7.1% in 2002, +5.5% in 2003, +7.3% in 2004).

The stagnation of the Eurozone economies inhibited the growth of local labour markets. The number of people employed remained virtually stable between 2002 and 2004, after a steady increase from 1995 to 2001 (Table 1.12).

In figures, employment in the EU-25 rose by +0.5% in 2004, following +0.7% in 2003 and +0.5% in 2002. This result is due to the EU-15 countries (+0.6% in 2004, +0.8% in 2003 and +0.8% in 2002), whose performance offset the poor figures in the new Member States, mainly due to rising unemployment in Poland and the Czech Republic. In 2004, the old Member States accounted for about 85% of total persons employed in the countries considered in this analysis (about 83% in 1995).

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Table 1.12 - Recent trends in employment, in total and by area, 1995-2004

Employment (in 1 000)	1995	2000	2001	2002	2003	2004
EU-25 + CC-4	196 536	203 331	205 651	205 732	206 687	207 710
EU-25 ¹	178 419	188 101	190 598	191 643	192 905	193 874
EU-15	148 731	158 758	161 408	162 736	164 016	164 986
CC-4 ²	18 116	15 230	15 053	14 089	13 782	13 836
Annual change rate %	1995	2000 (*)	2001	2002	2003	2004
EU-25 + CC-4		0.7	1.1	0.0	0.5	0.5
EU-25		1.1	1.3	0.5	0.7	0.5
EU-15		1.3	1.7	0.8	0.8	0.6
CC-4		-3.4	-1.2	-6.4	-2.2	0.4
Market share %	1995	2000	2001	2002	2003	2004
EU-25 + CC-4	100.0	100.0	100.0	100.0	100.0	100.0
EU-25	90.8	92.5	92.7	93.2	93.3	93.3
EU-15	75.7	78.1	78.5	79.1	79.4	79.4
CC-4	9.2	7.5	7.3	6.8	6.7	6.7

Note: (*) average annual growth rate (%) 1995-2000

1) 1995 includes estimations for CZ, EE, CY, LV, LT, MT, PL and SK. 1996 data is used for HU and SI.

2) Excluding TR. 1995 includes estimations for BG, HR and RO. 2000 and 2001 include estimations for HR.

The candidate countries recorded a steady decrease in the number of people employed over the period analysed (from 18.1 million in 1995 to 13.8 million in 2004 (Table 1.12). Their share of the total for all the countries included in this Panorama declined from 9.2% in 1995 to 6.7% in 2004. Comparing this trend with the GDP trend (Table 1.11), this fall may be explained by both an increase in the productivity per employed person and the delayed response of local employment to the growth in GDP.

Turning to prices, from 1995 to 2000 consumer prices increased more in the EU-25 as a whole than in the EU-15 countries (+2.4% on average each year, as against +1.7%, see Table 1.13). This was due to the high inflation rates of the new Member States. In the following years, however, the trends were broadly similar with the EU-15 having only a slightly lower rate of growth (with the exception of 2003).

Table 1.13 - Recent trends in consumer prices, in total and by area, 1995-2004 (%)

Prices (1996=100)	1995	2000	2001	2002	2003	2004
EU-25 + CC-4	:	:	:	:	:	:
EU-25	97.0	109.0	111.7	114.1	116.3	118.8
EU-15	97.7	106.2	108.6	110.8	113.0	115.2
CC-4	:	:	:	:	:	:
Annual change rate %	1995	2000 (*)	2001	2002	2003	2004
EU-25 + CC-4		:	:	:	:	:
EU-25		2.4	2.5	2.1	1.9	2.1
EU-15		1.7	2.3	2.0	2.0	1.9
CC-4		:	:	:	:	:

Note: (*) average annual growth rate (%) 1995-2000

Regarding exchange rates, the US\$/Euro and British Pound/Euro rates have also influenced tourism flows within Europe. Eurozone countries have lost comparative advantages to other parts of the world as tourism destinations for tourists coming from the USA due to the continuous appreciation of the Euro.

On the other hand, the strength of the Pound and the Yen against the Euro has increased, making Eurozone destinations more attractive to English and Japanese tourists.

Social, health and weather factors

Although market globalisation has reduced the physical and psychological distance between North, South, East and West, it has also led to the strong defence of local identities and values (ethnic, religious, cultural, etc.) against foreign influence. Ethnic conflicts have arisen in many parts of the world (e.g. Africa, Asia, etc.) and also in Europe (Chechnya in Russia).

The development of multiculturalism has thus gone hand in hand with the growth of radicalism, and this phenomenon is expected to intensify in some parts of the world in the near future.

The main effects are:

- A change in the geography of tourism: some destinations (especially in Africa) have been excluded from international tourism routes, and this has generally benefited other destinations with the same climatic conditions but considered more safe (e.g. southern Europe);
- At destinations, relationships between tourists and residents have sometimes been hard to manage, because of the adverse reaction of the local community to people perceived as "invaders" and not as guests of the country.

In addition, the growth of clandestine migration from developing countries to developed economies that are also important tourism destinations (e.g. Italy) have also influenced the evolution of the local tourism market.

Another aspect that has seen increased attention in Europe in recent years is "tourism for all". That means that disabled people also participate frequently in tourism activities. Their access to means of transport, attractions and other facilities (accommodation establishments, beaches, etc.) has considerably improved.

In the year 2000, official statistics showed that the proportion of people who are registered as severely disabled was estimated at 9% of the total EU population (33.8 million people). However, the overall number of disabled is much higher (about 25% — European Commission, 2004). Some studies have demonstrated that the number of trips per person that could be made by disabled people who are financially and physically able to travel would be the same as for the average population. This highlights the importance of adapting tourism offerings and services in such a way that nobody is excluded from enjoying them.

Apart from political and economic events, health aspects have also had profound effects on the tourism market in recent years, strengthening the importance of safety issues in the choice of travel destination. For example, there was the food and mouth disease that hit Great Britain in 2001/2002. Furthermore, the outbreak of SARS in 2003 reduced tourism flows towards Asia and Canada and redirected them to other parts of the world, including Europe.

As for weather conditions, the floods in central and eastern Europe during the summer of 2003 affected tourism arrivals in that period.

Market and accessibility factors

In addition to cyclical factors, the tourism market is also affected by structural changes. Although economic trends and the consequent growth, or reduction, in the purchasing power of European households have modified their travel behaviour, the changes in population demographics (ageing of the population, smaller households, more singles and childless couples, etc.), values (searching for something different, looking for new experiences, etc.) and lifestyles (flexible working hours, higher incomes and more free time, more short breaks, healthy living, etc.) have helped bring about a new kind of tourist, more experienced and demanding, flexible and independent-minded.

New holiday patterns are emerging, forcing public and private tourism operators to develop new tourism products and services and to rethink their marketing and promotional strategies.

In detail:

- More holiday trips, but shorter stays;
- Growing interest in last-minute travel and low-cost offers;
- Growth in independent travel at the expense of package tours;
- Search for direct, unfiltered contact with nature and the environment;
- Desire to gain a real and authentic experience of places;
- Interest in adventure, unexplored places or tourism 'off the beaten track';

- Development of 'proximity' tourism, i.e. tourism to destinations or areas close to the usual place of residence (weekend trips);
- Development of new cultural horizons (living culture) that go beyond merely visiting museums and monuments, or more generally a single attraction, to include all the territory and the cultural context where the attraction is located (e.g. food, traditions, way of life, etc.);
- Interest in local customs, folklore and resources (e.g. craftwork, etc.).

Where low-cost solutions are concerned, the improvement in international air transport with new economic options (low-cost carriers) has brought about competition not only between airline companies but also between different modes of short- or medium-haul transport (e.g. air and rail, air and car).

In addition, the emergence of low-cost carriers has opened new routes to and from secondary airports away from the main hubs used by traditional air carriers. This has expanded the potential traveller market by bringing air travel closer to where people live.

Apart from providing new travel opportunities to regular travellers (e.g. extending the market for short breaks), low-cost airlines have also created additional tourism demand, attracting new groups of travellers residing outside the main metropolitan or urban areas, with limited budgets but with a healthy appetite for travel. An interesting example is given by the United Kingdom, where the number of low-cost flights from Bournemouth, Bristol, Doncaster, Liverpool, Glasgow, etc. is increasing in comparison to the London metropolitan area.

Technology factors

The development of the internet and e-commerce, the convergence between information and communication technologies (ICT) and multimedia, and the spread of mobile technologies (GSM, UMTS, etc.) and navigation systems (GPS) are all elements that are beginning to have a strong impact on consumers' travel decision-making and thus on the choice and distribution of destinations.

On the demand side, the Internet allows potential tourists to search for information more quickly, to pick up data from different information sources (e.g. destination websites, hotel websites, etc.), to compare different travel solutions and, where e-commerce facilities are provided, to book and purchase travel online. Customers can "call the shots" themselves, using specific applications and devices to search for the best deal or last-minute booking.

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According to the latest web statistics (Internet World Statistics, 2005), about 259.6 million people (35.5% of the entire population) surf the Internet in Europe, with travel and tourism services among the most popular products on the web. In 2004, online travel sales in Europe accounted for about 7.6% of the total market (EUR 18.2 bn), representing an increase of +41.0% in comparison to 2003, when its share was 5.5% (EUR 13.0 bn) (Carl H. Marcussen, 2005)

1

On the supply side, the spread of ICT has increased opportunities for all tourism destinations and businesses to reach a larger world market of potential clients, but, at the same time, it has expanded global competition. The Internet offers tourism destinations and businesses (hotels, airlines, cruise companies, etc.) a new channel for making information and booking facilities available to a large number of customers at relatively low cost compared to other distribution channels (e.g. front office/call centre, travel intermediary, etc.). On the one hand, this has led to market “disintermediation”, with many businesses (especially low-cost airlines) bypassing travel agents and selling directly to consumers. On the other hand, however, the Internet has stimulated the emergence of new online intermediaries (e.g. Travelocity.com, Expedia.com, etc.) on the market, competing with traditional travel agencies.

Many destinations around the world have adopted Destination Management Systems (DMS) to organise and promote their tourism offers. However, despite the millions of euros spent, these systems are still underutilised. Only destinations that can take full advantage of the opportunities will be able to capitalise on the benefits in the future.



CHAPTER 2 - TOURISM ACCOMMODATION

2. TOURISM ACCOMMODATION

In this chapter, we give an overview of the characteristics and evolution of accommodation capacity in Europe by comparing the trends in the EU-25 area as a whole, in the old and new Member States, in the EFTA countries and in the candidate countries (Bulgaria, Croatia, Romania and Turkey).

Table 2.1 shows the volume and evolution of bed places by category (hotels and other collective accommodation) in all European countries in 1995 and 2004. In 2004, the EU-25 countries reported about 23 million bed places (+2.2% average growth each year in comparison to 1995), of which 10.5 million were in hotels and similar establishments (45.0%) and 12.9 million in other collective accommodation (55.0%).

Looking at non-hotel accommodation, tourist campsites accounted for about 64% of all bed places in the EU-25 as against 18.6% for holiday dwellings. However, the latter recorded a large increase in the period analysed, rising from 1.4 million to 2.4 million (average annual growth rate of +5.9%).

More than 60% of the entire accommodation capacity in Europe is concentrated in four countries: France (4.6 million, or 19.8% of all bed places), Italy (4.2 million, or 17.8%), Germany (3.2 million, or 14.1%) and Spain (3.0 million, or 12.7%). Their market share has remained fairly stable over the last nine years.

Table 2.1 - Evolution of accommodation supply 1995 and 2004, bed places (1 000)

1995	EU-25 ²	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT	
Total ¹	19 258.1	639.3	295.3	415.9	2 796.2	:	642.3	2 045.2	4 283.7	:	3 349.5	79.4	18.2	30.2	:	253.5	37.3	
Hotels	9 163.6	114.9	117.2	99.0	1 446.7	10.6	557.2	1 031.7	1 193.3	96.9	1 739.5	77.3	13.4	9.8	14.7	119.1	37.2	
Other collect.accomm ¹	10 094.6	524.4	178.1	316.9	1 349.5	:	85.1	1 013.5	3 090.4	:	1 610.0	2.1	4.8	20.4	:	134.4	0.1	
of which: Tourist campsites	7 373.9	368.4	93.9	266.1	731.6	:	85.1	622.4	2 828.2	:	1 269.6	0.9	0.8	0.8	54.2	105.3	:	
of which: Holidays dwellings	1 426.6	62.4	8.8	39.6	262.1	:	:	391.1	249.2	:	139.8	1.3	4.0	18.8	:	16.5	:	
2004	EU-25 ²	BE ³	CZ	DK	DE	EE	EL	ES	FR ³	IE ³	IT ³	CY	LV ³	LT	LU	HU	MT	
Total	23 379.5	623.9	439.5	390.2	3 292.2	32.9	760.9	2 973.4	4 633.1	210.0	4 158.6	96.3	19.0	32.3	66.6	314.9	39.2	
Hotels	10 514.9	122.4	232.1	68.9	1 609.0	22.7	668.3	1 511.6	1 206.6	146.2	1 969.5	92.2	15.0	18.6	14.2	149.1	38.8	
Other collect.accomm	12 864.6	501.5	207.5	321.3	1 683.2	10.2	92.7	1 461.9	3 426.6	63.8	2 189.1	4.0	4.0	13.7	52.3	165.7	0.5	
of which: Tourist campsites	8 276.7	343.9	26.4	269.9	782.9	2.7	92.7	786.5	2 773.1	30.5	1 343.1	2.8	0.7	0.8	48.5	93.6	:	
of which: Holidays dwellings	2 389.5	61.8	28.1	40.2	351.9	1.9	:	588.8	380.8	18.6	520.3	1.2	2.9	12.0	1.7	20.8	:	
Average annual growth rate % 1995-2004 ⁴																		
Total	2.2	-0.3	4.5	-0.7	1.8	:	1.9	4.2	1.0	:	2.7	2.2	0.5	0.8	:	2.4	0.6	
Hotels	1.5	0.8	7.9	-3.9	1.2	8.8	2	4.3	0.1	5.3	1.6	2.0	1.4	7.4	-0.4	2.5	0.5	
Other collect.accomm	2.7	-0.6	1.7	0.2	2.5	:	1.0	4.2	1.3	:	3.9	7.3	-2.3	-4.4	:	2.4	17.1	
of which: Tourist campsites	1.3	-0.9	-13.2	0.2	0.8	:	1.0	2.6	-0.2	:	0.7	14.2	-0.9	-0.1	-1.2	-1.3	:	
of which: Holidays dwellings	5.9	-0.1	13.7	0.2	3.3	:	:	4.7	5.4	:	17.9	-0.6	-3.9	-4.9	:	2.6	:	
1995	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR	
Total	806.5	733.4	671.3	469.1	67.4	78.0	200.3	:	:	:	:	:	:	140.5	523.9	289.5	286.5	
Hotels	142.5	646.1	93.3	204.1	30.8	39.3	105.0	173.8	1 050.2	9.8	1.4	131.2	265.0	118.1	205.2	205.7	280.2	
Other collect.accomm	664.0	87.2	578.0	265.0	36.6	38.7	95.2	:	:	:	:	:	:	22.4	318.7	83.9	6.2	
of which: Tourist campsites	474.4	:	98.6	256.1	16.6	17.4	83.5	:	:	:	:	299.2	:	6.4	260.8	27	6.1	
of which: Holidays dwellings	142.8	:	26.9	:	:	6.3	8.3	48.7	:	:	0.4	:	:	:	10.3	:	:	
2004	NL	AT	PL	PT ³	SI	SK	FI	SE	UK ³	IS	LI	NO	CH	BG	HR ³	RO	TR	
Total	1 176.2	928.2	584.6	422.7	63.8	162.0	214.3	682.3	:	:	:	541.6	:	190.0	483.1	:	:	
Hotels	189.8	570.8	165.3	245.8	29.7	56.3	119.9	190.0	1 062.1	15.2	1.2	141.1	:	171.0	193.5	:	:	
Other collect.accomm	986.4	357.4	419.3	176.9	34.2	105.7	94.4	492.3	:	:	:	400.5	:	19.1	289.5	:	:	
of which: Tourist campsites	722.6	196.2	24.1	167.9	14.9	59.3	81.9	411.7	:	:	:	314.1	:	1.5	197.6	:	:	
of which: Holidays dwellings	205.3	66.3	22.9	:	3.3	6.6	10.0	44.0	:	:	:	:	:	:	15.4	:	:	
Average annual growth rate % 1995-2004 ⁴																		
Total	4.3	2.7	-1.5	-1.3	-0.6	8.5	0.8	:	:	:	:	:	:	14.7	-1.0	:	:	
Hotels	3.2	-1.4	6.6	2.4	-0.4	4.1	1.5	1.0	0.1	5.1	-1.5	0.8	:	4.2	-0.7	:	:	
Other collect.accomm	4.5	17.0	-3.5	-4.9	-0.8	11.8	-0.1	:	:	:	:	:	:	-1.8	-1.2	:	:	
of which: Tourist campsites	4.8	:	-14.5	-5.1	-1.2	14.6	-0.2	:	:	:	:	0.5	:	-15	-3.4	:	:	
of which: Holidays dwellings	4.1	:	-1.8	:	:	0.6	2.1	-1.1	:	:	:	:	:	:	5.1	:	:	

1) EU-25 excluding EE, IE, LU and SE. 2) EU-25 excluding UK except for the hotel category. 3) 2003 data. 4) Average annual growth 1995-2003 for BE, FR, IE, IT, LV, PT, UK and HR.

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As regards the growth in accommodation supply, the countries among the old Member States with the highest increase over the period analysed were Spain and the Netherlands (+4.2% and +4.3% on average each year). The new Member States were headed by Slovakia and the Czech Republic (+8.5% and +4.5%).

Looking at hotels and similar establishments in 2004, Italy held first place (about 2.0 million bed places, or 18.7% of the European total), followed by Germany (more than 1.6 million, or 15.3%), Spain (more than 1.5 million, or 14.3%), France (more than 1.2 million, or 11.4%) and the United Kingdom (about 1.1 million, or 10.1%). These five countries accounted for about 70% of all hotel bed places in Europe, which is similar to their share in 1995. From 1995 to 2004, hotel accommodation grew most strongly in the new Member States, for example Estonia (average annual growth rate +8.8%), the Czech Republic (+7.9%), Lithuania (+7.4%), Poland (+6.6%), and Slovakia (+4.1%). Of the old Member States, only Ireland (+5.3%) and Spain (+4.3%) could compete with these annual average growth rates.

As for other collective accommodation, France ranked first with about 3.4 million bed places in 2004 (26.6%), followed by Italy (about 2.2 million, or 16.3%), Germany (nearly 1.7 million, or 13.1%), Spain (almost 1.5 million, or 11.4%) and the Netherlands (about 1 million, or 7.7%). These countries accounted for about 72.5% of the total non-hotel accommodation in the EU-25.

From 1995 to 2004, non-hotel accommodation capacity showed the best performance in terms of annual average growth rates in Malta (+17.1%), Slovakia (+11.8%) and Cyprus (+7.3%), although this had only a small impact on total accommodation supply. Good results were also recorded for the Netherlands (+4.5%), Spain (+4.2%) and Italy (+3.9%).

Looking at the different accommodation categories, growth in the first four countries above was accounted for by campsites, but in Spain and Italy by holiday dwellings (+4.7% and +17.9%, respectively). The latter two, together with France, had the highest share of campsites and holiday dwellings in the EU-25. In particular, France ranked first for campsites with Spain coming top for holiday dwellings. The prevalence of one category or the other depends on various reasons (favourable climatic conditions, type of holiday, higher proportion of domestic tourism in inbound tourism, etc.).

Table 2.2 shows the distribution of accommodation supply in each European country by category (hotels and other collective accommodation) and how this changed between 1995 and 2004.

As mentioned before, in 2004 about 45.0% of total EU-25 capacity comprised hotels and 55.0% other accommodation establishments (of which 64.3% were campsites and 18.6% holiday dwellings). This composition remained stable over the period analysed. The countries with the highest percentages of hotel bed places in 2004 were: Malta with 98.8% (99.7% in 1995), Cyprus 95.8% (97.3%), Bulgaria 90.0% (84.1%), Greece 87.8% (86.7%), Latvia 79.0% (73.5%), Ireland 69.6% and Estonia 68.9%. Eleven other countries recorded figures well above the EU-25 average in 2004.

Looking at other accommodation establishments (55.0% in the EU-25), the highest shares of bed places in this category were registered in the Benelux region (the Netherlands with 83.9%, Belgium 80.4%, and Luxembourg 78.6%),

Scandinavia (Denmark with 82.3%, Norway 73.9%, and Sweden 72.2%) and in a couple of eastern European countries (Slovakia with 65.2% and Hungary 52.6%). For the first two groups of countries, the trend did not substantially change between 1995 and 2004.

Looking at the most important destinations of international tourism in Europe, Italy saw the greatest changes in accommodation supply. Bed places in hotels declined from 51.9% in 1995 to 47.4% in 2004, with a corresponding increase in the share of other accommodation establishments (from 48.1% to 52.6%), due especially to a significant growth in holiday dwellings (from 8.7% to 23.8%). A similar trend, but at a lower rate, was recorded for France. Accommodation capacity remained mostly stable in Spain, while Greece saw a slight expansion in hotel accommodation (from 86.7% in 1995 to 87.8% in 2004). Almost all eastern European countries showed an increase in hotel capacity from 1995 to 2004.

Table 2.2 - Distribution of accommodation supply, bed places (%)

1995	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
Total ¹	100.0	100.0	100.0	100.0	100.0	:	100.0	100.0	100.0	:	100.0	100.0	100.0	100.0	:	100.0	100.0
Hotels ¹	47.6	18.0	39.7	23.8	51.7	:	86.7	50.4	27.9	:	51.9	97.3	73.5	32.4	:	47.0	99.7
Other collect. accomm ¹	52.4	82.0	60.3	76.2	48.3	:	13.3	49.6	72.1	:	48.1	2.7	26.5	67.6	:	53.0	0.3
of which: Tourist campsites ¹	73.0	70.3	52.7	84.0	54.2	:	100.0	61.4	91.5	:	78.9	39.7	16.3	4.1	:	78.3	:
of which: Holidays dwellings ¹	14.1	11.9	5.0	12.5	19.4	:	:	38.6	8.1	:	8.7	60.3	83.7	92.2	:	12.3	:
2004	EU-25	BE ²	CZ	DK	DE	EE	EL	ES	FR ²	IE ²	IT ²	CY	LV ²	LT	LU	HU	MT
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Hotels	45.0	19.6	52.8	17.7	48.9	68.9	87.8	50.8	26.0	69.6	47.4	95.8	79.0	57.7	21.4	47.4	98.8
Other collect. accomm	55.0	80.4	47.2	82.3	51.1	31.1	12.2	49.2	74.0	30.4	52.6	4.2	21.0	42.3	78.6	52.6	1.2
of which: Tourist campsites	64.3	68.6	12.7	84.0	46.5	26.3	100.0	53.8	80.9	47.9	61.4	69.5	18.3	6.0	92.7	56.5	:
of which: Holidays dwellings	18.6	12.3	13.5	12.5	20.9	19.0	:	40.3	11.1	29.2	23.8	30.5	73.9	88.0	3.2	12.5	:
1995	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	:	:	:	:	:	100.0	100.0	100.0	100.0
Hotels	17.7	88.1	13.9	43.5	45.7	50.4	52.4	:	:	:	:	:	:	84.1	39.2	71.0	97.8
Other collect. accomm	82.3	11.9	86.1	56.5	54.3	49.6	47.6	:	:	:	:	:	:	15.9	60.8	29.0	2.2
of which: Tourist campsites	71.4	:	17.1	96.6	45.2	44.9	87.7	:	:	:	:	:	:	28.5	81.8	32.2	98.2
of which: Holidays dwellings	21.5	:	4.7	:	:	16.2	8.7	:	:	:	:	:	:	:	3.2	:	:
2004	NL	AT	PL	PT ²	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR ²	RO	TR
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	:	:	100.0	:	100.0	100.0	:	:
Hotels	16.1	61.5	28.3	58.1	46.5	34.8	56.0	27.8	:	:	:	26.1	:	90.0	40.1	:	:
Other collect. accomm	83.9	38.5	71.7	41.9	53.5	65.2	44.0	72.2	:	:	:	73.9	:	10.0	59.9	:	:
of which: Tourist campsites	73.3	54.9	5.7	94.9	43.5	56.1	86.8	83.6	:	:	:	78.4	:	7.8	68.2	:	:
of which: Holidays dwellings	20.8	18.6	5.5	:	9.7	6.2	10.6	8.9	:	:	:	0.0	:	:	5.3	:	:

1) EU-25 excluding EE, IE, LU, SE and the UK. 2) 2003 data.

