

# Eurostat regional yearbook 2009



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Luxembourg: Publications Office of the European Union, 2009

ISBN 978-92-79-11696-4

ISSN 1830-9674

doi: 10.2785/17776

Cat. No: KS-HA-09-001-EN-C

**Theme: General and regional statistics**

**Collection: Statistical books**

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## Preface

Dear Readers,

Five years ago, 2004, was a momentous year, with 10 new Member States joining the European Union on 1 May. This *Eurostat regional yearbook 2009* is eloquent testimony to the economic and social progress made by these regions since then and highlights those areas where redoubled efforts will be needed to reach our goal of greater cohesion.

The 11 chapters of this yearbook investigate interesting aspects of regional differences and similarities in the 27 Member States and in the candidate and EFTA countries. The aim is to encourage readers to track down the regional data available on the Eurostat website and make their own analyses of economic and social developments.

In addition to the fascinating standard chapters on regional population developments, the regional labour market, regional GDP, etc., this year's edition features a new contribution on the regional development of information society data. As in recent years, the description of regional developments is rounded off by a contribution on the latest findings of the Urban Audit, a data collection containing a multitude of statistical data on European towns and cities.

We are constantly updating the range of regional indicators available and hope to include them as topics in future editions, provided the availability and quality of these data are sufficient.

I wish you an enjoyable reading experience!



Walter Radermacher  
Director-General, Eurostat



## Acknowledgements

The editors of the *Eurostat regional yearbook 2009* would like to thank all those who were involved in its preparation. We are especially grateful to the following chapter authors at Eurostat for making the publication of this year's edition possible.

- **Population:** Veronica Corsini, Monica Marcu and Rosemarie Olsson (Unit F.1: Population)
- **European cities:** Teodóra Brandmüller (Unit E.4: Regional statistics and geographical information)
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- **Science, technology and innovation:** Bernard Félix, Tomas Meri, Reni Petkova and Håkan Wilén (Unit F.4: Education, science and culture)
- **Education:** Sylvain Jouhette, Lene Mejer and Paolo Turchetti (Unit F.4: Education, science and culture)
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This publication was edited and coordinated by Åsa Önnersfors (Unit E.4: Regional statistics and geographical information) with the help of Berthold Feldmann (Unit E.4: Regional statistics and geographical information) and Pavel Bořkovec (Unit D.4: Dissemination). Baudouin Quennery (Unit E.4: Regional statistics and geographical information) produced all the statistical maps.

We are also very grateful to:

- the **Directorate-General for Translation of the European Commission**, and in particular the German, English and French translation units;
- the **Publications Office of the European Union**, and in particular Bernard Jenkins in Unit B.1, Cross-media publishing, and the proofreaders in Unit B.2, Editorial services.



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# Introduction





## Statistics on regions and cities

Statistical information is essential for understanding our complex and rapidly changing world. Eurostat, the Statistical Office of the European Communities, is responsible for collecting and disseminating data at European level, not only from the 27 Member States of the European Union, but also from the three candidate countries (Croatia, the former Yugoslav Republic of Macedonia and Turkey) and the four EFTA countries (Iceland, Liechtenstein, Norway and Switzerland).

The aim of this publication, the *Eurostat regional yearbook 2009*, is to give you a flavour of some of the statistics on regions and cities that we collect from these countries. Statistics on regions enable us to identify more detailed statistical patterns and trends than national data, but since we have 271 NUTS 2 regions in the EU-27, 30 statistical regions on level 2 in the candidate countries and 16 statistical regions on level 2 in the EFTA countries, the volume of data is so great that one clearly needs some sorting principles to make it understandable and meaningful.

Statistical maps are probably the easiest way for the human mind to sort and 'absorb' large amounts of statistical data at one time. Hence this year's *Eurostat regional yearbook*, as in previous editions, contains a lot of statistical maps where the data is sorted by different statistical classes represented by colour shades on the maps. Some chapters also make use of graphs and tables to present the statistical data, selected and sorted in some way (different top lists, graphs with regional extreme values within the countries or only giving representative examples) to make it easier to understand.

We are proud to present a great variety of subjects tackled in the 11 chapters in this year's edition of the *Eurostat regional yearbook*. The first chapter on **Population** gives us detailed knowledge of different demographic patterns, such as population density, population change and fertility rates in the countries examined. This chapter can be considered the key to all other chapters, since all other statistics depend on the composition of the population. The second chapter focuses on **European cities** and explains in detail the definitions of the various spatial levels used in the Urban Audit data collection, with some interesting examples on how people travel to work in nine European capitals.

The chapter on the **Labour market** mainly describes the differences in weekly working hours

throughout Europe and offers a couple of explanations for why they vary so much from region to region. The three economic chapters on **Gross domestic product**, **Household accounts** and **Structural business statistics** all give us detailed insight into the general economic situation in regions, private households and different sectors of the business economy.

We are particularly proud to present a new and very interesting chapter on the **Information society**, which describes the use of information and communication technologies (ICT) among private persons and households in European regions. This chapter tells us, for example, how many households use the Internet regularly and how many have broadband access. The next two chapters are on **Science, technology and innovation** and **Education**, three areas of statistics that are often seen as key to monitoring achievement of the goals set in the Lisbon strategy to make Europe the most competitive and dynamic knowledge-based economy in the world.

In the next chapter we learn more about regional statistics on **Tourism**, and which tourist destinations are the most popular. The last chapter focuses on **Agriculture**, this time mainly crop statistics, revealing which kind of crop is grown where in Europe.

## The NUTS classification

The nomenclature of territorial units for statistics (NUTS) provides a single uniform breakdown of territorial units for the production of regional statistics for the European Union. The NUTS classification has been used for regional statistics for many decades, and has always formed the basis for regional funding policy. It was only in 2003, though, that NUTS acquired a legal basis, when the NUTS regulation was adopted by the Parliament and the Council <sup>(1)</sup>.

Whenever new Member States join the EU, the NUTS regulation is amended to include the regional classification in those countries. This was the case in 2004, when the EU took in 10 new Member States, and in 2007 when Bulgaria and Romania also joined the European Union.

The NUTS regulation states that amendments of the regional classification, to take account of new administrative divisions or boundary changes in the Member States, may not be carried out more frequently than every three years. In 2006, this review took place for the first time, and the re-

<sup>(1)</sup> More information on the NUTS classification can be found at [http://ec.europa.eu/eurostat/ramon/nuts/splash\\_regions.html](http://ec.europa.eu/eurostat/ramon/nuts/splash_regions.html)



sults of these changes to the NUTS classification have been valid since 1 January 2008.

Since these NUTS changes were introduced quite recently, the statistical data are still missing in some cases or have been replaced with national values on some statistical maps, as indicated in the footnotes to each map concerned. This applies in particular to Sweden, which introduced NUTS level 1 regions, to Denmark and Slovenia, which introduced new NUTS level 2 regions, and to the two northernmost Scottish regions, North Eastern Scotland (UKM5) and Highlands and Islands (UKM6), where the border between the two regions has changed. The regional data availability for these countries will hopefully soon be improved.

