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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 1995-2005

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

Looking within Europe, however, western and southern countries show a different trend compared to northern and eastern Europe in 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

The number of tourist nights spent by residents and non-residents is the main indicator giving an impression of the development of tourism (Table 1.1). All three groups of countries distinguished, the EU-25, the EU-15 and the new Member States (those that joined the EU in 2004), showed an overall increase in the period 1995 to 2005. However, the general picture is two-sided. Between 1995 and 2000 each of the three groups recorded an average increase per year of at least 4.0%, while, mainly owing to September 11, the absolute number of nights fell between 2001 and 2003 but recovered in the years 2004 and 2005.

In 2005, the absolute number of nights surpassed the highest ever recorded value of 2 121 million, established in the year 2000, and achieved a new record of 2 161 nights spent, shared by the EU-15 and the new Member States in a proportion of 92.7% to 7.3%. During the whole period the old Member States' share of total nights decreased only slightly whereas in general the new Member States showed higher growth rates, especially in the years 2003, 2004 and 2005.

Table 1.1 - Evolution of tourist nights in the EU-25, in total and by area, 1995-2005

Nights spent (1 000)	1995	2000	2001	2002	2003	2004	2005
EU-25[1]	1 720 960	2 121 141	2 112 369	2 092 580	2 075 592	2 114 236	2 160 763
EU-15[1]	1 607 035	1 967 031	1 967 695	1 951 361	1 932 144	1 959 519	2 002 153
NMS	113 925	154 110	144 674	141 219	143 448	154 717	158 610
Annual change rate %	1995	2000 (*)	2001	2002	2003	2004	2005
EU-25		4.3	-0.4	-0.9	-0.8	1.9	2.2
EU-15		4.1	0.0	-0.8	-1.0	1.4	2.2
NMS		6.2	-6.1	-2.4	1.6	7.9	2.5
Market share %	1995	2000	2001	2002	2003	2004	2005
EU-25	100.0	100.0	100.0	100.0	100.0	100.0	100.0
EU-15	93.4	92.7	93.2	93.3	93.1	92.7	92.7
NMS	6.6	7.3	6.8	6.7	6.9	7.3	7.3

Note: (*) Average annual growth rate 1995-2000

1) 1995, 2000 and 2001 include estimates for EE. 2003-2004 include estimates for IE. 2005 includes 2004 data for PT and UK.

Looking at the intensity of tourism in different countries of the EU-25 (Map 1.1), measured by the number of total nights per resident, values above 10 are recorded in countries where tourism demand is very high in relation to population (such as the islands of Cyprus and Malta) and where long-stay tourism is prevalent (e.g. beach tourism, mountain tourism in Austria). In Cyprus and Malta, the ratio nights/residents in 2005 was 20.1 and 18.8 respectively, in Austria 11.8.

In contrast, very low values were recorded in emerging tourism destinations (new Member States) and in countries where short-stay tourism prevails (city breaks, business tourism, etc.). For example, the ratio nights/residents was below 2.5 in Lithuania, Latvia, Poland, Hungary, Slovakia and Bulgaria, while in Belgium, with a large share of business tourism, it was 2.7. Considering the most popular tourism destinations in Europe, the values reached 4.7 in France, 5.0 in Greece, 6.1 in Italy and 8.2 in Spain. These differences are the result of a varied population size, on the one hand, and of tourism motivations, on the other.

Map 1.1 - Tourism intensity in the European countries, 2005

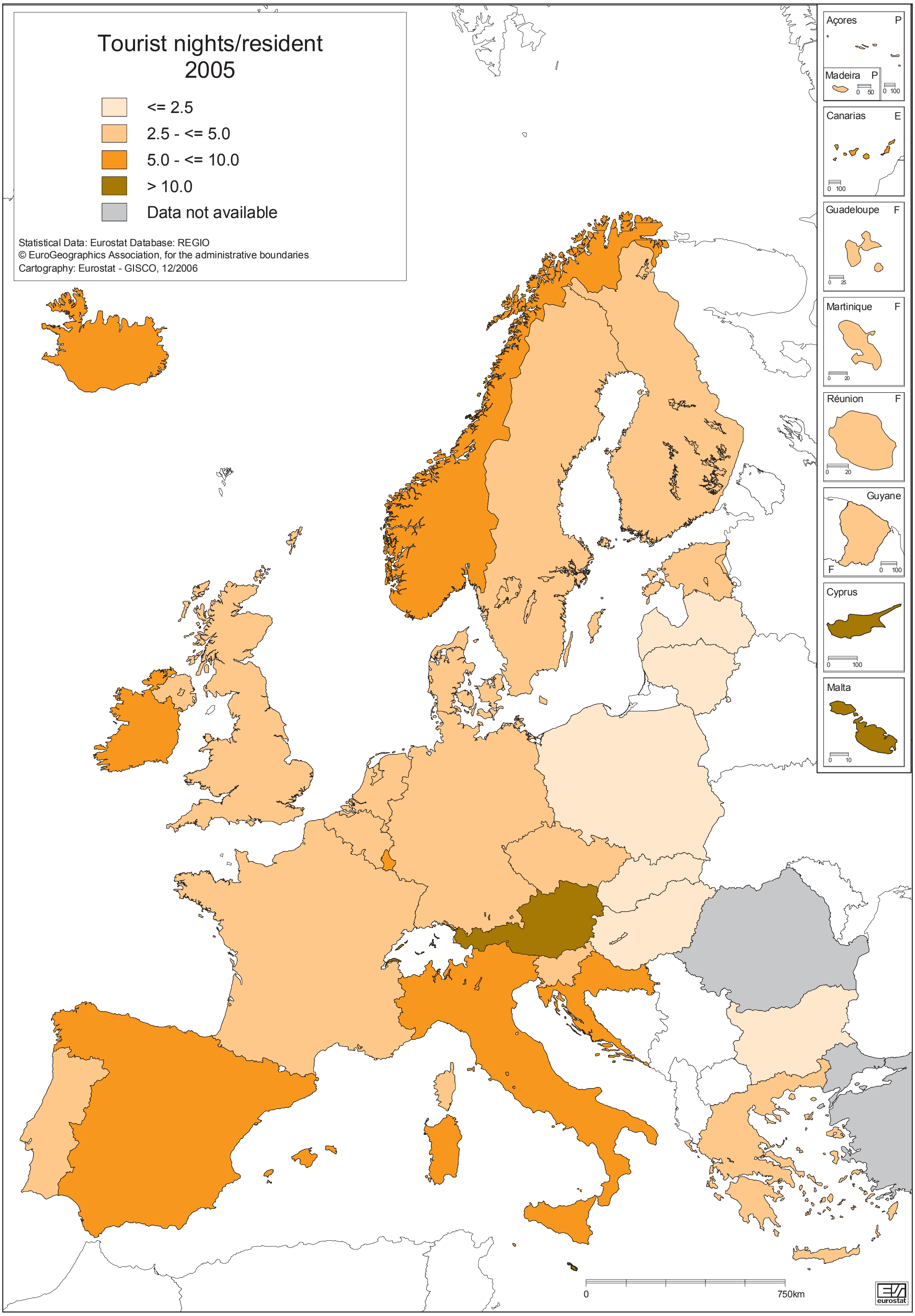


Table 1.2 - Evolution of tourist nights (non-residents) in the EU-25, in total and by area, 1995-2005

Nights spent (1 000)	1995	2000	2001	2002	2003	2004	2005
EU-25[1]	671 146	892 853	893 199	878 878	859 062	865 639	886 748
EU-15[1]	615 387	824 529	820 265	807 581	790 835	791 813	809 481
NMS	55 759	68 324	72 934	71 297	68 227	73 826	77 267
Annual change rate %	**1995**	**2000 (*)**	**2001**	**2002**	**2003**	**2004**	**2005**
EU-25		5.9	0.0	-1.6	-2.3	0.8	2.4
EU-15		6.0	-0.5	-1.5	-2.1	0.1	2.2
NMS		4.1	6.7	-2.2	-4.3	8.2	4.7
Market share %	**1995**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**
EU-25	100.0	100.0	100.0	100.0	100.0	100.0	100.0
EU-15	91.7	92.3	91.8	91.9	92.1	91.5	91.3
NMS	8.3	7.7	8.2	8.1	7.9	8.5	8.7

Note: (*) Average annual growth rate 1995-2000

1) 1995, 2000 and 2001 include estimates for EE. 2003-2005 include estimates for IE. 2005 includes 2004 data for PT and UK.

Table 1.2 shows the trend in and evolution of international tourism nights in the EU-25 from 1995 to 2005. A comparison is made between old Member States (EU-15) and new Member States, in terms of both absolute values and annual change rates. The market shares describe the distribution of international tourism nights in the different areas.

With almost 887 million international nights, tourism in the EU-25 recorded good growth in 2005 (+2.4%), strengthening the recovery shown in 2004 (+0.8%) after a two-year negative trend. Looking at the period from 1995 to 2005, the EU-25 shows an up-and-down trend. Very good performance was recorded in the area in the second half of the 1990s (from 671 million nights in 1995 to more than 893 million in 2000, +5.9% on average each year), driven by the exceptional results of the year 2000 (buoyant economy, the Holy Year in Italy, the EXPO in Hannover/Germany, etc.). The number of nights remained more or less stable between 2000 and 2001, then declined in 2002 (-1.6%), probably because of the economic and political consequences of September 11, which prompted growth in short-haul journeys within Europe and a general contraction of the length of stay. This negative performance worsened in 2003 (-2.3%), 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 nights spent by non-residents in the EU-15 and in the new Member States, it can be seen that the old Member States showed a similar trend to the new Member States but with smaller rates for both increases and decreases.

After healthy expansion from 1995 to 2000 (+6.0% average annual growth rate), international nights in the EU-15 stagnated in 2001 (-0.5%) and decreased in 2002 and 2003 (-1.5% and -2.1% respectively). They stabilised in 2004 before picking up in 2005 (+2.2%) (Table 1.2). This trend is easily explained by the fact that international nights spent in the EU-15 countries accounted for about 91%-92% of total international tourism nights in the EU-25 and their share was fairly stable over the period under review.

On the other hand, the new Member States showed the best performance in the last two years, after an up-and-down trend from 1995 to 2003. Nights spent by non-residents in these countries recorded steady expansion in the second half of the 1990s (from 55.8 million in 1995 to 68.3 million in 2000, +4.1% on average each year), which strengthened in 2001 (+6.7%). A downward movement took place in 2002 and 2003 (-2.2% and-4.3% respectively), when the effects of the international economic and political turmoil prompted western European tourists to stay in their countries of origin or to prefer neighbouring countries in the same area. This decline was well compensated in the following two years, when international nights increased by +8.2% and +4.7% (Table 1.2).

Figure 1.1 - Development of tourist nights (non-residents), 1995-2005 (million)

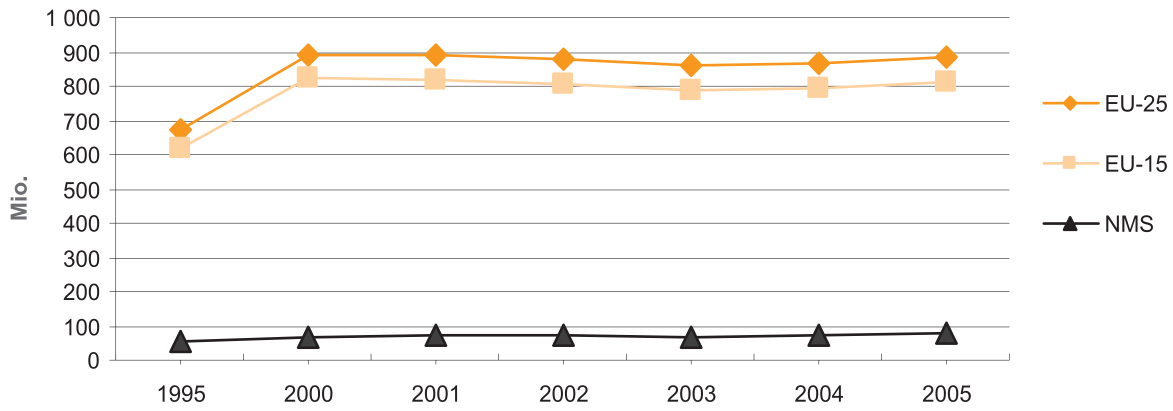


Figure 1.1 compares the evolution of non-resident tourist nights in the EU-25, the EU-15 and the new Member States from 1995 to 2005.

Table 1.3 - Evolution of tourism receipts in the EU-25, in total and by area, 1995-2005

Receipts (EUR million)	1995	2000	2001	2002	2003	2004	2005
EU-25	133 745	213 751	215 763	216 463	211 652	222 527	232 236
EU-15	124 224	194 816	196 271	199 076	195 520	205 169	213 263
NMS	9 521	18 935	19 492	17 387	16 132	17 358	18 973
Annual change rate %	1995	2000 (*)	2001	2002	2003	2004	2005
EU-25		9.8	0.9	0.3	-2.2	5.1	4.4
EU-15		9.4	0.7	1.4	-1.8	4.9	3.9
NMS		14.7	2.9	-10.8	-7.2	7.6	9.3
Market share %	1995	2000	2001	2002	2003	2004	2005
EU-25	100.0	100.0	100.0	100.0	100.0	100.0	100.0
EU-15	92.9	91.1	91.0	92.0	92.4	92.2	91.8
NMS	7.1	8.9	9.0	8.0	7.6	7.8	8.2

Note: (*) Average annual growth rate 1995-2000

Looking at the economic transactions generated by international tourism, tourism receipts performed well from 1995 to 2000 and from 2003 to 2005 (Table 1.3).

The EU-25 area as a whole earned about EUR 232.2 bn in 2005, an increase of +4.4% compared to the previous year. This growth followed the good results of 2004 (+5.1%), which offset the fall of 2003 (-1.3%), mainly due to the increased pressure on prices, along with the strength of the euro, which led to a drop in receipts across all sub-regions.

The EU-15 area, which accounted for about 92% of total international receipts in the EU-25 area as a whole, showed the same trend, recording EUR 213.2 bn in 2005 (+3.9% compared to 2004). However, the best performance of the last two years, though at lower absolute values, was seen in the new Member States, whose receipts rose by +9.3% in 2005 and +7.6% in 2004, compensating the loss of -7.2% in 2003.

Table 1.4 - Tourism expenditure of EU-25 residents, in total and by area, 1995-2005

Expenditure (EUR million)	1995	2000	2001	2002	2003	2004	2005
EU-25	130 149	210 350	215 237	216 631	215 938	223 743	235 238
EU-15	126 481	201 205	205 113	206 668	206 520	213 195	223 558
NMS	3 668	9 145	10 124	9 963	9 418	10 548	11 680
Annual change rate %	1995	2000 (*)	2001	2002	2003	2004	2005
EU-25		10.1	2.3	0.6	-0.3	3.6	5.1
EU-15		9.7	1.9	0.8	-0.1	3.2	4.9
NMS		20.0	10.7	-1.6	-5.5	12.0	10.7
Market share %	1995	2000	2001	2002	2003	2004	2005
EU-25	100.0	100.0	100.0	100.0	100.0	100.0	100.0
EU-15	97.2	95.7	95.3	95.4	95.6	95.3	95.0
NMS	2.8	4.3	4.7	4.6	4.4	4.7	5.0

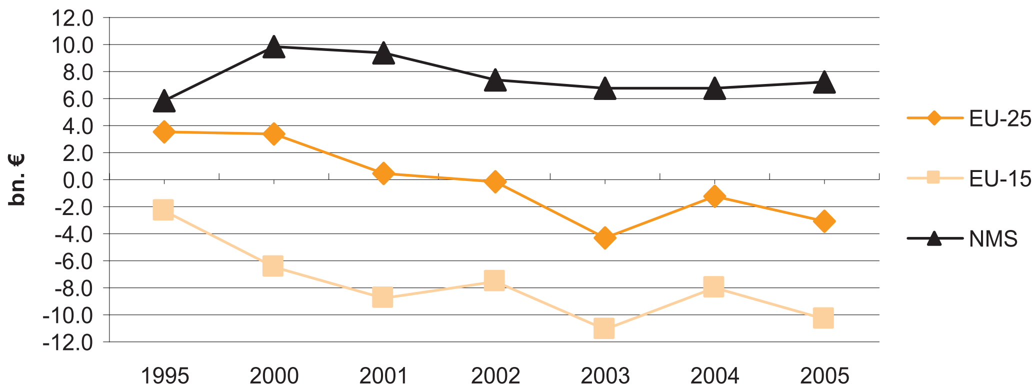
Note: (*) Average annual growth rate (%) 1995-2000

Turning to tourism expenditure of European residents (Table 1.4), the trend is fairly similar to that of receipts in the period analysed, owing to the fact that a large share of this expenditure is spent in other EU-25 countries.

Expenditure by tourists from the EU-25 countries on their trips abroad amounted to EUR 235.2 bn in 2005, with a strong increase from 1995 to 2000 (+10.1% on average per year), a reasonable performance in 2001 (+2.3%), virtual stability in 2002 (+0.6%) and stagnation in 2003 (-0.3%). The results in 2004 and 2005 (+3.6% and +5.1% respectively, compared to the previous year) are based on increasing outbound tourism in both the old and the new Member States. Growth rates were higher in new than in old Member States. Expenditure by residents in new Member States increased by +12.0% in 2004 and +10.7% in 2005, while in the EU-15 countries, which accounted for about 95% of total expenditure of the EU-25 area as a whole, they grew by +3.2% and +4.9% in the same years.