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Table 2.3 shows the seasonal gross annual occupancy (or utilisation) rates of hotels for almost all European countries in 2004. This rate is based on the number of bed places available in hotels in each month of the year (including seasonal closures) compared with the number of nights spent by tourists in the same month. It is influenced by the different tourism characteristics of each country.

For a given number of bed places, therefore, the more nights spent, the higher the occupancy rate. In addition, in countries where hotels represent the majority of the local tourism capacity (e.g. Cyprus, Malta, etc.), their monthly occupancy rates are generally higher than those of hotels in other countries.

Table 2.3 - Gross utilisation of bed places in hotels, 2004 (%)

	January	February	March	April	May	June	July	August	September	October	November	December
EU-25	:	:	:	:	:	:	:	:	:	:	:	:
BE ¹	19.8	23.6	28.7	32.9	36.7	35.5	38.7	42.8	37.1	35.9	30.1	28.1
CZ	25.8	31.9	32.8	33.7	37.6	36.6	41.2	44.0	38.6	35.7	28.0	25.4
DK	20.9	25.6	29.7	31.7	40.3	47.9	65.2	53.9	43.6	35.6	36.3	24.3
DE	20.5	24.9	26.5	30.0	37.5	37.4	38.2	40.4	42.6	36.5	26.0	24.1
EE	27.0	33.0	37.0	43.0	46.0	52.0	70.0	57.0	41.0	40.0	35.0	34.0
EL ¹	30.5	30.1	37.7	36.1	53.0	65.8	83.6	94.0	70.7	49.5	32.0	37.5
ES	10.5	13.3	14.4	18.5	15.8	19.6	24.8	32.6	22.7	17.7	13.1	12.9
FR	48.7	52.6	55.7	56.1	60.8	66.3	63.4	65.5	67.8	60.1	51.5	49.6
IE	:	:	:	:	:	:	:	:	:	:	:	:
IT ²	18.7	23.4	23.1	27.5	31.3	44.0	54.7	62.8	41.1	26.2	17.3	20.2
CY	14.2	19.0	22.7	34.4	50.5	56.6	66.6	75.7	61.5	56.4	25.7	14.0
LV	:	:	:	:	:	:	:	:	:	:	:	:
LT	15.2	17.4	20.2	21.5	28.8	37.1	39.9	40.8	30.8	25.9	22.8	21.1
LU	16.6	18.5	22.4	26.4	31.4	30.2	31.1	31.7	31.5	30.0	25.8	19.4
HU	:	:	:	:	:	:	:	:	:	:	:	:
MT	28.4	34.0	41.4	49.5	50.9	58.6	73.8	83.3	66.8	60.3	41.9	33.7
NL	26.6	31.1	34.0	46.1	47.4	44.7	46.3	54.7	48.1	44.6	37.6	31.1
AT	44.7	58.1	41.1	26.8	24.5	33.5	42.9	53.1	36.7	22.9	18.2	44.0
PL	25.6	30.3	30.6	32.6	41.5	45.3	39.1	41.0	38.3	32.5	25.6	22.9
PT	20.5	31.6	34.1	41.6	41.5	44.7	48.8	61.6	48.4	39.3	26.7	22.9
SI	36.4	37.0	36.9	41.5	48.8	52.7	59.5	70.8	56.6	45.0	33.1	30.7
SK	27.0	34.9	28.5	26.7	33.3	37.8	43.0	46.1	38.0	32.4	26.4	23.0
FI	27.8	34.7	35.7	30.9	28.7	36.9	49.6	38.0	35.7	32.7	31.3	27.9
SE	21.2	27.1	30.4	27.3	31.1	34.5	48.5	39.6	34.1	30.4	29.6	21.5
UK	28.0	35.0	38.0	45.0	46.0	51.0	56.0	58.0	53.0	47.0	37.0	34.0
IS	:	:	:	:	:	:	:	:	:	:	:	:
LI	23.1	32.5	23.8	20.9	20.0	26.6	20.6	29.5	24.0	22.8	18.8	21.8
NO	21.4	30.0	31.0	23.6	23.1	40.4	51.5	42.2	31.0	24.7	25.0	17.9
CH ¹	31.5	39.0	36.9	27.1	25.5	34.4	42.5	46.5	38.1	27.8	17.8	:
BG ¹	15.6	15.6	15.6	22.9	22.9	22.9	50.1	50.1	50.1	12.6	12.6	12.6
HR	:	:	:	:	:	:	:	:	:	:	:	:
RO	:	:	:	:	:	:	:	:	:	:	:	:
TR	:	:	:	:	:	:	:	:	:	:	:	:

1) 2003 data. 2) For November and December 2003 data.

Looking at all countries, the summer months generally show the highest hotel utilisation of the year, because Europeans are used to having their holidays during this period. However, some distinctions need to be made.

In countries where beach tourism dominates (Malta, Cyprus, Greece and Slovenia), the hotel occupancy rate records a peak between June and September, particularly in July and August. On the other hand, in countries where the main purposes of trips are city tourism, cultural tourism, business tourism, etc. (e.g. France, United Kingdom, Benelux, Germany, Switzerland, etc.), gross utilisation is more distributed over the year, with peaks from April/May to September/October.

Austria exhibits a double seasonality because it combines cultural tourism with mountain tourism and winter sports. Its gross utilisation has two peaks, one in summer (July/August) and one in winter (December to February).

Italy's hotels are also a special case. They have a lower gross monthly utilisation rate than other countries offering similar tourism products (e.g. France), with a peak in July and August. This is probably due to the high fragmentation of the local hotel supply, which is mainly concentrated in seasonal destinations (e.g. beach resorts, mountain resorts, spa resorts, etc.) where establishments are only open for some months of the year (from 90 to 180 days).

Looking at eastern and northern European countries, gross utilisation also depends on climatic conditions. In other words, although cultural and city tourism is the main motivation for trips to these countries, the majority of tourists prefer to visit them during periods with convenient temperatures. For example, Poland and Estonia recorded a peak from May to July/August, and Finland, Sweden and Norway from June to August.

Table 2.4 compares the trend in accommodation supply (available bed places) to the demographic trend (resident population). The higher the number of bed places available per inhabitant, the higher the intensity of tourism supply in the country.

This indicator can be used as a proxy for the potential pressure tourism exerts on a territory, since the number of bed places available gives an idea of the maximum number of tourists that can be accommodated at the same time.

In 2004, the EU-25 had an average of 52.4 bed places per 1 000 residents, as against 47.0 in 1995. This growth was driven by the increase in bed places in other accommodation establishments, which rose from 26.5 bed places per 1 000 residents in 1995 to 29.4 in 2004.

Table 2.4 - Number of bed places per 1 000 residents, 1995 and 2004

1995	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
Total ¹	47.0	63.1	28.6	79.7	34.3	:	60.6	52.0	74.2	:	58.9	123.0	7.3	8.3	:	24.5	101.0
Hotels	21.0	11.0	11.0	19.0	18.0	7.0	53.0	26.0	21.0	27.0	31.0	120.0	5.0	3.0	36.0	12.0	101.0
Other collect. accomm ¹	26.5	51.8	17.2	60.8	16.6	:	8.0	25.8	53.5	:	28.3	3.3	1.9	5.6	:	13.0	0.3
2004	EU-25	BE ²	CZ	DK	DE	EE	EL	ES	FR ²	IE ²	IT ²	CY	LV ²	LT	LU	HU	MT
Total	52.4	60.2	43.0	72.3	39.9	24.4	68.9	70.2	77.7	53.0	72.5	131.8	8.1	9.4	147.4	31.1	98.1
Hotels	23.0	11.8	22.7	12.8	19.5	16.8	60.5	35.7	20.2	36.9	34.4	126.3	6.4	5.4	31.5	14.7	96.9
Other collect. accomm	29.4	48.4	20.3	59.5	20.4	7.6	8.4	34.5	57.5	16.1	38.2	5.5	1.7	4.0	115.9	16.4	1.2
1995	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
Total	52.0	92.0	17.0	47.0	34.0	15.0	39.0	:	48.0	:	:	:	:	17.0	:	61.0	13.0
Hotels	9.0	81.0	2.0	20.0	15.0	7.0	21.0	20.0	18.0	:	5.0	30.2	61.0	14.0	:	43.0	12.0
Other collect. accomm	43	11.0	15.0	26.0	18.0	7.0	19.0	:	30.0	:	:	:	:	3.0	:	18.0	0.0
2004	NL	AT	PL	PT ²	SI	SK	FI	SE	UK ²	IS	LI	NO	CH	BG	HR ²	RO	TR
Total	72.0	114.0	15.0	41.0	32.0	30.0	41.0	76.0	27.0	:	:	118.3	:	24.0	108.8	:	:
Hotels	12.0	70.0	4.0	24.0	15.0	10.0	23.0	21.0	18.0	0.0	4.0	30.8	:	22.0	43.6	:	:
Other collect. accomm	61.0	44.0	11.0	17.0	17.0	20.0	18.0	55.0	10.0	:	:	87.5	:	2.0	65.2	:	:

1) EU-25 excluding EE, IE, LU and SE. 2) 2003 data.

The countries with the highest intensity of accommodation supply in 2004 were Luxembourg (147.4 bed places per 1 000 inhabitants), Cyprus (131.8), Austria (114.0), Croatia (108.8) and Malta (98.1). The intensity increased in Cyprus and Austria from 1995 to 2004 (from 123.0 to 131.8 bed places and from 92.0 to 114.0, respectively), but fell in Malta (from 101.0 to 98.1 bed places).

France ranked sixth with 77.7 (2003 data) bed places per 1 000 residents (74.2 in 1995), followed by Sweden (76.0, no data available for 1995), Italy (72.5 compared with 58.9), Denmark (72.3 compared with 79.7), Spain (70.2 compared with 52.0) and Greece (68.9 compared with 60.6).

The steady growth in Italy was due in particular to the increase in other accommodation establishments, whereas in Spain it was accounted for by hotels. The lowest intensities for hotels were recorded for Sweden (21.0) and several of the new Member States: Hungary 31.1, Estonia 24.4; Poland 15.0; Lithuania 9.4 and Latvia 8.1.



CHAPTER 3 - THE TOURISM BEHAVIOUR OF EUROPEANS

3. THE TOURISM BEHAVIOUR OF THE EUROPEANS

This chapter describes the evolution of the travel behaviour of European tourists by country of origin in general and in more detail by distinguishing between domestic tourists and outbound tourists. For this first edition of the Panorama, the analysis focuses on the EU-15 countries, because data are in many cases not available for the new Member States, EFTA countries and candidate countries.

3.1. General overview

Table 3.1 shows the total number of trips (domestic and outbound) made by all tourists (leisure and business) resident in the EU-15 countries for both 2000 and 2004, broken down by short (1-3 nights) and long trips (4 nights and more).

In most countries, the majority of tourists opted for short trips (1-3 nights) with an increasing tendency from 2000. In 2004, the proportion of short trips ranged from a minimum of 35.3% of total trips by Greek tourists to a maximum of 79.1% for Finnish tourists. Including the main tourism destinations like Spain, France and Italy, more than 50% of total trips by residents lasted not more than 3 nights, with a peak of 77.6% for Spanish tourists. The increase in short trips was generally higher than that for long trips between 2000 and 2004.

Table 3.1 - Total trips by tourists from EU-15 countries by length of stay, 2000 and 2004 (1 000)

2000	EU-15	BE ¹	DK	DE ²	EL	ES	FR	IE ¹	IT	LU	NL	AT	PT	FI	SE	UK
Total	:	9 760	10 730	127 977	6 880	123 144	163 758	7 603	77 335	994	:	19 582	11 728	26 843	:	175 500
1-3 nights	:	3 550	5 600	22 326	1 858	93 818	85 913	4 002	38 041	371	:	10 393	7 612	21 110	:	90 600
4 nights and more	:	6 210	5 130	105 651	5 022	29 326	77 845	3 601	39 294	623	:	9 188	4 117	5 733	:	84 900
2004	EU-15	BE	DK ³	DE ²	EL ⁴	ES	FR ³	IE ³	IT	LU	NL ²	AT	PT ³	FI	SE	UK ³
Total	858 949	12 700	10 931	137 848	7 137	132 601	175 534	8 570	83 621	1 407	30 185	16 549	9 946	32 140	32 453	167 327
1-3 nights	454 177	5 270	6 804	33 902	2 519	102 835	93 740	4 493	42 924	669	11 044	7 930	5 933	25 436	22 178	88 500
4 nights and more ⁵	404 773	7 431	4 127	103 946	4 618	29 766	81 794	4 077	40 697	738	19 141	8 619	4 013	6 704	10 275	78 827
Average annual growth rate % 2000-2004 ⁶																
Total	:	14.1	0.6	2.5	1.8	1.9	2.3	6.2	2.0	9.1	:	-4.1	-5.3	4.6	:	-1.6
1-3 nights	:	14.1	6.7	14.9	16.4	2.3	2.9	6.0	3.1	15.9	:	-6.5	-8.0	4.8	:	-0.8
4 nights and more	:	9.4	-7.0	-0.5	-4.1	0.4	1.7	6.4	0.9	4.3	:	-1.6	-0.8	4.0	:	-2.4
% distribution 2004																
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1-3 nights	52.9	41.5	62.2	24.6	35.3	77.6	53.4	52.4	51.3	47.5	36.6	47.9	59.7	79.1	68.3	52.9
4 nights and more	47.1	58.5	37.8	75.4	64.7	22.4	46.6	47.6	48.7	52.5	63.4	52.1	40.3	20.9	31.7	47.1

1) 2001 data. 2) Covers only leisure. 3) 2003 data. 4) 2002 data. 5) Danish figures are calculated using quarterly data, thus they are not comparable to the data in table 3.7. 6) Average annual growth rate 2000-2003 for DK, FR, PT and UK; 2000-2002 for EL; 2001-2004 for BE and 2001-2003 for IE.

Only for Irish tourists did the number of long trips of 4 nights or more increase more than the number of short trips (+6.4% as against +6.0% on average per year). For tourists from Austria, on the other hand, the number of long trips declined less than the number of short trips between 2000 and 2004 (-1.6% as against -6.5%). The same trend was noted for Portuguese tourists, with trips of 1-3 nights decreasing by -8.0% on average while long trips remained fairly stable (-0.8%).

As can be seen from the number of nights spent both at home and abroad by all tourists living in the EU-15 countries (Table 3.2), the majority were spent on trips of 4 nights and more, with proportions ranging from 54.9% for Finns to 94.2% for Germans (but only including leisure nights as distinct from total nights for all other countries) with rather high percentages (more than 80%) for tourists from the main tourism destinations like France and Italy.

Table 3.2 - Total nights spent by tourists from EU-15 countries by length of stay, 2000 and 2004 (1 000)

2000	EU-15	BE ¹	DK	DE ²	EL	ES	FR	IE ¹	IT	LU	NL	AT	PT	FI	SE	UK
Total	:	78 819	60 739	1 295 550	65 964	560 426	934 948	43 936	547 404	7 620	:	103 616	57 338	95 311	:	956 500
1-3 nights	:	7 108	12 293	55 447	3 993	176 337	157 942	8 034	69 697	739	:	18 644	13 276	46 932	:	184 200
4 nights and more	:	71 711	48 446	1 240 103	61 970	384 089	777 006	35 929	477 707	6 881	:	84 972	44 062	48 379	:	772 300
2004	EU-15	BE	DK ³	DE ²	EL ⁴	ES	FR ³	IE ³	IT	LU	NL ²	AT	PT ³	FI	SE	UK ³
Total	5 062 903	95 766	50 810	1 197 525	65 486	599 413	968 618	49 675	535 037	8 707	237 630	97 780	124 854	97 780	124 854	882 526
1-3 nights	859 018	10 400	14 293	69 158	5 357	199 117	171 459	8 995	78 894	1 305	23 999	44 075	38 616	44 075	38 616	166 253
4 nights and more ⁵	4 203 885	85 365	36 517	1 128 367	60 130	400 296	797 159	40 680	456 143	7 401	213 631	53 705	86 238	53 705	86 238	716 273
Average annual growth rate % 2000-2004 ⁶																
Total	:	6.7	-5.8	-2.6	-0.4	1.7	1.2	6.3	-0.6	3.4	:	-3.0	-0.1	0.6	:	-2.6
1-3 nights	:	13.5	5.2	7.6	15.8	3.1	2.8	5.8	3.1	15.3	:	-3.8	-5.7	-1.6	:	-3.4
4 nights and more	:	6.0	-9.0	-3.1	-1.5	1.0	0.9	6.4	-1.1	1.8	:	-2.8	1.5	2.6	:	-2.5
% distribution 2004																
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1-3 nights	17.0	10.9	28.1	5.8	8.2	33.2	17.7	18.1	14.7	15.0	10.1	17.4	19.5	45.1	30.9	18.8
4 nights and more	83.0	89.1	71.9	94.2	91.8	66.8	82.3	81.9	85.3	85.0	89.9	82.6	80.5	54.9	69.1	81.2

1) 2001 data. 2) Covers only leisure. 3) 2003 data. 4) 2002 data. 5) Danish figures are calculated using quarterly data, thus they are not comparable to the data in table 3.8. 6) Average annual growth rate 2000-2003 for DK, FR, PT and UK; 2000-2002 for EL; 2001-2004 for BE and 2001-2003 for IE.

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In general, short trips showed a stronger growth than long trips, also in terms of nights. This confirms the market trend towards shorter stays and an increase in the number of "multi-holidays". In particular, for tourists from countries where the growth in the number of 1-3 night trips was higher than that for trips of 4 nights or more (e.g. Denmark, Germany, Spain, France, Italy and Luxembourg), the total number of nights spent on such trips generally followed the same trend. For example, tourist trips of 1-3 nights made by Spaniards rose by +2.3% on average between 2000 and 2004. Over the same period, the nights spent on such trips increased by +3.1% as well. The same applies to French, Italian and Luxembourgish tourists.

On the other hand, trips of 1-3 nights by Finnish tourists increased by +4.8% on average, while the nights spent on these trips diminished by -1.6% over the same period, revealing a decline in the average duration of such trips.

Table 3.3 shows the evolution of the average duration of trips by length of stay. Looking at all EU-15 countries, the average duration of a trip (domestic and outbound, for holiday and business purposes) in 2004 covered a span from 3.0 nights for Finns to 9.2 nights for Greek tourists. As mentioned before, this average value depends on the breakdown of 1-3 night trips and long trips within the total trips made by residents in each country, both in terms of the number of trips and the nights spent. For example, short trips by Finnish tourists represented about 79% of total trips but only 45% of total nights, while on the other hand short trips by Greek tourists accounted for 35.3% of total trips but only for 8.2% in terms of nights.

Table 3.3 - Total trips by length of stay: average duration of trip, 2000 and 2004 (nights)

2000	EU-15	BE ¹	DK	DE ²	EL	ES	FR	IE ¹	IT	LU	NL	AT	PT	FI	SE	UK
Total	:	8.1	5.7	10.1	9.6	4.6	5.7	5.8	7.1	7.7	:	5.3	4.9	3.6	:	5.5
1-3 nights	:	2.0	2.2	2.5	2.1	1.9	1.8	2.0	1.8	2.0	:	1.8	1.7	2.2	:	2.0
4 nights and more	:	11.5	9.4	11.7	12.3	13.1	10.0	10.0	12.2	11.0	:	9.2	10.7	8.4	:	9.1
2004	EU-15	BE	DK ³	DE ²	EL ⁴	ES	FR ³	IE ³	IT	LU	NL	AT	PT ³	FI	SE	UK ³
Total	5.9	7.5	4.6	8.7	9.2	4.5	5.5	5.8	6.4	6.2	7.9	5.6	5.7	3.0	3.8	5.3
1-3 nights	1.9	2.0	2.1	2.0	2.1	1.9	1.8	2.0	1.8	2.0	2.2	2.0	1.9	1.7	1.7	1.9
4 nights and more	10.4	11.5	8.8	10.9	13.0	13.4	9.7	10.0	11.2	10.0	11.2	8.8	11.5	8.0	8.4	9.1

1) 2001 data. 2) Covers only leisure. 3) 2003 data. 4) 2002 data.

Looking at 1-3 night trips, in 2004 their average length ranged from a minimum of 1.7 nights for Finnish and Swedish tourists to a maximum of 2.1 nights for Danish and Greek residents. For long trips (4 nights and more), the minimum was the 8.0 nights recorded for Finnish tourists and the maximum was 13.4 nights for Spaniards (Table 3.3). Comparing 2000 and 2004, 7 countries of the 13 for which data are available recorded a decrease in the duration of trips of 4 nights or more made by their tourists. This was particularly evident for Italians (from 12.2 to 11.2 nights) and tourists from Luxembourg (from 11.0 to 10.0 nights). Only Greek and Portuguese tourists significantly increased the duration of their long trips (the Greeks from 12.3 to 13.0 nights, the Portuguese from 10.7 to 11.5 nights). On the other hand, the figures for trips of 1-3 nights remained stable from 2000 to 2004, except for Austrian and Portuguese tourists, for whom a slight increase was recorded.

Looking at short trips (1-3 nights), table 3.4 shows the distribution of total trips of 1-3 nights (domestic and outbound) for each country by the main purpose of visit (leisure vs business). Travelling for leisure purposes was by far the main motivation of tourists from all EU-15 countries, accounting for more than 94% of total 1-3 night trips by tourists from Spain and France. Business trips recorded relatively high shares only among Swedish (35.9%), Luxembourgish (33.7%), Austrian (32.4%) and Danish (30.7%) tourists.

Looking at the development between 2000 and 2004, short trips for leisure purposes showed a higher increase than business trips for Danes (+10.4% annual average), Germans (+11.0%), Greeks (+16.9%), the Irish (+8.2%) and Finns (+5.2%). In contrast, short trips for business reasons increased more than leisure trips among the Spanish (+15.7% annual average), Italians (+6.2%) and Portuguese (+2.3%). However, Austria saw a drop in both business trips (annual average of -4.4%) and leisure trips (-7.5%). For British tourists, the number of business trips remained fairly stable while leisure trips declined by -1.2% on average each year.