Please also note that some Member States have a relatively small population and are therefore not divided into more than one NUTS 2 region. Thus, for these countries the NUTS 2 value is exactly the same as the national value. Following the latest revision of the NUTS classification, this now applies to six Member States (Estonia, Cyprus, Latvia, Lithuania, Luxembourg and Malta), one candidate country (the former Yugoslav Republic of Macedonia) and two EFTA countries (Iceland and Liechtenstein). In all cases the whole country consists of one single NUTS 2 region.

A folding map on the inside of the cover accompanies this publication and it shows all NUTS level 2 regions in the 27 Member States of the European Union (EU-27) and the corresponding level 2 statistical regions in the candidate and EFTA countries. In the annex you will find the full list of codes and names of these regions. This will help you locate a specific region on the map.

## Coverage

The *Eurostat regional yearbook 2009* mainly contains statistics on the 27 Member States of the European Union but, when available, data is also

given on the three candidate countries (Croatia, the former Yugoslav Republic of Macedonia and Turkey) and the four EFTA countries (Iceland, Liechtenstein, Norway and Switzerland).

Regions in the candidate countries and the EFTA countries are called statistical regions and they follow the same rules as the NUTS regions in the European Union, except that there is no legal base. Data from the candidate and EFTA countries are not yet available in the Eurostat database for some of the policy areas, but the availability of data is constantly improving, and we hope to have even more complete coverage from these countries in the near future.

## More regional information

In the subject area 'Regions and cities' under the heading 'General and regional statistics' on the Eurostat website you will find tables with statistics on both 'Regions' and the 'Urban Audit', with more detailed time series (some of them going back as far as 1970) and with more detailed statistics than this yearbook contains. You will also find a number of indicators at NUTS level 3 (such as area, demography, gross domestic product and labour market data). This is important since some of the countries covered are not divided into NUTS 2 regions, as mentioned above.

For more detailed information on the content of the regional and urban databases, please consult the Eurostat publication *European regional and urban statistics — Reference guide — 2009 edition*, which you can download free of charge from the Eurostat website. You can also download Excel tables containing the specific data used to produce the maps and other illustrations for each chapter in this publication on the Eurostat website. We do hope you will find this publication both interesting and useful and we welcome your feedback at the following e-mail address: [estat-regio@ec.europa.eu](mailto:estat-regio@ec.europa.eu)

**Tourism**

**10**





## Introduction

Tourism is an important and fast-evolving economic factor in the European Union, occupying large numbers of small and medium-sized businesses. Its contribution to growth and employment varies widely across the EU regions. Particularly in rural regions, usually peripheral to the economic centres of their countries, tourism is often one of the main sources of income for the population and a prominent factor in creating and securing an adequate level of employment.

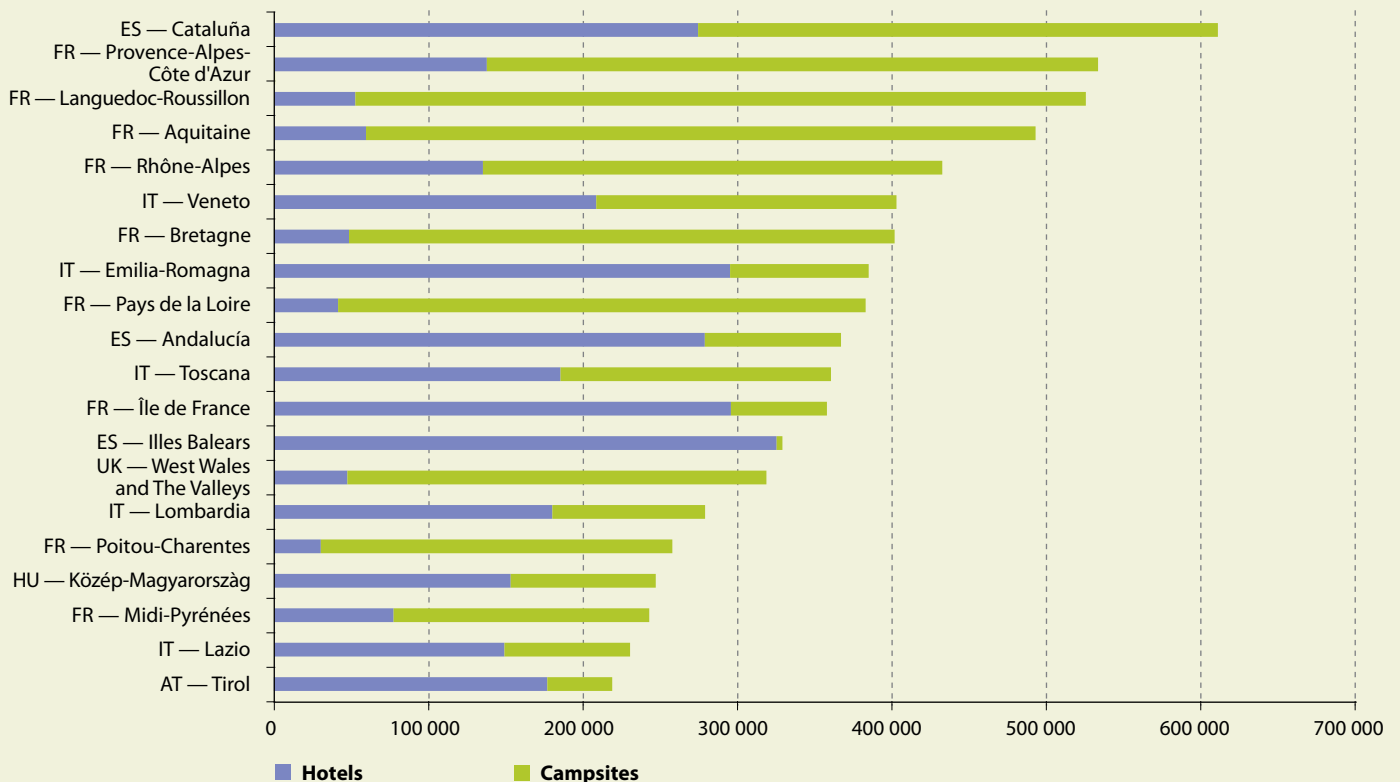
Tourism is a typical cross-cutting industry. Services to tourists involve a variety of economic branches: hotels and other accommodation, gastronomy (restaurants, cafes, etc.), the various transport operators and also a wide range of cultural and recreational facilities (theatres, museums, leisure parks, swimming pools, etc.). In many tourism-oriented regions the retail sector also benefits considerably from the demand created by tourists in addition to that of the resident population.

Eurostat has been collecting data on the development and structure of tourism since 1995, pursuant to Council Directive 95/57/EC on the col-

lection of statistical information in the field of tourism. This includes data both on accommodation capacity and its utilisation and on the travel behaviour of the population. The travel behaviour data are, however, only available at national level. In contrast, the data collected on accommodation capacity and its utilisation are also available by region. The regionalised data are outlined below.

It is important to point out that the statistical definition of tourism is broader than the common, everyday definition. It encompasses not only private travel but also business travel. This is primarily because it views tourism from an economic perspective. Private travellers and business travellers have broadly similar consumption patterns. They both make significant demands on transport, accommodation and restaurant services. To the providers of these services, it is of secondary interest whether their customers are private tourists or on business. Tourism promotion departments, on the other hand, are keen to combine the two aspects by emphasising the attractiveness of conference locations as tourist destinations in their own right, and they give particular prominence to this in their marketing activities.