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 were about 2% lower than expenditure in 2005 and the balance was negative starting from 2002 (Figure 1.2). In the EU-15 countries the share of receipts was 95% in 2005 and the balance was negative throughout the period examined. In contrast, the new Member States recorded a large share of receipts, generated by inbound tourism. The balance between receipts and expenditure in these countries was strongly positive. From 1995 to 2001, in particular, it grew considerably. From 2002 onwards it showed a slight decrease due to the growth of outbound tourism.

Figure 1.2 - Balance of tourism receipts and expenditure, 1995-2005 (EUR billion)



1.1.2 Leading generators of international 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 2005, in terms of nights spent on outbound trips of at least one night. The ranking is based on the data for 2005. 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 seven years.

Table 1.5 - Top 10 generators of outbound tourism in the EU-25, 1998-2005 (nights spent)

Rank		Country	Nights spent - outbound (1 000)		Average annual growth rate % 1998-2005	Market share (%)	
1998	2005		1998[1]	2005		1998	2005
		TOTAL EU-25	:	2 078 136	:	:	100.0
		Total top 10	1 638 435	1 821 532	1.5	:	87.7
1	1	DE	776 500	763 050	-0.2	:	36.7
2	2	UK[2]	295 564	387 906	4.6	:	18.7
3	3	FR[3]	129 182	161 029	3.2	:	7.7
4	4	NL	128 198	141 527	1.4	:	6.8
5	5	IT[2]	92 626	97 316	0.8	:	4.7
6	6	BE	68 697	76 166	1.5	:	3.7
7	7	AT	57 921	50 887	-1.8	:	2.4
8	8	SE	30 696	49 258	7.0	:	2.4
	9	PL	:	48 616	:	:	2.3
9	10	ES[2]	28 891	45 777	8.0	:	2.2

1) No EU-25 totals for 1995 available. 2) 2004 data. 3) 1999 data used for 1998.

In terms of nights spent abroad, the top 10 countries of origin accounted for 1.8 billion nights in 2005, which corresponds to 87.7% of total nights abroad within the EU-25. This resulted in average annual growth for the top 10 countries between 1998 and 2005 of +1.6%.

Germany ranked first, with 763 million nights in 2005 (36.7 % of the EU-25 total), as against 777 million in 1998. Nevertheless, Germany (-0.2%) and Austria (-1.8%) were the only top 10 countries showing a decrease in nights spent abroad between 1998 and 2005. The United Kingdom took second place with a strong rise in the number of nights abroad (+4.6% on average each year). Overnight stays rose from 296 million in 1998 to 388 million in 2005, corresponding to 18.7% of the EU-25 total. France came third with 161 million nights spent on outbound trips in 2005 (7.7% of the EU-25 total), as against 129 million in 1998, representing an increase of +3.2% on average per year. The Netherlands ranked fourth, with 142 million nights in 2005, which represented an average increase of +1.4% compared to 1998 and a market share of 6.8% in 2005. Italy and Belgium followed, showing a lower average growth in nights abroad in comparison with the top 10 average (+0.8% and +1.5% respectively). Their share of the EU-25 total was 4.7% and 3.7% respectively.

Sweden ranked eighth in 2005, showing a strong increase in nights spent abroad, from 31 million to 49 million (+7.0% on average each year) accounting for a 2.4% market share. In 2005, Poland climbed to ninth position and ranked for the first time amongst the top 10 countries. With 49 million nights spent on outbound trips in 2005, it overtook Spain with 46 million nights spent. However, Spain recorded the highest growth rate (annual average growth rate of +8.0% between 1998 and 2005) in the top 10 ranking. For Poland it was not possible to calculate the rate of change owing to the lack of data for 1998.

Table 1.6 - Top 10 tourism spenders of the EU-25, 1998-2005 (tourism expenditure, excluding transport)

Rank		Country	International tourism expenditure (EUR million)		Average annual growth rate % 1998-2005	Market share (%)	
1998	2005		1998[1]	2005		1998	2005
		TOTAL EU-25	164 738	235 238	5.2	100.0	100.0
		Total top 10	149 589	209 277	4.9	90.8	89.0
1	1	DE	48 604	58 822	2.8	29.5	25.0
2	2	UK	29 881	47 905	7.0	18.1	20.4
3	3	FR	15 896	25 070	6.7	9.6	10.7
4	4	IT	15 707	18 272	2.2	9.5	7.8
5	5	NL	9 716	12 954	4.2	5.9	5.5
9	6	ES	4 470	12 125	15.3	2.7	5.2
7	7	BE[2]	7 886	11 906	6.1	4.8	5.1
6	8	AT	8 496	8 883	0.6	5.2	3.8
8	9	SE	6 816	8 669	3.5	4.1	3.7
11	10	IE	2 117	4 671	12.0	1.3	2.0

1) 1998 data used in order to compare information with data in Table 1.5. 2) BLEU for 1998.

Looking at the top 10 countries of origin by total international tourism expenditure (Table 1.6), the ranking is almost the same as for nights spent. In 2005, the leading countries accounted for 89% of total expenditure abroad by visitors from the EU-25 countries. Although the amount of money spent by the main countries increased from 1998 to 2005 (from EUR 149.6 bn to EUR 209.3 bn), their share of the total declined (from 91% in 1998 to 89% in 2005), meaning that spending by visitors from other EU countries was growing at a higher rate.

Germany ranked first, with nearly EUR 58.9 billion in 2005 (25% of the EU-25 total), against 48.6 billion in 1998 (29.5%). The United Kingdom came second with a strong rise in expenditure abroad (+7% on average each year). Its international expenditure rose from EUR 29.9 billion in 1998 to EUR 47.9 billion in 2005, and its share of the EU-25 total from 18.1% to 20.4%. France took third place, with EUR 25.1 billion (10.7% of the EU-25 total), against EUR 15.9 billion in 1998 (9.6%), corresponding to an increase of +6.7% on average per year.

Italy came fourth, followed by the Netherlands, Spain and Belgium. It is interesting to note that expenditure by Spanish tourists abroad boomed. In 2005, they spent EUR 12.1 billion (5.2% of the EU-25 total) against 4.5 billion in 1998 (2.7%). This represented an average annual growth rate of +15.3%.

1.1.3 Leading destinations of international tourism

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 2005. The ranking is based on the data for 2005. The comparison with 1995 shows how the ranking has changed over time and reveals which countries strengthened their position and which lost ground over the period analysed.

In 2005, the group of ten leading tourism destinations represented 86.6% of total nights spent by non-residents in the EU-25 and their share remained almost stable over the period under review.

Spain was the most popular tourism destination of the EU-25 area in 2005, with 209.5 million nights in 2005 (annual average growth rate of +6.9% between 1995 and 2005) and a share of 23.6%. It surpassed Italy, which recorded 148.3 million nights (+2.8% on average over the period) and a share of 16.7%.

France ranked third with 108.0 million nights (12.2%), against 87.5 million in 1995 (13.0%) and an increase of +2.1% on average each year. The United Kingdom was fourth with 73.8 million inbound nights in 2005, but reduced its market share compared to 1995 (from 11.4% to 8.3%), also owing to an average annual fall in inbound nights in the previous nine years (-0.4%, 2004 data). Austria came fifth with 69.7 million nights (63.8 million in 1995, +0.9% on average each year). The other top countries were: Germany (48.2 million international nights in 2005), followed by Greece (40.7 million), the Netherlands (25.2 million), Portugal (24.6 million, 2004 data) and the Czech Republic (19.6 million). Among the last group, the best results were recorded by the Czech Republic and the Netherlands, where nights spent by non-residents increased by +6.7% and +2.5% on average each year

Table 1.7 - Top 10 tourism destinations in the EU-25, 1995-2005 (nights spent by non-residents)

Rank		Country	Nights spent by non-residents (1 000)		Average annual growth rate % 1995-2005	Market share (%)	
1995	2005		1995	2005		1995	2005
		TOTAL EU-25[1]	672 150	886 748	2.8	100.0	100.0
		Total top 10	574 281	767 673	2.9	85.4	86.6
2	1	ES	107 605	209 518	6.9	16.0	23.6
1	2	IT	113 001	148 290	2.8	16.8	16.7
3	3	FR	87 548	107 952	2.1	13.0	12.2
4	4	UK[2]	76 523	73 778	-0.4	11.4	8.3
5	5	AT	63 840	69 733	0.9	9.5	7.9
7	6	DE	38 227	48 246	2.4	5.7	5.4
6	7	EL	35 285	40 734	1.4	5.2	4.6
9	8	NL	19 736	25 210	2.5	2.9	2.8
8	9	PT[2]	22 241	24 617	1.1	3.3	2.8
14	10	CZ	10 275	19 595	6.7	1.5	2.2

1) 1995 includes estimates for EE. 2) 2004 data.

1

Looking at international tourism receipts (Table 1.8), the ranking changes slightly. In terms of percentage share, the top 10 destinations are also somewhat less dominant: their share of receipts is below their share of nights, representing 84.1% of total receipts in the EU-25 in 2005 (as against 86.6% in 1995).

Table 1.8 - Top 10 tourism earners in the EU-25, 1995-2005 (tourism receipts, excluding transport)

Rank		Country	International tourism receipts (EUR million)		Average annual growth rate % 1995-2005	Market share (%)	
1995	2005		1995	2005		1995	2005
		TOTAL EU-25	133 745	232 236	5.7	100.0	100.0
		Total top 10	115 828	195 376	5.4	86.6	84.1
3	1	ES	19 473	38 494	7.1	14.6	16.6
1	2	FR	21 064	33 981	4.9	15.7	14.6
2	3	IT	20 946	28 823	3.2	15.7	12.4
4	4	UK	15 632	24 450	4.6	11.7	10.5
5	5	DE	13 771	23 473	5.5	10.3	10.1
6	6	AT	9 883	12 432	2.3	7.4	5.4
10	7	EL	3 146	11 037	13.4	2.4	4.8
7	8	NL	4 780	8 421	5.8	3.6	3.6
8	9	BE[1]	3 424	7 889	8.7	2.6	3.4
9	10	PT	3 709	6 376	5.6	2.8	2.7

1) BLEU for 1995.

As for nights, Spain ranked first, with EUR 38.5 billion, as against EUR 19.5 billion in 1995 (with an average annual growth rate of +7.1%). Its market share rose from 14.6% to 16.6%. It lies ahead of France, where receipts grew from EUR 21.1 to EUR 34.0 billion, corresponding to an increase of 4.9% on average each year. Comparing the results for international tourism receipts on the one hand with nights spent in collective accommodation on the other hand, 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 the evolution of prices in the destination country.

Although Italy came second in terms of international nights, it only ranked third as regards receipts (EUR 28.8 billion in 2005, 12.4% of total receipts in the EU-25). This means that Italy recorded smaller expenditure per night in collective accommodation compared to France, or registered more cross-border same-day trips or nights in private accommodation.

For the United Kingdom, receipts continued to increase (from EUR 15.6 billion to EUR 24.5 billion, +4.6% on average each year) despite a fall in international tourism nights. This shows that international tourists who chose to go there either spent more in 2005 than in 1995, or the number of same-day trips or nights in private accommodation increased between 1995 and 2005.

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 +13.4% each year from 1995 to 2005, while nights only rose by +1.4% in the same period.

1.1.4 Hotel capacity

Following the general overview of international tourism development in different areas of Europe, it is interesting to see whether the trends in hotel accommodation supply have followed the same pattern or not.

As shown 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. Looking at the figures, the EU-25 as a whole had about 201 000 hotels and similar establishments in 2005, as against around 195 000 in 1995 (average growth of +0.3% each year). Over the same period, bed places rose from 9.2 million to 11.4 million, with an average annual growth rate of +1.0%. This positive trend was somewhat dented by a decline of -3.1% between 2002 and 2003.

Table 1.9 - Hotels and similar establishments: Recent trends in the number of establishments, in total and by area, 1995-2005

Establishments (1 000)	1995	2000	2001	2002	2003	2004	2005
EU-25[1]	195	201	200	200	200	200	201
EU-15[1]	190	192	191	191	190	190	191
NMS	5	9	9	9	10	10	10
Market share %	**1995**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**
EU-25	100.0	100.0	100.0	100.0	100.0	100.0	100.0
EU-15	97.4	95.5	95.5	95.5	95.0	95.0	95.0
NMS	2.6	4.5	4.5	4.5	5.0	5.0	5.0

1) 2005 includes 2004 data for PT and UK.

Most hotel accommodation was concentrated in the old Member States (95.0% of establishments and 92.6% of bed places). The number of hotels and similar establishments stagnated in comparison with the EU-25 between 1995 and 2005 (-0.1% on average each year), while bed places grew slowly over the period analysed (average annual growth of +0.9%).

In contrast, new Member States recorded the largest expansion in hotel accommodation supply, especially from 2000 onwards. The number of hotels rose by +1.0% on average each year between 1995 and 2005 (+3.5% between 2000 and 2005), representing about 5% of total hotel supply in the EU-25 (2.6% in 1995). There was higher impact for bed places (7.4% in 2005 against 6.0% in 1995), which showed an average growth rate of +1.6% in the same period (+3.5% for both indicators between 2000 and 2005).

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 an average of 47.0 bed places in 1995, 51.5 in 2000 and 56.7 in 2005, revealing continuing fragmentation of the accommodation supply, dominated by small and medium-sized establishments. In the old Member States, the average size was slightly smaller: 45.3 bed places in 1995, 50.2 in 2000 and 55.3 in 2005. On the other hand, the new Member States had larger establishments. However, there was a decline in the average size of hotels over the period under review (from 109 bed places per hotel in 1995 to 84 in 2005), which in consequence leads to an alignment of the size structure between new and old Member States.

Table 1.10 - Hotels and similar establishments: Recent trends in bed places, in total and by area, 1995-2005

Bed places (1 000)	1995	2000	2001	2002	2003	2004	2005
EU-25[1]	9 164	10 355	10 547	10 746	10 409	10 785	11 404
EU-15[1]	8 617	9 634	9 817	9 986	9 627	9 953	10 560
NMS	547	721	730	760	782	832	844
Market share %	**1995**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**
EU-25	100.0	100.0	100.0	100.0	100.0	100.0	100.0
EU-15	94.0	93.0	93.1	92.9	92.5	92.3	92.6
NMS	6.0	7.0	6.9	7.1	7.5	7.7	7.4

1) 2005 includes 2004 data for PT and UK.

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.

This section gives a summary of the most important positive and negative factors that shaped the development of international tourism in Europe over the last three years of the period analysed (2003-2005). 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 demand in the medium and long term.

In 2005 the population in the EU-25 amounted to 453.7 million people, corresponding to about 116.4 inhabitants per km^2. 85% of this population was living in EU-15 countries, where the ratio is 119.9 people per km^2 (Table 1.11).

Table 1.11 - Population and area, 2005

	Population (1 000)	Area (km^2)	Inhabitants per km^2
EU-25[1]	453 692	3 959 323	116.4
EU-15[1]	386 866	3 225 835	119.9
NMS	74 106	733 488	101.0

1) Includes 2004 population data for UK.

The demographic trend in Europe features is marked by 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 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 money and time available for travel, also off-season. 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 also 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 different European sub-regions, the new Member States have a younger population than the old ones. In 2004, residents up to 24 years accounted for about 32% of the total population on average, against 28% in the EU-15 area (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 outbreak of wars in Afghanistan and Iraq, policy and security issues became more important for travel behaviour. In 2002, the perception of risk 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 preferred travelling by road and rail instead of air travel. Last minute bookings saw a dramatic increase and leisure tourism performed better than business tourism.

In the following years, the persistence of conflicts in the Middle East, the spread of terrorism in Europe, North Africa (Egypt) and Asia (Indonesia, Istanbul, etc.) and particularly the attacks on the countries involved in the war in Iraq (Madrid, 2004; London, 2005) contributed to an ongoing degree of uncertainty and tension. Intra-regional tourism (i.e. within Europe) continued to play a considerable role in comparison with inter-regional tourism (to and from Europe).

Looking at the European continent, the enlargement of the European Union in 2004 to include ten new countries (the Czech Republic, Estonia, Cyprus, Hungary, Latvia, Lithuania, Malta, Poland, Slovenia and Slovakia) imparted new impetus 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 further development of intra-regional tourism. The new enlargement with Bulgaria and Romania in 2007 and accession negotiations with some other countries currently under way should support 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 regional "devolution" (i.e. decentralisation) in both old and new Member States (e.g. Italy, Portugal, Greece, Czech Republic), 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 a duplication or overlap of initiatives at regional level, which can have the effect of puzzling potential tourists.

Economic factors

In the last three years of the period under review, the evolution of economic factors made for 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 continuous hope of recovery from the second half of 2003, the recession in Germany and the stagnation in other neighbouring economies (e.g. Italy and France) persisted in 2005 as well. However, 2006/2007 forecasts see an improvement of the economic trends in these countries.

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 decade. This will also lead to an expansion in outbound tourism, which is currently driven by visits to friends and relatives within the same area of Europe.