Table 3.4 - Trips of 1-3 nights: total trips by purpose, 2000 and 2004 (1 000)

2000	EU-15	BE ¹	DK	DE	EL	ES	FR	IE ¹	IT	LU	NL	AT	PT	FI	SE	UK
Total	:	3 550	5 600	:	1 858	93 818	85 913	4 002	38 041	371	:	10 393	7 612	21 110	:	90 600
Leisure	:	2 766	3 502	22 326	1 606	92 492	81 421	3 137	29 063	248	:	7 310	6 955	17 989	:	68 000
Business	:	783	2 098	:	252	1 326	4 492	865	8 979	123	:	3 083	657	3 121	:	22 600
2004	EU-15	BE	DK ²	DE	EL ³	ES	FR ²	IE ²	IT	LU	NL	AT	PT ²	FI	SE	UK ²
Total	:	5 270	6 804	:	2 519	102 835	93 740	4 493	42 924	669	:	7 930	5 933	25 436	22 178	88 500
Leisure	:	4 219	4 716	33 902	2 194	100 460	88 849	3 674	31 501	443	11 044	5 360	5 229	22 006	14 222	65 642
Business	:	1 050	2 088	:	325	2 374	4 891	819	11 423	226	:	2 570	704	3 430	7 956	22 858
Average annual growth rate % 2000-2004⁴																
Total	:	14.1	6.7	:	16.4	2.3	2.9	6.0	3.1	15.9	:	-6.5	-8.0	4.8	:	-0.8
Leisure	:	15.1	10.4	11.0	16.9	2.1	3.0	8.2	2.0	15.6	:	-7.5	-9.1	5.2	:	-1.2
Business	:	10.3	-0.1	:	13.6	15.7	2.9	-2.7	6.2	16.4	:	-4.4	2.3	2.4	:	0.4
% distribution 2004																
Total	:	100.0	100.0	:	100.0	100.0	100.0	100.0	100.0	100.0	:	100.0	100.0	100.0	100.0	100.0
Leisure	:	80.1	69.3	:	87.1	97.7	94.8	81.8	73.4	66.3	:	67.6	88.1	86.5	64.1	74.2
Business	:	19.9	30.7	:	12.9	2.3	5.2	18.2	26.6	33.7	:	32.4	11.9	13.5	35.9	25.8

1) 2001 data. 2) 2003 data. 3) 2002 data. 4) Average annual growth rate 2000-2003 for DK, FR, PT and UK; 2000-2002 for EL; 2001-2004 for BE and 2001-2003 for IE.

Looking at the distribution of nights spent on short trips by the main purpose of visit, most were spent on leisure trips, with the Spaniards accounting for the maximum of 97.7% (Table 3.5). This confirms the trend already noted for table 3.4. For tourists from other popular tourism destinations like Italy, Greece and France, the share of nights spent on leisure trips ranged from 75.4% to 95.4%. On the other hand, the highest proportion of business trips were made by Swedish (32.1%), Luxembourgish (29.6%), Austrian (27.8%) and Danish (25.3%) tourists.

Looking at the evolution between 2000 and 2004, nights spent on short trips for leisure purposes showed a higher increase than nights spent on business trips among Belgians (+14.5% annual average, 2001 to 2004), Danes (+6.3%, 2000 to 2003), Greeks (+16.0%, 2000 to 2002) and the Irish (+7.5%, 2001 to 2004).

Only nights spent by Finnish tourists on short leisure trips declined (-2.0%) significantly while on the other hand the number of trips went up (+5.2%), revealing a fall in the average length of stay.

At the beginning of the 21st century, nights on business trips saw a considerable increase among Spaniards (+15.6% annual average increase) and Italians (+6.0%), also in comparison to nights spent on leisure trips. Among Austrians, Portuguese and Finns, nights spent on business trips increased by 0.8% to 2.0% while nights spent on leisure trips saw a reduction (-5.2%, -6.5% and -2.0% respectively).

Table 3.5 - Trips of 1-3 nights: total nights by purpose, 2000 and 2004 (1 000)

2000	EU-15	BE ¹	DK	DE	EL	ES	FR	IE ¹	IT	LU	NL	AT ²	PT	FI	SE	UK
Total	:	7 108	12 293	:	3 993	176 337	157 942	8 034	69 697	739	:	18 644	13 276	46 932	:	184 200
Leisure	:	5 764	8 891	55 447	3 474	173 726	150 636	6 579	54 347	522	:	14 278	12 109	42 120	:	146 400
Business	:	1 344	3 402	:	519	2 611	7 306	1 455	15 350	217	:	4 366	1 167	4 812	:	37 800
2004	EU-15	BE	DK ³	DE	EL ⁴	ES	FR ³	IE ³	IT	LU	NL	AT	PT ³	FI	SE	UK ³
Total	:	10 400	14 293	:	5 357	199 117	171 459	8 995	78 894	1 305	:	15 960	11 138	44 075	38 616	166 253
Leisure	:	8 653	10 679	69 158	4 679	194 451	163 494	7 607	59 521	919	23 999	11 520	9 901	38 906	26 219	130 143
Business	:	1 747	3 614	:	678	4 666	7 965	1 388	19 373	387	:	4 439	1 237	5 169	12 397	36 110
Average annual growth rate % 2000-2004⁵																
Total	:	13.5	5.2	:	10.3	3.1	2.8	5.8	3.1	15.3	:	-3.8	-5.7	-1.6	:	-3.4
Leisure	:	14.5	6.3	5.7	16.0	2.9	2.8	7.5	2.3	15.2	:	-5.2	-6.5	-2.0	:	-3.8
Business	:	9.1	2.0	:	9.3	15.6	2.9	-2.3	6.0	15.5	:	0.8	2.0	1.8	:	-1.5
% distribution 2004																
Total	:	100.0	100.0	:	100.0	100.0	100.0	100.0	100.0	100.0	:	100.0	100.0	100.0	100.0	100.0
Leisure	:	83.2	74.7	:	87.3	97.7	95.4	84.6	75.4	70.4	:	72.2	88.9	88.3	67.9	78.3
Business	:	16.8	25.3	:	12.7	2.3	4.6	15.4	24.6	29.6	:	27.8	11.1	11.7	32.1	21.7

1) 2001 data. 2) 2002 data for business. 3) 2003 data. 4) 2002 data. 5) Average annual growth rate 2000-2003 for DK, FR, PT and UK; 2000-2002 for EL; 2001-2004 for BE and 2001-2003 for IE.

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Looking at the duration of trips (Table 3.6), trips of 1-3 nights generally lasted from a minimum of 1.7 nights for Scandinavian tourists (Finns and Swedes) to a maximum of 2.1 nights for Danish and Greek tourists. As mentioned for table 3.3, this average value depends on the breakdown of leisure and business trips within the total number of short trips made by residents in each country, both in terms of the number of trips and the nights spent. For the Danes, for example, leisure trips accounted for about 69% of the total number and about 75% of the total nights.

This means the leisure trips were generally longer than business trips. The same was noted for tourists from Ireland, Luxembourg, Austria, Sweden and the United Kingdom, where the nights spent on leisure trips as a proportion of the whole was about 3 to 4 percentage points higher than the proportion in terms of the number of trips.

Table 3.6 - Trips of 1-3 nights by purpose: average length of stay, 2000 and 2004 (nights)

2000	EU-15	BE ¹	DK	DE	EL	ES	FR	IE ¹	IT	LU	NL	AT ²	PT	FI	SE	UK
Total	:	2.0	2.2	:	2.1	1.9	1.8	2.0	1.8	2.0	:	1.8	1.7	2.2	:	2.0
Leisure	:	2.1	2.5	2.5	2.2	1.9	1.9	2.1	1.9	2.1	:	2.0	1.7	2.3	:	2.2
Business	:	1.7	1.6	:	2.1	2.0	1.6	1.7	1.7	1.8	:	1.4	1.8	1.5	:	1.7
2004	EU-15	BE	DK ³	DE	EL ⁴	ES	FR ³	IE ³	IT	LU	NL	AT	PT ³	FI	SE	UK ³
Total	:	2.0	2.1	:	2.1	1.9	1.8	2.0	1.8	2.0	:	2.0	1.9	1.7	1.7	1.9
Leisure	:	2.1	2.3	2.0	2.1	1.9	1.8	2.1	1.9	2.1	2.2	2.1	1.9	1.8	1.8	2.0
Business	:	1.7	1.7	:	2.1	2.0	1.6	1.7	1.7	1.7	:	1.7	1.8	1.5	1.6	1.6

1) 2001 data. 2) 2002 data for business. 3) 2003 data. 4) 2002 data.

In 2004, the length of leisure trips ranged from 1.8 nights for French, Finnish and Swedish tourists up to 2.3 nights for Danish tourists, while business trips were shorter and lasted from 1.5 nights for Finns to 2.1 nights for Greeks. In contrast with other countries, business trips made by Spaniards are slightly longer than leisure trips (2.0 nights as against 1.9 nights).

Turning now to holiday trips of 4 nights or more, table 3.7 describes the evolution and distribution of total trips for each EU-15 country by destination (domestic or outbound). These data show how international the tourism market is in each country.

Table 3.7 - Trips of 4 nights or more: total holiday trips by destination, 2000 and 2004 (1 000)

2000	EU-15	BE	DK	DE	EL	ES	FR	IE	IT	LU	NL	AT	PT	FI	SE	UK
Total	:	6 374	4 556	105 650	4 753	27 988	75 753	2 765	35 457	570	15 529	5 689	3 689	5 261	:	76 400
Domestic	:	1 142	1 406	35 898	4 330	25 108	63 025	1 104	27 382	2	5 749	1 811	3 024	3 755	:	38 700
Outbound	:	5 232	3 150	69 752	423	2 880	12 727	1 661	8 075	568	9 780	3 878	664	1 506	:	39 300
2004	EU-15 ¹	BE	DK ²	DE	EL ¹	ES	FR	IE ²	IT	LU	NL	AT	PT	FI	SE	UK
Total	383 394	6 983	5 195	103 947	4 420	28 777	81 071	3 695	37 137	681	18 475	7 841	4 165	6 200	8 807	66 000
Domestic ⁴	215 637	1 478	1 927	37 388	3 986	25 483	67 216	1 069	27 905	5	6 956	2 769	3 225	4 308	4 622	27 300
Outbound ⁴	167 760	5 505	3 269	66 559	434	3 295	13 856	2 626	9 232	676	11 519	5 072	940	1 892	4 185	38 700
Average annual growth rate % 2000-2004 ³																
Total	:	2.3	4.5	-0.4	-2.4	-4.0	1.7	10.1	1.2	4.5	4.4	8.4	3.1	4.2	:	-3.6
Domestic	:	6.7	11.1	1.0	-2.7	0.4	1.6	-1.1	0.5	25.7	4.9	11.2	1.6	3.5	:	-8.4
Outbound	:	1.3	1.2	-1.2	0.9	3.4	2.1	16.5	3.4	4.4	4.2	6.9	9.1	5.9	:	-0.4
% distribution 2004																
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Domestic	56.2	21.2	37.1	36.0	90.2	88.6	82.9	28.9	75.1	0.7	37.7	35.3	77.4	69.5	52.5	41.4
Outbound	43.8	78.8	62.9	64.0	9.8	11.5	17.1	71.1	24.9	99.3	62.3	64.7	22.6	30.5	47.5	58.6

1) EU-15 and EL estimated. 2) 2003 data. 3) Average annual growth rate 2000-2003 for DK and IE. 4) Consider methodological notes for tables 3.10 to 3.14 and 3.16 to 3.20 in the annex.

In 2004, about 56% of holiday trips of 4 nights or more in the EU-15 area were spent in the country of residence and about 44% abroad. In general, tourists living in the Benelux countries, the United Kingdom, Ireland and the German-speaking countries (Germany and Austria) preferred to spend trips of 4 nights or more abroad. Percentages ranged from about 63% for the Danes and Dutch to about 99% for Luxembourgish tourists. In contrast, the residents of southern European countries (Greece, Spain, France, Italy, Portugal) and Scandinavia (Finland and Sweden) spent more nights on domestic trips, with figures ranging from 69.5% for the Finns to 90.2% for the Greeks.

Looking at the development from 2000 to 2004, it is interesting to note that domestic trips by residents for holiday purposes showed the highest increases in countries where outbound tourism dominates. These countries were Belgium (+6.7% annual average increase), Denmark (+11.1%), Luxembourg (+25.7%), Austria (+11.2%) and the Netherlands (+4.9%). On the other hand, outbound trips increased more in countries where tourists usually spend a large part of their holidays within national boundaries: Spain saw a +3.4% annual average increase, France +2.1%, Italy +3.4%, Portugal +9.1%, etc. The only exception among the countries with a greater increase in outbound trips, with a positive trend since 2000, was Ireland, where residents already spend the majority of their holidays abroad.

This means that the travel behaviour of people residing in the EU-15 countries has changed since the beginning of the 21st century. In countries like Belgium, for example, the number of domestic trips by residents in absolute terms has grown more than the number of trips abroad. Consequently, their share of total trips rose from 17.9% in 2000 to 21.2% in 2004, while the proportion of outbound tourist trips correspondingly declined from 82.1% to 78.8%.

On the other hand, outbound trips by Italian tourists in absolute figures increased at a higher rate than domestic trips. Consequently their share grew from 22.8% in 2000 to 24.9% in 2004, at the expense of domestic tourism (falling from 77.2% to 75.1%).

Table 3.8 - Trips of 4 nights or more: total holiday nights by destination, 2000 and 2004 (1 000)

2000	EU-15 ¹	BE	DK	DE	EL	ES	FR	IE ¹	IT	LU	NL	AT	PT	FI	SE ¹	UK
Total	4 151 436	73 083	42 371	1 240 103	58 271	371 633	757 009	27 392	434 863	6 508	180 037	63 710	40 243	43 758	105 855	706 600
Domestic	2 184 418	11 237	10 858	343 137	51 903	337 577	624 530	7 869	344 408	17	58 492	17 473	32 027	26 861	55 229	262 800
Outbound	1 967 017	61 845	31 513	896 966	6 368	34 056	132 478	19 523	90 455	6 491	121 545	46 238	8 216	16 897	50 626	443 800
2004	EU-15 ²	BE	DK ³	DE	EL ²	ES	FR	IE ³	IT	LU	NL	AT	PT	FI	SE	UK
Total	3 955 635	79 656	47 249	1 128 366	54 145	324 183	779 346	37 087	423 000	7 044	200 998	69 496	47 436	50 260	77 069	630 300
Domestic	2 031 560	13 902	14 356	320 115	47 725	289 363	638 644	8 455	330 000	46	62 668	19 806	35 523	29 842	33 915	187 200
Outbound	1 923 220	65 754	32 893	808 251	6 420	34 820	140 702	28 632	92 245	6 998	138 329	49 690	11 913	20 418	43 155	443 000
Average annual growth rate % 2000-2004⁴																
Total	-1.2	2.2	3.7	-2.3	-1.8	-3.4	0.7	10.6	-0.7	2.0	2.8	2.2	4.2	3.5	-10.0	-2.8
Domestic	-1.8	5.5	9.8	-1.7	-2.1	-3.8	0.6	2.4	-1.1	28.3	1.7	3.2	2.6	2.7	-15.0	-8.1
Outbound	-0.6	1.5	1.4	-2.6	0.2	0.6	1.5	13.6	0.5	1.9	3.3	1.8	9.7	4.8	-5.2	0.0
% distribution 2004																
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Domestic	51.4	17.5	30.4	28.4	88.1	89.3	81.9	22.8	78.0	0.7	31.2	28.5	74.9	59.4	44.0	29.7
Outbound	48.6	82.5	69.6	71.6	11.9	10.7	18.1	77.2	21.8	99.3	68.8	71.5	25.1	40.6	56.0	70.3

1) EU-15, IE (only domestic) and SE estimated. 2) EU-15 and EL estimated. 3) 2003 data. 4) Average annual growth rate 2000-2003 for DK and IE.

Table 3.8 shows the distribution of nights spent by tourists on holiday trips of 4 nights or more by destination. In general, the share of nights spent on outbound holiday trips of 4 nights or more was higher than that spent on domestic trips. Looking at the EU-15 as a whole, about 49% of total nights on average are spent abroad compared with about 44% of the total number of trips. Trips abroad are thus generally longer than domestic trips. This also depends on the chosen destination.

Tourists living in the Benelux countries, the United Kingdom, Ireland and the German-speaking countries (Germany and Austria) generally spent more nights abroad than in their country of residence, with percentages ranging from about 69% in the Netherlands to 99.3% in Luxembourg. In these countries, the share of nights spent by their tourists abroad was generally higher than that of the number of trips, confirming the longer duration of outbound trips.

Likewise, tourists from southern Europe (the Greeks, Spaniards, French, Italians and Portuguese) and Finns spent more nights at domestic holiday destinations, with a share ranging from about 59% for Finnish to around 89% for Spanish tourists. However, the share of trips is generally higher than that of nights (e.g. for the Greeks, French and Finns), indicating the shorter duration of domestic trips. Swedish tourists were also an exception: they spent about 52.5% of long trips but only about 44% of total nights in their home country.

Looking at the average length of stay for trips of 4 nights or more (Table 3.9) in the EU-15, domestic trips had an average duration of 9.4 nights in 2004 while outbound trips lasted 11.5 nights. As mentioned before, the duration also depends on the chosen destination. Taking into account that most outbound trips are short- to medium-haul and within Europe (see chapter 1), this explains why the gap between outbound and domestic trips is not very large.

Table 3.9 - Trips of 4 nights or more by destination: average length of stay, 2000 and 2004 (nights)

2000	EU-15	BE	DK	DE	EL	ES	FR	IE ¹	IT	LU	NL	AT	PT	FI	SE	UK
Total	:	11.5	9.3	11.7	12.3	13.3	10.0	9.9	12.3	11.4	11.6	11.2	10.9	8.3	:	9.2
Domestic	:	9.8	7.7	9.6	12.0	13.4	9.9	7.1	12.6	8.5	10.2	9.6	10.6	7.2	:	6.8
Outbound	:	11.8	10.0	12.9	15.1	11.8	10.4	11.8	11.2	11.4	12.4	11.9	12.4	11.2	:	11.3
2004	EU-15 ²	BE	DK ³	DE	EL ²	ES	FR	IE ³	IT	LU	NL	AT	PT	FI	SE	UK
Total	10.3	11.4	9.1	10.9	12.3	11.3	9.6	10.0	11.4	10.3	10.9	8.9	11.4	8.1	8.8	9.6
Domestic	9.4	9.4	7.4	8.6	12.0	11.4	9.5	7.9	11.8	9.2	9.0	7.2	11.0	6.9	7.3	6.9
Outbound	11.5	11.9	10.1	12.1	14.8	10.6	10.2	10.9	10.0	10.4	12.0	9.8	12.7	10.8	10.3	11.4

1) Estimated (only domestic). 2) Estimated. 3) 2003 data.

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In terms of figures, in the Benelux region, the United Kingdom and the German-speaking countries, where residents make the most trips abroad, the average duration of outbound trips was about 11 nights, with a peak of 12.1 nights for the Germans. In southern Europe and Scandinavia, where domestic tourism dominates, domestic tourist trips lasted about 10 nights, with a peak of 12 nights for Greek tourists. Looking at all countries together, Greek tourists made the longest domestic and outbound trips (12.0 and 14.8 nights, respectively) in 2004, while Austrians made the shortest (7.2 and 9.8 nights, respectively).

Comparing 2000 and 2004, it is interesting to note that in almost all countries the average duration of all tourist trips of 4 nights and more showed a slight decrease. This was reflected in both domestic and outbound tourism. For example, the average duration of trips by German, Spanish and Italian tourists declined by about 1 night or more both home and abroad. For Austrians, domestic tourism saw a larger reduction in the average length of stay (from 9.6 nights to 7.2 nights) than outbound tourism (from 11.9 to 9.8 nights). On the other hand, tourists from Luxembourg spent one night fewer on trips abroad, but more time on domestic trips in 2004 (9.2 nights as against 8.5 in 2000). The only countries where tourists extended the duration of their holidays both at home and abroad over the last four years were Portugal and the United Kingdom.

3.2 The profile of the domestic tourist

Looking at the profile of the domestic tourist in 2004, table 3.10 shows the distribution of holiday trips of 4 nights or more by length of stay. On average, more than 60% of total domestic holiday trips in the EU-15 countries had a duration of 4-7 nights. Looking at the different geographical areas of Europe, Benelux, northern Europe (Denmark, Finland, Sweden, United Kingdom and Ireland) and the German-speaking countries were above the EU-15 average for 4-7 night trips, with peaks of about 83% and 81% in Finland and the United Kingdom, respectively.

In southern Europe (Spain, Portugal, France and Italy), on the other hand, 4-7 night trips represented only about 50% or fewer of total domestic trips, while the frequency of trips lasting more than 15 nights was well above the EU-15 average of 10.0%. The different behaviour of domestic tourists is in general caused by the different climatic conditions, which encourage people living in the North to spend their longer holidays (e.g. in summer or at Christmas) in countries abroad where weather conditions are more favourable.

Table 3.10 - Domestic holiday trips of 4 nights or more by length of stay, 2004 (1 000)

2004	EU-15	BE	DK ¹	DE	EL ²	ES	FR	IE ¹	IT ³	LU	NL	AT ⁴	PT	FI	SE	UK
Total	215 637	1 478	1 927	37 388	3 986	25 483	67 216	1 069	27 905	5	6 956	2 768	3 226	4 308	4 621	27 400
4-7 nights	131 452	899	1 528	23 424	1 940	12 784	39 032	810	13 763	4	4 598	1 941	1 537	3 563	3 529	22 100
8-14 nights⁵	54 353	346	293	10 729	864	6 026	19 185	187	7 999	:	1 467	587	969	558	743	4 400
15-28 nights⁵	21 589	176	88	2 921	751	3 572	7 237	50	4 124	:	674	186	567	138	305	800
29-91 nights⁵	7 761	55	16	:u	419	2 945	1 698	22	2 004	:	217	47	149	45	44	100
92-365 nights	:	2	2	:u	11	156	64	0	15	:	:	9	4	4	0	0
% distribution																
Total	100	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
4-7 nights	61.0	60.8	79.3	62.7	48.7	50.2	58.1	75.8	49.3	80.0	66.1	70.1	47.6	82.7	76.4	80.7
8-14 nights	25.2	23.4	15.2	28.7	21.7	23.6	28.5	17.5	28.7	:	21.1	21.2	30.0	13.0	16.1	16.1
15-28 nights	10.0	11.9	4.6	7.8	18.8	14.0	10.8	4.7	14.8	:	9.7	6.7	17.6	3.2	6.6	2.9
29-91 nights	3.6	3.7	0.8	:u	10.5	11.6	2.5	2.1	7.2	:	3.1	1.7	4.6	1.0	1.0	0.4
92-365 nights	:	0.1	0.1	:u	0.3	0.6	0.1	0.0	0.1	:	:	0.3	0.1	0.1	0.0	0.0

1) 2003 data. 2) Estimates based on 2004 total and ratios in 2002. 3) Preliminary data. 4) Estimates based on 2004 total and ratios in 2001. 5) EU-15 excluding LU.