**Figure 10.1:** Top 20 EU-27 tourist regions, number of bedplaces by type of accommodation, by NUTS 2 regions, 2007





## Accommodation capacity

Figure 10.1 shows the 20 NUTS 2 regions of the EU with the highest accommodation capacities, measured by the number of bedplaces in hotels and similar establishments and on campsites. Numbers of pitches on campsites are multiplied by four to make them comparable with hotel accommodation capacity. This gives a theoretical number of bedplaces, assuming that four people occupy the average pitch.

The ranking of the 20 regions with the largest accommodation capacities reveals the dominance of three main tourist destinations in Europe, namely France, Italy and Spain. Nine of the 20 regions on this list are in France, five are in Italy and three are in Spain. The United Kingdom, Hungary and Austria complete the list of the top regions for accommodation capacity, with one region each (West Wales and The Valleys, Közép-Magyarország and Tirol). It is clear that the strong position of the French regions on this list reflects a very heavy preponderance of campsite accommodation.

Map 10.1 shows the number of bedplaces in hotels and on campsites per 1 000 inhabitants (bed

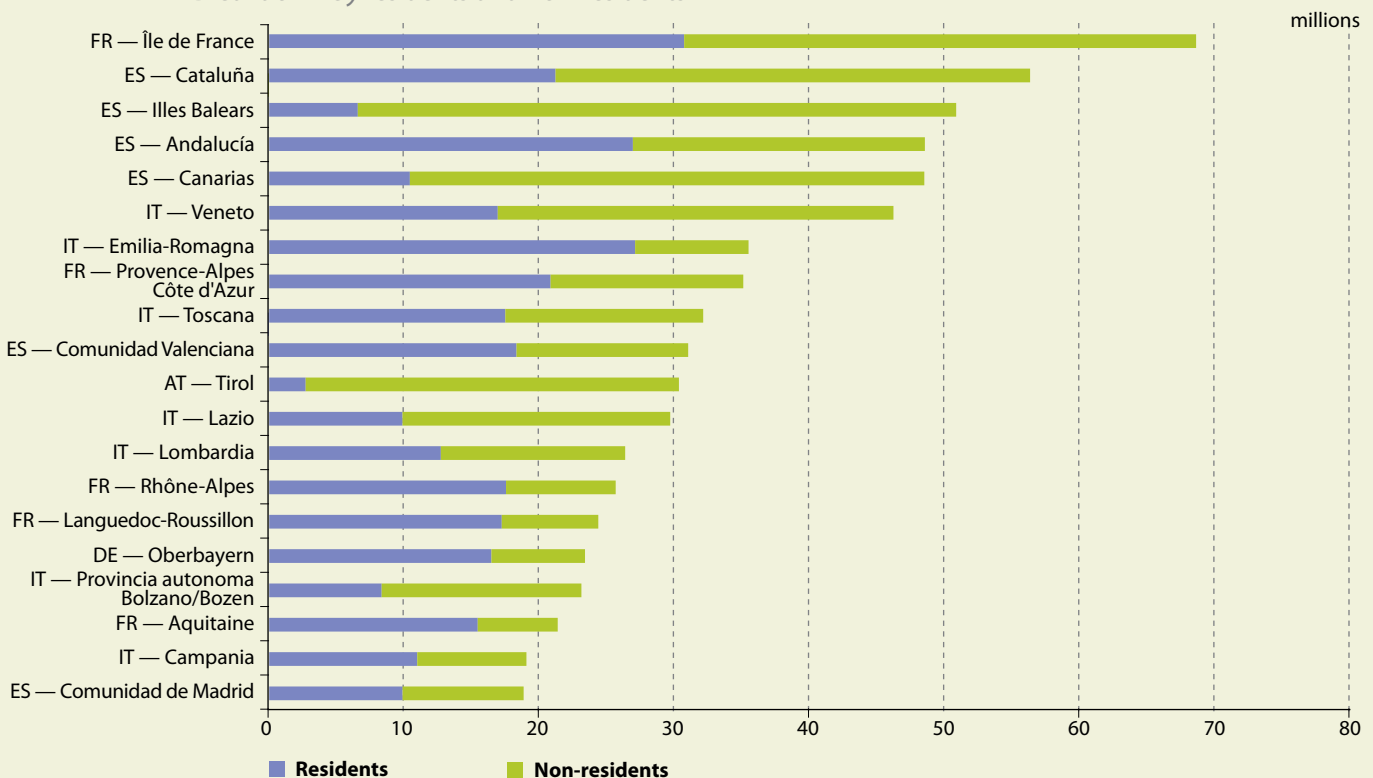
density) for the countries of Europe. This link with the number of inhabitants shows the relative importance of tourism capacity per head of population. This indicator is therefore affected not only by the number of available beds (bedplaces) but also by the population figure. It can be seen that the highest bed densities are to be found primarily in coastal regions and on islands, but also in most Alpine regions and in Luxembourg, together with its two neighbouring regions to the east (Trier in Germany) and west (the Province of Luxembourg in Belgium).

## Overnight stays

The central indicator for accommodation services is the number of overnight stays in establishments. This figure reflects both the length of stay and the number of visitors. Furthermore, expenditure by tourists during their stay at their destination correlates closely with the number of overnight stays.