Table 1.12 - Recent trends in GDP, in total and by area, 1995-2005

GDP (EUR million) (at current prices)	1995	2000	2001	2002	2003	2004	2005
EU-25[1]	6 903 359	9 091 932	9 458 233	9 812 142	9 967 203	10 450 989	10 842 924
EU-15	6 670 975	8 710 834	9 029 575	9 357 042	9 517 357	9 964 247	10 285 871
NMS	232 384	381 098	428 658	455 100	449 846	486 742	557 053
Annual change rate % (at constant prices)	1995	2000 (*)	2001	2002	2003	2004	2005
EU-25		3.0	1.9	1.1	1.1	2.4	1.6
EU-15		2.9	1.8	1.0	1.0	2.3	1.4
NMS		4.5	2.4	2.4	3.7	5.2	4.4
Market share % (at current prices)	1995	2000	2001	2002	2003	2004	2005
EU-25	100.0	100.0	100.0	100.0	100.0	100.0	100.0
EU-15	96.6	95.8	95.5	95.4	95.5	95.3	94.9
NMS	3.4	4.2	4.5	4.6	4.5	4.7	5.1

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

1) 1995 includes estimate for MT.

Looking at the figures, GDP at current prices rose in the EU-25 from EUR 6 903 bn in 1995 to EUR 10 843 bn in 2005 (Table 1.12). The largest share of GDP is concentrated in the old Member States, where it increased from EUR 6 671 bn to 10 286 bn over the same period. These figures hide differences in performance between the EU-15 countries, ranging from substantial stability in Italy to an increase of +3.7% in Greece and +3.4% in Spain. The share of EU-15 GDP in the EU-25 total declined from 96.6% in 1995 to 94.9% in 2005, confirming the dynamic growth of the new Member States.

In real terms (i.e. corrected for inflation effects), GDP in the EU-25 rose on average by +3.0% per year from 1995 to 2000. In the first five years of the 21st century, GDP continued to grow but at a lower rate (+1.9% in 2001, +1.1% in 2002 and 2003). The rapid growth in 2004 and 2005 (+2.4% and +1.6%, respectively) is mainly the result of expansion in the new Member States (+5.2% and +4.4% in the same years).

In spite of lower GDP growth in 2005 than in 2004, positive economic forecasts for 2006 and improved consumer and business confidence in industrialised countries had positive effects on the local labour markets (Table 1.13). The number of people employed in the EU-25 area grew by +1.6% in 2005, against +0.5% in 2004. The result was led by the EU-15 countries, which accounted for 85.1% of all people employed in Europe (+1.7% in 2005, against +0.6% in 2004).

Table 1.13 - Recent trends in employment, in total and by area, 1995-2005

Employment (1 000)	1995	2000	2001	2002	2003	2004	2005
EU-25[1]	178 419	188 101	190 598	191 643	192 904	193 876	197 049
EU-15	148 731	158 758	161 408	162 736	164 015	164 988	167 711
NMS	29 688	29 343	29 190	28 907	28 889	28 888	29 338
Annual change rate %	1995	2000 (*)	2001	2002	2003	2004	2005
EU-25		1.1	1.3	0.5	0.7	0.5	1.6
EU-15		1.3	1.7	0.8	0.8	0.6	1.7
NMS		-0.2	-0.5	-1.0	-0.1	0.0	1.6
Market share %	1995	2000	2001	2002	2003	2004	2005
EU-25	100.0	100.0	100.0	100.0	100.0	100.0	100.0
EU-15	83.4	84.4	84.7	84.9	85.0	85.1	85.1
NMS	16.6	15.6	15.3	15.1	15.0	14.9	14.9

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

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

Social, health and weather factors

Although market globalisation has reduced the physical and psychological distance between North and South, East and West, it has also led to a 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) 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) has 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". This means that disabled people also participate frequently in tourism activities. Their access to means of transport, attractions and other facilities (accommodation, beaches, etc.) has considerably improved. In the year 2000, official statistics showed that the proportion of people registered as severely disabled was estimated at 9% of the total EU population (33.8 million people). However, the overall number of disabled people 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 prevented from enjoying them.

Apart from political and economic events, health questions have also had strong effects on the tourism market in recent years, strengthening the importance of safety issues in the choice of travel destination. After foot and mouth disease in 2001-02 and SARS in 2003, the outbreak of bird flu in late 2004/early 2005 in Asia (Indonesia, Korea, Thailand, China, etc.), and then its spread to poultry and wild birds in the Russian Federation, Turkey, Romania and other East European and North African countries, tended to discourage tourism towards these areas. In addition, the effect on consumer confidence of negative media messages to the effect that the virus can become transmissible from person to person, and then the fear of a new human pandemic influenza virus, initially affected tourism mobility all over the world. Many actions were taken at international level (World Health Organisation, United Nations, World Tourism Organisation, European Commission, etc.) to inform consumers and stakeholders of the importance of preparedness and to face the situation in a measured and rational way, thus minimising the disruption of travel and tourism.

As for weather conditions, the Tsunami disaster in South and South-East Asia (particularly in Sri Lanka, Maldives, Thailand and Indonesia) on 26 December 2004 caused a dramatic loss of human lives and a downturn of tourism in these areas. However, it had only a limited impact on global tourism, for several reasons.

First of all, the market share of the destinations concerned is small (according to the UNWTO, about 3% of total world tourism arrivals in 2004) and the damage was limited to a few coastal resorts in each country. Secondly, a substitution effect took place. In the very short term, some of the tourists who had intended to spend their holidays in those countries switched their travel plans to other destinations with similar characteristics.

In addition, there was a feeling of solidarity among tourists most familiar with these countries: they continued to go there, because tourism is the largest source of revenue for the local population. In general, the perception was that it was a distressing event that was wholly unprecedented, but that destinations and tourism establishments would be restored quite soon. Much of the tourism industry operating in the area has strong ties with international operators and intermediaries, who shared their knowledge and skills and provided the necessary support to shorten the time taken for tourism to be productive again.

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 work hours, higher incomes and more free time, more short breaks, healthy living, etc.) have helped to develop 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 and more "conscious" 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 short-range tourism, i.e. tourism to destinations/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 (food, traditions, way of life, etc.);
- Interest in local customs, folklore and resources (e.g. craftwork).

Where low-cost solutions are concerned, the improvement in international air transport with new economic options (low-cost carriers) has forced 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 from and to 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 with the London metropolitan area.

The growing attention paid to nature and the environment represents a first step towards a more conscious approach to tourism. This has probably also been prompted by the actions taken in recent years by international organisations to promote the sustainable development of tourism, from both the demand and the supply side. Conscious tourist behaviour, good public governance and quality management of private production patterns are considered crucial in order to ensure the economic, social and environmental sustainability of tourism at different territorial levels.

Sustainable development can be defined as "a broad political objective, encompassing an intention to avoid activities that will cause long-term damage to the environment and a desire to ensure an adequate quality of life for present and future generations" (European Commission). In 1992, during the UN Earth Summit held in Rio de Janeiro, the sustainable development approach was further elaborated in Agenda 21 and then in Agenda 21 for Travel and Tourism. Ten years later, the "Plan of Implementation" adopted at the Johannesburg World Summit on Sustainable Development called for a focus on sustainable tourism development and outlined actions to change unsustainable patterns of consumption and production that are also highly relevant for sustainable tourism.

In 2003, the European Commission developed a set of basic guidelines for the sustainability of European tourism, in order to provide input to broaden the European Agenda 21 for tourism. The document highlighted the need to balance business and economic success, environmental containment, preservation and development, and responsibility towards society and cultural values as three pillars of sustainability. This calls for an integrated and systemic management strategy focused on promoting sustainable consumption patterns and sustainable production patterns, in terms of both the tourism value chain and destination development. As a follow-up, in 2004 the European Sustainability Group was established. In April 2005, the conclusions of the Group regarding actions to be taken for the sustainability of European tourism were adopted by the Council of Ministers. Concerning tourism destinations, many countries, regions and local communities in Europe have developed local plans according to the principles of Agenda 21.

As for tourism enterprises (tour operators, hotels, etc.), there has been increasing awareness of the key role that policies for sustainable tourism development can have on their business. The preservation and enhancement of the natural, economic and social environment in which they operate is as important as their internal processes for ensuring profitability and competitiveness in the medium/long term. For example, NET[1] (the Network of European Private Entrepreneurs in the Tourism Sector), responding to the Commission's basic guidelines, has developed an Environmental Charter, which invites all European tourism entrepreneurs to place the principles of sound environmental management at the heart of their agendas when they formulate their business plans and calls on clients to recognise their responsibilities in relation to the environment.

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 (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.

According to the latest web statistics (Internet World Statistics, 2006), as of the beginning of 2006 about 291.6 million people (36.1% of the entire population) surf the Internet in Europe, with travel and tourism services among the most popular products on the web. In 2005, online travel sales in Europe accounted for 10.3% of the total market (EUR 25.2 bn), representing an increase of about +34% on 2004, when their share was 7.9% (EUR 18.9 bn) (Carl H. Marcussen, 2006).

On the supply side, the spread of ICT has increased opportunities for all tourism destinations and businesses to reach a larger 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 (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 customers. 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.

1) NET is a coalition formed by ECTAA (the Group of National Travel Agents' and Tour Operators' Associations within the EU), EFCO&HPA (the European Federation of Campingsite Organisations and Holiday Park Associations), ETOA (European Tour Operators Association), HOTREC (Hotel, Restaurants & Cafés in Europe) and IRU (International Road Transport Union, Permanent Delegation to the EU).

Chapter 2 - Tourist Accommodation

2. TOURIST ACCOMMODATION

This chapter gives an overview of the characteristics of and changes in accommodation capacity in Europe comparing the trends in the EU-25 area as a whole, in the “old” and “new” Member States and in candidate countries.

Table 2.1 shows the number of and trend in bed places by category (hotels and other collective accommodation) in various European countries in 1995 and 2005. In 2005 the EU-25 countries reported 24.6 million bed places (average annual growth rate of 1.6% since 1995), of which 11.4 million in hotels and similar establishments (46.2% of total bed places, +2.2% on average each year) and 13.3 million in other collective accommodation (53.8%, +1.1%). Looking at this "non-hotel accommodation", tourist campsites accounted for about 64% of all bed places in EU-25 against 18.6% for holiday dwellings. However, the latter showed a big increase in the period analysed, rising from 1.7 million to 2.8 million bed places (average annual growth rate of 3.9%), against stagnation of campsites (-0.1%).

Table 2.1 - Trends in accommodation capacity in Europe between 1995 and 2005 (1 000 bed places)

1995	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
Total1	20 960.6	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	9 126.4	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]	11 834.2	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[2]	*8 654.7*	*368.4*	*93.9*	*266.1*	*731.6*	:	*85.1*	*622.4*	*2 828.2*	:	*1 269.6*	*0.8*	*0.8*	*0.8*	*54.2*	*105.3*	:
of which: holiday dwellings[3]	*1 692.3*	*62.4*	*8.8*	*39.6*	*262.1*	:	:	*391.1*	*249.2*	:	*139.8*	*1.3*	*4.0*	*18.8*	:	*16.5*	:
2005	**EU-25**	**BE**	**CZ**	**DK**	**DE**	**EE**	**EL**	**ES**	**FR**	**IE**	**IT**	**CY**	**LV**	**LT**	**LU**	**HU**	**MT**
Total	24 631.2	415.2	436.0	390.7	3 316.8	38.1	777.7	3 063.8	4 778.7	208.9	4 350.6	95.4	24.0	31.2	66.8	329.3	38.3
Hotels	11 367.3	120.7	232.3	69.9	1 621.1	25.2	682.1	1 580.0	1 739.5	148.7	2 028.5	91.3	19.2	19.9	14.4	162.2	37.6
Other collect. accomm.	13 263.9	294.5	203.7	320.8	1 695.7	12.9	95.6	1 483.8	3 039.2	60.2	2 322.1	4.1	4.8	11.3	52.4	167.1	0.7
of which: tourist campsites[4]	*8 537.1*	*148.6*	*30.2*	*269.4*	*794.9*	*4.7*	*95.6*	*779.0*	*2 777.9*	*26.7*	*1 344.2*	*2.8*	*1.9*	*1.0*	*48.6*	*94.1*	:
of which: holiday dwellings[5]	*2 470.1*	*47.8*	*28.2*	*39.6*	*331.7*	*2.4*	:	*604.3*	*247*	*20.2*	*594.1*	*1.3*	*2.1*	*9.7*	*1.7*	*23.5*	:
Average annual growth rate % 1995-2005[6]																	
Total	1.6	-4.2	4.0	-0.6	1.7	:	1.9	4.1	1.1	:	2.6	1.9	2.8	0.3	:	2.7	0.3
Hotels	2.2	0.5	7.1	-3.4	1.1	9.0	2.0	4.4	3.8	4.4	1.5	1.7	3.7	7.3	-0.2	3.1	0.1
Other collect. accomm.	1.1	-5.6	1.4	0.1	2.3	:	1.2	3.9	-0.2	:	3.7	6.9	0.0	-5.7	:	2.2	21.5
of which: tourist campsites	*-0.1*	*-8.7*	*-10.7*	*0.1*	*0.8*	:	*1.2*	*2.3*	*-0.2*	:	*0.6*	*13.3*	*9.0*	*2.3*	*-1.1*	*-1.1*	:
of which: holiday dwellings	*3.9*	*-2.6*	*12.4*	*0.0*	*2.4*	:	:	*4.4*	*-0.1*	:	*15.6*	*0.0*	*-6.2*	*-6.4*	:	*3.6*	:
1995	**NL**	**AT**	**PL**	**PT**	**SI**	**SK**	**FI**	**SE**	**UK**	**BG**	**HR**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
Total	806.5	733.3	671.3	469.1	67.4	78.0	200.2	:	2 790.1	140.5	523.9	289.6	286.4	:	:	:	:
Hotels	142.5	646.1	93.3	204.1	30.8	39.3	105.0	173.8	1 050.2	118.1	205.2	205.7	280.2	9.8	1.4	131.2	265.0
Other collect. accomm.	664.0	87.2	578.0	265.0	36.6	38.7	95.2	:	1 739.9	22.4	318.7	83.9	6.2	:	:	:	:
of which: tourist campsites	*474.4*	:	*98.6*	*256.1*	*16.6*	*17.4*	*83.5*	:	*1 280.9*	*6.4*	*260.8*	*27.0*	*6.1*	:	:	*299.2*	:
of which: holiday dwellings	*142.8*	:	*26.9*	:	:	*6.3*	*8.3*	*48.7*	*265.7*	:	*10.3*	:	*43.5*	:	*0.4*	:	:
2005	**NL**	**AT**	**PL**	**PT7**	**SI**	**SK**	**FI**	**SE**	**UK[7]**	**BG**	**HR**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
Total	1 189.7	926.1	569.9	433.1	64.7	160.2	210.2	734.9	2 019.2	221.1	499.2	:	:	:	:	487.2	:
Hotels	192.2	571.4	169.6	253.9	30.0	57.1	117.6	197.5	1 223.0	200.9	203.5	:	:	16.6	1.2	143.6	:
Other collect. accomm.	997.5	354.7	400.3	179.2	34.7	103.1	92.6	537.4	796.2	20.2	295.7	:	:	:	:	343.6	:
of which: tourist campsites	*728.3*	*194.5*	*24.9*	*170.5*	*15.9*	*56.9*	*79.0*	*453.8*	*393.7*	*1.4*	*208.0*	:	:	:	:	*326.5*	:
of which: holiday dwellings	*212.1*	*68.0*	*21.6*	:	*3.4*	*6.9*	*11.6*	*46.0*	*146.9*	:	*11.1*	:	:	:	:	*11.3*	:
Average annual growth rate % 1995-2005[6]																	
Total	4.0	2.4	-1.6	-0.9	-0.4	7.5	0.5	:	-3.5	4.6	-0.5	:	:	:	:	:	:
Hotels	3.0	-1.2	6.2	2.5	-0.3	3.8	1.1	1.3	1.7	5.5	-0.1	:	:	5.4	-1.5	0.9	:
Other collect. accomm.	4.2	15.1	-3.6	-4.3	-0.5	10.3	-0.3	:	-8.3	-1.0	-0.7	:	:	:	:	:	:
of which: tourist campsites	*4.4*	:	*-12.9*	*-4.4*	*-0.4*	*12.6*	*-0.6*	:	*-12.3*	*-14.1*	*-2.2*	:	:	:	:	*0.9*	:
of which: holiday dwellings	*4.0*	:	*-2.2*	:	:	*0.9*	*3.4*	*-0.6*	*-6.4*	:	*0.8*	:	:	:	:	:	:

1) EU-25 excluding EE, IE, LU and SE. 2) EU-25 excluding EE, IE, MT, AT and SE. 3) EU-25 excluding EE, EL, IE, LU, MT, AT, PT and SI. 4) EU-25 excluding MT. 5) EU-25 excluding EL, MT and PT. 6) Average annual growth 1995-2004 for PT and UK. 7) 2004 data.