Looking at the distribution of domestic trips by mode of transport (Table 3.11), more than 80% of tourists in the EU-15 countries in 2004 used road transport, in particular private vehicles, to reach domestic holiday destinations, with a peak of 94.3% in the Netherlands and 92.6% in Belgium. The lowest use of road transport by domestic tourists was recorded in Greece, with about 71%. Rail transport accounted for the highest percentages in Germany (15.5%), France (13.8%) and Finland (12.4%).

Relatively high percentages for air transport were recorded for tourists in Portugal (9.2% of total domestic trips), Spain (8.4%), Italy (5.9%) and the United Kingdom (4.8%). The growth of low-cost flights on domestic routes as well as the desire to get to islands within national territory were the main reasons for this trend. In Greece, on the other hand, the geography of the country (where islands represent a good part of the territory) has favoured the strong development of sea transport, which is used by almost a quarter of total domestic tourists. Other countries where travelling by boat accounted for relatively high shares were Italy (5.3% of total domestic trips) and Sweden (4.1%).

Table 3.11 - Domestic holiday trips of 4 nights or more, by mode of transport, 2004 (1 000)

2004	EU-15	BE	DK ¹	DE	EL ²	ES	FR	IE ¹	IT ³	LU	NL	AT ³	PT	FI	SE	UK
Total	215 637	1 477	1 927	37 388	3 986	25 482	67 202	1 070	27 905	5	6 956	2 768	3 226	4 307	4 621	27 100
Air	:	:	24	:	128	2 132	1 238	31	1 653	:	:	12	297	126	66	1 300
Waterway	:	0	65	:	972	390	264	8	1 477	:	86	0	63	75	188	200
Railway⁴	23 704	110	205	5 796	67	1 176	9 265	75	3 017	:	310	213	115	532	323	2 500
Road	180 222	1 367	1 633	30 894	2819	21 784	56 435	956	21 758	4	6 560	2 543	2 751	3 574	4 044	23 100
% distribution																
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Air	:	:	1.2	:	3.2	8.4	1.8	2.9	5.9	:	:	0.4	9.2	2.9	1.4	4.8
Waterway	:	0.0	3.4	:	24.4	1.5	0.4	0.7	5.3	:	1.2	0.0	2.0	1.7	4.1	0.7
Railway	11.0	7.4	10.6	15.5	1.7	4.6	13.8	7.0	10.8	:	4.5	7.7	3.6	12.4	7.0	9.2
Road	83.7	92.6	84.7	82.6	70.7	85.5	84.0	89.3	78.0	80.0	94.3	91.9	85.3	83.0	87.5	85.2

1) 2003 data. 2) Estimates based on 2004 total and ratios in 2002. 3) Preliminary data. 4) EU-15 excluding LU.

Looking at domestic trips by type of accommodation (Table 3.12), about 67% of total domestic trips at EU-15 level were spent in private tourist accommodation (rented accommodation, second homes, etc.), 19.0% in hotels and similar establishments and 14.0% in other collective accommodation.

Countries with a high preference for private accommodation were Finland (84.7% of domestic trips), Greece (82.5%), Portugal (80.3%) and France (75.1%).

3

Table 3.12 - Domestic holiday trips of 4 nights or more, by type of accommodation, 2004 (1 000)

2004	EU-15	BE	DK ¹	DE	EL ²	ES ³	FR	IE ¹	IT ⁴	LU	NL	AT	PT	FI	SE	UK ⁵
Total	215 637	1 479	1 926	37 388	3 986	25 483	67 208	1 069	27 905	5	6 955	2 769	3 224	4 308	4 622	27 100
Hotels and similar establishments	40 987	122	164	10 101	642	5 469	6 769	300	8 040	1	535	1 299	438	328	279	6 500
Other collective accommodation	30 226	434	603	4 416	55	2 158	9 969	213	2 925	1	4 953	287	196	329	1 287	2 400
Private tourist accommodation	144 072	923	11 59	22 871	3 289	17 714	50 470	556	16 940	3	1 467	1 183	2 590	3 651	3 056	18 200
% distribution																
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Hotels and similar establishments	19.0	8.2	8.5	27.0	16.1	21.5	10.1	28.1	28.8	20.0	7.7	46.9	13.6	7.6	6.0	24.0
Other collective accommodation	14.0	29.3	31.3	11.8	1.4	8.5	14.8	19.9	10.5	20.0	71.2	10.4	6.1	7.6	27.8	8.9
Private tourist accommodation	66.9	62.4	60.2	61.2	82.5	69.5	75.1	52.0	60.7	60.0	21.1	42.7	80.3	84.7	66.1	67.2

1) 2003 data. 2) Estimates based on 2004 total and ratios in 2002. 3) "Type of accommodation not specified" not included in one of the 3 categories but in the total. 4) Preliminary data. 5) For private tourist accommodation the difference between the total of table 3.8 and hotels and other collective accommodation was used.

The type of accommodation chosen is also reflected in the organisation of trips (Table 3.13). In countries where the use of private tourist accommodation is high (e.g. Finland, Spain and France), domestic tourists do not organise their holidays far in advance.

The use of travel agencies to organise a domestic trip was relatively high in Spain (19.2% of total domestic trips, of which 42.9% package holidays), Germany (14.6%, of which 76.5% package holidays), Italy and Austria (about 11% each, but with different shares for package holidays).

Table 3.13 - Domestic holiday trips of 4 nights or more, by organisation of trip, 2004 (1 000)

2004	EU-15	BE	DK ¹	DE	EL ²	ES	FR	IE ¹	IT ³	LU	NL	AT ³	PT	FI	SE	UK
Total	215 638	1 477	1 927	37 388	3 986	25 483	67 217	1 070	27 905	5	6 956	2 768	3 225	4 309	4 622	27 300
Direct reservation	:	1 268	1 727	31 926	3 857	3 930	12 157	839	10 582	3	3 041	2 324	1 722	709	:	10 600
Travel agency	:	36	200	5 462	128	4 901	2 504	64	3 125	0	743	306	200	141	:	2 000
of which: Package holidays	:	2	69	4 178	10	2 103	589	27	11 93	0	38	244	37	85	:	900
No organisation	:	173	0	0	:	16 426	40 029	167	14 107	2	2 804	:	1 303	170	:	:
Unspecified	:	0	0	0	:	226	12 527	0	91	0	368	:	0	3 289	:	:
% distribution																
Total	:	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	100.0
Direct reservation	:	85.8	89.6	85.4	96.8	15.4	18.1	78.4	37.9	60.0	43.7	84.0	53.4	16.5	:	38.8
Travel agency	:	2.4	10.4	14.6	3.2	19.2	3.7	6.0	11.2	0.0	10.7	11.1	6.2	3.3	:	7.3
of which: Package holidays	:	5.6	34.5	76.5	7.8	42.9	23.5	42.2	38.2	0.0	5.1	8.8	18.5	60.3	:	45.0
No organisation	:	11.7	0.0	0.0	:	64.5	59.6	15.6	50.6	40.0	40.3	:	40.4	3.9	:	:
Unspecified	:	0.0	0.0	0.0	:	0.9	18.6	0.0	0.3	0.0	5.3	:	0.0	76.3	:	:

1) 2003 data. 2) Estimates based on 2004 total and ratios in 2002. 3) Preliminary data.

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Table 3.14 shows the seasonal distribution of domestic holiday trips of 4 nights or more. In general, the pattern in each country depends on the local school calendar. Unsurprisingly, the third quarter (July-September), which corresponds to the summer holiday period, accounted for about 50% of total trips on average, peaking in southern European countries (Italy 62.1%, Spain 61.9% and Portugal 59.0%).

In the Netherlands, the United Kingdom and Germany, almost a third of domestic trips were made during spring, while in countries where winter sports are very popular (Austria, France, Finland and Sweden) about 18% to 27% of trips made by domestic tourists were concentrated in the first quarter (January-March). Denmark is the only country where trips made in the fourth quarter (October-December) had a high share (about 37%) of total domestic trips.

Table 3.14 - Domestic holiday trips of 4 nights or more, by seasonality, 2004 (1 000)

2004	EU-15	BE	DK	DE	EL ¹	ES	FR ²	IE ³	IT	LU	NL	AT	PT	FI	SE	UK
Total year	215 637	1 474	1 927	37 388	3 986	25 483	67 217	1 070	27 905	5	7 349	2 769	3 225	4 284	4 621	27 300
First quarter	30 760	97	119	4 923	272	2 803	11 999	122	3 594	1	720	753	344	784	843	3 386
Second quarter	49 559	357	363	10 287	866	4 403	15 481	186	4 498	1	2 224	436	510	992	1 143	7 812
Third quarter	:	838	737	14 163	2 206	15 779	32 191	548	17 327	2	3 424	1 136	1 902	1 728	2 321	:
Fourth quarter	:	182	708	8 015	642	2 498	7 546	214	2 486	1	981	444	469	780	314	:
% distribution																
Total year	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
First quarter	14.6	6.6	6.2	13.2	6.8	11.0	19.3	11.4	12.9	20.0	9.8	27.2	10.7	18.3	18.2	12.4
Second quarter	23.0	24.2	18.8	27.5	21.7	17.3	24.9	17.4	16.1	20.0	30.3	15.7	15.8	23.2	24.7	28.6
Third quarter	:	56.9	38.2	37.9	55.3	61.9	51.7	51.2	62.1	40.0	46.6	41.0	59.0	40.3	50.2	:
Fourth quarter	:	12.3	36.7	21.4	16.1	9.8	4.1	20.0	8.9	20.0	13.3	16.0	14.5	18.2	6.8	:

1) Estimates based on 2004 total and ratios in 2002. 2) Fourth quarter: calculated as difference between quarters 1 to 3 and total from table 3.10. 3) 2003 data..

Table 3.15 shows, for each EU-15 country, the total expenditure on domestic tourism and the average expenditure per trip. Considering the EU-15 as a whole, total expenditure by domestic tourists in 2004 amounted to EUR 59.7 bn, which corresponds to an average expenditure per trip of EUR 402. The country with the highest overall domestic tourism expenditure was Germany (EUR 18 848 million), followed by Italy (EUR 12 402 million) and the United Kingdom (EUR 11 866 million).

On the other hand, Austrian tourists recorded the highest average tourist expenditure per trip (EUR 829.9), followed by German (EUR 504.1), Italian (EUR 444.4) and British tourists (EUR 434.6). The lowest expenditure per trip was recorded by the Dutch (EUR 194.9). This is mainly due to the travel behaviour of the Dutch population (e.g. massive use of private cars, caravans and campers, preference for campsites and other collective accommodation, etc.; see also tables 3.11 and 3.12).

Table 3.15 - Domestic holiday trips of 4 nights or more. Expenditure of resident tourists, 2004

	Domestic tourist expenditure (mic. Euro)	Domestic tourist expenditure per trip (Euro)
EU-15 ¹	59 705.4	402.3
BE ²	438.3	296.5
DK ³	484.0	251.2
DE	18 848.0	504.1
EL ⁴	1 170.3	293.6
ES	7 582.5	297.6
FR	:	:
IE ³	283.5	265.2
IT	12 401.8	444.4
LU	2.0	400.0
NL	1 356.0	194.9
AT	2 298.1	829.9
PT	825.6	256.0
FI	944.0	219.1
SE	1 205.6	260.8
UK	11 865.7	434.6

1) EU-15 excluding FR. 2) Estimate. 3) 2003 data. 4) 2002 data.

3.3. The profile of the outbound tourist

Outbound tourism in the EU-15 accounted for about 44% of total holiday trips of 4 nights or more (Table 3.7) in 2004. In general, outbound holiday trips were longer than domestic trips (Table 3.16). This also depended on the outbound destinations chosen (e.g. within Europe or outside Europe).

On average, 45% of outbound trips lasted 4-7 nights (as against about 61% of domestic trips), 38.0% were stays of 8 to 14 nights (25.2% of domestic trips) and 17.0% lasted 15 nights and more (13.6% of domestic trips).

Table 3.16 - Outbound holiday trips of 4 nights or more by length of stay, 2004 (1 000)

2004	EU-15	BE	DK ¹	DE	EL ²	ES	FR	IE ¹	IT ³	LU	NL	AT ⁴	PT	FI	SE	UK
Total	1 67 771	5 504	3 270	66 559	434	3 295	13 856	2 626	9 232	677	11 519	5 072	939	1 892	4 186	38 600
4-7 nights	75 236	2 238	1 926	25 572	174	1 503	7 478	1 331	5 124	379	4 445	2 546	389	1 264	2 567	18 300
8-14 nights	63 681	2 076	968	29 056	115	922	4 225	971	2 649	197	3 947	1 777	320	456	1 202	14 800
15-28 nights	22 970	920	277	9 775	78	503	1 811	245	1 189	78	2 663	594	147	103	287	4 300
29-91 nights	5 553	254	89	2 029	68	356	335	79	270	23	464	148	83	54	101	1 200
92-365 nights	222	16	10	127	:	11	7	:	:	:	:	7	:	15	29	0
% distribution																
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
4-7 nights	44.9	40.7	58.9	38.4	40.0	45.6	54.0	50.7	55.5	56.0	38.6	50.2	41.4	66.8	61.3	47.4
8-14 nights	38.0	37.7	29.6	43.7	26.4	28.0	30.5	37.0	28.7	29.1	34.3	35.0	34.1	24.1	28.7	38.3
15-28 nights	13.7	16.7	8.5	14.7	17.9	15.3	13.1	9.3	12.9	11.5	23.1	11.7	15.7	5.4	6.9	11.1
29-91 nights	3.3	4.6	2.7	3.0	15.7	10.8	2.4	3.0	2.9	3.4	4.0	2.9	8.8	2.9	2.4	3.1
92-365 nights	0.1	0.3	0.3	0.2	:	0.3	0.1	:	:	:	:	0.1	:	0.8	0.7	0.0

1) 2003 data. 2) Estimates based on 2004 total and ratios in 2002. 3) Preliminary data. 4) Estimates based on 2004 total and ratios in 2001.

In countries where outbound tourism is generally to neighbouring destinations, more than half of total trips made by residents abroad had a duration of less than 7 nights. This was the case for Finland (66.8%), Sweden (61.3%), Denmark (58.9%), Luxembourg (56.0%), Italy (55.5%), France (54.0%), Ireland (50.7%) and Austria (50.2%). On the other hand, the countries where the proportion of long trips (15 nights or more) was highest were Greece (33.6%), the Netherlands (27.1%), Spain (26.4%), Portugal (24.5%) and Belgium (21.6%). For these countries, the length of stay also depended on the destinations chosen and, to some extent, on the level of "ethnic tourism" (i.e. foreigners living in the country who go back to their native countries during the holiday period).

In contrast with domestic trips, the main mode of transport used was air transport. In 2004, about 56% of total trips abroad in the EU-15 were made by plane, while 38.3% were by road (Table 3.17).

Again, the choice depended in general on the destination chosen and also the pattern of outbound holiday behaviour. For example, the use of air transport was higher in northern European countries (Ireland 87.2%, the United Kingdom 82.4%, Finland 72.8%, Sweden 70.8%), where tourists usually opted for destinations in the south of Europe or outside Europe. In Benelux, on the other hand, more than 56% of holiday trips abroad were made by road (often with caravan and camper). As regards other transport modes, rail transport had a relatively important share in France (5.0% of total outbound trips as against 2.9% on average in the EU-15), Italy (4.5%), Luxembourg (4.4%) and Belgium (4.1%), while water transport in Finland (13.3% as against 1.7% on average in EU-15), Italy (7.4%), Greece (7.1%) and Ireland (6.7%) stood out.

Table 3.17 - Outbound holiday trips of 4 nights or more by mode of transport, 2004 (1 000)

2004	EU-15	BE	DK ¹	DE	EL ²	ES	FR	IE ¹	IT ³	LU	NL	AT ²	PT	FI	SE	UK
Total	1 67 771	5 504	3 269	66 559	434	3 295	13 870	2 626	9 232	677	11 520	5 072	939	1 892	4 184	38 700
Air	94 708	2 078	1 664	28 969	256	2 073	8 578	2 290	5 399	256	4 331	1 974	600	1 378	2 962	31 900
Waterway	2 914	81	93	10	31	134	227	175	679	9	168	34	14	252	117	900
Railway	4 800	227	63	1 880	2	60	700	21	419	30	324	200	4	21	49	800
Road	64 340	3 118	1 449	34 699	146	1 028	4 365	140	2 735	382	6 697	2 863	321	241	1 056	5 100
% distribution																
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Air	56.4	37.8	50.9	43.5	58.9	62.9	61.8	87.2	58.5	37.8	37.6	38.9	63.9	72.8	70.8	82.4
Waterway	1.7	1.5	2.8	:	7.1	4.1	1.6	6.7	7.4	1.3	1.5	0.7	1.5	13.3	2.8	2.3
Railway	2.9	4.1	1.9	2.8	0.5	1.8	5.0	0.8	4.5	4.4	2.8	3.9	0.4	1.1	1.2	2.1
Road	38.3	56.6	44.3	52.1	33.6	31.2	31.5	5.3	29.6	56.4	58.1	56.4	34.2	12.7	25.2	13.2

1) 2003 data. 2) Estimates based on 2004 total and ratios in 2002. 3) Preliminary data.

THE TOURISM BEHAVIOUR OF EUROPEANS

As for the accommodation chosen (Table 3.18), unlike domestic tourists, who preferred private accommodation (Table 3.12), outbound tourists mainly chose hotels. In 2004, in the EU-15 countries about 52% of total outbound trips went to hotels and similar establishments, 35.7% to private tourist accommodation (rented accommodation, second homes, etc.) and 12.3% to other collective accommodation.

Tourists, which showed a much higher preference for hotels than for other accommodation originated in Sweden (70.5%), Finland (69.6%), Austria (61.8%), Portugal (60.4%) and France (56.2%).

The use of private tourist accommodation (rented dwellings, private homes, etc.) during an outbound trip was well above the EU-15 average for tourists from Greece (53.7%), the United Kingdom (49.1%), Luxembourg (42.5%) and Spain (41.0%).

Other collective accommodation (campsites, holiday dwellings, etc.) accounted for relatively high percentages among tourists from the Netherlands (44.6% of total outbound trips), Ireland (28.8%), Denmark (19.4%) and Belgium (18.9%).

Table 3.18 - Outbound holiday trips of 4 nights or more by type of accommodation, 2004 (1 000)

2004	EU-15	BE	DK ¹	DE	EL ²	ES ³	FR	IE ¹	IT	LU	NL	AT	PT	FI	SE	UK
Total	1 67 771	5 505	3 269	66 560	434	3 295	13 864	2 627	9 232	676	11 520	5 072	940	1 892	4 185	38 700
Hotels and similar establishments	87 230	2 611	1 729	35 542	197	1 740	7 792	960	4 698	340	4 552	3 134	568	1 317	2 950	19 100
Other collective accommodation	20 697	1 043	634	7 157	3	328	2 086	756	1 795	49	5 138	478	27	132	471	600
Private tourist accommodation	59 967	1 851	906	23 861	233	1 351	3 986	911	2 739	287	1 830	1 460	345	443	764	19 000
% distribution																
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Hotels and similar establishments	52.0	47.4	52.9	53.4	45.4	52.8	56.2	36.5	50.9	50.3	39.5	61.8	60.4	69.6	70.5	49.4
Other collective accommodation	12.3	18.9	19.4	10.8	0.7	10.0	15.0	28.8	19.4	7.2	44.6	9.4	2.9	7.0	11.3	1.6
Private tourist accommodation	35.7	33.6	27.7	35.8	53.7	41.0	28.8	34.7	29.7	42.5	15.9	28.8	36.7	23.4	18.3	49.1

1) 2003 data. 2) Estimates based on 2004 total and ratios in 2002. 3) For private tourist accommodation estimated data has been used.

Turning to the organisation of trips (Table 3.19), the use of intermediaries increases when Europeans travel abroad. On average, about 43% of total outbound holiday trips in 2004 were organised through a travel agency (of which 76.3% were package holidays) and 41.1% were direct reservations. Travel agents were the main holiday distribution channel in northern Europe (Finland 65.8%, Denmark 54.1%, Sweden 50.3%), Spain and France (51.5% each) and the Netherlands (50.2%). This choice depended on both the holiday destination chosen (e.g. European vs non-European countries) and the holiday behaviour of residents (i.e. preference for organising travel themselves).

More than half of outbound tourists from Belgium, Germany, Greece, Ireland, Luxembourg, Austria and Portugal booked their trips directly. It is interesting to note that Italy and Spain were the countries where more than a fifth of total outbound trips were not organised before departure. This can be explained by the fact that most of these trips were to neighbouring countries (e.g. Slovenia, Austria and France for Italy; Portugal and France for Spain), with which tourists are in general familiar.

Table 3.19 - Outbound holiday trips of 4 nights or more by organisation of trip, 2004 (1 000)

2004	EU-15	BE	DK ¹	DE	EL ²	ES	FR	IE ¹	IT	LU	NL	AT ²	PT	FI	SE	UK
Total	1 67 771	5 504	3 269	66 559	434	3 295	13 856	2 626	9 232	676	11 520	5 072	940	1 892	4 185	38 700
Direct reservation	68 994	3 072	1 500	38 844	303	851	1 887	1 348	2 910	418	2 978	2 559	495	494	1 235	10 100
Travel agency	72 571	2 138	1 769	27 715	130	1 696	7 135	1 220	4 082	185	5 781	1 958	311	1 244	2 107	15 100
of which: Package holidays	55 383	1 447	1 238	24 487	34	888	4 701	735	3 642	85	3 443	1 631	161	1 039	1 752	10 100
No organisation	:	294	0	0	:	727	2 103	58	2 146	:	2 077	:	134	117	762	:
Unspecified	:	0	0	0	:	21	2 731	0	94	:	684	:	0	37	81	:
% distribution																
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Direct reservation	41.1	55.8	45.9	58.4	69.8	25.8	13.6	51.3	31.5	61.8	25.9	50.5	52.7	26.1	29.5	26.1
Travel agency	43.3	38.8	54.1	41.6	30.0	51.5	51.5	46.5	44.2	27.4	50.2	38.6	33.1	65.8	50.3	39.0
of which: Package holidays	76.3	67.7	70.0	88.4	26.2	52.4	65.9	60.2	89.2	45.9	59.6	83.3	51.8	83.5	83.2	66.9
No organisation	:	5.3	0.0	0.0	:	22.1	15.2	2.2	23.2	:	18.0	:	14.3	6.2	18.2	:
Unspecified	:	0.0	0.0	0.0	:	0.6	19.7	0.0	1.0	:	5.9	:	0.0	2.0	1.9	:

1) 2003 data. 2) Estimates based on 2004 data and on ratios in 2002.

Table 3.20 shows the seasonal distribution of outbound holiday trips of 4 nights or more for each EU-15 country. As noted for domestic trips, the different pattern in each country generally depends on the local school calendar. However, in comparison to domestic tourism, outbound tourism was more evenly distributed over the year. Looking at the countries for which data for the third quarter are available, about 41% of all outbound trips were made in the summer season (compared to about 50% of domestic trips).