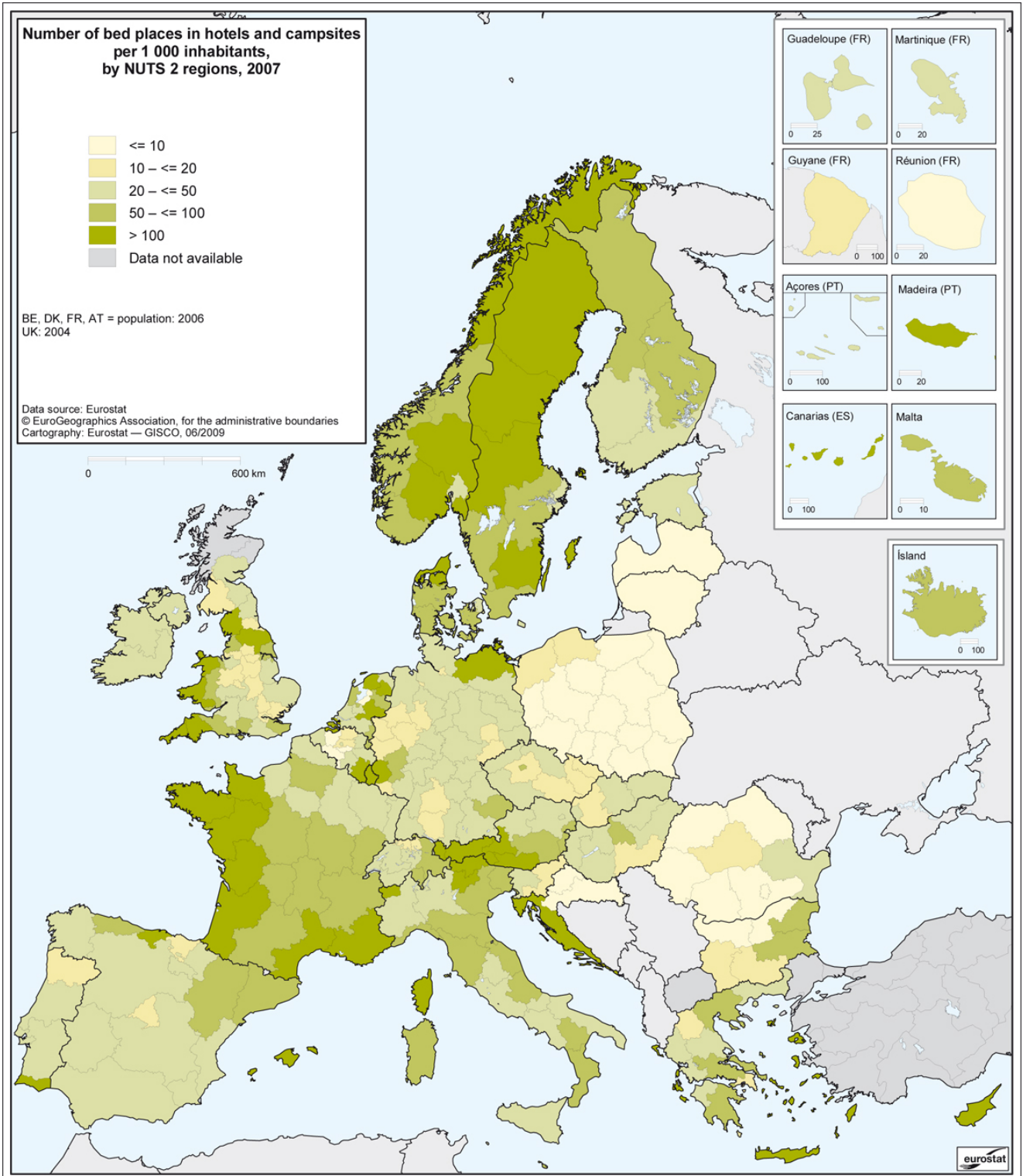
Figure 10.2 shows the 20 regions in Europe with the highest numbers of overnight stays, broken down by domestic and foreign visitors. The dominance in European tourism of Italy, Spain and France is

**Figure 10.2:** Top 20 EU-27 tourist regions, number of nights spent in hotels and campsites, by NUTS 2 regions, 2007  
*Breakdown by residents and non-residents*





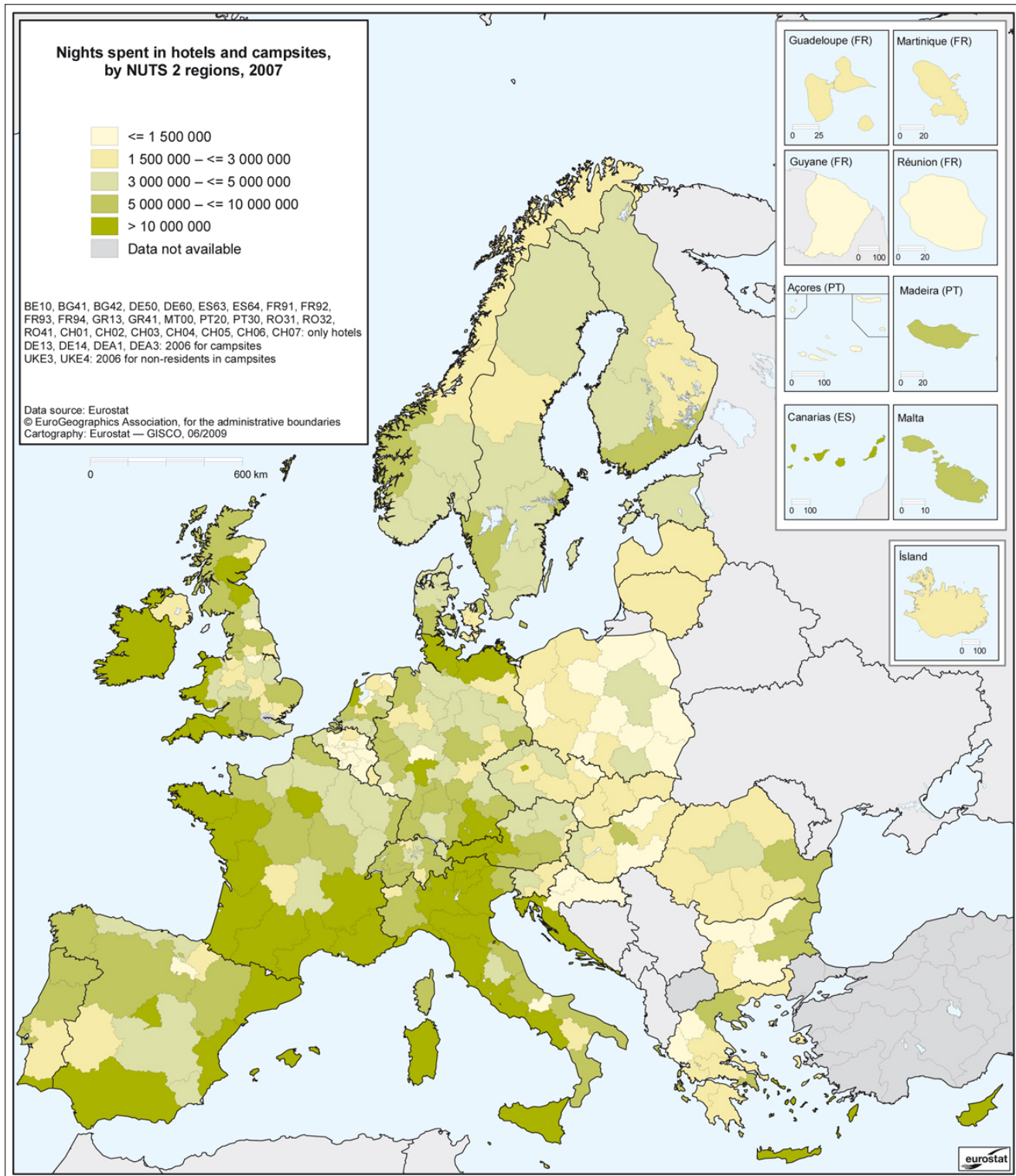
**Map 10.1:** Number of bedplaces in hotels and campsites per 1 000 inhabitants, by NUTS 2 regions, 2007







**Map 10.2:** Nights spent in hotels and campsites, by NUTS 2 regions, 2007





even more pronounced for overnight stays than for accommodation capacities; these three countries accounting for 18 of the 20 regions. At 68.7 million overnight stays, the Île-de-France region containing the French capital Paris is well in the lead, followed by the four Spanish regions of Cataluña (56.4 million), Illes Balears (50.9 million), Andalucía (48.6 million) and Canarias (48.5 million). Tirol in Austria, at 30.4 million overnight stays, and Oberbayern in Germany (23.4 million) with the Bavarian metropolitan area of München are the only regions on the list of 20 that are not in one of the three leading tourism countries mentioned before.

Map 10.2 gives an overview of numbers of overnight stays in the regions of Europe. Here, too, it is clear that the focus of European tourism is in the Mediterranean. The Alpine regions also occupy a strong position. In addition to the abovementioned five countries (Italy, Spain, France, Austria and Germany) represented in the top 20 regions, Croatia, the Netherlands, Portugal, Greece, Cyprus, the United Kingdom and the Czech Republic also have NUTS 2 regions with more than 10 million overnight stays.