More than 60% of the entire accommodation capacity in Europe is concentrated in four countries – France (4.8 million or 19.4% of all bed places), Italy (4.3 million or 17.7%), Germany (3.3 million or 13.5%) and Spain (3.1 million or 12.4%) – and their market share remained fairly stable over the ten years surveyed. The United Kingdom ranked fifth in 2005 (2.0 million bed places or 8.2%) but came fourth in 1995 with about 2.8 million (13.3%), well ahead of Spain. This is due to the large decrease (8.3%) in bed places in "other collective accommodation".

Regarding the growth in accommodation capacity, the "old" Member States with the highest increase over the period analysed were Spain and the Netherlands (+4.1% and +4.0% on average each year). Top of the "new" Member States came Slovakia, the Czech Republic and Latvia (+7.5%, +4.0% and +2.8% respectively).

Looking at hotels and similar establishments, in 2005 Italy held first place (2.0 million bed places or 17.8% of the European total), followed by France (1.7 million or 15.3%), Germany (1.6 million or 14.3%), Spain (1.6 million or 13.9%) and the United Kingdom (1.2 million or 10.8%). These five countries accounted for about 72% of all bed places in hotels and similar establishments in EU-25, which is similar to their share in 1995. From 1995 to 2005 hotel accommodation grew strongly in the "new" Member States and in the candidate countries, for example in Estonia (average annual growth rate 9.0%), Lithuania (+7.3%), the Czech Republic (+7.1%), Poland (+6.2%) and also Bulgaria (+5.5%). Of the "old" Member States, only Ireland and Spain (+4.4% each) could compete with these average annual growth rates.

As for other collective accommodation, France ranked first with 3.0 million bed places in 2005 (22.9% of the European total), followed by Italy (2.3 million or 17.5%), Germany (1.7 million or 12.8%), Spain (1.5 million or 10.8%) and the Netherlands (1.0 million or 7.5%). These countries accounted for about 72% of the total non-hotel accommodation in EU-25, mainly due to the high capacity of French tourist campsites.

From 1995 to 2005 non-hotel accommodation showed the best performance in terms of average annual growth rates in Malta (+21.5%), Austria (+15.1%), Slovakia (+10.3%) and Cyprus (+6.9%). However, this had only a small impact on total accommodation capacity. Good results were also recorded by the Netherlands (+4.2%), Spain (+3.9%) and Italy (+3.7%).

Looking at the different categories of accommodation, growth was driven by campsites in Cyprus (+13.3%), Slovakia (+12.6%) and the Netherlands (+4.4%) but by holiday dwellings in Spain and Italy (+4.4% and +15.6% respectively). Spain and Italy together with France and Germany had the highest share of campsites and holiday dwellings in EU-25 (67.9% of total capacity in these categories).

In particular, France ranked first for campsites (2.8 million bed places in 2005) and Spain was top in the holiday dwellings category (0.6 million bed places in 2005). Predominance by one category or the other depends on a variety of factors (climate, type of holiday, higher proportion of domestic tourism than inbound tourism, etc.).

Table 2.2 shows the distribution of accommodation in European countries by category (hotels and other collective accommodation) and how it changed between 1995 and 2005. As mentioned earlier, in 2005 hotels and similar establishments accounted for 46.2% of total capacity in EU-25 and other collective accommodation for 53.8%, of which 64.4% were campsites and 18.6% holiday dwellings. Over the decade surveyed hotel capacity increased (from 43.5% of total bed places in 1995 to 46.2% in 2005) and other collective accommodation decreased (from 56.5% to 53.8%). In particular, campsites' share of total bed places in non-hotel accommodation declined from 73.1% in 1995 to 64.4% in 2005, while holiday dwellings rose from 14.3% to 18.6%.

The countries with the highest percentages of their bed places in hotels in 2005 were Malta with 98.2% (99.7% in 1995), Cyprus with 95.7% (97.4%), Bulgaria with 90.9% (84.1%), Greece with 87.7% (86.8%), Latvia with 80.0% (73.6%), Ireland with 71.2% and Estonia with 66.1% (no figures are available for holiday dwellings in Greece, Malta and Portugal). Figures above 55.0% were also recorded in Austria (61.7%), the United Kingdom (60.6%), Portugal (58.6%) and Finland (55.9%).

Looking at other accommodation establishments (53.8% in EU-25), in 2005 their highest shares of bed places were registered in the Benelux region (the Netherlands with 83.8%, Luxembourg 78.4% and Belgium 70.9%), Scandinavia (Denmark 82.1%, Sweden 73.1% and Norway 70.5%), France (63.6%) and in some eastern European countries (Slovakia 64.4% and Croatia 59.2%). The trend did not change substantially in the first two groups of countries between 1995 and 2005.

Focusing on the leading destinations for international tourism in Europe, Italy saw the greatest changes in accommodation capacity. Bed places in hotels declined from 51.9% in 1995 to 46.6% in 2005, with a corresponding increase in the share of bed places in other accommodation establishments (from 48.1% to 53.4%), due especially to strong growth in holiday dwellings (from 8.7% to 25.6%). The opposite trend was reported in France, where the share of bed places in hotels rose from 27.9% to 36.4% between 1995 and 2005, while the share of other collective accommodation decreased (from 72.1% to 63.6%). Hotel capacity in Spain and Greece expanded slightly (from 50.4% in 1995 to 51.6% in 2005 and from 86.8% to 87.7% respectively). Almost all eastern European countries, except Slovakia, increased their hotel capacity from 1995 to 2005.

Table 2.2 - Distribution of accommodation capacity (bed places), 1995 and 2005 (%)

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]	43.5	18.0	39.7	23.8	51.7	:	86.8	50.4	27.9	:	51.9	97.4	73.6	32.5	:	47.0	99.7
Other collect. accomm.[1]	56.5	82.0	60.3	76.2	48.3	:	13.2	49.6	72.1	:	48.1	2.6	26.4	67.5	:	53.0	0.3
of which: tourist campsites[2]	*73.1*	*70.3*	*52.7*	*84.0*	*54.2*	:	*100.0**	*61.4*	*91.5*	:	*78.9*	*38.1*	*16.7*	*3.9*	:	*78.3*	:
of which: holiday dwellings[3]	*14.3*	*11.9*	*4.9*	*12.5*	*19.4*	:	:	*38.6*	*8.1*	:	*8.7*	*61.9*	*83.3*	*92.2*	:	*12.3*	:
2005	**EU-25**	**BE[2]**	**CZ**	**DK**	**DE**	**EE**	**EL**	**ES**	**FR**	**IE**	**IT**	**CY**	**LV**	**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	46.2	29.1	53.3	17.9	48.9	66.1	87.7	51.6	36.4	71.2	46.6	95.7	80.0	63.8	21.6	49.3	98.2
Other collect. accomm.	53.8	70.9	46.7	82.1	51.1	33.9	12.3	48.4	63.6	28.8	53.4	4.3	20.0	36.2	78.4	50.7	1.8
of which: tourist campsites[4]	*64.4*	*50.5*	*14.8*	*84.0*	*46.9*	*36.4*	*100.0*	*52.5*	*91.4*	*44.4*	*57.9*	*68.3*	*39.6*	*8.8*	*92.7*	*56.3*	:
of which: holiday dwellings[5]	*18.6*	*16.2*	*13.8*	*12.3*	*19.6*	*18.6*	:	*40.7*	*8.1*	*33.6*	*25.6*	*31.7*	*43.8*	*85.8*	*3.2*	*14.1*	:
1995	**NL**	**AT**	**PL**	**PT**	**SI**	**SK**	**FI**	**SE**	**UK**	**BG**	**HR**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
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	:	:	:	:
Hotels	17.7	88.1	13.9	43.5	45.7	50.4	52.4	:	37.6	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	:	62.4	15.9	60.8	29.0	2.2	:	:	:	:
of which: tourist campsites	*71.4*	:	*17.1*	*96.6*	*45.4*	*45.0*	*87.7*	:	*73.6*	*28.6*	*81.8*	*32.2*	*98.4*	:	:	:	:
of which: holiday dwellings	*21.5*	:	*4.7*	:	:	*16.3*	*8.7*	:	*15.3*	:	*3.2*	:	:	:	:	:	:
2005	**NL**	**AT**	**PL**	**PT[6]**	**SI**	**SK**	**FI**	**SE**	**UK[6]**	**BG**	**HR[2]**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
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	:
Hotels	16.2	61.7	29.8	58.6	46.4	35.6	55.9	26.9	60.6	90.9	40.8	:	:	:	:	29.5	:
Other collect. accomm.	83.8	38.3	70.2	41.4	53.6	64.4	44.1	73.1	39.4	9.1	59.2	:	:	:	:	70.5	:
of which: tourist campsites	*73.0*	*54.8*	*6.2*	*95.1*	*45.8*	*55.2*	*85.3*	*84.4*	*49.4*	*6.9*	*70.3*	:	:	:	:	*95.0*	:
of which: holiday dwellings	*21.3*	*19.2*	*5.4*	:	*9.8*	*6.7*	*12.5*	*8.6*	*18.5*	:	*3.8*	:	:	:	:	*3.3*	:

1) EU-25 excluding EE, IE, LU and SE. 2) EU-25 excluding EE, IE, LU, MT, AT and SE. 3) EU-25 excluding EE, EL, IE, LU, MT, AT, PT, SI and SE. 4) EU-25 excluding MT. 5) EU-25 excluding EL, MT and PT. 6) 2004 data.

* For EL only campsites registered in the category "other collective accommodation".

Table 2.3 shows the gross annual occupancy (or utilisation) rates of accommodation in almost all European countries in 1995 and 2005. This rate is based on the number of bed places available in accommodation establishments all year long (including seasonal closures) compared with the number of nights spent by tourists (residents and non-residents) over the same period.

It is also influenced by the different characteristics of tourism in each country. For a given number of bed places, therefore, the more nights spent, the higher the occupancy rate.

Table 2.3 - Gross annual occupancy rates, 1995 and 2005 (%)

1995	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
Total[1]	22.5	12.0	22.4	14.6	27.0	:	21.6	24.1	15.5	:	23.4	50.3	21.1	18.9	:	17.4	:
Hotels[2]	33.6	26.1	35.9	22.3	32.6	24.1	24.3	42.3	33.2	51.0	32.8	51.5	25.8	20.9	21.2	25.0	:
Other collect. accomm.[1]	13.8	8.9	13.5	12.1	21.0	:	4.0	5.6	8.7	:	13.4	5.1	8.1	18.0	:	10.7	:
2005	**EU-25**	**BE**	**CZ**	**DK**	**DE**	**EE**	**EL**	**ES**	**FR**	**IE**	**IT**	**CY**	**LV**	**LT**	**LU**	**HU**	**MT**
Total	23.1	18.7	25.3	18.4	28.4	29.6	19.5	31.6	16.9	38.2	22.4	43.2	30.1	23.0	11.0	16.4	54.2
Hotels	34.4	33.2	29.7	39.6	33.9	38.5	21.7	42.6	31.2	46.4	32.5	44.8	32.9	28.4	25.8	26.6	54.5
Other collect. accomm.	13.5	12.8	20.3	13.8	23.1	12.1	3.6	19.9	8.8	17.9	13.5	8.0	18.9	13.6	6.9	6.5	41.1
1995	**NL**	**AT**	**PL**	**PT**	**SI**	**SK**	**FI**	**SE**	**UK**	**BG**	**HR**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
Total	21.0	33.0	17.4	21.1	23.1	22.5	19.1	:	25.2	19.5	6.4	22.8	:	:	:	:	:
Hotels	35.3	30.7	21.1	37.5	36.7	31.5	29.7	29.1	37.5	21.0	10.3	27.2	27.5	23.6	25.0	31.0	31.7
Other collect. accomm.	18.0	49.6	16.8	8.5	11.6	13.3	7.3	:	17.7	11.7	4.0	11.9	:	:	:	:	:
2005	**NL**	**AT**	**PL**	**PT**	**SI**	**SK**	**FI**	**SE**	**UK**	**BG**	**HR**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
Total	18.5	28.7	23.4	26.4	30.9	18.2	22.5	16.8	31.4	19.9	20.5	:	:	:	:	14.8	:
Hotels	42.1	36.5	32.8	36.9	45.4	32.8	33.3	31.8	35.9	21.0	28.6	:	:	25.9	25.3	32.6	:
Other collect. accomm.	13.9	16.2	19.4	11.6	18.4	10.1	8.8	11.2	24.4	8.7	14.8	:	:	:	:	7.3	:

1) EU-25 exluding EE, IE, LU, MT and SE. 2) EU-25 excluding MT.

In 2005 the average gross annual occupancy rate of all accommodation establishments (hotels and similar establishments and other collective accommodation establishments) in the EU-25 area was 23.1%, against 22.5% in 1995. Values well above the average were recorded in Malta (54.2%), Cyprus (43.2%) and Ireland (38.2%). Ten other countries also showed above-average occupancy rates.

Looking only at hotels and similar establishments, the average gross annual occupancy rate in EU-25 was 34.4% (33.6% in 1995). The countries that showed the highest gross annual utilisation of hotel bed places were Malta (54.5%), Ireland (46.4% against 51.0% in 1995), Slovenia (45.4% against 36.7%), Cyprus (44.8% against 51.5%), Spain (42.6% against 42.3%) and the Netherlands (42.1% against 35.3%). By contrast, values well below average were reported in Bulgaria (21.0%), Greece (21.7%), Liechtenstein (25.3%), Luxembourg (25.8%) and Iceland (25.9%).

For other collective accommodation the average gross annual occupancy rate was very low in comparison to hotels and similar establishments (13.5% in 2005 against 13.8% in 1995). Use of such establishments was highest in Malta (41.1%), the United Kingdom (24.4% against 17.7% in 1995), Germany (23.1% against 21.0%) and the Czech Republic (20.3% against 13.5%). The lowest values were reported in Greece (3.6% against 4.0% in 1995), Hungary (6.5% against 10.7%), Luxembourg (6.9%), Norway (7.3%) and Cyprus (8.0% against 5.1% in 1995).

Turning to the monthly utilisation of bed places in hotels (see Table 2.4), the summer months generally show the highest rates of the year, because Europeans are used to taking their holidays during this period. However, some distinctions need to be drawn.

Table 2.4 - Gross utilisation of bed places in hotels, 2005 (%)

	January	February	March	April	May	June	July	August	September	October	November	December
EU-25	:	:	:	:	:	:	:	:	:	:	:	:
BE	21.3	28.0	29.1	34.3	36.5	36.2	37.4	41.3	39.3	37.2	32.5	30.4
CZ	26.2	31.8	31.8	31.4	36.6	35.9	39.9	43.7	37.7	36.0	27.3	25.4
DK	24.0	28.0	31.0	38.0	43.0	50.0	65.0	60.0	50.0	41.0	40.0	28.0
DE	22.6	26.1	27.3	30.1	36.8	37.6	38.8	42.5	43.1	37.6	27.0	25.3
EE	24.0	27.0	34.0	39.0	46.0	51.0	68.0	60.0	46.0	42.0	35.0	33.0
EL	25.2	27.9	32.7	29.1	49.2	63.9	80.3	91.4	72.6	45.5	28.3	26.9
ES	23.6	29.2	34.2	35.8	46.5	53.5	63.0	71.6	60.0	45.8	28.2	23.6
FR	39.5	44.0	50.5	50.9	57.6	64.7	62.8	64.5	65.1	54.0	44.4	39.1
IE	:	:	:	:	:	:	:	:	:	:	:	:
IT	20.5	22.8	26.9	26.2	32.5	46.1	57.1	65.8	43.6	27.8	16.6	17.9
CY	14.8	18.0	26.3	34.6	55.1	62.9	71.9	85.4	68.3	58.8	24.5	13..1
LV	20.2	25.9	29.0	34.1	40.0	45.6	54.3	52.3	39.1	36.0	31.4	29.2
LT	18.8	21.4	22.7	28.3	35.0	40.8	47.0	45.6	34.9	29.6	25.6	23.5
LU	18.4	21.5	24.8	27.8	31.9	31.2	33.6	34.5	32.6	30.1	24.6	18.6
HU												
MT	32.4	38.0	43.8	49.8	56.8	66.1	80.4	86.3	70.1	58.9	37.6	28.4
NL	28.9	32.7	35.8	43.8	45.7	47.4	49.1	55.5	48.0	44.8	38.5	33.4
AT	48.6	56.9	51.7	20.4	26.0	32.3	44.4	54.4	37.1	24.4	14.6	31.5
PL	24.4	26.6	27.8	31.8	40.2	43.5	42.4	45.1	43.2	36.4	29.2	24.3
PT	22.6	29.6	34.1	36.2	40.8	44.0	49.6	60.8	49.0	38.2	25.1	21.6
SI	34.2	34.1	40.1	39.1	46.1	51.0	58.7	70.1	56.2	45.8	32.8	32.7
SK	28.2	35.8	30.6	25.9	33.4	37.4	40.6	45.8	38.0	32.7	26.0	24.6
FI	28.8	35.7	37.6	33.5	30.2	36.4	47.6	39.2	35.2	32.7	31.7	28.9
SE	21.8	28.2	28.4	30.6	31.1	34.3	46.9	42.6	35.3	30.8	30.2	22.8
UK	27.0	34.0	38.0	41.0	46.0	50.0	54.0	56.0	51.0	46.0	38.0	33.0
BG	20.7	20.7	20.7	31.0	31.0	31.0	50.7	50.7	50.7	18.3	18.3	18.3
HR	:	:	:	:	:	:	:	:	:	:	:	:
RO	:	:	:	:	:	:	:	:	:	:	:	:
TR	:	:	:	:	:	:	:	:	:	:	:	:
IS	:	:	:	:	:	:	:	:	:	:	:	:
LI	33.1	36.5	33.6	19.6	17.9	23.2	27.3	30.2	22.8	21.8	19.0	18.0
NO	22.8	32.0	30.4	26.9	25.2	42.1	52.0	46.8	33.5	27.3	26.9	19.5
CH[1]	31.5	39.0	36.9	27.1	25.5	34.4	42.5	46.5	38.1	27.8	17.8	:

1) 2003 data.