Table 3.20 - Outbound holiday trips of 4 nights or more by seasonality, 2004 (1 000)

2004	EU-15	BE	DK	DE	EL	ES	FR	IE	IT	LU	NL	AT	PT	FI	SE	UK
Total year	1 67 771	5 505	3 269	66 559	434	3 295	13 856	2 626	9 231	676	11 519	5 072	940	1 892	4 186	38 700
First quarter	28 170	735	603	11 214	53	493	2 370	468	1 734	125	1 869	613	170	373	800	6 550
Second quarter	43 453	1 406	768	16 459	118	583	4 286	790	1 646	154	3 341	1 368	194	521	995	10 824
Third quarter	:	2 739	1 160	23 461	148	1 689	5 187	:	4 566	273	4 474	2 411	425	566	1 639	:
Fourth quarter¹	:	624	738	15 425	115	528	2 013	:	1 285	124	1 835	680	151	432	752	:
% distribution																
Total year	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
First quarter	16.8	13.4	18.4	16.8	12.2	15.0	17.1	17.8	18.8	18.5	16.2	12.1	18.1	19.7	19.1	16.9
Second quarter	25.9	25.5	23.5	24.7	27.2	17.7	30.9	30.1	17.8	22.8	29.0	27.0	20.6	27.5	23.8	28.0
Third quarter	:	49.8	35.5	35.2	34.1	51.3	37.4	:	49.5	40.4	38.8	47.5	45.2	29.9	39.2	:
Fourth quarter	:	11.3	22.6	23.2	26.5	16.0	14.5	:	13.9	18.3	15.9	13.4	16.1	22.8	18.0	:

1) For EL and FR: estimated as difference between first 3 quarters and total of table 3.5.

Looking at the different countries, the third quarter (July-September), in which the summer holidays fall, was the preferred period for travelling abroad particularly in Spain (51.3% of total outbound trips), Belgium (49.8%), Italy (49.5%), Austria (47.5%) and Portugal (45.2%). The countries where autumn accounted for a relatively high share were Greece (26.5%), Germany (23.2%), Finland (22.8%) and Denmark (22.6%), while spring (second quarter) was relatively popular in France (30.9% against 25.9% for the EU-15 as a whole), Ireland (30.1%), the Netherlands (29.0%), the United Kingdom (28.0%), and Greece (27.2%). Finally, outbound trips during winter recorded the highest shares in northern Europe (Finland 19.7% and Sweden 19.1%), where climatic conditions encourage residents to travel towards warmer destinations.

Table 3.21 shows the total expenditure on outbound trips of 4 nights or more and the average expenditure per trip abroad. In this context, total expenditure includes all expenses for an outbound trip, even if they occurred in the tourist's country of origin (e.g. a flight to a foreign country, which was bought and paid in a travel agency in the country of origin). As with domestic tourism, the countries with the highest outbound tourism expenditure were Germany (EUR 63 322 million) and the United Kingdom (EUR 55 748 million). On the other hand, tourists from Luxembourg had the highest average tourist expenditure per outbound trip (EUR 2 326 as against an EU-15 average of EUR 1 058), followed by Austrian tourists (EUR 1 493) and Finnish tourists (EUR 990).

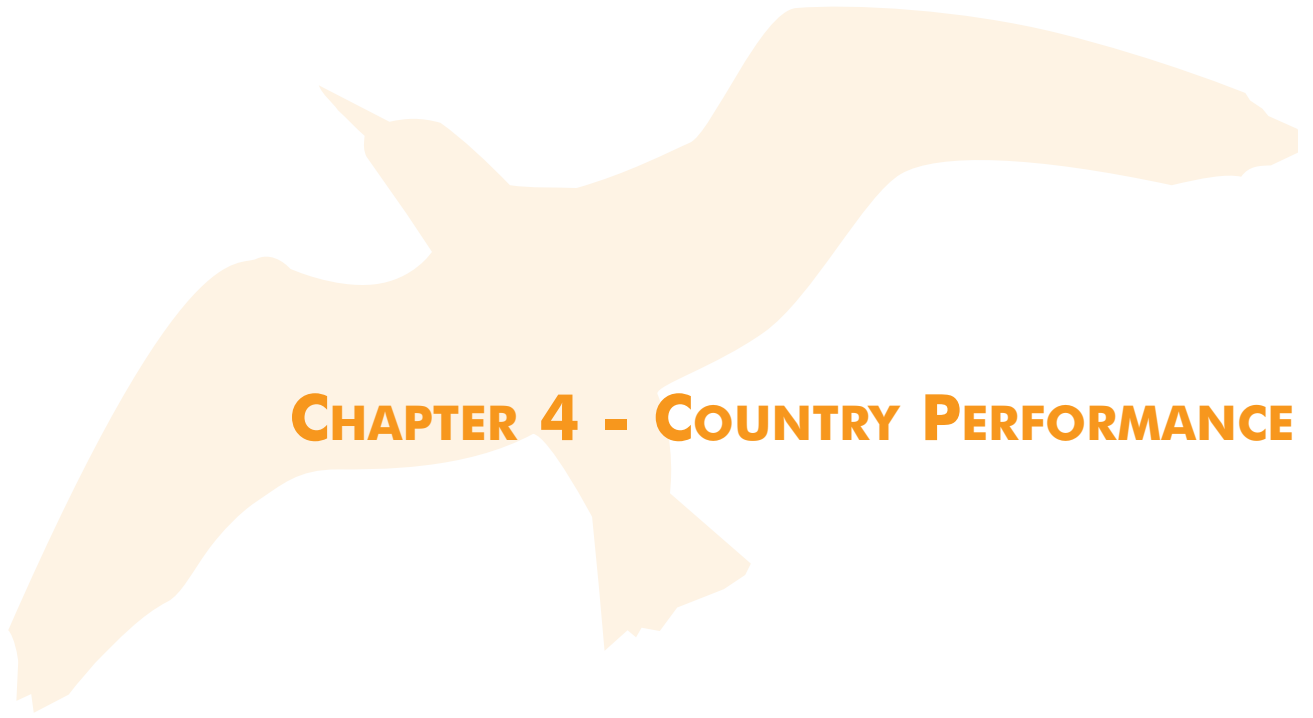
The countries with the lowest expenditure per trip abroad were Spain (EUR 791), the Netherlands (EUR 734), and Belgium (EUR 615). As mentioned for domestic tourism, this is on account of the destinations chosen and the travel behaviour of residents (e.g. means of transport used, accommodation chosen, etc.).

However, all the other quarters were more important for outbound trips than for domestic trips. The fourth quarter (October-December) recorded about 18% (15% for domestic trips), the second quarter (April-June) about 26% (23% for domestic trips) and the winter season about 17% (15% for domestic trips). In general, this was related to the different seasonality of the holiday destinations around the world.

Table 3.21 - Outbound holiday trips of 4 nights or more. Expenditure of resident tourists, 2004

	Outbound tourist expenditure (mio. Euro)	Outbound tourist expenditure per trip (Euro)
EU-15 ¹	162 747.0	1 057.5
BE ²	3 385.9	615.1
DK ³	2 696.0	824.7
DE	63 322.0	951.4
EL ²	360.8	831.3
ES	2 607.4	791.3
FR	:	:
IE ³	2 396.7	912.7
IT	7 948.0	860.9
LU	1 572.4	2 326.0
NL	8 455.0	734.0
AT	7 571.3	1 492.8
PT	753.4	801.5
FI	1 873.0	990.0
SE	4 056.9	969.4
UK	55 748.2	1 440.5

1) EU-15 excluding FR. 2) 2002 data. 3) 2003 data.



CHAPTER 4 - COUNTRY PERFORMANCE

4. COUNTRY PERFORMANCE

4.1. Introduction

In this chapter, the recent tourism performance (1995-2004) of each country in the EU-15 is discussed. This starts with a set of indicators describing the international attractiveness of each country within the EU-15 area, its dependency on intra-area (EU-15) demand, the level of market internationalisation (in terms of demand and receipts) and the economic contribution of tourism to the local economy.

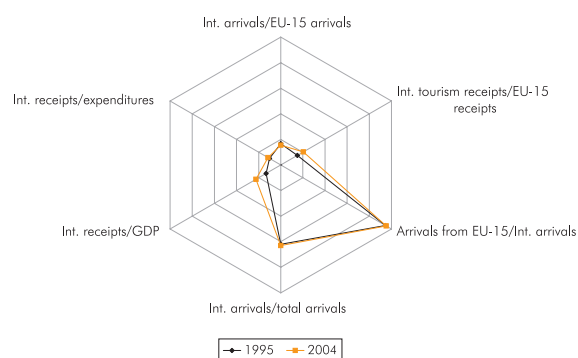
For this first edition of the Panorama, the analysis focuses on the EU-15 countries because a significant amount of data are still missing for the new Member States, EFTA and candidate countries.

Specifically, the six selected indicators used are:

1. The share of international arrivals in collective accommodation in a country as a proportion of total international arrivals in the EU-15 area (percentage values), which measures the attractiveness of the country within the area as a whole.
2. The share of international tourism receipts in the country as a proportion of total international receipts in the EU-15 area (percentage values), which shows how much the country gains relatively from international tourism compared with the area as a whole.
3. The share of tourist arrivals from the EU-15 area as a proportion of total international arrivals in the country (percentage values). This indicator measures the level of concentration of the international tourism market in each country and gives information on the level of "dependency" on intra-area (EU-15) tourism demand.
4. The proportion of international tourism arrivals as a share of total tourism arrivals (in collective accommodation) in the country (percentage values), which measures the level of internationalisation of the local tourism market.
5. The proportion of international tourism receipts as a share of GDP (percentage values), which measures the contribution of international tourism to the country's economy and welfare.
6. The ratio of international tourism receipts to expenditure, which measures the tourism balance. It compares the revenues generated by foreign tourists in the country with expenditure by residents abroad. The more receipts outweigh expenditure, the more positive the tourism balance and the greater the gain from international tourism. On the other hand, the more expenditure exceeds receipts, the more negative the tourism balance and the greater the loss due to international tourism.

A graphic tool called a 'spider plot' was used in order to summarise each country's overall tourism performance in 1995 and 2004. Normalised values for each indicator are each shown as a point along a separate axis. The hexagon obtained by linking the six points on the six axes by a line represents the country profile. The normalised values (0-1) for each indicator, representing the vertices of the hexagon, were calculated by taking the maximum value for the indicator among the EU-15 countries and dividing each country's data by that value.

For example, the country with the highest share of international arrivals as a proportion of total international arrivals in the EU-15 area was determined for each year (e.g. France). Then, the data for all other countries were divided by this value in order to obtain the normalised values. The following graph shows an example of a spider plot.



The strength of this tool is that it provides a dynamic presentation of the set of indicators together in one graph for the two years considered. It depicts simultaneously the variations in each indicator and the evolution of a country's performance in a very comprehensive and user-friendly way.

In addition, when the spider plots of different countries are compared, some common patterns can be isolated and discussed and therefore clusters of similar countries identified.

COUNTRY PERFORMANCE

4.2. The dynamics 1995-2004

The following table summarises the dynamics that characterised the EU-15 countries in the last nine years, according to the six indicators defined in the previous paragraph.

Tab. 4.1. Tourism performances in the EU-15 countries, 1995-2004

Dynamics 1995-2004	BE	DK	DE	EL	ES	FR	IE	IT	LU	NL	AT	PT	FI	SE	UK
Share of international arrivals in the country as a proportion of total int. arrivals in the EU-15 ¹	-	-	+	-	++	-	=	-	=	+	-	-	=	=	-
Share of international tourism receipts in the country as a proportion of total int. receipts in the EU-15 ²	+	=	-	++	++	-	+	-	+	=	-	+	-	+	-
Share of arrivals from the EU-15 as a proportion of total international arrivals in the country ^{1,3}	+	-	=	-	+	=	=	-	+	-	-	-	-	+	+
Proportion of international tourism compared with total tourism in the country ¹	+	-	+	+	+	-	+	+	-	-	-	-	=	+	=
Proportion of international tourism receipts in GDP ²	+	+	+	++	=	+	-	-	++	+	-	+	-	+	-
Ratio of international tourism receipts to expenditures ²	+	-	+	++	-	-	-	-	+	+	+	+	=	=	-

1) For BE, EL, IT, PT and UK 2003 data for 2004. For DK 1996 data for 1995, for IE 1998 data for 1995 and estimated data for 2004, for SE estimated data for 1995.

2) In 1995: BE and LU calculated from BLEU for receipts and expenditures. 3) For LU: 1996 data for 1995 for arrivals from EU-15.

Note: for each country, the table compares the performance of each indicator between 1995 and 2004. The values corresponding to each symbol (++, +, =, -, --) are as follows:

++:	$x \geq +2.1\%$
+:	$+2.1\% > x \geq +0.2\%$
=:	$+0.2\% > x \geq -0.2\%$
-:	$-0.2\% > x \geq -2.1\%$
--:	$-2.1\% > x$

where $x = (\text{value 2004} - \text{value 1995})$

At first glance, Spain seems to have had the best performance in the EU-15 area over the period considered, while Austria and Italy have had difficulties.

Comparing the evolution of each indicator in all countries, Spain is the country with the highest increase in attractiveness within the EU-15 tourism market from 1995 to 2004 and, together with Greece, the one that gained the most from international tourism within the EU-15 area.

Belgium, Spain, Luxembourg, Sweden and the United Kingdom recorded a growth in arrivals from the EU-15 area as a proportion of total international arrivals. This indicates an increase in the "dependency" on EU-15 tourism demand over the same period. Belgium, Spain and Sweden also recorded an increase in the share of international tourism as a proportion of total tourism in the country, along with Germany, Greece, Ireland and Italy.

From the economic point of view, the contribution of international tourism to GDP rose considerably in Greece and Luxembourg from 1995 to 2004. Greece also showed the most significant improvement in the tourism balance (receipts vs expenditure) of all countries in the same period.

However, a deeper analysis of each indicator and the relationships between the indicators is needed for each country in order to understand the real evolution of its tourism. In the following section, a set of country profiles is presented in order to analyse the evolution of the indicators from 1995 to 2004 and to examine the overall tourism performance of each country, taking into account the characteristics of the local tourism market.

The following table summarises the results of this analysis, grouping the EU-15 countries according to the information derived from the spider plots and their role in the tourism market.

Tab. 4.2. Classification of EU-15 countries

Mainly origin countries	Origin-destination countries	Mainly destination countries
Denmark	Belgium	Greece
Germany	France	Spain
The Netherlands	Ireland	Luxembourg
Finland	Italy	Austria
Sweden	United Kingdom	Portugal

Countries that are mainly sources of international tourism are those where outbound tourism (i.e. the number of resident tourists travelling abroad or the number of trips they make abroad) exceeds inbound tourism (i.e. the number of international tourists travelling to the country or the number of trips they make to the country) and/or where international tourism expenditure exceed receipts.

On the other hand, countries that are mainly destinations of international tourism are those whose inbound tourism exceeds outbound tourism and/or where international tourism receipts exceed expenditure.

Source/destination countries are those that are both generators and destinations of international tourism. They can be divided into two main groups: countries that are mainly a source and destination of leisure tourism (France, Italy, Ireland) and countries that are mainly a source and destination for specific market segments. For example, Belgium is mainly an important destination for business tourism (Brussels) and a source of leisure tourism abroad. As for the United Kingdom, it is one of the most important countries of origin for both leisure and business tourism and also one of the most popular destinations for urban tourism, business tourism, language tours, etc.

In some cases, source/destination countries may be countries in transition, i.e. countries that were sources or destinations of international tourism flows but have seen a change in tourism behaviour in recent years. For example, Italy is acknowledged as one of the most important tourist destinations in the world. In the past few years, however, it has seen a growth in outbound tourism and hence a decrease in the ratio of tourist receipts to expenditure, which means that expenditure by Italian tourists abroad is growing much more than international receipts. This trend is making travel behaviour in Italy more similar to that of other countries that are traditionally generators of international tourism (e.g. Germany).

COUNTRY PERFORMANCE

4.3. Country profiles

4.3.1. Belgium

Belgium with its capital Brussels represents one of the most important business tourism destinations in Europe and is a holiday destination for people from neighbouring countries (mainly the Netherlands). However, it is also a country that generates a steady volume of outbound tourism flows. This situation has not substantially changed over the last nine years.

Table 4.3.1 - Main tourism indicators: Belgium in 1995 and 2004

Indicators	1995	2004
- Share of international arrivals in the country as a proportion of total international arrivals in the EU-15 ¹	3.5%	3.2%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-15 ²	2.6%	3.6%
- Share of arrivals from the EU-15 as a proportion of total international arrivals in the country ¹	81.7%	82.2%
- Proportion of international tourism compared with total tourism in the country ¹	59.5%	60.4%
- Proportion of international tourism receipts in GDP ²	1.5%	2.6%
- Ratio of international tourism receipts to expenditures ²	0.58	0.66

1) 2003 data for 2004. 2) 1995 data calculated from BLEU for receipts and expenditures.

Comparing 1995 and 2004, the attractiveness of the country within the EU-15 area slightly decreased in terms of tourism flows (international arrivals falling from 3.5% to 3.2%), although it increased in terms of turnover (international receipts rising from 2.6% to 3.6%). This boosted the profit margins of the incoming tourism industry in comparison to other EU-15 countries. This growth was due to the high proportion of inbound tourism for business purposes, which usually yields a higher expenditure per arrival than leisure tourism.

The share of international tourism as a proportion of total tourism in the country grew from 1995 to 2004 (from 59.5% to 60.4%), but the proportion of arrivals from the EU-15 area compared with total international arrivals was still very high (increasing from 81.7% to 82.2%). This highlights the strong dependence on intra-area tourism.

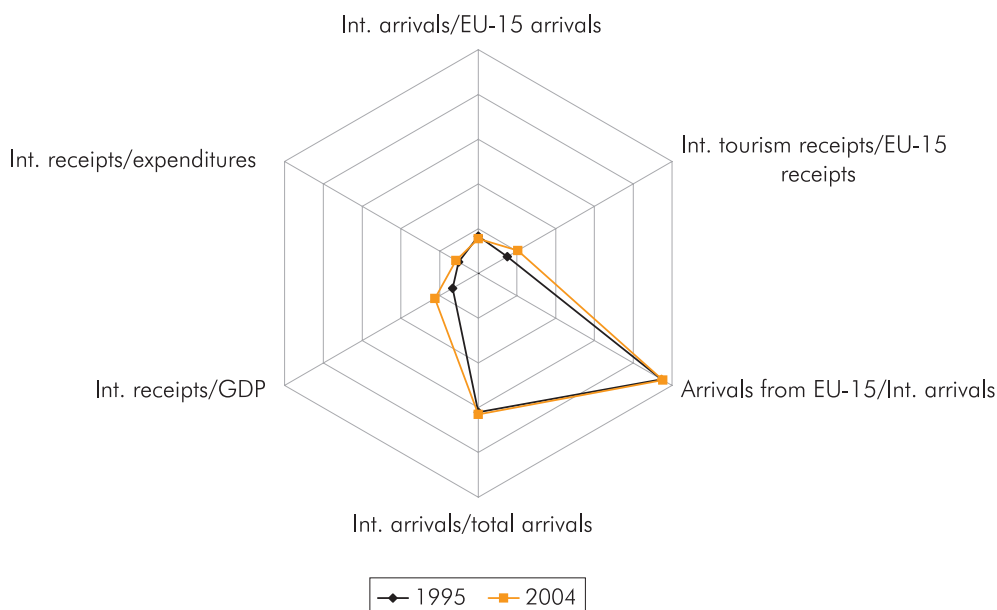
In particular, about one third of arrivals were from the Netherlands and another 20% from the United Kingdom.

The contribution of tourism to the country's GDP grew (from 1.5% to 2.6%) at about the same rate as international tourism (about +0.9 percentage points from 1995 to 2004).

The ratio of international tourism receipts to expenditure, which measures the tourism balance, slightly increased over the same period. Receipts represented 66% of expenditure in 2004 as against 58% in 1995. This shows that inbound tourism was increasing, even though outbound tourism flows continued to dominate.

The following spider plot summarises the overall tourism performance of Belgium between 1995 and 2004 according to the six indicators discussed above.

Figure 4.3.1 - Evolution of the global tourism performance of Belgium in 1995 and 2004



4.3.2. Denmark

Denmark is more a generator of tourism flows, both at home and abroad, than an international tourism destination. This trend has strengthened over the last nine years.

Table 4.3.2 - Main tourism indicators: Denmark in 1995 and 2004

Indicators	1995	2004
- Share of international arrivals in the country as a proportion of total international arrivals in the EU-15 ¹	1.3%	1.0%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-15	2.2%	2.2%
- Share of arrivals from the EU-15 as a proportion of total international arrivals in the country ¹	67.7%	61.3%
- Proportion of international tourism compared with total tourism in the country ¹	42.1%	37.7%
- Proportion of international tourism receipts in GDP	2.0%	2.3%
- Ratio of international tourism receipts to expenditures	0.84	0.78

1) 1996 data for 1995.

Comparing 1995 and 2004, the attractiveness of the country within the EU-15 decreased slightly in terms of tourism flows (arrivals falling from 1.3% to 1.0%) and remained unchanged in terms of turnover (receipts: 2.2%). However, the relative share of receipts was higher than that of flows (more or less double). This means that the profit margins on incoming tourism grew more than the volume of incoming tourism over the period analysed.

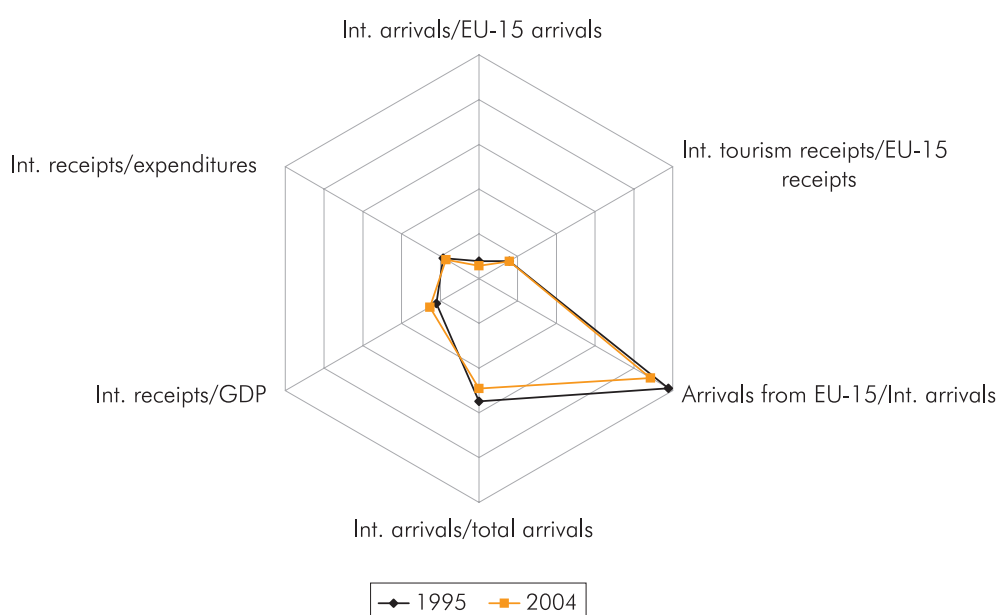
The share of arrivals from the EU-15 as a proportion of total international arrivals in the country decreased from 67.7% to 61.3%, probably due to both a decline in international demand in general (from 42.1% to 37.7% of total tourism flows) and increased demand from countries outside the EU-15.

Although the share of international tourism declined, the contribution of tourism from abroad to the country's GDP grew (from 2.0% to 2.3% in terms of receipts) due to increased expenditure by international tourists in Denmark.

In contrast, the ratio of international tourism receipts to expenditure, which measures the tourism balance, fell. In 1995, expenditure by Danish tourists abroad exceeded international tourism receipts by 19%, and this gap increased to 28% by 2004, pointing to a steady growth in outbound tourism from the country, exceeding that of inbound tourism.