### Average length of stay

The number of overnight stays in a region is based not only on the number of visitors but also on their

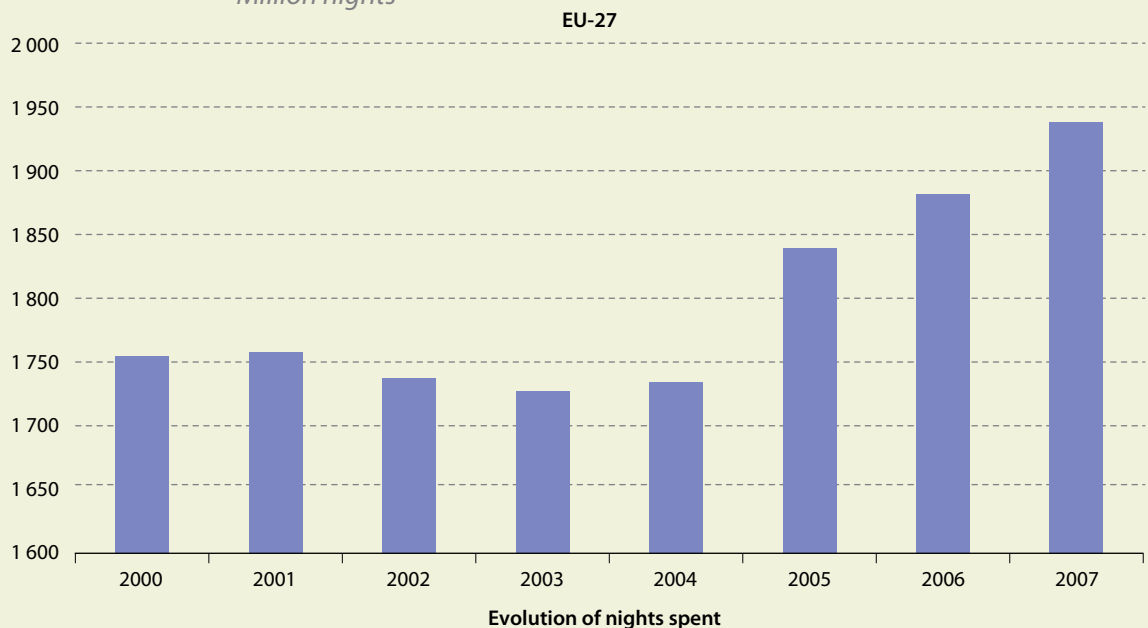
average length of stay. This, however, depends on the character of the region. For example, urban regions frequently tend to have very large numbers of visitors, but these visitors tend to stay for only a few days and nights. A big share of visitors to these regions are often there on business. But even in the case of private tourists there is a trend towards shorter stays. In contrast, stays are generally substantially longer in the typical holiday regions visited chiefly for recreational purposes. To that extent, an overview of average lengths of stay can also indicate the touristic nature of a region.

Map 10.3 shows the NUTS 2 regions in Europe according to the average length of stay of visitors. Once again, it can be seen that the holiday areas in the European Union with the greatest average length of visitor stays are very often maritime regions. They either have extensive coastlines or are islands and therefore encircled by the sea. Of the 22 NUTS 2 regions where the average length of stay of visitors is five nights or more, only one is completely landlocked, namely the Italian Provincia Autonoma Bolzano/Bozen. The remaining 21 are either island regions or have long coastlines.

### Tourism intensity

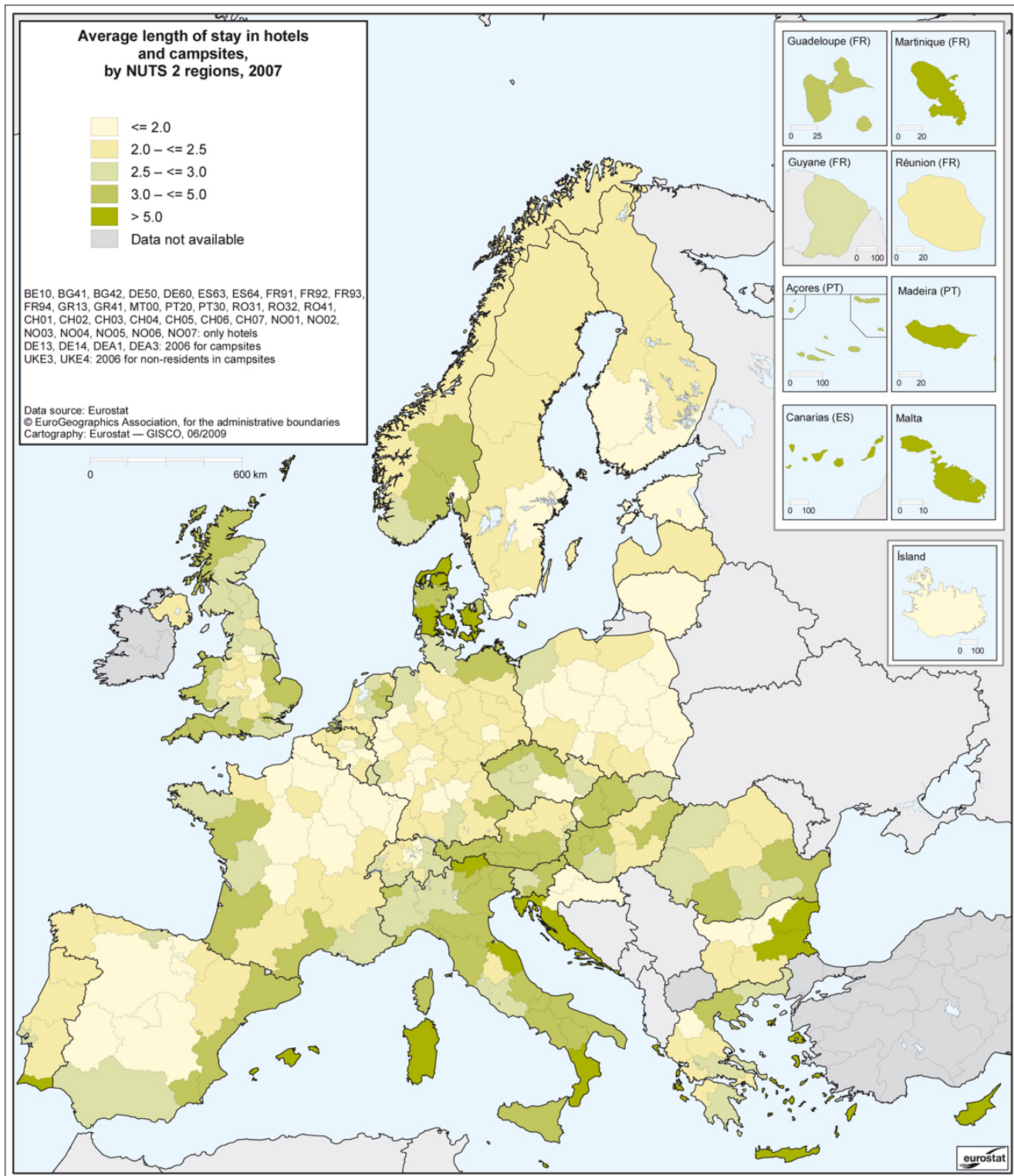
Another important indicator of the touristic nature of a region is tourism intensity. This serves