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

Austria has two seasons because it combines cultural tourism with mountain tourism and winter sports. Its gross utilisation rate has two peaks, one in summer (July/August), the other in winter (December to February). Italy's hotels are another 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 capacity, which is concentrated mainly in seasonal destinations (e.g. seaside resorts, mountain resorts, spas, etc.) where establishments are open for only a few months of the year (from 90 to 180 days).

In eastern and northern European countries gross utilisation also depends on the climate. In other words, although cultural and city tourism are strong reasons for trips to these countries, the majority of tourists prefer to visit them during periods with more clement temperatures. For example, Poland and Estonia have a peak from May to July/August and Finland, Sweden and Norway from June to August.

Table 2.5 relates the trend in accommodation capacity (available bed places) to the demographic situation (resident population). The higher the number of bed places available per inhabitant, the higher the intensity of tourism measured from the supply side in the country. This indicator can be used as a proxy for the potential tourist pressure on any given location, since the number of bed places available gives an idea of the maximum number of tourists that can be accommodated at the same time.

2

Table 2.5 - Number of bed places per 1 000 residents, 1995 and 2005

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	20.5	11.3	11.3	19.0	17.7	7.3	52.6	26.2	20.7	26.9	30.6	119.8	5.4	2.7	36.2	11.5	100.7
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
2005	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
Total	61.7	39.7	42.7	72.2	40.2	28.3	70.2	71.2	78.9	50.8	74.4	127.3	10.1	9.1	146.8	32.6	95.1
Hotels	28.5	11.6	22.7	12.9	19.6	18.7	61.5	36.7	28.7	36.2	34.7	121.9	8.3	5.8	31.6	16.1	93.4
Other collect. accomm.	33.2	28.2	19.9	59.3	20.6	9.6	8.6	34.5	50.2	14.7	39.7	5.5	2.1	3.3	115.2	16.5	1.7
1995	NL	AT	PL	PT	SI	SK	FI	SE	UK	BG	HR	RO	TR	IS	LI	NO	CH
Total	52.3	92.3	17.4	46.8	33.9	14.6	39.3	:	48.2	16.7	109.7	12.8	:	:	:	:	:
Hotels	9.2	81.3	2.4	20.4	15.5	7.3	20.6	19.7	18.1	14.0	43.0	9.1	:	36.7	45.7	30.2	37.8
Other collect. accomm.	4.3	11.0	15.0	26.5	18.4	7.2	18.7	:	30.0	2.7	66.7	3.7	:	:	:	:	:
2005	NL	AT	PL	PT[2]	SI	SK	FI	SE	UK[2]	BG	HR	RO	TR	IS	LI	NO	CH
Total	73.0	112.8	14.9	41.1	32.4	29.8	40.1	81.6	33.8	28.5	112.3	:	:	:	:	105.8	:
Hotels	11.8	69.6	4.4	24.1	15.0	10.6	22.5	21.9	20.5	25.9	45.8	:	:	56.5	34.7	31.2	:
Other collect. accomm.	61.2	43.2	10.5	17.0	17.4	19.1	17.7	59.6	13.3	2.6	66.5	:	:	:	:	74.6	:

1) EU-25 excluding EE, IE, LU and SE. 2) 2004 data.

In 2005 EU-25 had an average of 61.7 bed places per 1 000 residents, against 47.0 in 1995. This growth was driven by the increase in bed places (per 1 000 inhabitants) both in hotels, from 20.5 in 1995 to 28.5 in 2005, and in other accommodation establishments (from 26.5 to 33.2).

The countries that showed the highest intensity of accommodation in 2005 were Luxembourg (146.8 bed places per 1 000 inhabitants), Cyprus (127.3), Austria (112.8), Croatia (112.3), Norway (105.8) and Malta (95.1). In particular, in Cyprus, Croatia and Austria the pressure increased from 1995 to 2005 (from 123.0 bed places to 127.3, from 109.7 to 112.3 and from 92.3 to 112.8 respectively), while in Malta it fell (from 101.0 to 95.1 bed places). No comparable data for 1995 are available for Luxembourg and Norway. At the other end of the scale, in 2005 the lowest values for tourism pressure were recorded in "new" Member States (e.g. Lithuania 9.1 bed places per 1 000 inhabitants, Latvia 10.1 and Poland 14.9).

Looking at the most popular tourist destinations, France reported 78.9 bed places per 1 000 residents in 2005 (74.2 in 1995), followed by Italy (74.4 against 58.9 in 2005), Spain (71.2 against 52.0) and Greece (70.2 against 60.6). The steady growth in Italy and Spain from 1995 to 2005 is explained by the increase in bed places in hotels and, above all, in other collective accommodation, while in Greece it can be put down to hotels.

Chapter 3 - The Travel Patterns of European Tourists

3. THE TRAVEL PATTERNS OF EUROPEAN TOURISTS

This chapter describes the trends in the travel patterns of European tourists aged 15 years or over. It includes a comparison of the number of trips made and nights spent by length of stay, purpose of trip (leisure or business) and destination (domestic or outbound). Data are not yet available for most of the "new" Member States and candidate countries.

Table 3.1 shows the total number of trips (domestic and outbound) made by all resident tourists in European countries (both for leisure and on business) in 2000 and 2005, broken down between short trips (1-3 nights) and long trips (4 nights and more).

Table 3.1 - Total trips (leisure and business) by length of stay, 2000 and 2005 (1 000)

2000	EU-25	BE[1]	CZ	DK	DE[2]	EE	EL	ES	FR	IE[1]	IT	CY	LV	LT	LU	HU	MT
Total	:	9 759	:	10 025	127 977	:	6 880	123 144	163 758	7 603	77 336	:	:	:	994	:	:
1-3 nights	:	3 549	:	5 600	22 326	:	1 858	93 818	85 913	4 002	38 042	:	:	:	371	:	:
4 nights and more	:	6 210	:	4 425	105 651	:	5 022	29 326	77 845	3 601	39 294	:	:	:	623	:	:
2005	EU-25	BE	CZ	DK	DE[2]	EE	EL[3]	ES[3]	FR	IE	IT[3]	CY	LV	LT	LU	HU	MT
Total	:	13 221	32 075	10 367	156 156	:	12 390	132 600	195 839	9 201	83 621	:	5 188	3 930	1 470	23 801	:
1-3 nights	:	5 106	21 028	4 765	42 471	973	4 847	102 834	108 647	4 705	42 924	:	4 249	2 648	690	16 408	:
4 nights and more	:	8 115	11 047	5 602	113 685	:	7 543	29 766	87 192	4 496	40 697	:	939	1 282	780	7 393	:
Average annual growth rate % 2000-2005[4]																	
Total	:	7.9	:	0.7	4.1	:	15.8	1.9	3.6	4.9	2.0	:	:	:	8.1	:	:
1-3 nights	:	9.5	:	-3.2	13.7	:	27.1	2.3	4.8	4.1	3.1	:	:	:	13.2	:	:
4 nights and more	:	6.9	:	4.8	1.5	:	10.7	0.4	2.3	5.7	0.9	:	:	:	4.6	:	:
% distribution 2005																	
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	:
1-3 nights	:	38.6	65.6	46.0	27.2	:	39.1	77.6	55.5	51.1	51.3	:	81.9	67.4	46.9	68.9	:
4 nights and more	:	61.4	34.4	54.0	72.8	:	60.9	22.4	44.5	48.9	48.7	:	18.1	32.6	53.1	31.1	:
2000	NL	AT	PL	PT	SI	SK	FI	SE	UK	BG	HR	RO	TR	IS	LI	NO	CH
Total	:	19 581	:	11 729	:	:	26 843	:	175 500	:	:	:	:	:	:	:	:
1-3 nights	:	10 393	:	7 612	:	:	21 110	:	90 600	:	:	:	:	:	:	:	:
4 nights and more	:	9 188	:	4 117	:	:	5 733	:	84 900	:	:	:	:	:	:	:	:
2005	NL	AT	PL	PT	SI	SK	FI	SE	UK[3]	BG	HR	RO	TR	IS	LI	NO	CH
Total	:	17 242	40 760	13 059	4 600	8 908	33 982	29 029	162 081	:	:	:	:	:	:	21 083	:
1-3 nights	:	8 866	22 340	8 007	2 784	4 044	27 118	20 085	88 500	:	:	:	:	:	:	13 962	:
4 nights and more	:	8 376	18 420	5 052	1 816	4 864	6 864	8 944	73 581	:	:	:	:	:	:	7 121	:
Average annual growth rate % 2000-2005[4]																	
Total	:	-2.5	:	2.2	:	:	4.8	:	-2.0	:	:	:	:	:	:	:	:
1-3 nights	:	-3.1	:	1.0	:	:	5.1	:	-0.6	:	:	:	:	:	:	:	:
4 nights and more	:	-1.8	:	4.2	:	:	3.7	:	-3.5	:	:	:	:	:	:	:	:
% distribution 2005																	
Total	:	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	:	:	:	:	:	100.0	:
1-3 nights	:	51.4	54.8	61.3	60.5	45.4	79.8	69.2	54.6	:	:	:	:	:	:	66.2	:
4 nights and more	:	48.6	45.2	38.7	39.5	54.6	20.2	30.8	45.4	:	:	:	:	:	:	33.8	:

1) 2001 data. 2) Covers only leisure. 3) 2004 data. 4) Average annual growth rate for 2001-2005 for BE and IE and for 2000-2004 for EL, ES, IT and UK.

In most countries the majority of tourists opted for short trips (1-3 nights) which showed an upward trend from 2000 on. This is heavily influenced by the fact that tourists use the Internet to organise short trips. In 2005 the proportion of short trips in the "old" Member States ranged from 27.2% of all trips by German tourists at the bottom end of the scale to 79.8% for Finnish tourists at the top. In Spain, France and Italy more than 50% of all trips by residents lasted not more than three nights, with a peak of 77.6% for Spanish tourists. A similar trend was seen in the "new" Member States for which data are available. Most tourist trips made by residents are for short stays, ranging from 54.8% of all trips by Polish tourists at one end to 81.9% by Latvian tourists at the other. The only exceptions are tourists from the Slovak Republic, for whom the breakdown between short and long trips was 45.4% to 54.6%.

Looking at the dynamics between 2000 and 2005, the increase in short trips was generally higher than that for long trips as outbound trips decreased in favour of short-haul domestic trips after 11 September (see Chapter 1.1.1). Only Irish and Portuguese tourists increased their number of long trips (4 nights or more) by more than their number of short trips (average annual growth of 5.7% against +4.1% for Ireland, 2001-2005 data; +4.2% against +1.0% for Portugal). For Austrian tourists, on the other hand, the number of long trips declined by less than the number of short trips between 2000 and 2005 (-1.8% against -3.1%). Conversely, for tourists from the United Kingdom the number of long trips declined by more than the number of short trips in the same period (-3.5% against -0.6% on average per year, 2000-2004 data).

Table 3.2 - Total nights spent by tourists from European countries by length of stay, 2000 and 2005 (1 000)

2000	EU-25	BE[1]	CZ	DK	DE[2]	EE	EL	ES	FR	IE1	IT	CY	LV	LT	LU	HU	MT
Total	:	78 819	:	60 739	1 295 550	:	65 963	560 426	934 948	43 963	547 404	:	:	:	7 620	:	:
1-3 nights	:	7 108	:	12 293	55 447	:	3 993	176 337	157 942	8 034	69 697	:	:	:	739	:	:
4 nights and more	:	7 1711	:	48 446	1 240 103	:	61 970	384 089	777 006	35 929	477 707	:	:	:	6 881	:	:
2005	**EU-25**	**BE**	**CZ**	**DK**	**DE[2]**	**EE**	**EL[3]**	**ES[3]**	**FR**	**IE**	**IT[3]**	**CY**	**LV**	**LT**	**LU**	**HU**	**MT**
Total	:	102 015	128 503	59 163	1 226 181	:	105 216	599 413	1 033 618	49 387	535 037	:	16 285	21 845	8 966	86 489	:
1-3 nights	:	10 455	39 927	9 798	91 960	1 652	10 283	199 117	194 357	9 457	78 894	:	7 323	4 380	1 343	31 568	:
4 nights and more	:	91 560	88 576	49 365	1 134 221	:	94 933	400 296	839 261	39 930	456 143	:	8 962	17 465	7 623	54 921	:
Average annual growth rate % 2000-2005[4]																	
Total	:	6.7	:	-0.5	-1.1	:	12.4	1.7	2.0	3.0	-0.6	:	:	:	3.3	:	:
1-3 nights	:	10.1	:	-4.4	10.6	:	26.7	3.1	4.2	4.2	3.1	:	:	:	12.7	:	:
4 nights and more	:	6.3	:	0.4	-1.8	:	11.3	1.0	1.6	2.7	-1.1	:	:	:	2.1	:	:
% distribution 2005																	
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	:
1-3 nights	:	10.2	31.1	16.6	7.5	:	9.8	33.2	18.8	19.1	14.7	:	45.0	20.1	15.0	36.5	:
4 nights and more	:	89.8	68.9	83.4	92.5	:	90.2	66.8	81.2	80.9	85.3	:	55.0	79.9	85.0	63.5	:
2000	**NL**	**AT**	**PL**	**PT**	**SI**	**SK**	**FI**	**SE**	**UK**	**BG**	**HR**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
Total	:	:	:	57 338	:	:	95 311	:	956 500	:	:	:	:	:	:	:	:
1-3 nights	:	:	:	13 276	:	:	46 932	:	184 200	:	:	:	:	:	:	:	:
4 nights and more	:	84 972	:	44 062	:	:	48 379	:	772 300	:	:	:	:	:	:	:	:
2005	**NL**	**AT**	**PL**	**PT**	**SI**	**SK**	**FI**	**SE**	**UK[3]**	**BG**	**HR**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
Total	:	90 998	224 600	66 392	20 185	50 489	101 632	112 409	820 864	:	:	:	:	:	:	90 296	:
1-3 nights	:	17 342	39 940	13 985	5 244	7 998	47 293	35 214	140 769	:	:	:	:	:	:	27 092	:
4 nights and more	:	73 656	184 660	52 407	14 941	42 491	54 339	77 195	680 095	:	:	:	:	:	:	63 204	:
Average annual growth rate % 2000-2005[4]																	
Total	:	:	:	3.0	:	:	1.3	:	-3.8	:	:	:	:	:	:	:	:
1-3 nights	:	:	:	1.0	:	:	0.2	:	-6.5	:	:	:	:	:	:	:	:
4 nights and more	:	-2.8	:	3.5	:	:	2.4	:	-3.1	:	:	:	:	:	:	:	:
% distribution 2005																	
Total	:	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	:	:	:	:	:	100.0	:
1-3 nights	:	19.1	17.8	21.1	26.0	15.8	46.5	31.3	17.1	:	:	:	:	:	:	30.0	:
4 nights and more	:	80.9	82.2	78.9	74.0	84.2	53.5	68.7	82.9	:	:	:	:	:	:	70.0	:

1) 2001 data. 2) Covers only leisure. 3) 2004 data. 4) Average annual growth rate for 2001-2005 for BE and IE and for 2000-2004 for EL, ES, IT and UK.

The number of nights spent both in their own country and abroad by all tourists living in European countries (see Table 3.2) shows that the majority were spent on trips of 4 nights and more, with the proportion ranging from 53.5% for Finns to 92.5% for Germans in 2005. Relatively high percentages (more than 80%) were also recorded by tourists from Belgium (89.8%), Italy (85.3%), the United Kingdom (82.9%) and France (81.2%). In the "new" Member States, the share of nights spent on long trips ranged from 55.0% for Latvian tourists to 84.2% for Slovaks.

In general, short trips showed stronger growth than long trips, including in terms of nights. This confirms the market trend towards shorter stays with 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 for trips of 4 nights or more (Belgium, Germany, Greece, Spain, France, Ireland, Italy, Luxembourg and Finland), the total number of nights spent on such trips generally followed the same trend (with the exception of Finland).

For example, the number of 1-3 night tourist trips by Spaniards rose by 2.3% on average between 2000 and 2005. Over the same period the number of nights spent on such trips increased by 3.1%. The same also applies to tourists from Germany, France, Italy and Luxembourg. Amongst EU tourists Germans showed the highest increases in both 1-3 night trips and nights spent on such trips, with 13.7% and 10.6% respectively. On the other hand, 1-3 night trips by Finnish tourists increased by 5.1% on average, while the number of nights spent on such trips remained basically stable over the same period (+0.2%), indicating a shortening of the average duration of such trips.