The spider plot summarises the overall tourism performance of Denmark in 1995 and 2004 according to the six indicators discussed above.

Figure 4.3.2 - Evolution of the global tourism performance of Denmark in 1995 and 2004



COUNTRY PERFORMANCE

4.3.3. Germany

Germany is one of the main countries of origin for international tourism, but its position has weakened over the last nine years because of the domestic economic crisis, which has reduced outbound flows.

Table 4.3.3 - Main tourism indicators: Germany in 1995 and 2004

Indicators	1995	2004
- Share of international arrivals in the country as a proportion of total international arrivals in the EU-15	9.2%	9.7%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-15	11.0%	10.8%
- Share of arrivals from the EU-15 as a proportion of total international arrivals in the country	56.6%	56.5%
- Proportion of international tourism compared with total tourism in the country	16.1%	17.3%
- Proportion of international tourism receipts in GDP	0.7%	1.0%
- Ratio of international tourism receipts to expenditures	0.30	0.39

Comparing 1995 and 2004, the attractiveness of the country within the EU-15 slightly increased in terms of tourism flows (arrivals rising from 9.2% to 9.7%). On the other hand, turnover showed a small reduction (receipts falling from 11.0% to 10.8%). However, the relative share of receipts was higher than that of flows (10.8% vs 9.7% in 2004). This means that the profit margin on incoming tourism was higher than the volume of incoming tourism.

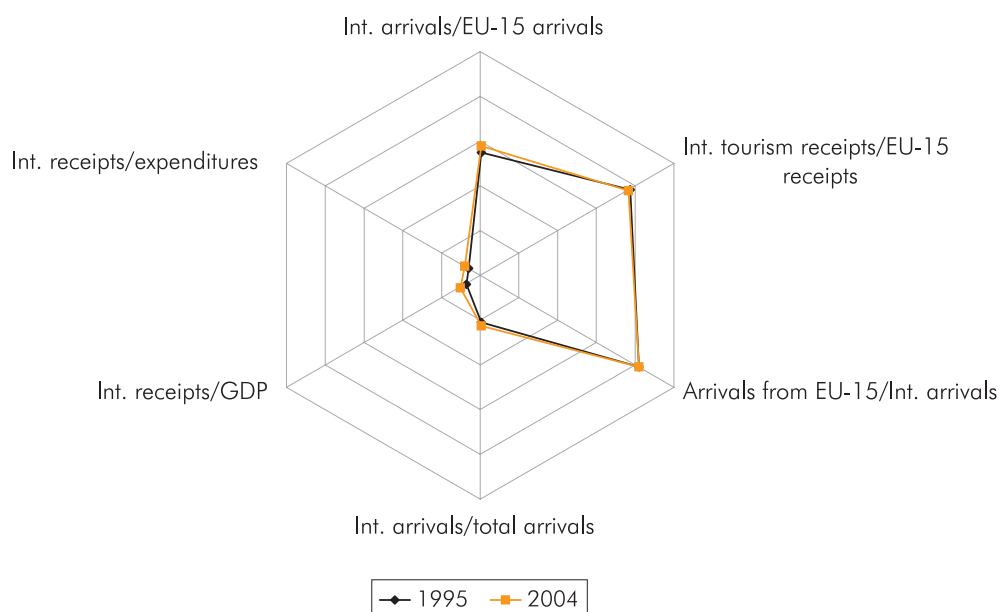
The share of arrivals from the EU-15 area as a proportion of total international arrivals remained fairly stable, while total international arrivals on total arrivals in the country grew over the same period (from 16.1 % to 17.3%). This highlights a change in inbound tourism flows, with an increase in flows from countries outside the EU-15.

As with arrivals, the contribution of international tourism to the country's GDP also grew (from 0.7% to 1.0%). However, it was still very low compared to other EU-15 countries. That confirms that the impact of tourism on the country's economy is still rather limited.

The ratio of international tourism receipts to expenditure, which measures the tourism balance, increased. International tourism expenditure exceeded receipts by a factor of 3.3 in 1995, but this fell to 2.6 in 2004, confirming once again the decline in outbound tourism and the slight increase in inbound demand.

The spider plot summarises the overall tourism performance of Germany in 1995 and 2004 according to the six indicators discussed above.

Figure 4.3.3 - Evolution of the global tourism performance of Germany in 1995 and 2004



4.3.4. Greece

Greece is one of the most popular tourism destinations in Europe, and this trend, especially in terms of economic performance, has strengthened over the last nine years.

Table 4.3.4 - Main tourism indicators: Greece in 1995 and 2004

Indicators	1995	2004
- Share of international arrivals in the country as a proportion of total international arrivals in the EU-15 ¹	3.8%	3.3%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-15	2.5%	5.0%
- Share of arrivals from the EU-15 as a proportion of total international arrivals in the country ¹	74.4%	70.3%
- Proportion of international tourism compared with total tourism in the country ¹	53.7%	54.1%
- Proportion of international tourism receipts in GDP	3.5%	6.2%
- Ratio of international tourism receipts to expenditures	3.11	4.48

¹) 2003 data for 2004.

Comparing 1995 and 2004, the attractiveness of the country within the EU-15 area decreased slightly in terms of tourism flows (arrivals falling from 3.8% to 3.3%), although the share of turnover doubled over the same period (receipts rising from 2.5% to 5.0%). This means that the profit margin on incoming tourism grew more than the volume of incoming tourism over the period analysed.

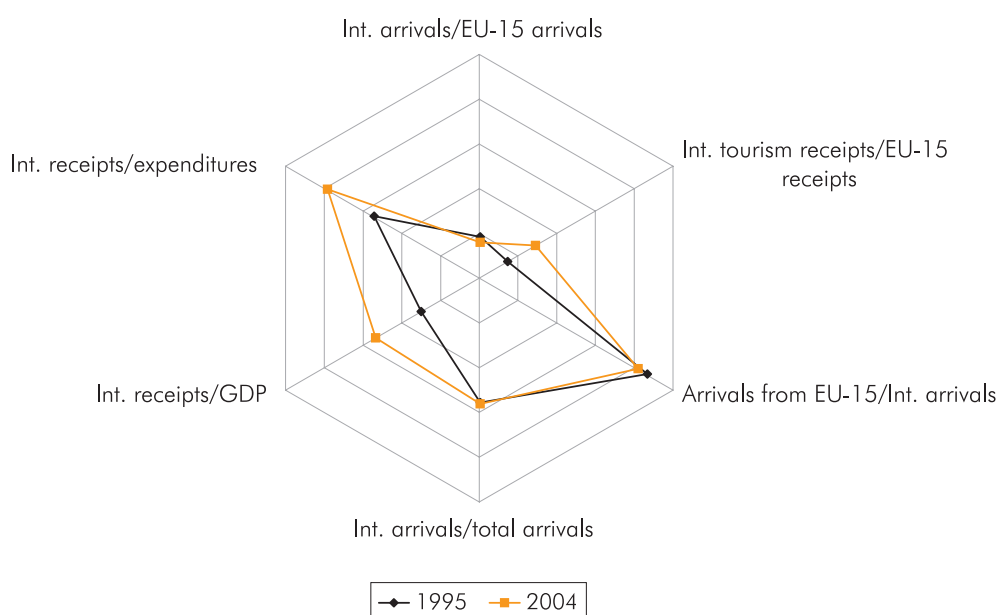
The share of arrivals from the EU-15 as a proportion of total international arrivals declined from 1995 to 2004 (from 74.4% to 70.3%). Given the increase in international demand for the country over the same period (from 53.7% to 54.1% of total tourism flows), this indicates increased demand from countries outside the EU-15.

While the proportion of international tourism grew slightly, the contribution of tourism to the country's GDP rose strongly, almost doubling over the nine years (from 3.5% in 1995 to 6.2% in 2004). This highlights once again the importance of the tourism industry to the country's economy.

The ratio of international tourism receipts to expenditure, which measures the tourism balance, significantly increased as well. Receipts exceeded expenditure by 3.1 times in 1995 and by almost 4.5 in 2004. This confirms the important role of inbound tourism in the national economy.

The spider plot summarises the overall tourism performance of Greece in 1995 and 2004 according to the six indicators discussed above.

Figure 4.3.4 - Evolution of the global tourism performance of Greece in 1995 and 2004



COUNTRY PERFORMANCE

4.3.5. Spain

Spain is one of the main destinations in the world and is the best performer of the EU-15, even if some critical points can be identified, looking at the indicators below. It is also growing as a country of origin for international tourism. Outbound tourism flows show an interesting trend, fuelled by the country's economic prosperity.

Table 4.3.5 - Main tourism indicators: Spain in 1995 and 2004

Indicators	1995	2004
- Share of international arrivals in the country as a proportion of total international arrivals in the EU-15	10.8%	17.5%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-15	15.5%	17.7%
- Share of arrivals from the EU-15 as a proportion of total international arrivals in the country	79.6%	81.3%
- Proportion of international tourism compared with total tourism in the country	42.0%	43.4%
- Proportion of international tourism receipts in GDP	4.4%	4.3%
- Ratio of international tourism receipts to expenditures	5.69	3.72

Comparing 1995 and 2004, the attractiveness of the country within the EU-15 area increased strongly in terms of both tourism flows (arrivals rising from 10.8% to 17.5%) and turnover (receipts increasing from 15.5% to 17.7%). However, the growth in receipts was lower than that of flows (+2.2 vs +6.7 percentage points). That means that in comparison to other EU-15 countries, the revenues from incoming tourism grew more slowly than the volume of incoming tourism.

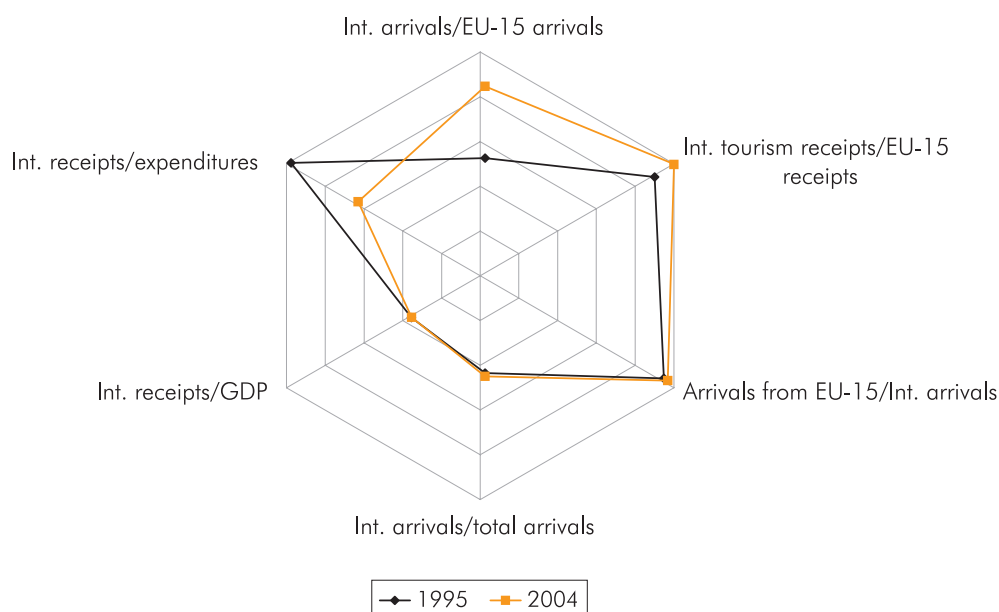
The share of arrivals from the EU-15 as a proportion of total international arrivals in the country increased (from 79.6% to 81.3%). It grew more than international demand for the country (from 42.0% to 43.4%). This confirms the strong concentration of arrivals from EU-15 countries in comparison to other areas of origin.

Although incoming tourism increased, the contribution of tourism to the country's GDP remained virtually stable. This means there was a reduction in profit margins for the local tourism industry compared to other sectors.

Although still very positive, the tourism balance decreased significantly over the last nine years. Receipts exceeded expenditure by almost 5.7 times in 1995, but this factor went down to about 3.7 in 2004. The reason is that expenditure by Spanish tourists abroad has grown more than international tourism receipts. If the trend remains unchanged (reduction of average expenditure per international arrival vs increase in outbound tourism), there is the risk of a steady erosion in the tourism balance over the coming years.

The spider plot summarises the overall tourism performance of Spain in 1995 and 2004 according to the six indicators discussed above.

Figure 4.3.5 - Evolution of the global tourism performance of Spain in 1995 and 2004



4.3.6. France

Along with Spain, France is one of the main tourism destinations in the world. It is also one of the main generators of tourism, above all within the country itself but also abroad. This trend has remained relatively unchanged over the last nine years.

Table 4.3.6 - Main tourism indicators: France in 1995 and 2004

Indicators	1995	2004
- Share of international arrivals in the country as a proportion of total international arrivals in the EU-15	20.8%	19.6%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-15	16.8%	16.0%
- Share of arrivals from the EU-15 as a proportion of total international arrivals in the country	72.2%	72.3%
- Proportion of international tourism compared with total tourism in the country	34.4%	33.9%
- Proportion of international tourism receipts in GDP	1.8%	2.0%
- Ratio of international tourism receipts to expenditures	1.69	1.43

The attractiveness of the country within the EU-15 area decreased slightly in terms of tourism flows from 1995 to 2004 (arrivals falling from 20.8% to 19.6%). The share of turnover for the EU-15 as a whole also decreased (receipts falling from 16.8% to 16.0%), but at a lower rate than flows. The fact that the share of receipts was lower than that of arrivals (16.0% as against 19.6% in 2004) implies that the country earned less from incoming tourism compared to other EU-15 countries over the period analysed.

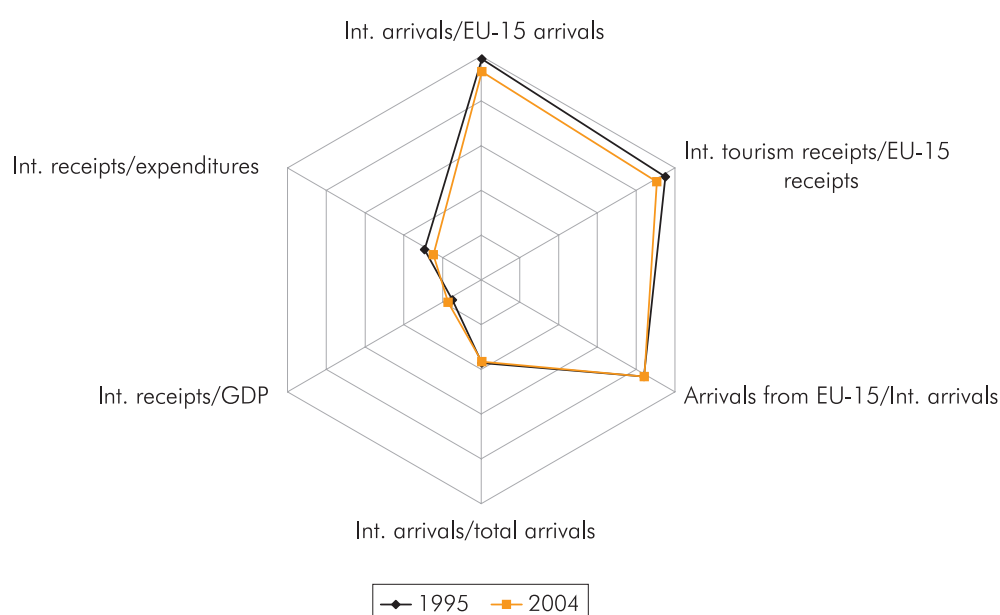
Although France is the most popular tourism destination in the world, the share of international tourism as a proportion of total tourism in the country is low compared with Greece or Spain because of the high proportion of domestic tourism. In addition, while the share of international tourism slightly declined (from 34.4% to 33.9%), the proportion of arrivals from the EU-15 compared with total international arrivals remained stable at a high level (72.3%). This confirms the strong dependence on tourism from the EU-15 area.

Although the proportion of international arrivals decreased slightly along with international receipts, the contribution of tourism to the country's GDP increased (from 1.8% to 2.0%). That indicates that the tourism industry is gaining importance within the country's economy compared to other economic sectors.

The ratio of international tourism receipts to expenditure, which measures the tourism balance, decreased from 1.7 in 1995 to 1.4 in 2004. The reason is that expenditure by French tourists abroad grew much more than international receipts.

The spider plot summarises the overall tourism performance of France in 1995 and 2004 according to the six indicators discussed above.

Figure 4.3.6 - Evolution of the global tourism performance of France in 1995 and 2004



COUNTRY PERFORMANCE

4.3.7. Ireland

Ireland is both a country of origin for international tourism and a destination. In particular, it has one of the highest outbound tourism rates in Europe, along with the Netherlands. Even if lower in absolute terms, outbound tourism has grown faster than inbound tourism over the last nine years, stimulated by both the improvement in the economy and the emergence of low-cost carriers.

Table 4.3.7 - Main tourism indicators: Ireland in 1995 and 2004

Indicators	1995	2004
- Share of international arrivals in the country as a proportion of total international arrivals in the EU-15 ¹	2.2%	2.2%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-15	1.3%	1.7%
- Share of arrivals from the EU-15 as a proportion of total international arrivals in the country ¹	72.0%	72.0%
- Proportion of international tourism compared with total tourism in the country ¹	52.7%	55.1%
- Proportion of international tourism receipts in GDP	3.3%	2.3%
- Ratio of international tourism receipts to expenditures	1.09	0.82

1) 1998 data for 1995 and estimated data for 2004.

Comparing 1995 to 2004, the attractiveness of Ireland within the EU-15 area remained stable in terms of tourism flows (arrivals: 2.2%). On the other hand, its share of international receipts increased from 1.3% to 1.7%. This means that average receipts per arrival grew. Consequently, the incoming tourism industry had a good profit margin in comparison to other EU-15 countries.

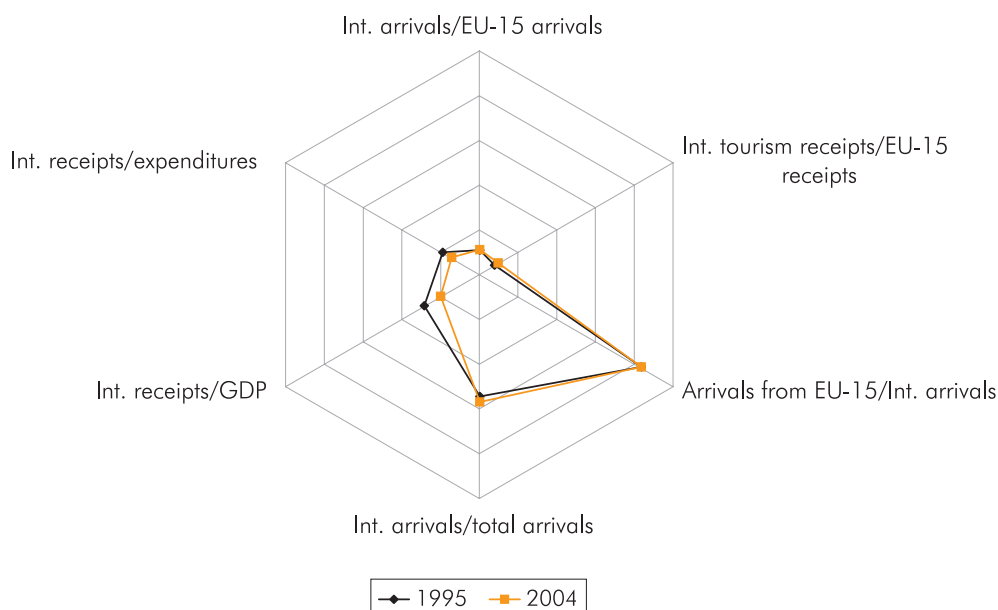
The share of arrivals from the EU-15 as a proportion of total international arrivals in the country remained stable (72.0%), while international demand as a proportion of total tourism in the country rose (from 52.7% to 55.1%). This indicates a growth in demand from either other European or non-European countries, thus reducing the dependence on inbound tourism from the EU-15.

On the other hand, the contribution of international tourism to the country's GDP fell (from 3.3% to 2.3%). Given that the average expenditure per arrival increased, this means that other economic sectors were growing faster than tourism.

The ratio of international tourism receipts to expenditure, which measures the tourism balance, declined over the last nine years. Receipts exceeded expenditure by 1.1 times in 1995, but the ratio decreased to 82% in 2004. This indicates a strong growth in expenditure by Irish tourists abroad in comparison to inbound tourism receipts. About 50% of total trips abroad were visits to friends and relatives, mainly in the United Kingdom.

The spider plot summarises the overall tourism performance of Ireland in 1995 and 2004 according to the six indicators discussed above.

Figure 4.3.7 - Evolution of the global tourism performance of Ireland in 1995 and 2004



4.3.8. Italy

Like Spain and France, Italy is traditionally one of the main destinations for tourism in both Europe and in the world. In recent years, the evolution of tourism indicators shows that the country is losing its position on the international tourism market. However, at the same time it is strengthening its position as one of the most important generators of tourism abroad, following the tourism pattern of western European countries in general.

Table 4.3.8 - Main tourism indicators: Italy in 1995 and 2004

Indicators	1995	2004
- Share of international arrivals in the country as a proportion of total international arrivals in the EU-15 ¹	17.1%	16.9%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-15	16.7%	14.0%
- Share of arrivals from the EU-15 as a proportion of total international arrivals in the country ¹	61.6%	60.1%
- Proportion of international tourism compared with total tourism in the country ¹	41.1%	42.3%
- Proportion of international tourism receipts in GDP	2.5%	2.1%
- Ratio of international tourism receipts to expenditures	2.16	1.74

1) 2003 data for 2004.

Comparing 1995 and 2004, the attractiveness of the country within the EU-15 area decreased slightly in terms of international incoming tourism flows (arrivals falling from 17.1% to 16.9%). The share of turnover recorded an even larger fall (receipts declining from 16.7% to 14.0%), indicating a decrease in the average receipts per arrival and thus a cut in profit margins for the incoming tourism industry in comparison to other EU-15 tourism destinations.

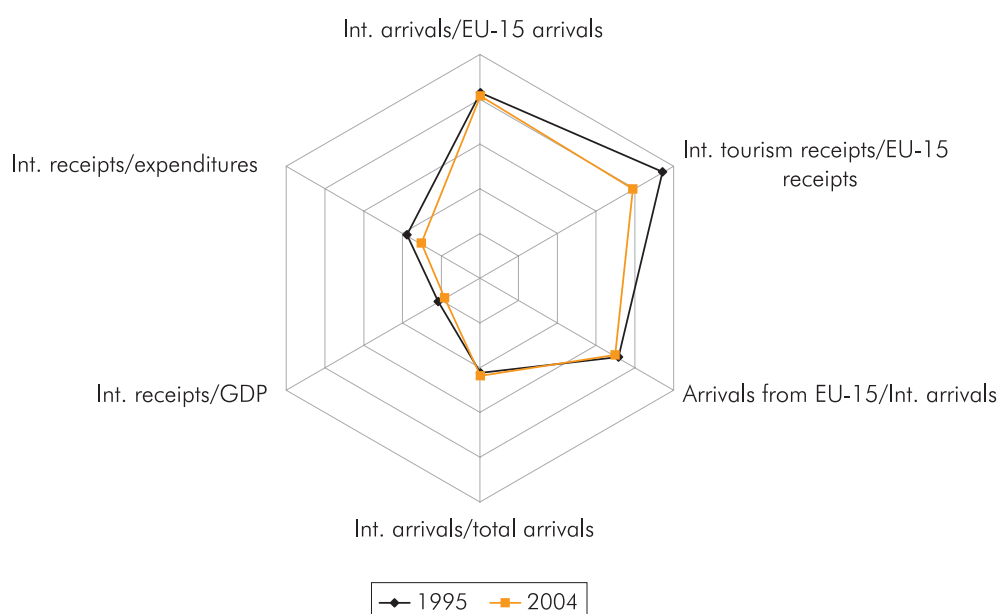
The proportion of arrivals from the EU-15 compared with total international arrivals in the country decreased slightly (from 61.6% to 60.1%), while international demand rose over the same period (from 41.2% to 42.3%). This points to a growth in tourism flows from other European countries or from outside of Europe.