**Figure 10.3:** Evolution of nights spent in hotels and campsites 2000–07 in the EU-27  
*Million nights*



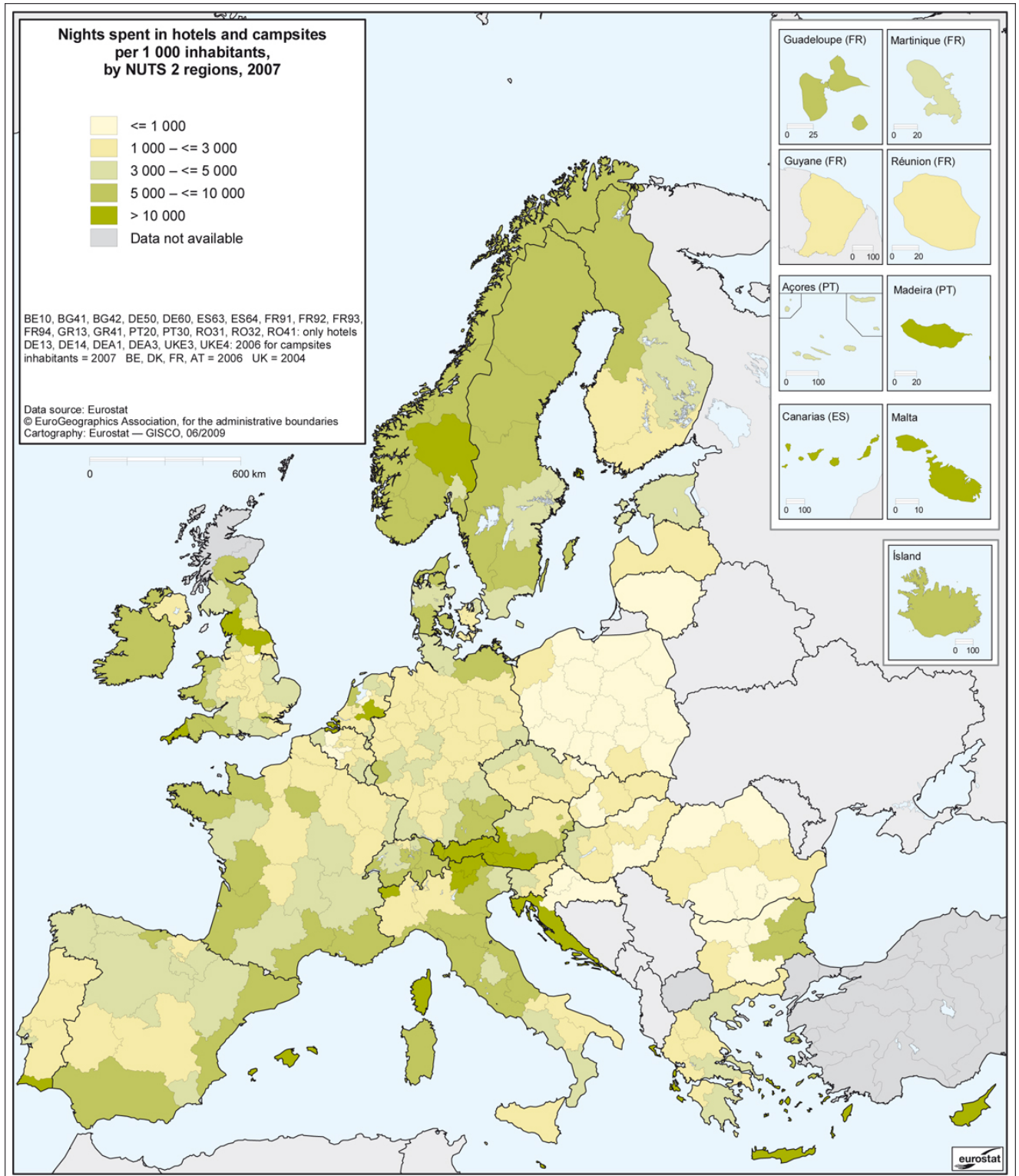
Footnote: EE 2000, 2001; IE 2001; CY 2000, 2002; MT (only hotels)

**Map 10.3:** Average length of stay in hotels and campsites, by NUTS 2 regions, 2007  
Days





**Map 10.4:** Nights spent in hotels and campsites per 1 000 inhabitants, by NUTS 2 regions, 2007





as an indicator of the relative importance of tourism for a region. Tourism intensity is calculated by comparing the number of overnight stays in a region with the size of the resident population. It is generally a better guide to the economic weight of tourism for a region than the absolute number of overnight stays. The huge importance of tourism to many of Europe's coastal regions and, even more so, to its islands, as well as to most of the Alpine regions of Austria and Italy, is evident here too.

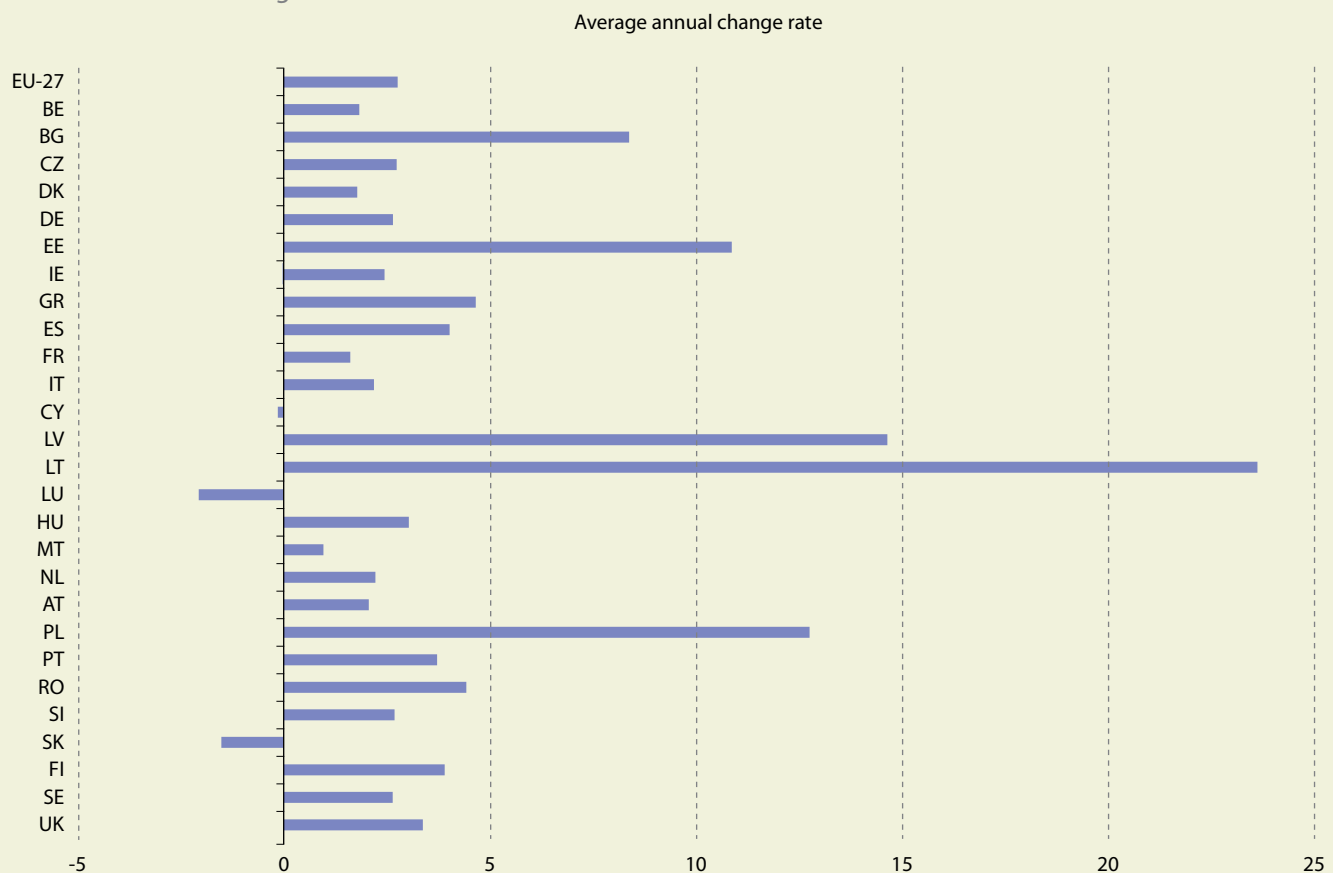
Of the 25 regions in Europe with a tourism intensity of more than 10 000 overnight stays per 1 000 inhabitants, 10 are island regions, seven are Alpine regions and six are coastal regions. The Spanish region of Illes Balears shows the highest tourism intensity, at 50 178 overnight stays per 1 000 inhabitants, followed by the Greek region of Notio Aigaiο (48 168), the Italian Provincia Autonoma Bolzano/Bozen (47 438), the Austrian Tirol (43 527), the Portuguese Algarve (39 132), the Greek Ionia Nisia (33 304) and the Austrian region of Salzburg (30 487).