Table 3.3 shows the trend in the average length of stay. Looking at all European countries, in 2005 the average stay (both domestic and outbound, on holiday and on business) covered a span from 3.0 nights for Finns to 8.5 nights for Greeks. As mentioned earlier, this average depends on the breakdown of the total trips made by residents in each country between 1-3 night trips and long trips, in terms of number of both trips and nights spent. For example, short trips accounted for 79.8% of all trips by Finnish residents but only 46.5% of all nights. In Greece, 1-3 night trips by residents accounted for only 39.1% of all trips and for just 9.8% of nights.

Table 3.3 - Total trips by length of stay: average duration of trip, 2000 and 2005 (nights)

2000	EU-25	BE[1]	CZ	DK	DE[2]	EE	EL	ES	FR	IE[1]	IT	CY	LV	LT	LU	HU	MT
Total	:	8.1	:	6.1	10.1	:	9.6	4.6	5.7	5.8	7.1	:	:	:	7.7	:	:
1-3 nights	:	2.0	:	2.2	2.5	:	2.1	1.9	1.8	2.0	1.8	:	:	:	2.0	:	:
4 nights and more	:	11.5	:	10.9	11.7	:	12.3	13.1	10.0	10.0	12.2	:	:	:	11.0	:	:
2005	**EU-25**	**BE**	**CZ**	**DK**	**DE**	**EE**	**EL[3]**	**ES[3]**	**FR**	**IE**	**IT[3]**	**CY**	**LV**	**LT**	**LU**	**HU**	**MT**
Total	:	7.7	4.0	5.7	7.9	:	8.5	4.5	5.3	5.4	6.4	:	3.1	5.6	6.1	3.6	:
1-3 nights	:	2.0	1.9	2.1	2.2	1.7	2.1	1.9	1.8	2.0	1.8	:	1.7	1.7	1.9	1.9	:
4 nights and more	:	11.3	8.0	8.8	10.0	:	12.6	13.4	9.6	8.9	11.2	:	9.5	13.6	9.8	7.4	:
2000	**NL**	**AT**	**PL**	**PT**	**SI**	**SK**	**FI**	**SE**	**UK**	**BG**	**HR**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
Total	:	:	:	4.9	:	:	3.6	:	5.5	:	:	:	:	:	:	:	:
1-3 nights	:	:	:	1.7	:	:	2.2	:	2.0	:	:	:	:	:	:	:	:
4 nights and more	:	9,2	:	10.7	:	:	8.4	:	9.1	:	:	:	:	:	:	:	:
2005	**NL**	**AT**	**PL**	**PT**	**SI**	**SK**	**FI**	**SE**	**UK[3]**	**BG**	**HR**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
Total	:	5.3	5.5	5.1	4.4	5.7	3.0	3.9	5.1	:	:	:	:	:	:	4.3	:
1-3 nights	:	2.0	1.8	1.7	1.9	2.0	1.7	1.8	1.6	:	:	:	:	:	:	1.9	:
4 nights and more	:	8.8	10.0	10.4	8.2	8.7	7.9	8.6	9.2	:	:	:	:	:	:	8.9	:

1) 2001 data. 2) Covers only leisure. 3) 2004 data.

In 2005 the average length of 1-3 night trips ranged from 1.6 nights for British residents to 2.2 nights for Germans. In the Baltic states, tourists spent about 1.7 nights, on average, on short trips. As for long trips (4 nights and more), in the "old" Member States a low of 7.9 nights was recorded for Finnish tourists and a high of 13.4 nights for Spaniards (see Table 3.3). In the "new" Member States the figures ranged from 7.4 nights for Hungarians to 13.6 nights for Latvians.

Comparing 2000 and 2005, ten of the 13 countries for which data are available reported a decrease in the duration of trips of 4 nights or more by their citizens. This was particularly marked for Danes (from 10.9 to 8.8 nights), Germans (from 11.7 to 10.0 nights for leisure trips only), Italians (from 12.2 to 11.2 nights, 2000-2004 data), Irish (from 10.0 to 8.9 nights, 2001-2005 data) and tourists from Luxembourg (from 11.0 to 9.8 nights). Only Greek, Spanish and British tourists slightly extended the duration of their long trips (Greeks from 12.3 to 12.6 nights, Spaniards from 13.1 to 13.4 nights, and British tourists from 9.1 to 9.2 nights, 2000-2004 data for Spanish and British tourists).

On the other hand, the figures for 1-3 night trips remained stable from 2000 to 2005, except for Germany (down from 2.5 to 2.2 nights), Denmark (from 2.2 to 2.1), Luxembourg (from 2.0 to 1.9), Finland (from 2.2 to 1.7) and the UK (from 2.0 to 1.6).

3

Looking at short trips (1-3 nights), Table 3.4 shows the distribution of all (domestic and outbound) trips for each country by the main purpose of visit (leisure or business). Leisure was by far the main reason for travelling from nearly all European countries, accounting for 46.2% of all 1-3 night trips from Slovakia to 97.7% from Spain. In the "old" EU Member States business trips took relatively high shares in Denmark (33.6%), Sweden (31.0%), Luxembourg (30.9%) and Austria (29.6%) only. Leisure purposes also predominated in the "new" Member States. The only exception was Slovakia, where short trips were mainly on business in 2005 (53.8% of all 1-3 night trips).

Table 3.4 - Trips of 1-3 nights: total trips by purpose, 2000 and 2005 (1 000)

2000	EU-25	BE[1]	CZ	DK	DE	EE	EL	ES	FR	IE[1]	IT	CY	LV	LT	LU	HU	MT
Total	:	3 549	:	5 600	:	:	1 858	93 818	85 913	4 002	38 042	:	:	:	371	:	:
Leisure	:	2 766	:	3 502	22 326	:	1 606	92 492	81 421	3 137	29 063	:	:	:	248	:	:
Business	:	783	:	2 098	:	:	252	1 326	4 492	865	8 979	:	:	:	123	:	:
2005	**EU-25**	**BE**	**CZ**	**DK**	**DE**	**EE**	**EL[2]**	**ES[2]**	**FR**	**IE**	**IT[2]**	**CY**	**LV**	**LT**	**LU**	**HU**	**MT**
Total	:	5 106	21 028	4 765	:	973	4 847	102 834	108 647	4 705	42 924	:	4 249	2 648	690	16 408	:
Leisure	:	4 250	18 394	3 163	42 471	801	4 272	100460	100 794	3 614	31 501	:	3 768	2 192	477	15 647	:
Business	:	856	2 634	1 602	:	172	575	2 374	7 853	1 091	11 423	:	481	456	213	761	:
Average annual growth rate % 2000-2005[4]																	
Total	:	9.5	:	-3.2	:	:	27.1	2.3	4.8	4.1	3.1	:	:	:	13.2	:	:
Leisure	:	11.3	:	-2.0	13.7	:	27.7	2.1	4.4	3.6	2.0	:	:	:	14.0	:	:
Business	:	2.3	:	-5.3	:	:	22.9	15.7	11.8	6.0	6.2	:	:	:	11.6	:	:
% distribution 2005																	
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	87.5	66.4	:	82.3	88.1	97.7	92.8	76.8	73.4	:	88.7	82.8	69.1	95.4	:
Business	:	16.8	12.5	33.6	:	17.7	11.9	2.3	7.2	23.2	26.6	:	11.3	17.2	30.9	4.6	:
2000	**NL**	**AT**	**PL**	**PT**	**SI**	**SK**	**FI**	**SE**	**UK**	**BG**	**HR**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
Total	:	10 393	:	7 612	:	:	21 110	:	90 600	:	:	:	:	:	:	:	:
Leisure	:	7 310	:	6 955	:	:	17 989	:	68 000	:	:	:	:	:	:	:	:
Business	:	3 083	:	657	:	:	3 121	:	22 600	:	:	:	:	:	:	:	:
2005	**NL[2]**	**AT**	**PL**	**PT**	**SI**	**SK**	**FI**	**SE**	**UK[3]**	**BG**	**HR**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
Total	:	8 866	22 340	8 007	2 784	4 044	27 118	20 085	88 500	:	:	:	:	:	:	13 962	:
Leisure	11 044	6 241	18 970	7 295	2 258	1 867	23 372	13 862	65 642	:	:	:	:	:	:	10 112	:
Business	:	2 625	3 370	712	526	2 177	3 746	6 223	22 858	:	:	:	:	:	:	3 850	:
Average annual growth rate % 2000-2005[4]																	
Total	:	-3.1	:	1.0	:	:	5.1	:	-0.8	:	:	:	:	:	:	:	:
Leisure	:	-3.1	:	1.0	:	:	5.4	:	-1.2	:	:	:	:	:	:	:	:
Business	:	-3.2	:	1.6	:	:	3.7	:	0.4	:	:	:	:	:	:	:	:
% distribution 2005																	
Total	:	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	:	:	:	:	:	100.0	:
Leisure	:	70.4	84.9	91.1	81.1	46.2	86.2	69.0	74.2	:	:	:	:	:	:	72.4	:
Business	:	29.6	15.1	8.9	18.9	53.8	13.8	31.0	25.8	:	:	:	:	:	:	27.6	:

1) 2001 data. 2) 2004 data. 3) 2003 data. 4) Average annual growth rate for 2001-2005 for BE and IE; for 2000-2004 for EL, ES and IT and for 2000-2003 for UK.

Looking at the trend between 2000 and 2005, short trips for leisure purposes showed a higher increase than business trips for Belgian (+11.3% against +2.3% annual average, 2001-2005 data), Greek (+27.7% against 22.9%, from 2000 to 2004), Luxembourg's (+14.0% against +11.6%) and Finnish tourists(+5.4% against +3.7%). On the contrary, short trips on business increased by more than leisure trips for Spanish (+15.7% against +2.1% annual average, from 2000 to 2004), French (+11.8% against +4.4%), Irish (+6.0% against +3.6%, 2001-2005 data), Italian (+6.2% against +2.0% from 2000 to 2004) and Portuguese tourists (+1.6% against 1.0%). Austria reported a similar drop in both business trips (annual average of -3.2%) and leisure trips (-3.1%). For British tourists the number of business trips remained fairly stable (+0.4%), while leisure trips declined by 1.2% on average each year (2000-2004 data).

Analysing the breakdown of nights spent on short trips by the main purpose of visit in 2005, in every country analysed most were spent on leisure trips, with the Spaniards scoring highest on 97.7% (see Table 3.5). This confirms the trend noted in Table 3.4. For tourists from Italy, Greece and France, the share of nights spent on leisure trips ranged from 75.4% to 93.5%. Over 80% was reported in most of the "new" Member States (e.g. Hungary 95.5%, Latvia 89.3%, Poland 85.9%, etc.).

On the other hand, the largest proportion of nights spent on business trips was recorded for Slovaks (49.3% of nights spent on short trips), followed by businessmen from Denmark (28.4%), Austria (26.5%), Luxembourg (26.4%), Sweden (26.0%), Norway (24.9%) and Italy (24.6%). This top score for Slovakia might be due to its traditionally close economic relations with their neighbours: the Czech Republic and Austria.

Table 3.5 - Trips of 1-3 nights: total nights by purpose, 2000 and 2005 (1 000)

2000	EU-25	BE[1]	CZ	DK	DE	EE	EL	ES	FR	IE[1]	IT	CY	LV	LT	LU	HU	MT
Total	:	7 108	:	12 293	:	:	3 993	176 337	157 942	8 034	69 697	:	:	:	739	:	:
Leisure	:	5 764	:	8 891	55 447	:	3 474	173 726	150 636	6 579	54 347	:	:	:	522	:	:
Business	:	1 344	:	3 402	:	:	519	2 611	7 306	1 455	15 350	:	:	:	217	:	:
2005	**EU-25**	**BE**	**CZ**	**DK**	**DE**	**EE**	**EL[2]**	**ES[2]**	**FR**	**IE**	**IT[2]**	**CY**	**LV**	**LT**	**LU**	**HU**	**MT**
Total	:	10 455	39 927	9 798	:	1 652	10 283	199 117	194 357	9 457	78 894	:	7 323	4 380	1 343	31 568	:
Leisure	:	8 905	35 656	7 016	91 960	1 374	9 104	194 451	181 669	7 604	59 521	:	6 539	3 564	989	30 158	:
Business	:	1 550	4 271	2 782	:	278	1 179	4 666	12 688	1 853	19 373	:	784	816	354	1 410	:
Average annual growth rate % 2000-2005[3]																	
Total	:	10.1	:	-4.4	:	:	26.7	3.1	4.2	4.2	3.1	:	:	:	12.7	:	:
Leisure	:	11.5	:	-4.6	10.6	:	27.2	2.9	3.8	3.7	2.3	:	:	:	13.6	:	:
Business	:	3.6	:	-3.9	:	:	22.8	15.6	11.7	6.2	6.0	:	:	:	10.3	:	:
% distribution 2005																	
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	:	85.2	89.3	71.6	:	83.2	88.5	97.7	93.5	80.4	75.4	:	89.3	81.4	73.6	95.5	:
Business	:	14.8	10.7	28.4	:	16.8	11.5	2.3	6.5	19.6	24.6	:	10.7	18.6	26.4	4.5	:
2000	**NL**	**AT**	**PL**	**PT**	**SI**	**SK**	**FI**	**SE**	**UK**	**BG**	**HR**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
Total	:	:	:	13 276	:	:	46 932	:	184 200	:	:	:	:	:	:	:	:
Leisure	:	14 278	:	12 109	:	:	42 120	:	146 400	:	:	:	:	:	:	:	:
Business	:	:	:	1 167	:	:	4 812	:	37 800	:	:	:	:	:	:	:	:
2005	**NL**	**AT**	**PL**	**PT**	**SI**	**SK**	**FI**	**SE**	**UK[2]**	**BG**	**HR**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
Total	:	17 342	39 940	13 985	5 244	7 998	47 293	35 214	140 769	:	:	:	:	:	:	27 092	:
Leisure	:	12 755	34 320	12 758	4 341	4 056	41 670	26 047	109 549	:	:	:	:	:	:	20 359	:
Business	:	4 587	5 620	1 227	903	3 942	5 623	9 167	31 220	:	:	:	:	:	:	6 733	:
Average annual growth rate % 2000-2005[3]																	
Total	:	:	:	1.0	:	:	0.2	:	-6.5	:	:	:	:	:	:	:	:
Leisure	:	-2.2	:	1.0	:	:	-0.2	:	-7.0	:	:	:	:	:	:	:	:
Business	:	:	:	1.0	:	:	3.2	:	-4.7	:	:	:	:	:	:	:	:
% distribution 2005																	
Total	:	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	:	:	:	:	:	100.0	:
Leisure	:	73.5	85.9	91.2	82.8	50.7	88.1	74.0	77.8	:	:	:	:	:	:	75.1	:
Business	:	26.5	14.1	8.8	17.2	49.3	11.9	26.0	22.2	:	:	:	:	:	:	24.9	:

1) 2001 data. 2) 2004 data. 3) Average annual growth rate for 2001-2005 for BE and IE and for 2000-2004 for EL, ES, IT and UK.

Looking at the trend between 2000 and 2005, nights spent on short trips for leisure purposes showed a higher increase than nights spent on business trips for tourists from Belgium (+11.5% annual average, 2001 to 2005), Greece (+27.2% from 2000 to 2004) and Luxembourg (+13.6%). This trend is the same as in the number of trips (see above). Nights spent by British and Austrian tourists on short leisure trips declined significantly (-7.0% and -2.2% respectively), in the first case by more than the number of trips (-1.2%), indicating a shortening of the average length of stay. On the other hand, the number of nights spent on short business trips increased considerably for Spaniards (+15.6% average annual increase), French (+11.7%), Irish (+6.2%) and Italians (+6.0%), also in comparison to nights spent on leisure trips. The growth in nights was in line with that in the number of trips, indicating stability in the average length of

Looking at the duration of short trips by purpose (see Table 3.6) in 2005, 1-3 night leisure trips generally lasted from a minimum of 1.6 nights for Lithuanian tourists to a maximum of 2.2 nights for Danish, German and Slovakian tourists. In the case of business trips, the shortest length of stay was reported for the Scandinavians (Finns and Swedes, with 1.5 nights each) and British (1.4 nights), while Greek businessmen stayed longest (2.1 nights) followed by Spaniards with 2.0 nights. This means that short leisure trips were generally longer than short trips on business.

As mentioned in connection with Table 3.3, these average values depend on the proportions of leisure and business trips in the total short trips made by residents in each country, in terms of number of both trips and nights spent. For the Danes, for example, leisure trips accounted for about 66% of the total number and about 72% of the total nights. The same was reported for tourists from Ireland, Luxembourg, Austria, Sweden and the United Kingdom, where nights spent on leisure trips as a proportion of the whole were about 3 to 4 percentage points higher than the proportion of the total number of trips. By contrast, business accounted for 31.0% of the total number of trips by Swedes and for 26.0% of the total nights. In contrast to other countries, business trips made by Spaniards were slightly longer than leisure trips (2.0 nights against 1.9 nights).