Although international tourism grew, its contribution to the country's GDP decreased (from 2.5% to 2.1%). This was due to a fall in average receipts per international arrival.

The ratio of international tourism receipts to expenditure, which measures the tourism balance, declined. Receipts exceeded expenditure by 1.7 times in 2004, as against 2.2 in 1995. The reason was that expenditure by Italian tourists abroad grew more than international tourism receipts. If the trend remains unchanged (reduction in average expenditure per international arrival vs increase in outbound tourism), there is the risk of a steady erosion in the tourism balance in the coming years.

The spider plot summarises the overall tourism performance of Italy in 1995 and 2004 according to the six indicators discussed above.

Figure 4.3.8 - Evolution of the global tourism performance of Italy in 1995 and 2004



COUNTRY PERFORMANCE

4.3.9. Luxembourg

Like Belgium, Luxembourg is an important destination for business tourism and a generator of international tourism. This situation has not significantly changed over the last nine years.

Table 4.3.9 - Main tourism indicators: Luxembourg in 1995 and 2004

Indicators	1995	2004
- Share of international arrivals in the country as a proportion of total international arrivals in the EU-15	0.5%	0.4%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-15 ¹	0.9%	1.4%
- Share of arrivals from the EU-15 as a proportion of total international arrivals in the country ²	82.9%	86.4%
- Proportion of international tourism compared with total tourism in the country	96.0%	93.9%
- Proportion of international tourism receipts in GDP ¹	8.4%	11.5%
- Ratio of international tourism receipts to expenditures ¹	1.05	1.25

1) 1995 data calculated from BLEU for receipts and expenditures. 2) 1996 data for 1995 for arrivals from EU-15.

Comparing 1995 and 2004, the attractiveness of the country within the EU-15 area was very low and even slightly decreased in terms of tourism flows (international arrivals from 0.5% to 0.4%), although it did increase in terms of turnover (international receipts from 0.9% to 1.4%). This means that profit margins increased for the incoming tourism industry.

The proportion of international tourism compared with total tourism in the country decreased from 1995 to 2004 (from 96.0% to 93.9%), while the share of arrivals from the EU-15 area as a proportion of total international arrivals grew over the same period (from 82.9% to 86.4%). This highlights the strong dependence on intra-area tourism.

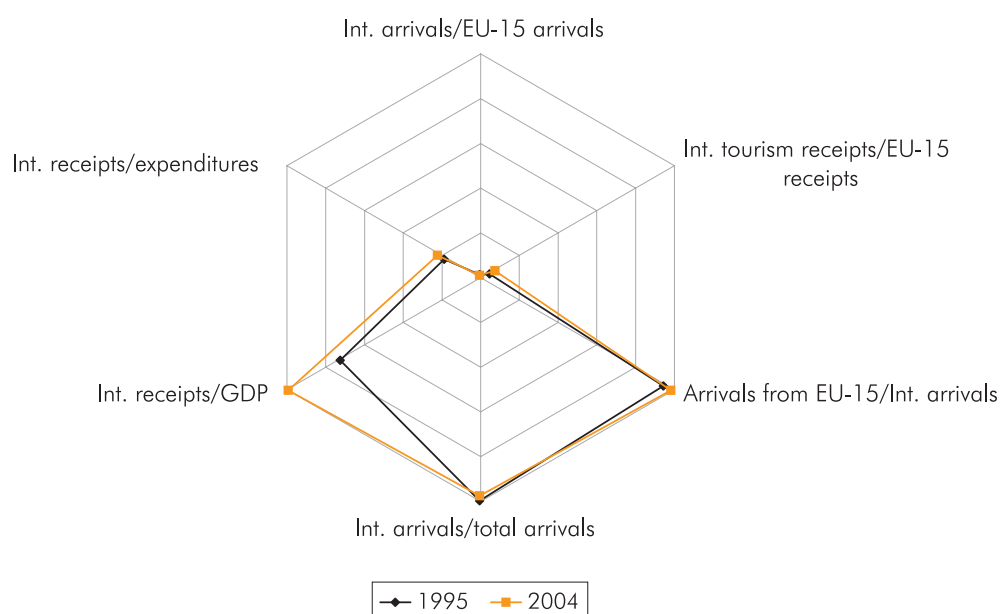
The contribution of tourism to the country's GDP is the highest within the EU-15 area and grew over the nine years (from 8.4% to 11.5%). This is evidence of the importance that business tourism has for the local economy.

In addition, the fact that the contribution of international tourism receipts grew while international tourism as a proportion of total tourism decreased points to an increase in average expenditure per arrival.

The ratio of international tourism receipts to expenditure, which measures the tourism balance, grew slightly over the same period. Receipts exceeded expenditure by 1.1 times in 1995 and by nearly 1.3 times in 2004. This also indicates a stronger growth in expenditure by international business tourists in Luxembourg in comparison to outbound tourism expenditure.

The following spider plot summarises the overall tourism performance of Luxembourg in 1995 and 2004 according to the six indicators discussed above.

Figure 4.3.9 - Evolution of the global tourism performance of Luxembourg in 1995 and 2004



4.3.10. The Netherlands

In general, the Netherlands is a generator of tourism, both within the country and abroad. It has one of the highest outbound tourism rates in Europe, one that has grown constantly over the last nine years.

Table 4.3.10 - Main tourism indicators: Netherlands in 1995 and 2004

Indicators	1995	2004
- Share of international arrivals in the country as a proportion of total international arrivals in the EU-15	4.1%	4.6%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-15	4.0%	4.1%
- Share of arrivals from the EU-15 as a proportion of total international arrivals in the country	73.1%	71.9%
- Proportion of international tourism compared with total tourism in the country	38.1%	37.6%
- Proportion of international tourism receipts in GDP	1.6%	1.7%
- Ratio of international tourism receipts to expenditures	0.56	0.63

Comparing 1995 and 2004, the attractiveness of the country within the EU-15 area increased slightly in terms of tourism flows (arrivals rising from 4.1% to 4.6%) and remained fairly stable in terms of turnover (receipts: 4.1% in 2004 compared to 4.0% in 1995).

The share of arrivals from the EU-15 area as a proportion of total international arrivals in the country declined from 1995 to 2004 (from 73.1% to 71.9%). The proportion of international tourism compared with total tourism in the country fell over the same period (from 38.1% to 37.6%), but at a lower rate. This implies an increase in tourism flows from countries outside the EU-15.

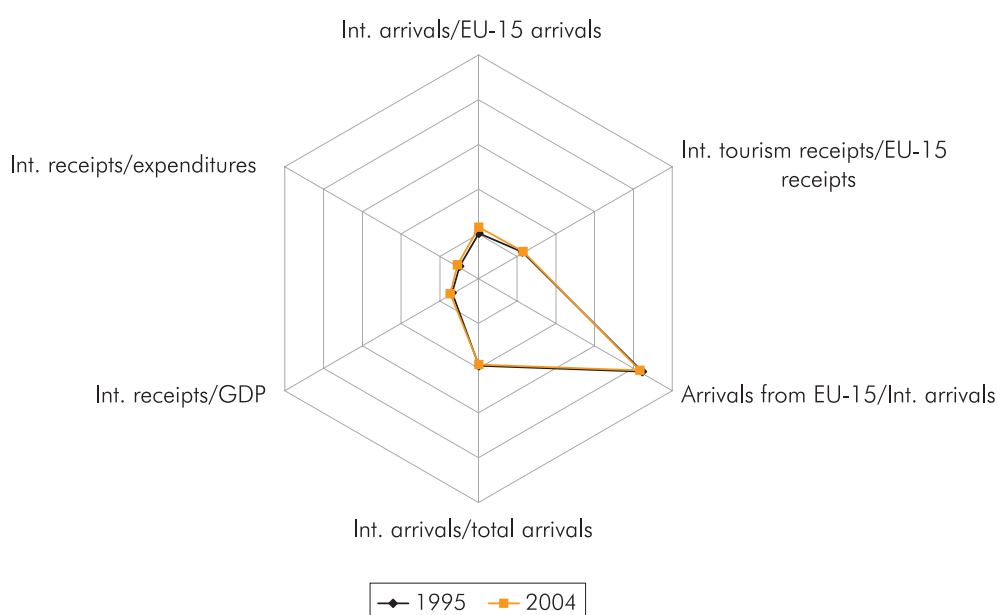
Although international tourism flows decreased, the contribution of international tourism to the country's GDP grew slightly (from 1.6% to 1.7%). This shows that the role of the tourism industry within the local economy improved.

The ratio of international tourism receipts to expenditure, which measures the tourism balance, showed a positive trend. Receipts amounted to 56% of expenditure in 1995 and to 63% in 2004, revealing a slight growth in inbound tourism to the country.

The spider plot summarises the overall tourism performance of the Netherlands in 1995 and 2004 according to the six indicators discussed above.



Figure 4.3.10 - Evolution of the global tourism performance of the Netherlands in 1995 and 2004



COUNTRY PERFORMANCE

4.3.11. Austria

According to the international statistics, Austria is amongst the most important tourism destinations in Europe, but it has also increasingly been a generator of tourism abroad in recent years.

Table 4.3.11 - Main tourism indicators: Austria in 1995 and 2004

Indicators	1995	2004
- Share of international arrivals in the country as a proportion of total international arrivals in the EU-15	8.7%	8.0%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-15	7.9%	6.0%
- Share of arrivals from the EU-15 as a proportion of total international arrivals in the country	79.6%	76.9%
- Proportion of international tourism compared with total tourism in the country	69.9%	67.1%
- Proportion of international tourism receipts in GDP	5.4%	5.2%
- Ratio of international tourism receipts to expenditures	1.24	1.35

Comparing 1995 and 2004, the attractiveness of the country within the EU-15 area decreased both in terms of tourism flows (arrivals falling from 8.7% to 8.0%) and turnover (receipts dropping from 7.9% to 6.0%). Since the decline in international tourism receipts was higher than that of arrivals (1.9 percentage points as against 0.7), Austria is earning less from incoming tourism in comparison to other EU-15 countries.

The share of arrivals from the EU-15 as a proportion of total international arrivals in the country decreased (from 79.6% to 76.9%), similar to the fall in overall international tourism demand (from 69.9% to 67.1%). This implies a persisting high proportion of tourism flows from the EU-15 area between 1995 and 2004.

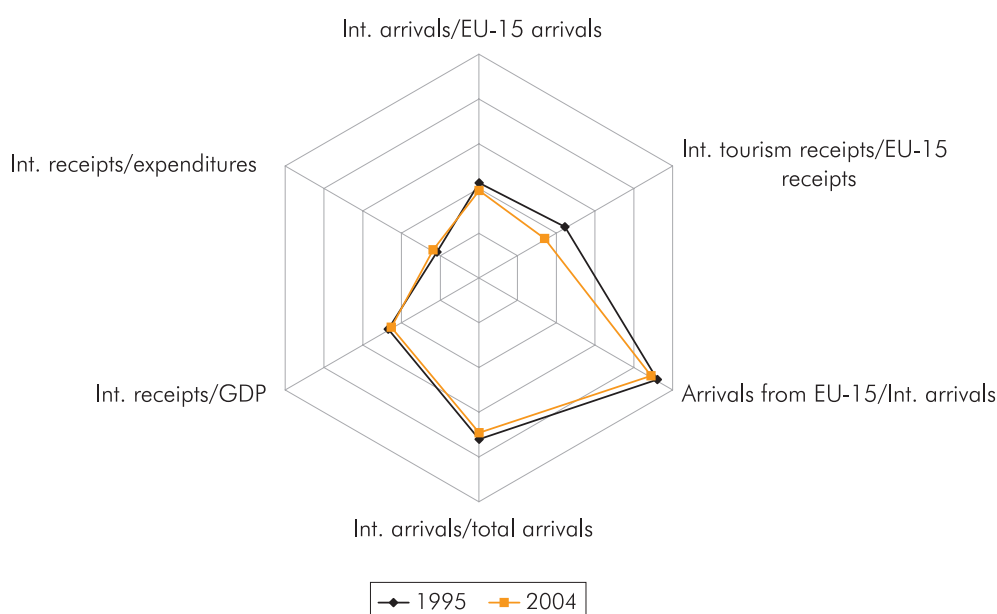
The contribution of international tourism to the country's GDP is high in comparison to other EU-15 countries (5.2% in 2004) and is evidence of the importance that tourism has in the country's economy, as in Greece and Spain.

However, its contribution fell slightly from 1995 to 2004 (from 5.4% to 5.2%), though less rapidly than the international share of tourism (-0.2 vs -2.7 percentage points).

The ratio of international tourism receipts to expenditure, which measures the tourism balance, showed a positive trend over the last nine years. Receipts exceeded expenditure by 1.2 times in 1995 and by nearly 1.4 in 2004. That means that expenditure by international tourists in Austria grew at a higher rate than expenditure by Austrian tourists abroad.

The spider plot summarises the overall tourism performance of Austria in 1995 and 2004 according to the six indicators discussed above.

Figure 4.3.11 - Evolution of the global tourism performance of Austria in 1995 and 2004



4.3.12. Portugal

Like Greece, Portugal is mainly an international tourism destination, and this trend, especially in terms of economic performance, has strengthened over the last nine years.

Table 4.3.12 - Main tourism indicators: Portugal in 1995 and 2004

Indicators	1995	2004
- Share of international arrivals in the country as a proportion of total international arrivals in the EU-15 ¹	2.8%	2.6%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-15	3.0%	3.1%
- Share of arrivals from the EU-15 as a proportion of total international arrivals in the country ¹	84.0%	82.3%
- Proportion of international tourism compared with total tourism in the country ¹	51.7%	47.7%
- Proportion of international tourism receipts in GDP	4.3%	4.4%
- Ratio of international tourism receipts to expenditures	2.30	2.84

¹) 2003 data for 2004.

Comparing 1995 and 2004, the attractiveness of Portugal within the EU-15 area decreased in terms of tourism flows (arrivals falling from 2.8% to 2.6%) but slightly increased in terms of turnover (receipts rising from 3.0% to 3.1%). The relative share of receipts is higher than that of flows (3.1% as against 2.6% in 2004). That means that the profit margin on incoming tourism in Portugal has grown more than in other EU-15 countries.

The proportion of international tourism compared with total tourism decreased (from 51.7% to 47.7%), more than the drop in arrivals from the EU-15 area (from 84.0% to 82.3%). This reveals a persisting strong dependence on intra-area demand.

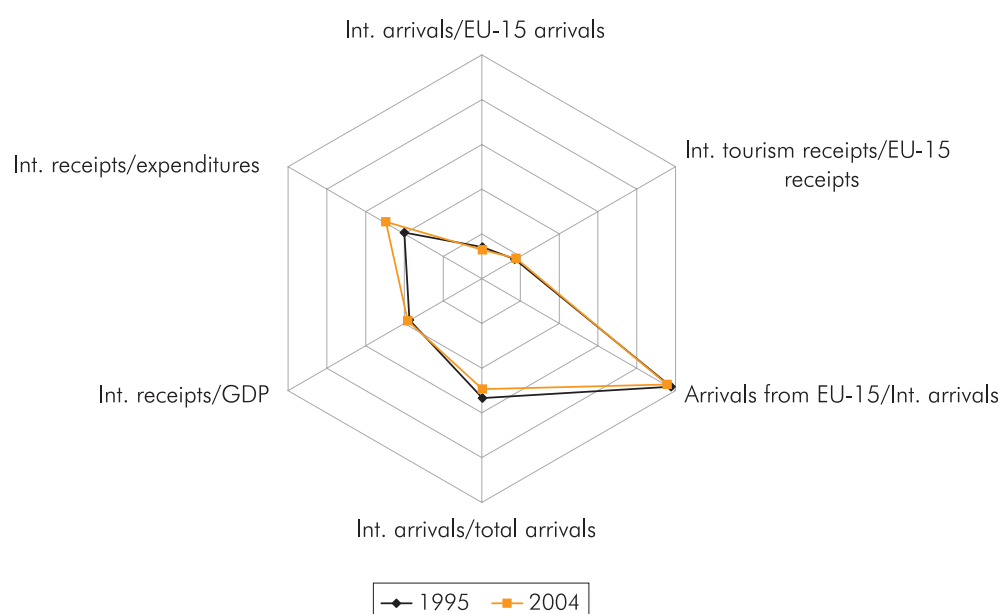
Despite the decrease in international tourism, the contribution of tourism to the country's GDP slightly increased (from 4.3% to 4.4%).

The proportion is similar to that in Spain and Austria, i.e. countries whose economy is dependent on tourism.

The ratio of international tourism receipts to expenditure, which measures the tourism balance, also increased. Receipts exceeded expenditure by 2.3 times in 1995 and by more than 2.8 in 2004, confirming once again the important role of tourism for the national economy. This compared with the relative fall in international tourism points to an increase in the average receipts per international arrival.

The spider plot summarises the overall tourism performance of Portugal in 1995 and 2004 according to the six indicators discussed above.

Figure 4.3.12 - Evolution of the global tourism performance of Portugal in 1995 and 2004



COUNTRY PERFORMANCE

4.3.13. Finland

Finland is more a generator of tourism abroad than an international tourism destination. This trend has strengthened over the last nine years. Looking at national tourism (domestic + outbound), however, it is interesting to note that the Finns are less inclined to travel abroad than their counterparts in other North European countries.

Table 4.3.13 - Main tourism indicators: Finland in 1995 and 2004

Indicators	1995	2004
- Share of international arrivals in the country as a proportion of total international arrivals in the EU-15	1.1%	1.0%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-15	1.0%	0.8%
- Share of arrivals from the EU-15 as a proportion of total international arrivals in the country	60.4%	58.5%
- Proportion of international tourism compared with total tourism in the country	23.5%	23.4%
- Proportion of international tourism receipts in GDP	1.3%	1.1%
- Ratio of international tourism receipts to expenditures	0.72	0.73

Looking at the role of Finland within the EU-15 tourism market, its attractiveness is clearly low in comparison to other countries and is similar to that of Denmark. Comparing 1995 and 2004, the share of arrivals from the EU-15 area decreased slightly (from 1.1% to 1.0%) as did the share of receipts (from 1.0% to 0.8%).

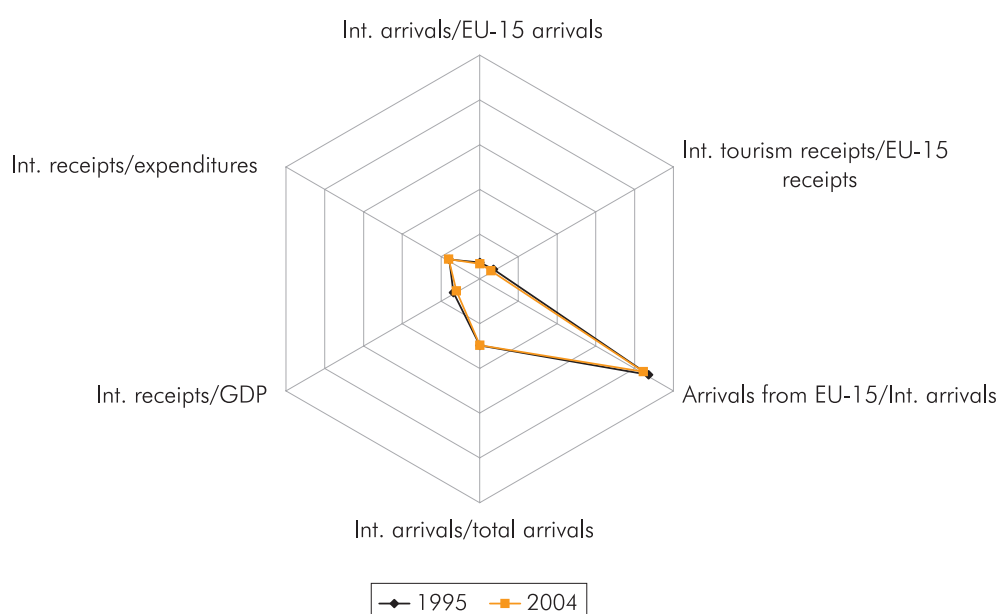
The stability of international tourism demand (23.5% of total tourism in 1995 compared with 23.4% in 2004) was accompanied, however, by a diversification in tourism flows. The proportion of arrivals from the EU-15 compared with total international arrivals decreased from 60.4% to 58.5%. This implies a growth in demand from countries outside the EU-15. However, after Germany, Finland is the country within the EU-15 area where domestic tourism accounts for the largest proportion of the local tourism market.

Although the proportion of international tourism remained virtually stable, the contribution of foreign tourism to the country's GDP fell slightly (from 1.3% to 1.1%), probably due to the faster growth in other national industries. This share shows that tourism is still a marginal element in the Finnish economy.

The ratio of international tourism receipts to expenditure, which measures the tourism balance, remained unchanged over the nine years. Receipts came to 72% of expenditure in 1995 and 73% in 2004. This confirms the domination of outgoing tourism over incoming tourism.

The spider plot summarises the overall tourism performance of Finland in 1995 and 2004 according to the six indicators discussed above.

Figure 4.3.13 - Evolution of the global tourism performance of Finland in 1995 and 2004



4.3.14. Sweden

Like Finland, Sweden is basically more a generator of tourism abroad than an international tourism destination. This trend has strengthened over the last nine years.

Table 4.3.14 - Main tourism indicators: Sweden in 1995 and 2004

Indicators	1995	2004
- Share of international arrivals in the country as a proportion of total international arrivals in the EU-15 ¹	2.2%	2.3%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-15	2.1%	2.4%
- Share of arrivals from the EU-15 as a proportion of total international arrivals in the country ¹	49.2%	54.3%
- Proportion of international tourism compared with total tourism in the country ¹	21.0%	22.5%
- Proportion of international tourism receipts in GDP	1.4%	1.8%
- Ratio of international tourism receipts to expenditures	0.64	0.61

1) For 1995 estimated data.

Comparing 1995 and 2004, the attractiveness of the country within the EU-15 area increased slightly both in terms of tourism flows (arrivals rising from 2.2% to 2.3%) and turnover (receipts growing from 2.1% to 2.4%).

The share of arrivals from the EU-15 countries as a proportion of total international arrivals grew significantly from 1995 to 2004 (from 49.2% to 54.3%). This was higher than the growth in the proportion of international tourism compared with total tourism in Sweden. This led to stronger dependence on inbound tourism from the EU-15.