## Tourism development

Tourism in the European Union increased overall from 2000 to 2007. Two particular phases stand out. The years 2000 and 2001 were both record years, each recording 1.75 billion overnight stays in hotels and on campsites, thanks to the favourable economic climate at the time and to special events such as the Holy Year in Italy and the Hannover World EXPO. Tourism declined in 2002 and 2003, due in part to the economic slowdown but certainly also due to the 9/11 attacks. The number of overnight stays decreased to 1.73 billion in 2003 but then increased markedly from 2004 to 2007. In 2007 the number of overnight stays in the EU Member States' hotels and campsites was just below the 2 billion mark, at 1.94 billion.

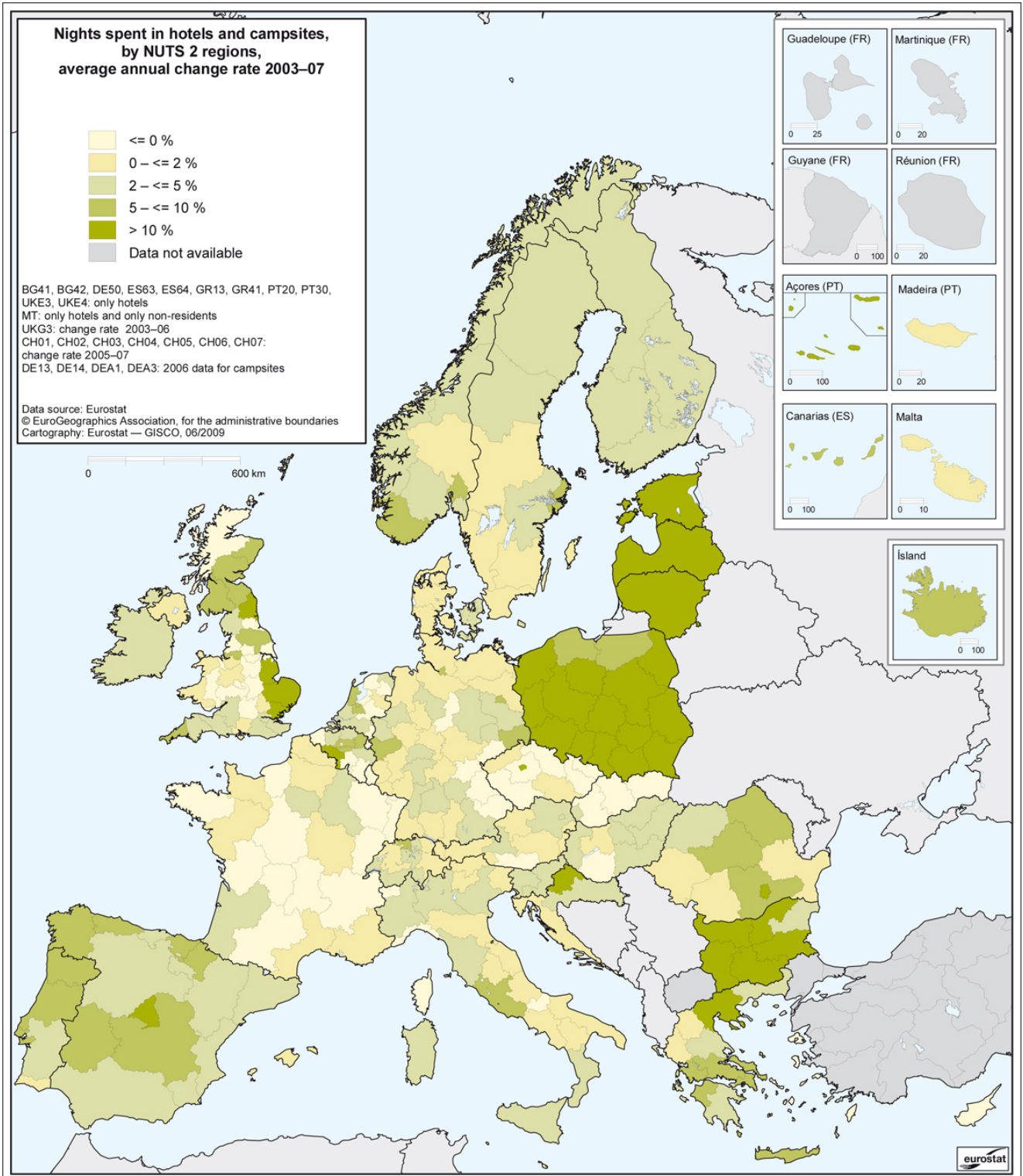
The biggest beneficiaries were the three Baltic States and Poland, all of which recorded double-digit growth in overnight stays. Bulgaria, Greece, Romania, Spain, Finland, Portugal, the United Kingdom and Hungary also recorded growth figures above the EU average of 2.8 %.

**Figure 10.4:** Nights spent in hotels and campsites, EU-27, average annual change rate 2003–07  
Percentage





**Map 10.5:** Nights spent in hotels and campsites, by NUTS 2 regions, average annual change rate 2003–07



Only Luxembourg, Slovakia and Cyprus recorded declines in the number of overnight stays between 2003 and 2007.