Comparing 2000 and 2005, six of the 13 countries for which data are available reported a decrease in the duration of short leisure trips by their tourists. This was particularly evident for Danes and Germans (each from 2.5 to 2.2 nights) and for Finnish (from 2.3 to 1.8 nights) and British tourists (from 2.2 to 1.7 nights). As for short business trips, only businessmen from Luxembourg and Portugal (each from 1.8 to 1.7 nights) and the British shortened their stays (from 1.7 to 1.4 nights), while Belgian and Danish businessmen extended the average duration (from 1.7 to 1.8 nights and from 1.6 to 1.7 nights respectively). For other countries, the data were stable for both leisure and short trips.

Table 3.6 - Trips of 1-3 nights by purpose: average length of stay, 2000 and 2005 (nights)

2000	EU-25	BE1	CZ	DK	DE	EE	EL	ES	FR	IE1	IT	CY	LV	LT	LU	HU	MT
Total	:	2.0	:	2.2	:	:	2.1	1.9	1.8	2.0	1.8	:	:	:	2.0	:	:
Leisure	:	2.1	:	2.5	2.5	:	2.2	1.9	1.9	2.1	1.9	:	:	:	2.1	:	:
Business	:	1.7	:	1.6	:	:	2.1	2.0	1.6	1.7	1.7	:	:	:	1.8	:	:
2005	**EU-25**	**BE**	**CZ**	**DK**	**DE**	**EE**	**EL2**	**ES2**	**FR**	**IE**	**IT2**	**CY**	**LV**	**LT**	**LU**	**HU**	**MT**
Total	:	2.0	1.9	2.1	:	1.7	2.1	1.9	1.8	2.0	1.8	:	1.7	1.7	1.9	1.9	:
Leisure	:	2.1	1.9	2.2	2.2	1.7	2.1	1.9	1.8	2.1	1.9	:	1.7	1.6	2.1	1.9	:
Business	:	1.8	1.6	1.7	:	1.6	2.1	2.0	1.6	1.7	1.7	:	1.6	1.8	1.7	1.9	:
2000	**NL**	**AT**	**PL**	**PT**	**SI**	**SK**	**FI**	**SE**	**UK**	**BG**	**HR**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
Total	:	:	:	1.7	:	:	2.2	:	2.0	:	:	:	:	:	:	:	:
Leisure	:	2.0	:	1.7	:	:	2.3	:	2.2	:	:	:	:	:	:	:	:
Business	:	:	:	1.8	:	:	1.5	:	1.7	:	:	:	:	:	:	:	:
2005	**NL**	**AT**	**PL**	**PT**	**SI**	**SK**	**FI**	**SE**	**UK2**	**BG**	**HR**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
Total	:	2.0	1.8	1.7	1.9	2.0	1.7	1.8	1.6	:	:	:	:	:	:	1.9	:
Leisure	:	2.0	1.8	1.7	1.9	2.2	1.8	1.9	1.7	:	:	:	:	:	:	2.0	:
Business	:	1.7	1.7	1.7	1.7	1.8	1.5	1.5	1.4	:	:	:	:	:	:	1.7	:

1) 2001 data. 2) 2004 data.

Turning to holiday trips of 4 nights or more, Table 3.7 shows the trend in and distribution of all holiday trips for each European country by destination (domestic or outbound).

In 2005 tourists living in the Benelux countries, Denmark, the United Kingdom, Ireland, Germany and Austria preferred to spend trips of 4 nights or more abroad. Percentages ranged from about 57% for Germans to about 99% for tourists from Luxembourg. By contrast, residents of southern European countries (Greece, Spain, France, Italy and Portugal) and Finland showed a clear preference for domestic trips, with figures ranging from 69.6% for Finns to 88.7% for Greeks. The same applies to residents in some of the "new" Member States and candidate countries (for which data are available), most of whom made their holiday trips in their country of residence (Polish tourists 79.1%, Czech 56.0%, Hungarian 57.8% and Croatian 80.1%). The exceptions were tourists living in Lithuania and Slovenia, who spent about 65% and 74% of their long trips abroad respectively. All these countries are (or, in the case of Slovenia, were) not members of the common European currency (euro) area. For tourists from these countries trips abroad, particularly to countries in the euro area, will be considerably more expensive than domestic trips.

Looking at developments from 2000 to 2005, it is interesting to note that the highest increases in domestic holiday trips were in countries where outbound tourism generally predominates. These were Belgium (6.3% average annual increase), Germany (+5.1%), Luxembourg (+14.9%) and Austria (+8.3%). On the other hand, outbound trips increased more in countries where tourists usually spend a large part of their holidays in their own country: Greece saw a 17.1% average annual increase, France +2.1%, Italy +1.3%, Portugal +6.1 %, Finland +5.4%, 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 spent the majority of their holidays abroad in 2000.

This means that the travel patterns of people residing in the EU-15 countries have changed since the beginning of the 21st century. In general, the travel patterns show that the shares of domestic and outbound tourism out of all trips of 4 nights or more are approaching each other. Countries with a high share of outbound trips have larger growth rates for domestic tourism and vice versa. In 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 20.1% in 2005, while the proportion of outbound tourist trips declined correspondingly, from 82.1% to 79.9%. On the other hand, outbound trips by Greek tourists in absolute figures increased at a higher rate than domestic trips but starting from a relatively low level. Consequently, their share grew from 8.9% in 2000 to 11.3% in 2004, at the expense of domestic tourism (down from 91.1% to 88.7%).

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Table 3.7 - Trips of 4 nights or more: total holiday trips by destination, 2000 and 2005 (1 000)

2000	EU-25	BE	CZ	DK	DE	EE[1]	EL	ES	FR	IE	IT	CY[1]	LV	LT	LU	HU	MT
Total	:	6 374	:	4 556	105 650	313	4 753	27 988	75 752	2 765	35 457	:	:	:	570	:	:
Domestic	:	1 142	:	1 406	35 898	167	4 330	25 108	63 025	1 104	27 382	:	:	:	2	:	:
Outbound	:	5 232	:	3 150	69 752	146	423	2 880	12 727	1 661	8 075	412	:	:	568	:	:
2005	EU-25	BE	CZ	DK	DE	EE[2]	EL[2]	ES[2]	FR[2]	IE	IT[2]	CY	LV	LT	LU	HU	MT
Total	:	7 715	9 941	5 064	106 950	282	7 023	23 762	81 072	4 298	36 034	:	760	1 079	725	7 115	:
Domestic	:	1 549	5 567	1 532	45 933	160	6 227	20 942	67 216	1 075	27 538	:	389	381	4	4 112	:
Outbound	:	6 166	4 374	3 532	61 017	122	796	2 820	13 856	3 223	8 496	499	371	698	721	3 003	:
Average annual growth rate % 2000-2005[4]																	
Total	:	3.9	:	2.1	0.2	-5.1	10.3	-4.0	1.7	9.2	0.4	:	:	:	4.9	:	:
Domestic	:	6.3	:	1.7	5.1	-2.1	9.5	-4.4	1.6	-0.5	0.1	:	:	:	14.9	:	:
Outbound	:	3.3	:	2.3	-2.6	-8.6	17.1	-0.5	2.1	14.2	1.3	6.6	:	:	4.9	:	:
% distribution 2005																	
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	:
Domestic	:	20.1	56.0	30.3	42.9	56.7	88.7	88.1	82.9	25.0	76.4	:	51.2	35.3	0.6	57.8	:
Outbound	:	79.9	44.0	69.7	57.1	43.3	11.3	11.9	17.1	75.0	23.6	:	48.8	64.7	99.4	42.2	:
2000	NL	AT	PL	PT	SI	SK	FI	SE[1]	UK	BG[3]	HR	RO	TR	IS	LI	NO	CH
Total	15 529	5 689	:	3 688	:	:	5 261	8 790	78 000	:	:	:	:	:	:	5 096	:
Domestic	5 749	1 811	:	3 024	:	:	3 755	4 823	38 700	:	:	:	:	:	:	2 702	:
Outbound	9 780	3 878	:	664	:	:	1 506	3 967	39 300	779	:	:	:	:	:	2 394	:
2005	NL	AT	PL	PT	SI	SK	FI	SE	UK[2]	BG	HR[2]	RO	TR	IS	LI	NO	CH
Total	18 048	7 468	16 522	3 936	1 643	4 199	6 443	7 908	66 000	:	1 798	:	:	:	:	5 872	:
Domestic	6 562	2 693	13 070	3 043	429	2 307	4 482	3 710	27 300	:	1 440	:	:	:	:	2 750	:
Outbound	11 486	4 775	3 452	893	1 214	1 892	1 961	4 198	38 700	1 121	358	:	:	:	:	3 122	:
Average annual growth rate % 2000-2005[4]																	
Total	3.1	5.6	:	1.3	:	:	4.1	-3.5	-4.1	:	:	:	:	:	:	2.9	:
Domestic	2.7	8.3	:	0.1	:	:	3.6	-8.4	-8.4	:	:	:	:	:	:	0.4	:
Outbound	3.3	4.2	:	6.1	:	:	5.4	1.9	-0.4	7.6	:	:	:	:	:	5.5	:
% distribution 2005																	
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	100.0	:	:	:	:	100.0	:
Domestic	36.4	36.1	79.1	77.3	26.1	54.9	69.6	46.9	41.4	:	80.1	:	:	:	:	46.8	:
Outbound	63.6	63.9	20.9	22.7	73.9	45.1	30.4	53.1	58.6	:	19.9	:	:	:	:	53.2	:

1) 2002 data. 2) 2004 data. 3) 2001 data 4) Average annual growth rate for 2001-2005 for BG; for 2002-2005 for CY and SE; for 2002-2004 for EE and for 2000-2004 for EL, ES, FR, IT, UK and HR. See methodological notes in the Annex.

Table 3.8 shows the trend in and 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.

As was the case with the number of trips, in 2005 tourists from the Benelux countries, Denmark, the United Kingdom, Ireland, Germany and Austria generally spent more nights abroad than in their country of residence, with percentages ranging from about 63.9% in Germany to 99.4% in Luxembourg. The share of nights spent abroad by tourists from these countries was generally higher than the number of trips, confirming the longer duration of outbound trips. For example, British tourists spent about 58.6% of all their trips of 4 nights or more abroad, but about 70% of all nights.

By contrast, tourists from southern Europe (Greeks, Spaniards, French, Italians and Portuguese) and Finns spent more nights at domestic holiday destinations, with shares ranging from about 61% for Finnish to around 89% for Spanish tourists. However, for French, Finnish and Portuguese tourists the share of trips was generally higher than that of nights (France 82.9% against 81.9%, Portugal 77.3% against 73.9% and Finland 69.6% against 61.1%), indicating shorter domestic trips.

The trend varies for residents of "new" Member States and candidate countries. In the Baltic states, Slovenia and Slovakia the majority of tourist nights spent by residents were concentrated on long outbound trips (from 57.5% in Latvia to 81.1% in Lithuania). By contrast, in the Czech Republic, Hungary, Poland and Croatia more than 50% of all nights are spent on long domestic trips.

3

Table 3.8 - Trips of 4 nights or more: total holiday nights by destination, 2000 and 2005 (1 000)

2000	EU-25	BE	CZ	DK	DE	EE[1]	EL	ES	FR	IE[2]	IT	CY	LV	LT	LU	HU	MT
Total	:	73 082	:	42 371	1 240 103	3 282	58 271	371 633	757 008	27 586	434 863	:	:	:	6 508	:	:
Domestic	:	11 237	:	10 858	343 137	1 474	51 903	337 577	624 530	8 063	344 408	:	:	:	17	:	:
Outbound	:	61 845	:	31 513	896 966	1 808	6 368	34 056	132 478	19 523	90 455	:	:	:	6 491	:	:
2005	**EU-25**	**BE**	**CZ**	**DK**	**DE**	**EE**	**EL[3]**	**ES[3]**	**FR[3]**	**IE**	**IT[3]**	**CY**	**LV**	**LT**	**LU**	**HU**	**MT**
Total	:	86 719	81 011	45 527	1 036 945	2 684	87 657	324 183	779 346	43 465	422 245	:	7 451	15 824	7 247	53 101	:
Domestic	:	15 024	42 725	10 687	374 542	888	77 914	289 363	638 644	9 323	330 000	:	3 166	2 988	40	27 826	:
Outbound	:	71 695	38 286	34 840	662 403	1 796	9 743	34 820	140 702	34 142	92 245	6 213	4 285	12 836	7 207	25 275	:
Average annual growth rate % 2000-2005[4]																	
Total	:	3.5	:	1.4	-3.5	-6.5	10.7	-3.4	0.7	12.0	-0.7	:	:	:	2.2	:	:
Domestic	:	6.0	:	-0.3	1.8	-15.5	10.7	-3.8	0.6	3.7	-1.1	:	:	:	18.7	:	:
Outbound	:	3.0	:	2.0	-5.9	-0.2	11.2	0.6	1.5	15.0	0.5	:	:	:	2.1	:	:
% distribution 2005																	
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	:
Domestic	:	17.3	52.7	23.5	36.1	33.1	88.9	89.3	81.9	21.4	78.2	:	42.5	18.9	0.6	52.4	:
Outbound	:	82.7	47.3	76.5	63.9	66.9	11.1	10.7	18.1	78.6	21.8	:	57.5	81.1	99.4	47.6	:

2000	NL	AT	PL	PT	SI	SK	FI	SE[1]	UK	BG[2]	HR	RO	TR	IS	LI	NO	CH
Total	180 037	63 711	:	40 243	:	:	43 758	77 209	706 600	:	:	:	:	:	:	50 894	:
Domestic	58 492	17 473	:	32 027	:	:	26 861	35 617	262 800	3 195	:	:	:	:	:	24 004	:
Outbound	121 545	46 238	:	8 216	:	:	16 897	41 592	443 800	:	:	:	:	:	:	26 890	:
2005	**NL**	**AT**	**PL**	**PT**	**SI**	**SK**	**FI**	**SE**	**UK[3]**	**BG**	**HR3**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
Total	194 339	66 725	169 267	43 759	13 460	37 152	50 139	78 252	630 200	:	17 254	:	:	:	:	55 134	:
Domestic	59 189	19 782	122 944	32 321	3 108	16 679	30 619	37 527	187 200	4 447	14 565	:	:	:	:	22 733	:
Outbound	135 150	46 943	46 323	11 438	10 352	20 473	19 520	40 725	443 000	:	2 689	:	:	:	:	32 401	:
Average annual growth rate % 2000-2005[4]																	
Total	1.5	0.9	:	1.7	:	:	2.8	0.4	-2.8	:	:	:	:	:	:	1.6	:
Domestic	0.2	2.5	:	0.2	:	:	2.7	1.8	-8.1	8.6	:	:	:	:	:	-1.1	:
Outbound	2.1	0.3	:	6.8	:	:	2.9	-0.7	0.0	:	:	:	:	:	:	3.8	:
% distribution 2005																	
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	100.0	:	:	:	:	100.0	:
Domestic	30.5	29.6	72.6	73.9	23.1	44.9	61.1	48.0	29.7	:	84.4	:	:	:	:	41.2	:
Outbound	69.5	70.4	27.4	26.1	76.9	55.1	38.9	52.0	70.3	:	15.6	:	:	:	:	58.8	:

1) 2002 data. 2) 2001 data. 3) 2004 data 4) Average annual growth rate for 2001-2005 for IE and BG; for 2002-2005 for EE and SE and for 2000-2004 for EL, ES, FR, IT, UK and HR. See methodological notes in the Annex.

As was the case with the number of trips, the trend between 2000 and 2005 shows that the highest increases in nights spent on domestic trips of 4 nights and more were in countries where outbound tourism predominates. These were Belgium (6.0% average annual increase), Luxembourg (+18.7%) and Austria (+2.5%). On the other hand, the number of nights abroad increased more in countries where tourists usually spend a large part of their holidays in their own country: Greece saw an 11.2% average annual increase, France +1.5%, Portugal +6.8% and Finland +2.9%. The only exception among the countries with a greater increase in outbound trips, with a positive trend since 2000, was Ireland, where residents already spent the majority of their holidays abroad.

Table 3.9 - Trips of 4 nights or more by destination: average length of stay, 2000 and 2005 (nights)

2000	EU-25	BE	CZ	DK	DE	EE[1]	EL	ES	FR	IE[2]	IT	CY[1]	LV	LT	LU	HU	MT
Total	:	11.5	:	9.3	11.7	10.5	12.3	13.3	10.0	10.0	12.3	:	:	:	11.4	:	:
Domestic	:	9.8	:	7.7	9.6	8.8	12.0	13.4	9.9	7.3	12.6	:	:	:	8.5	:	:
Outbound	:	11.8	:	10.0	12.9	12.4	15.1	11.8	10.4	11.8	11.2	:	:	:	11.4	:	:
2005	**EU-25**	**BE**	**CZ**	**DK**	**DE**	**EE**	**EL[3]**	**ES[3]**	**FR[3]**	**IE**	**IT[3]**	**CY**	**LV**	**LT**	**LU**	**HU**	**MT**
Total	:	11.2	8.1	9.0	9.7	9.5	12.5	13.6	9.6	10.1	11.7	:	9.8	14.7	10.0	7.5	:
Domestic	:	9.7	7.7	7.0	8.2	5.6	12.5	13.8	9.5	8.7	12.0	:	8.1	7.8	10.0	6.8	:
Outbound	:	11.6	8.8	9.9	10.9	14.7	12.2	12.3	10.2	10.6	10.9	12.5	11.5	18.4	10.0	8.4	:
2000	**NL**	**AT**	**PL**	**PT**	**SI**	**SK**	**FI**	**SE[1]**	**UK**	**BG**	**HR**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
Total	11.6	11.2	:	10.9	:	:	8.3	8.8	9.1	:	:	:	:	:	:	10.0	:
Domestic	10.2	9.6	:	10.6	:	:	7.2	7.4	6.8	:	:	:	:	:	:	8.9	:
Outbound	12.4	11.9	:	12.4	:	:	11.2	10.5	11.3	:	:	:	:	:	:	11.2	:
2005	**NL**	**AT**	**PL**	**PT**	**SI**	**SK**	**FI**	**SE**	**UK[3]**	**BG**	**HR**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
Total	10.8	8.9	10.2	11.1	8.2	8.8	7.8	9.9	9.5	:	9.6	:	:	:	:	9.4	:
Domestic	9.0	7.3	9.4	10.6	7.2	7.2	6.8	10.1	6.9	:	10.1	:	:	:	:	8.3	:
Outbound	11.8	9.8	13.4	12.8	8.5	10.8	10.0	9.7	11.4	:	7.5	:	:	:	:	10.4	:

1) 2002 data. 2) 2001 data. 3) 2004 data. See methodological notes in the Annex.