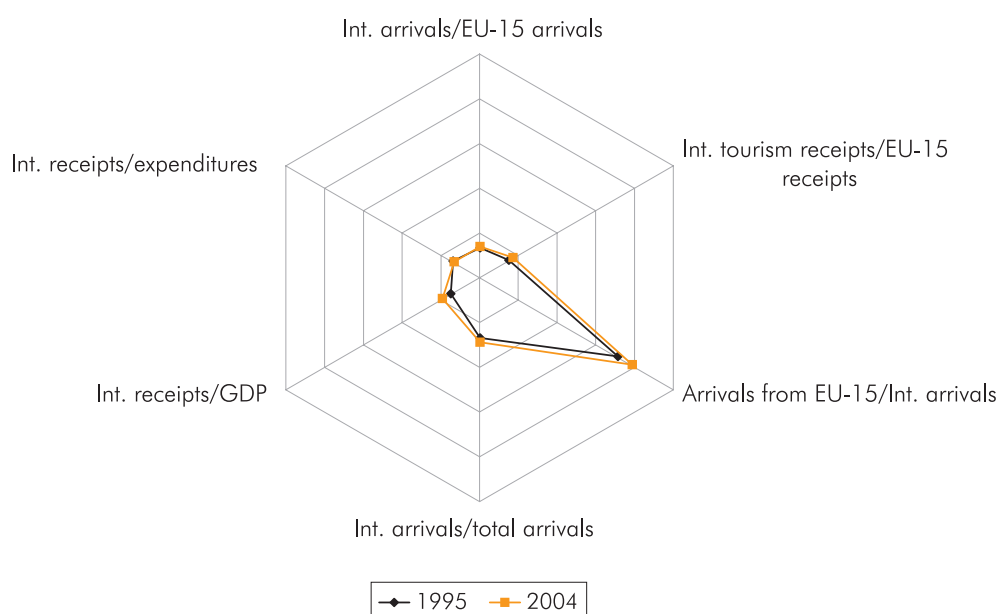
In parallel with the increase in international tourism, the contribution of tourism to the country's GDP rose (from 1.4% to 1.8%). However, it is still a marginal element in the Swedish economy.

The ratio of international tourism receipts to expenditure, which measures the tourism balance, slightly decreased. Receipts came to 61% of expenditure in 2004 compared with 64% in 1995, which means that expenditure by Swedish tourists abroad grew at a higher rate than incoming tourism receipts.

The spider plot summarises the overall tourism performance of Sweden in 1995 and 2004 according to the six indicators discussed above.



Figure 4.3.14 - Evolution of the global tourism performance of Sweden in 1995 and 2004



COUNTRY PERFORMANCE

4.3.15. United Kingdom

The United Kingdom is one of the most important countries of origin for tourism and also one of the main tourism destinations in Europe for specific market segments (urban tourism, business tourism, language tours, etc.). Over the last nine years, however, its overall tourism performance has lost some ground in terms of both demand and economic results.

Table 4.3.15 - Main tourism indicators: United Kingdom in 1995 and 2004

Indicators	1995	2004
- Share of international arrivals in the country as a proportion of total international arrivals in the EU-15 ¹	11.8%	7.7%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-15	12.5%	11.1%
- Share of arrivals from the EU-15 as a proportion of total international arrivals in the country ¹	43.8%	49.2%
- Proportion of international tourism compared with total tourism in the country ¹	19.6%	19.4%
- Proportion of international tourism receipts in GDP	1.8%	1.3%
- Ratio of international tourism receipts to expenditures	0.82	0.50

1) 2003 data for 2004.

Comparing 1995 and 2004, the attractiveness of the country within the EU-15 area significantly declined in terms of tourism flows (arrivals falling from 11.8% to 7.7%), due to the boom in Spain (from 10.8% to 17.5%) and the rise in other countries' market shares (e.g. Germany). The share of international receipts as a proportion of all tourism receipts also showed a similar trend, but at a lower rate (from 12.5% to 11.1%). This means that average receipts per arrival grew and the incoming tourism industry maintained solid profit margins compared to other EU-15 countries.

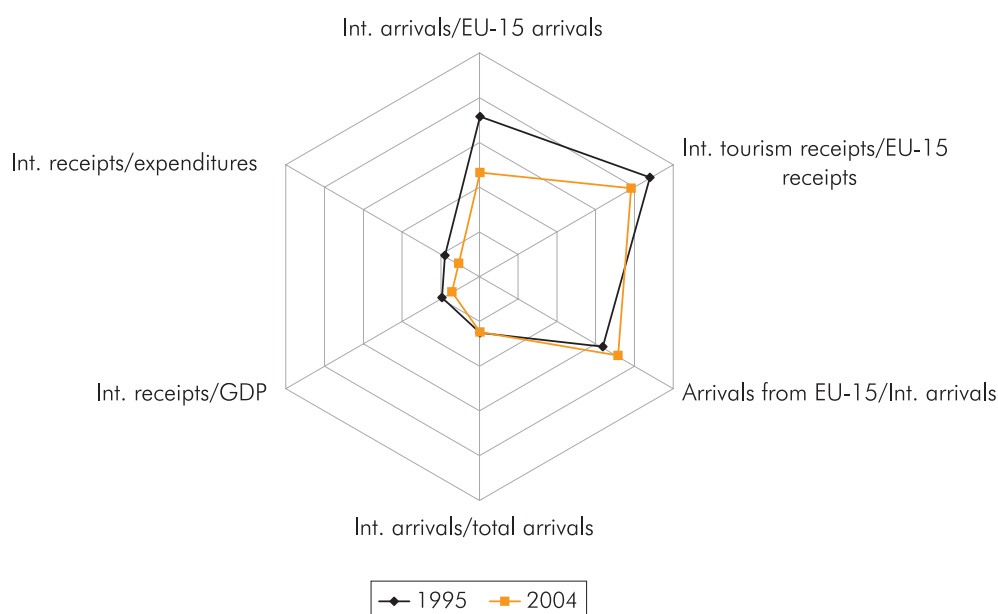
The proportion of arrivals from the EU-15 compared with total international arrivals in the country grew strongly (from 43.8% to 49.2%), while international demand remained virtually stable (falling slightly from 19.6% to 19.4%). That resulted in greater dependence on inbound tourism from the EU-15.

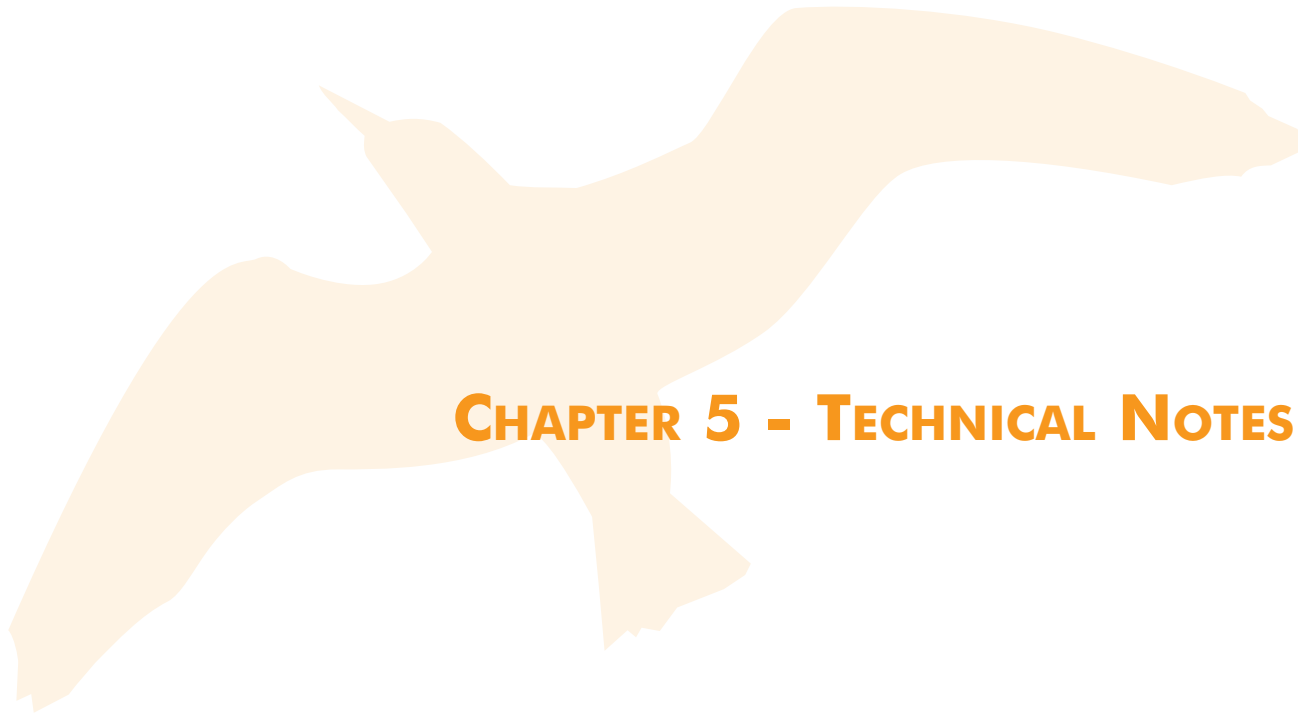
However, the contribution of international tourism to the country's GDP decreased (from 1.8% to 1.3%). Despite high profit margins with incoming tourism, this trend can be explained by the relatively better performance of other economic sectors in comparison to tourism.

The ratio of international tourism receipts to expenditure, which measures the tourism balance, declined strongly over the last nine years. Receipts came to 82% of expenditure in 1995 and as little as 50% in 2004. That points to the strong increase in expenditure by British tourists abroad, which grew about three times faster than inbound tourism receipts.

The spider plot summarises the overall tourism performance of the United Kingdom in 1995 and 2004 according to the six indicators discussed above.

Figure 4.3.15 - Evolution of the global tourism performance of the United Kingdom in 1995 and 2004





CHAPTER 5 - TECHNICAL NOTES

5. TECHNICAL NOTES

5.1 General information

Information on definitions, classifications and concepts concerning tourism are available under the following Internet address:

<http://ec.europa.eu/eurostat>

All estimates in tables are made by Eurostat except indicated otherwise.

EU-15 and country totals for tables 3.10 to 3.14 and 3.16 to 3.20 do not always match with the sum of the different breakdowns due to methodological problems with the data collection in several countries.

5.2 Additional terms and definitions

General terms and definitions

Annual average growth rate: The year-on-year growth rate of a phenomenon over a specified period. It is fictitious in the sense that it assumes the phenomenon grew at the same rate over the entire period.

Consumer price index: Measures changes over time in the general level of prices paid by a reference population for goods and services acquired or used for consumption.

Employment (total): Covers both employees and self-employed persons of 15 years and more who are engaged in some productive activity in the economy. In Table 1.12, all employment data relate to the second quarter of each year, except for France (1995 and 2000 to 2002) and Austria (1995), for which the first quarter of each year is used.

Enterprise: An enterprise is defined as the smallest combination of legal units that constitutes an organisational unit producing goods or services and which benefits from a certain degree of autonomy in decision-making, especially for the allocation of its current resources. An enterprise can carry out one or more activities at one or more locations.

Establishment: The local unit of an enterprise or part thereof situated in a geographically identified place. At or from this place, economic activity is carried out in which — save for certain exceptions — one or more persons work (even if only part-time) for one and the same enterprise. An accommodation establishment conforms to the definition of a local unit as the production unit. This is irrespective of whether the accommodation of tourists is the main or secondary activity. This means that all establishments are classified in the accommodation sector if their capacity exceeds the national minimum, even if the major part of turnover may come from restaurant or other services.

Gross domestic product (GDP): Final result of the production activity of resident producer units.

Gross domestic product (GDP) at constant prices: Gives the volume of GDP. Constant price estimates of GDP are obtained by expressing values in terms of a base period.

Gross domestic product (GDP) at current prices: GDP at prices of the current reporting period. Also known as nominal GDP.

Growth rate: Growth rates (rates of change) are ratios of total changes over a specified time reference period to values at the beginning of the period or at a specified earlier time.

Market share: Measures the relative size of an entity as a proportion of the total value of all entities.

Tourism specific terms and definitions

Accommodation establishments: Local kind-of-activity unit (local KAU) which provides accommodation. Includes collective tourist accommodation establishments and private tourist accommodation.

Arrivals of residents and non-residents: An arrival is defined as a person who arrives at a collective accommodation establishment or a private tourism accommodation and checks in. However in the context of this publication, arrivals relate only to arrivals in collective accommodation establishments as data collection on private accommodation is not covered by the tourism statistics directive of the EU. No age limit is applied: children are counted along with adults, even where overnight stays might be free of charge for children. Arrivals are registered by country of residence of the guest. The arrivals of non-tourists (e.g. refugees) should be excluded if possible. The arrivals of same-day visitors spending only few hours during the day (no overnight stay, the date of arrival and departure being the same) at the establishment are not included in accommodation statistics.

Average hotel size: Average accommodation capacity of the hotel supply in a country in terms of the average number of bed places per hotel. It is derived by dividing the overall capacity (number of bed places) of hotels and similar establishments by the number of establishments in this category.

Average length of stay: This is obtained by dividing the number of nights spent by the number of arrivals.

Business trip: It is recommended that the term "trip" should be used to describe tourism from the standpoint of the place or country of origin. A business trip covers the whole period that a person engages in tourism but for professional purposes.

Collective tourist accommodation establishment: An accommodation establishment that provides overnight lodging for the traveller in a room or some other unit. However, the number of places it provides must be greater than a specified minimum for groups of persons exceeding a single family unit and all the places in the establishment must come under a common commercial-type management, even if it is non-profit-making. Include hotels and similar establishments, specialised establishments and other collective establishments.

Domestic tourism: Activities of residents of a given country travelling to and staying in places only within that country but outside their usual environment.

Gross utilisation of bed places: The gross utilisation or gross occupancy rate of bed places measures the difference in the use of accommodation capacity between various types of accommodation establishments (e.g. hotels vs other collective accommodation) or, within the same type, between different categories (e.g. in hotels, according to star classification). When calculated on a monthly basis, it indicates the seasonal patterns of use. For hotels, the gross occupancy rate in one month is obtained by dividing hotel overnight stays by the product of the bed places on offer and the number of days in the corresponding month when the bed places are available for use. The quotient is multiplied by 100 to express the result as a percentage:

$$\text{Gross utilisation in month } m = \frac{\text{Overnight stays in month } m}{(\text{number of bed places in month } m \times \text{days in month } m)} \times 100$$

Holiday trip: It is recommended that the term "trip" should be used to describe tourism from the standpoint of the place or country of origin. A holiday trip covers the whole period that a person engages in tourism for leisure purposes.

Hotels and similar establishments: Establishments that have rooms in a number exceeding a specified minimum, come under a common management, provide certain services including room service, daily bed-making and cleaning of sanitary facilities, are grouped in classes and categories according to the facilities and services provided, and do not fall under the category of specialised establishments.

Inbound tourism: Activities of non-residents of a given country travelling to and staying in places in that country but outside their usual environment.

Intensity of tourism supply: Measures the intensity, or density, of the accommodation supply in a given country, a region, etc. in order to compare it with that of other tourism destinations; used to interpret the absolute indicators of tourism supply (e.g. number of bed places) taking into account the characteristics of the territory under study (population, area, etc.).

The intensity can be measured using the accommodation or tourist function index, which is obtained by dividing the number of bed places on offer in an area (in all accommodation establishments or by type of accommodation) by the total resident population in the same area:

$$\text{Accommodation function rate in an area } X = \frac{\text{Number of bed places on offer in the area}}{\text{Number of people residing in the area}}$$

This indicator can also be used as a proxy for the potential tourism pressure within a territory (see below), since the number of bed places on offer in an area gives an indication of the maximum number of tourists that can be accommodated in this area at the same time.

Internal tourism: Comprises domestic and inbound tourism.

International tourism: Consists of inbound tourism and outbound tourism.

Length of stay: The length of stay for domestic and overnight trips is defined as nights spent.

National tourism: Comprises domestic tourism and outbound tourism.

5

Nights spent by residents and non-residents: A night spent (or overnight stay) is each night that a guest actually spends (sleeps or stays) or is registered (his/her physical presence there being unnecessary) in a collective accommodation establishment or in private tourism accommodation. However, in the context of this publication, nights only relate to nights in collective accommodation establishments. Overnight stays are recorded by country of residence of the guest and by month. Normally, the date of arrival is different from the date of departure but persons arriving after midnight and leaving on the same day are included in overnight stays. A person should not be registered in two accommodation establishments at the same time. The overnight stays of non-tourists (e.g. refugees) should be excluded if possible.

Number of bed places: The number of bed places in an establishment or dwelling is determined by the number of persons who can stay overnight in the beds provided in the establishment (dwelling), ignoring any extra beds that may be made available on customer request. The term 'bed place' applies to a single bed, and a double bed is counted as two bed places. The unit serves to measure the capacity of any type of accommodation. A bed place is also a place for one person on a camping pitch or in a boat at a mooring. One camping pitch should equal four bed places if the actual number of bed places is not known.

Number of bed places per 1 000 residents: Number of bed places in a defined area divided by the resident population (in 1 000) of the same area.

Outbound tourism: Activities of residents of a given country travelling to and staying in places outside that country and outside their usual environment.

Tourist/resident ratio: This indicator compares the number of tourists (in terms of overnight stays) to the number of residents at a destination over the same time period (e.g. a day, a month, a year). It measures the intensity of tourism demand over that period and is one of the indicators used to measure the carrying capacity of a tourist destination. It represents the number of nights spent in a country divided by the inhabitants of the same country.

Tourism balance: Difference between international tourism receipts and expenditure. In countries that are basically destinations of international tourism the difference is usually positive (i.e. receipts exceed expenditure). This means that the economy gains from tourism. In contrast, countries that are mainly generators of international tourism generally show a negative balance (i.e. expenditure exceeds receipts). This means that their economy loses from tourism, because expenditure by residents abroad is higher than that of international tourists in the country.

Tourism expenditure: Total consumption expenditure made by a visitor, or on behalf of a visitor, for and during his/her trip and stay at the destination.

Tourism pressure: Analysing the pressure tourism exerts over a territory is important in order to measure the capacity of a tourism destination so as to maximise the economic, social and environmental benefits of tourism, while at the same time minimising the negative effects (e.g. pollution, traffic and transport congestion, changes to the nature of the local economy, etc.). This pressure can be measured by the visitor/resident ratio, which helps to assess the relative impact of visitors on different destinations.

The indicator is calculated by dividing the number of total visitors (tourists + day-trippers) at a destination at any one time by the figure for the resident population at the destination at the same time.

Often, however, no reliable data are available on the total number of visitors (tourists and/or day-trippers) at either macro level (e.g. country, region, etc.) or micro level (a resort). Considering overnight tourists only, this indicator can be replaced by the intensity of tourism supply (see above), which provides a proxy for the maximum number of visitors that can be accommodated in this area at the same time.

Tourism receipts: Expenditure by international inbound tourists, including their payments to international carriers for international transport.

5.3 Symbols and abbreviations

:	not available
:p	preliminary data
:c	confidential data
:e	country estimate
:u	unreliable data
bn	billion
mio	million

Country abbreviations

EU-25	European Union of 25 countries (as of 1st of May 2004)
EU-15	European Union of 15 countries (up to 30th of April 2004)
CC-4	Actual Candidate Countries to the EU (Bulgaria, Croatia, Romania, Turkey)
BLEU	Belgium and Luxembourg
BE	Belgium
CZ	Czech Republic
DK	Denmark
DE	Germany
EE	Estonia
EL	Greece
ES	Spain
FR	France
IE	Ireland
IT	Italy
CY	Cyprus
LV	Latvia
LT	Lithuania
LU	Luxembourg
HU	Hungary
MT	Malta
NL	Netherlands
AT	Austria
PL	Poland
PT	Portugal
SI	Slovenia
SK	Slovakia
FI	Finland
SE	Sweden
UK	United Kingdom

IS	Iceland
LI	Liechtenstein
NO	Norway
CH	Switzerland
BG	Bulgaria
HR	Croatia
RO	Romania
TR	Turkey

Other abbreviations

DMS	Destination Management System
GDP	Gross domestic product
GPS	Global Positioning System
GSM	Global System for Mobile Communication
ICT	Information and Communication technologies
UMTS	Universal Mobile Communication System

Organisations

OECD	Organisation for Economic Co-operation and Development
UN	United Nations
WTO	World Tourism Organisation

5.4 Data sources

Data extraction: November 2005

Name	Web address	Sources used
Eurostat	http://ec.europa.eu/eurostat	Free dissemination database Tourism – production database Balance of payment database National accounts database
European Commission -DG Enterprise	http://europa.eu.int/comm/enterprise/services/tourism/index_en.htm	The European Tourism Industry. A multi-sector with dynamic markets
Country	Web address	Source name
Belgium	http://www.statbel.fgov.be	National Instituut voor de Statistiek / Institut National de Statistique (Statistics Belgium)
Czech Republic	http://www.czso.cz	Czech Statistical Office
Denmark	http://www.dst.dk	Danmarks Statistics (Statistics Denmark)
Germany	http://www.destatis.de	Statistisches Bundesamt (Federal Statistical Office)
Estonia	http://www.stat.ee	Statistikaamet (Statistical Office of Estonia)
Greece	http://www.statistics.gr	National Statistical Service of Greece
Spain	http://www.ine.es	Instituto Nacional de Estadística (National Statistics Institute)
France	http://www.insee.fr	Institut National de Statistique et des Etudes Economiques (National Institute for Statistics and Economic Studies)
Ireland	http://www.cso.ie	Central Statistics Office
Italy	http://www.istat.it	Istituto nazionale di statistica (National Institute of Statistics)
Cyprus	http://www.mof.gov.cy/mof/cystat/statistics.nsf	Statistical Service of the Republic of Cyprus
Latvia	http://www.csb.lv	Central Statistical Bureau of Latvia
Lithuania	http://www.std.lt	Statistics Lithuania
Luxembourg	http://www.stat.ec.lu	Service central de la statistique et des études économique
Hungary	http://www.ksh.hu	Központi Statisztika Hivatal (Hungarian Central Statistical Office)
Malta	http://www.nso.gov.mt	National Statistics Office
Netherlands	http://www.cbs.nl	Centraal Bureau voor de Statistiek (Statistics Netherlands)
Austria	http://www.statistik.at	Statistik Austria
Poland	http://www.stat.gov.pl	Central Statistical Office
Portugal	http://www.ine.pt	Instituto Nacional de Estatística
Slovenia	http://www.stat.si	Statistical Office of the Republic of Slovenia
Slovakia	http://www.statistics.si	Statistický úrad Slovenskej republiky (Statistical Office of the Slovak Republic)
Finland	http://www.stat.fi	Tilastokeskus (Statistics Finland)
Sweden	http://www.scb.se	Statistiska centralbyrån (Statistics Sweden)
United Kingdom	http://www.statistics.gov.uk	Office for National Statistics
Iceland	http://www.statice.is	Hagstofa Islands (Statistics Iceland)
Liechtenstein	http://www.llv.li/amtsstellen/llv-avw-statistik.htm	Amt für Volkswirtschaft - Büro für Statistik
Norway	http://www.ssb.no	Statistisk sentralbyrå (Statistics Norway)
Switzerland	http://www.statistik.admin.ch	Statistik Schweiz
Bulgaria	http://www.nsi.bg	National Statistical Institute
Croatia	http://www.dzs.hr	Central Bureau of Statistics (CROSTAT)
Romania	http://www.insse.ro	Institutul National de Statistica (National Institute of Statistics)
Turkey	http://www.die.gov.tr	State Institute of Statistics