Map 10.5 illustrates the trend in overnight stays over the period 2003–07. It shows that the main beneficiaries of the upswing in tourism over this period were the regions in the new EU Member States of the Baltic States, Poland and Bulgaria. Most regions in these countries achieved growth rates of over 10 %. Equally strong growth in overnight stays was recorded in the regions of Romania, Portugal and Spain.

## Inbound tourism

Inbound tourism, i.e. visits from abroad, is of particular interest to most analyses of tourism in a given region. The statistically important factor here is the usual place of residence of the visitors, not their nationality. Foreign visitors, particularly those from distant countries, usually spend more per day than domestic visitors during their stays and thus carry greater weight as a demand factor for the local economy. Their expenditure also contributes to the balance of payments of the country visited. They may therefore help to offset foreign trade deficits.

Map 10.6 shows overnight stays by foreign visitors as percentages of total overnight stays in the various regions. The values differ very widely from region to region, from less than 5 % to well over 90 %. Europe's island regions, or at least those in the south, show particularly high figures for foreign visitors as a percentage of total overnight stays. This is true not only for the island states of Malta and Cyprus but also for the Greek island regions, the Spanish Illes Balears and Ca-

narias and the Portuguese Região Autónoma da Madeira. Foreign visitors also account for more than 90 % of overnight stays in Luxembourg and Praha, the Croatian region of Jadranska Hrvatska and the Austrian region of Tirol.

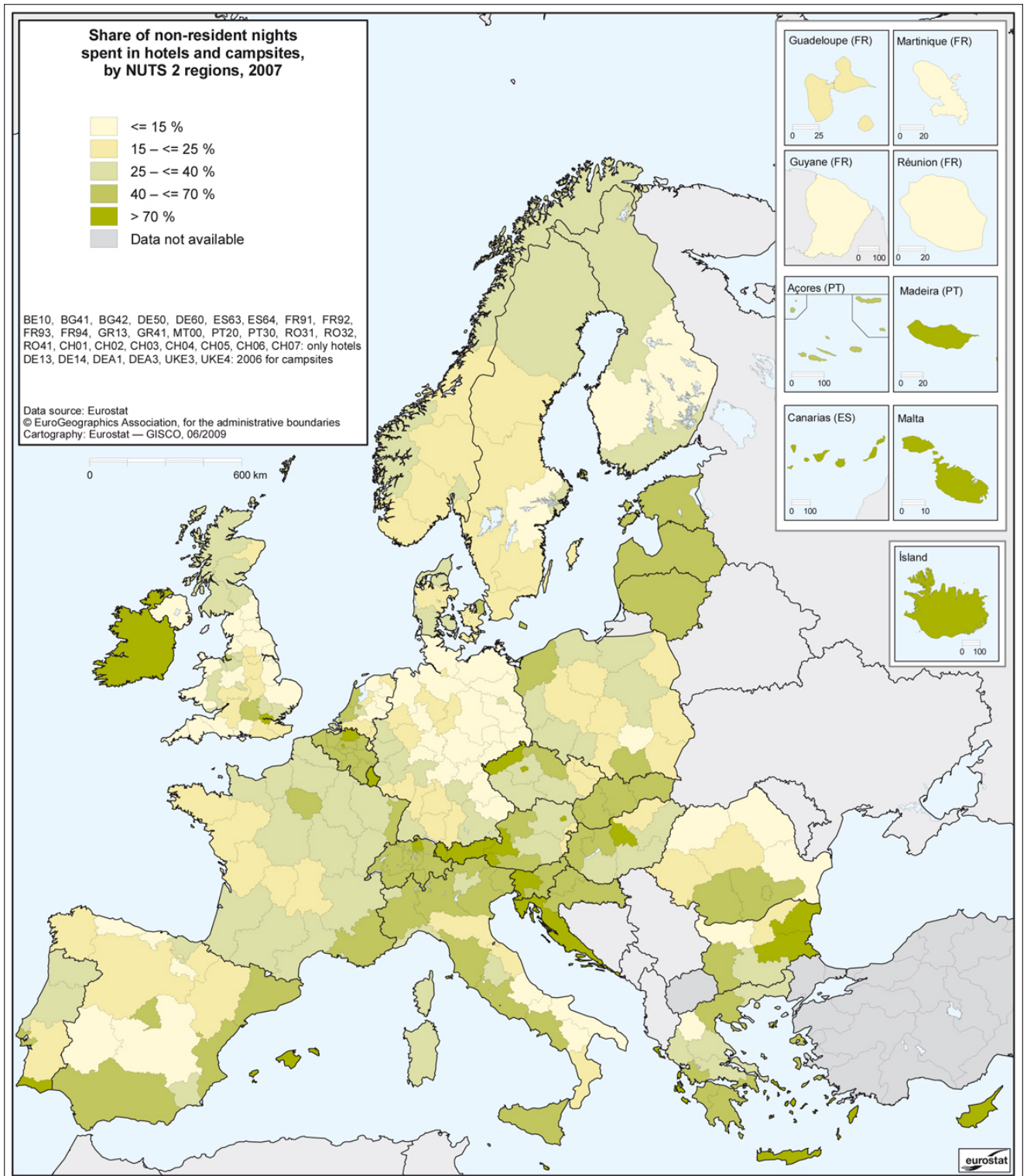
## Conclusion

Analysis of the structure and development of tourism in Europe's regions confirms the compensatory role which this sector of the economy plays in many countries. It is particularly significant in those regions that are at a distance from and often peripheral to the economic centres of their country. Here, tourism services are often an important factor in creating and securing employment and are one of the main sources of income for the population. This applies especially to Europe's island states and island regions, to many coastal regions, particularly in southern Europe, and to the whole Alpine region. The particularly dynamic growth in tourism in most of the new central and east European Member States is a significant factor in helping their economies to catch up more rapidly with those of the old Member States.

According to the World Tourism Organisation, Europe is the most frequently visited region on earth. Five of the top 10 countries for visitors worldwide are European Union Member States. The wealth of its cultures, the variety of its landscapes and the exceptional quality of its tourist infrastructure are some of the probable reasons for this prominent position. The accession of the new Member States has hugely enriched the European Union's tourism potential by enhancing its cultural diversity and providing interesting new destinations for many citizens to discover.



**Map 10.6:** Share of non-resident nights spent in hotels and campsites, by NUTS 2 regions, 2007







## Methodological notes

Harmonised statistical data on tourism have been collected since 1996 in the Member States of the European Union on the basis of Council Directive 95/57/EC of 23 November 1995 on the collection of statistical information in the field of tourism. The programme covers both the supply side, i.e. data on available accommodation capacity (establishments, rooms, bedplaces) and its utilisation (number of visitor arrivals and overnight stays), and the demand side, i.e. the travel behaviour of the population. Results by region below Member State level are available only for the supply side, however.

The tourism statistics presented in this chapter relate only to 'hotels and similar establishments' and 'tourist campsites'. Statistics for 'holiday dwellings' and 'other collective accommodation', on which data are also collected under the tourism statistics directive, are not included in this analysis since their comparability must at present still be regarded as limited, particularly at regional level.

The analysis of tourism statistics covers data on both private and business travellers. This means that the definition of tourism applied to these statistics is broader than the everyday definition. The reason for this is primarily an economic one, since the two groups of travellers demand similar services and are thus, for the providers of those services, more or less interchangeable.