Looking at the average duration of long trips by destination, in 2005 domestic trips of 4 nights or more generally lasted from a minimum of 6.8 nights for Finnish tourists to a maximum of 13.8 nights for Spanish tourists (see Table 3.9). In the case of outbound trips, the shortest length of stay for tourists from all EU-25 countries was recorded by Hungarians (8.4 nights) and the longest by Lithuanian tourists (18.4 nights). As mentioned earlier, the duration also depends on the destination chosen. 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 wide.

In 2005 the largest absolute values for the average length of stay were recorded in the Benelux region, the United Kingdom, Germany and Austria, where most trips abroad averaged between 11 and 13 nights with a peak of 12.9 nights for Germans. In southern Europe, where domestic tourism predominates, domestic tourist trips lasted about 11 nights on average, with a peak of 13.8 nights for Spanish tourists.

The trend between 2000 and 2005 highlights that in the majority of countries for which data are available the average duration of all tourist trips of 4 nights and more decreased slightly. This was often reflected in both domestic and outbound tourism. For example, the average length of stay for German, Austrian and Finnish tourists fell by about one night or more for both domestic and foreign destinations. On the other hand, tourists from Ireland, Luxembourg and Sweden spent about one night less on trips abroad, but more time on domestic trips in 2005 (8.7 nights against 7.3 in 2000 for the Irish, 10.0 nights against 8.5 in 2000 for tourists from Luxembourg and 10.1 nights against 7.4 in 2000 for the Swedish). Conversely, Greek tourists increased the number of nights spent on long domestic trips (from 12.0 to 12.5 nights), at the expense of outbound trips (from 15.1 to 12.2 nights). The only countries where tourists extended the duration of their holidays both at home and abroad over the last five years surveyed were Spain and the United Kingdom.

Chapter 4 - Country Description

4. COUNTRY DESCRIPTION

4.1 Introduction

In this chapter, the tourism performance of each country of the EU-25 in 2005 is discussed. This starts with a set of indicators describing the international attractiveness of each country within the EU-25 area, its dependency on intra-area (EU-25) demand, the level of market internationalisation (in terms of demand and receipts) and the contribution of tourism to the local economy.

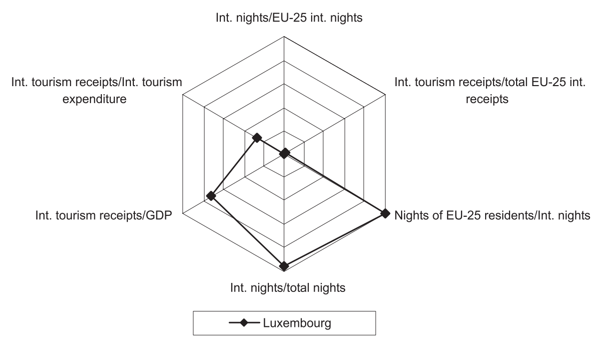
The analysis focuses on the EU-25 countries because there is still a significant lack of data for EFTA countries (Norway, Switzerland, Liechtenstein and Iceland) and candidate countries (Croatia and Turkey).

Specifically, the six selected indicators used are:

1. The share of international nights spent in collective accommodation in a country as a proportion of total international nights in the EU-25 area (percentage values), which measures the capacity of the country to accommodate international tourists in comparison to the EU-25 area as a whole. The value of the indicator depends on the type of tourism prevalent in the country: e.g. leisure tourism versus business tourism and, in the first case, long-stay tourism (e.g. beach tourism, language tours) versus short-stay tourism (e.g. city breaks).
2. The share of international tourism receipts in the country as a proportion of total international receipts in the EU-25 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 tourism nights spent by EU-25 residents as a proportion of total international nights in the country (percentage values). This indicator gives information on the level of "dependency" on intra-area (EU-25) tourism demand.
4. The proportion of international tourism nights as a share of total tourism nights (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 revenues generated by foreign tourists in the country with expenditure by residents abroad. The more receipts exceed 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 outbound tourism.

A graphic tool called 'spider plot' has been used to summarise each country's overall tourism performance in 2005. Normalised values for each indicator are shown as a point along a separate axis. The hexagon obtained by linking up the six points on the six axes 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-25 countries and the EU-25 area as a whole, and dividing each country's data by that value.

For example, the country with the highest share of nights from the EU-25 area as a proportion of total international nights in the country was determined for 2005 (i.e. Luxembourg). Then, the data for all the other countries were divided by this value in order to obtain the normalised values. The following graph shows an example of a spider plot.



It has to be noted that for indicators no. 1 (the share of international tourism nights in each country as a proportion of total international nights in the EU-25 area) and no. 2 (the share of international tourism receipts in each country as a proportion of total international tourism receipts in the EU-25 area), the highest value is assumed by the EU-25 area as a whole. The value is equal to 1. Consequently, data for all countries have been normalised in relation to these data.

The strength of this tool is that it provides a presentation of the set of indicators together in one graph for each country.

Once statistical data for two years for all the EU-25 countries are available, it could also provide a dynamic presentation of the set of indicators together in one graph for each country for the two years considered. It would depict 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 clusters of similar countries can thus be identified.

4.2. Tourism performance in the EU-25 area in 2005: the country profiles

The following table groups the EU-25 countries according to their role in the tourism market and the information derived from the spider plots.

Table 4.1 - Classification of EU-25 countries

Mainly origin countries	Origin/destination countries	Mainly destination countries
Denmark	Belgium	Czech Republic
Germany	France	Estonia
Netherlands	Ireland	Greece
Finland	Italy	Spain
Sweden	Latvia	Cyprus
	Lithuania	Luxembourg
	Poland	Hungary
	Slovakia	Malta
	United Kingdom	Austria
		Portugal
		Slovenia

Countries that are mainly places of origin of international tourism are those where outbound tourism (i.e. the number of tourism nights spent by resident tourists abroad) exceeds inbound tourism (i.e. the number of tourism nights spent by non-resident tourists in the country) and/or where international tourism expenditure exceeds receipts.

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

Origin/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, etc.) 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. The United Kingdom also belongs to this group but it covers more market segments than Belgium. While it is one of the most important countries of origin for both leisure and business tourism, it is also one of the most popular destinations for urban tourism, business tourism, language tours, etc.

In some cases, origin/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 an increase 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).

The following paragraphs show the tourism profile of each of the EU-25 countries in 2005. Each profile includes two tables and a spider plot. The first table presents the value assumed by the six main tourism indicators described above, while the second one focuses on the six main markets of origin of international tourism in the country.

4.2.1 Belgium

Belgium with its capital Brussels, is one of the most important business tourism destinations in Europe and 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.

Table 4.2.1.1 - Main tourism indicators: Belgium in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	1.8%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	3.4%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	84.6%
- Proportion of international tourism compared with total tourism in the country	54.8%
- Proportion of international tourism receipts in GDP	2.7%
- Ratio of international tourism receipts to expenditure	0.66

The prevalence of short-stay business tourism explains why the numbers of international tourists which the country takes in are lower than its tourism gains within the EU-25 area. In 2005, Belgium accounted for less than 2% of total international nights spent in the EU-25 but more than 3% of international tourism receipts (Table 4.2.1.1). This means that the profit margin on incoming tourism was higher than the volume of incoming tourism.

The share of international tourism nights as a proportion of total tourism nights in the country was about 55%, but the proportion of nights from the EU-25 area compared with total international nights was much higher (84.6%). This highlights a strong dependence on intra-area tourism. Looking at the six main markets of origin, five out of six are EU-25 countries (the United Kingdom, the Netherlands, France, Germany and Spain) and accounted for about 65% of total international tourism nights. The United States ranked fifth with a share of 5.8% (Table 4.2.1.2).

The contribution of international tourism receipts to the country's GDP amounted to 2.7% in 2005, while the ratio of international tourism receipts to expenditure, which measures the tourism balance, was 66.0%. This means that expenditure by foreign tourists in the country exceeded expenditure by domestic tourists abroad.

The following spider plot summarises the overall tourism performance of Belgium and compares it with the average performance of the EU-25 area as a whole.

4

Figure 4.2.1 - Situation of tourism in Belgium in 2005

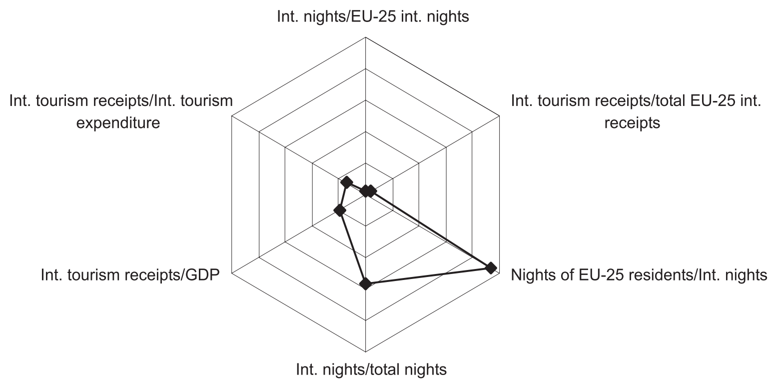


Table 4.2.1.2 - Main tourism markets in Belgium - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	UK	19.4
- 2nd market	NL	16.4
- 3rd market	FR	13.8
- 4th market	DE	11.3
- 5th market	US	5.8
- 6th market	ES	4.0

4.2.2 Czech Republic

The Czech Republic, with its capital Prague, represents an emerging destination for international tourism in Europe, especially for tourists coming from Central European markets.

Table 4.2.2.1 - Main tourism indicators: Czech Republic in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	2.2%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	1.6%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	75.8%
- Proportion of international tourism compared with total tourism in the country	48.6%
- Proportion of international tourism receipts in GDP	3.7%
- Ratio of international tourism receipts to expenditure	1.92

In 2005, the country accounted for more than 2% of total international nights spent in the EU-25 area and about 1.6% of international tourism receipts. This means a low average receipt per night in comparison to other countries and reveals that the profit margin on incoming tourism was lower than the volume of incoming tourism (table 4.2.2.1).

About 49% of total nights were spent by non-resident tourists and more than three quarters of them by tourists coming from the EU-25 (75.8%). This highlights a strong dependence on intra-area tourism. Taking into account the six main markets of origin, Germany ranked first with almost 30% of total international tourism nights, followed by the United Kingdom with 10.5% and Italy with 6.7%. The other EU-25 markets included in the ranking are Spain (4.2% of nights spent by non-residents) and France (3.7%) (Table 4.2.1.2).

The contribution of international tourism receipts to the country's GDP amounted to 3.7% in 2005, while receipts exceeded expenditure by 1.9 times. This indicates that expenditure by foreign tourists in the country is well above that of Czech tourists abroad.

The following spider plot summarises the overall tourism performance of the Czech Republic and compares it with the average performance of the EU-25 area as a whole.

Figure 4.2.2 - Situation of tourism in the Czech Republic in 2005

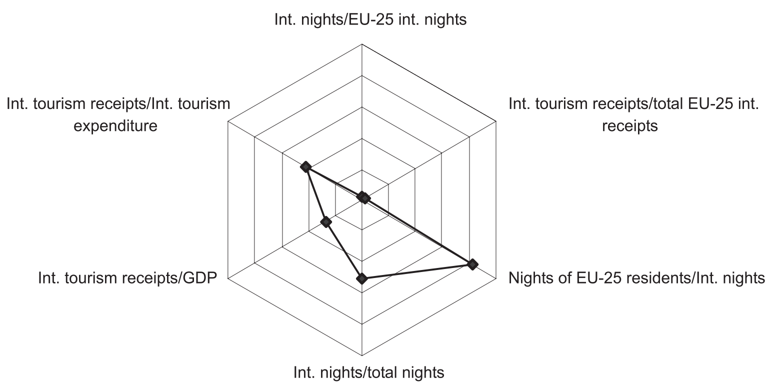


Table 4.2.2.2 - Main tourism markets in the Czech Republic - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	DE	28.6
- 2nd market	UK	10.5
- 3rd market	IT	6.7
- 4th market	US	5.0
- 5th market	ES	4.2
- 6th market	FR	3.7

4.2.3 Denmark

Denmark is more a generator of tourism flows, both at home and abroad, than an international tourism destination.

Table 4.2.3.1 - Main tourism indicators: Denmark in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	1.1%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	1.7%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	69.6%
- Proportion of international tourism compared with total tourism in the country	35.8%
- Proportion of international tourism receipts in GDP	1.9%
- Ratio of international tourism receipts to expenditure	0.77

In 2005, international nights spent in the country represented about 1% of total international nights in the EU-25 area. As for international tourism receipts, the share was 1.7% (Table 4.2.3.1).

Domestic tourism is prevalent. The proportion of nights spent by non-residents as a proportion of total nights is much lower than 40%. Tourists living in EU-25 countries spent about 70% of these nights. The most important markets were the neighbouring countries Sweden and Norway, which accounted for about 38% of total international nights. The United Kingdom ranked third in this list (11.0%), followed by Germany (9.7%), the United States (7.6%) and Italy (3.2%)(Table 4.2.3.2).

Receipts from international tourism amounted to about 1.9% of GDP and accounted for 77% of expenditure. This clearly confirms a dominance of outbound over inbound tourism.

The following spider plot summarises the overall tourism performance of Denmark and compares it with the average performance of the EU-25 area as a whole.

4

Figure 4.2.3 - Situation of tourism in Denmark in 2005

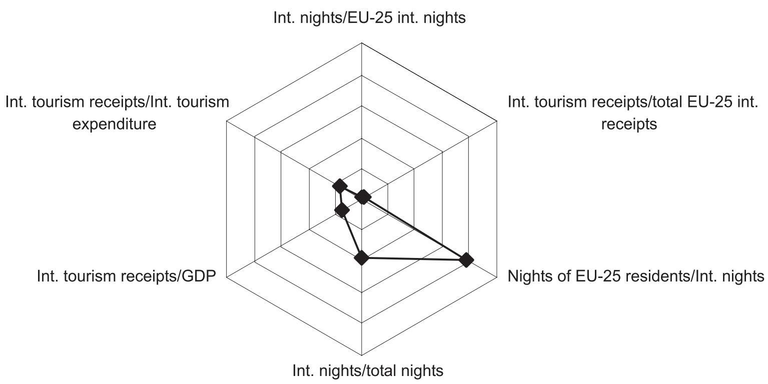


Table 4.2.3.2 - Main tourism markets in Denmark - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	SE	19.7
- 2nd market	NO	17.9
- 3rd market	UK	11.0
- 4th market	DE	9.7
- 5th market	US	7.6
- 6th market	IT	3.2

4.2.4 Germany

Germany is one of the main countries of origin for international tourism, both at home and abroad.

Table 4.2.4.1 - Main tourism indicators: Germany in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	5.4%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	10.1%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	62.3%
- Proportion of international tourism compared with total tourism in the country	14.0%
- Proportion of international tourism receipts in GDP	1.0%
- Ratio of international tourism receipts to expenditure	0.40

In 2005, Germany accounted for about 5% of total international nights spent within the EU-25 area, but 10.1% of international tourism receipts (Table 4.2.4.1). This means that the profit margin on incoming tourism was higher than the volume of incoming tourism.

The influence of international tourism is quite low. The share of foreign nights as a proportion of total tourism nights in the country amounted to 14.0%. Tourists coming from the EU-25 countries spent more than 60% of these nights. Four out of the six main markets of origin were in the EU-25 area. The Netherlands and the United States ranked first with about 11% of total international nights each, followed by the United Kingdom (9.1%), Switzerland (7.2%), Italy (6.2%) and Austria (4.7%). Altogether, these markets covered about 48% of total international nights in the country (Table 4.2.4.2).

The contribution of international tourism receipts to the country's GDP is low compared to other old Member States (about 1.0%), confirming that the impact of tourism on the country's economy is still rather limited. The ratio of international tourism receipts to expenditure was 40%, which means that outbound tourism exceeds inbound demand by far.

The following spider plot summarises the overall tourism performance of Germany and compares it with the average performance of the EU-25 area as a whole.

Figure 4.2.4 - Situation of tourism in Germany in 2005

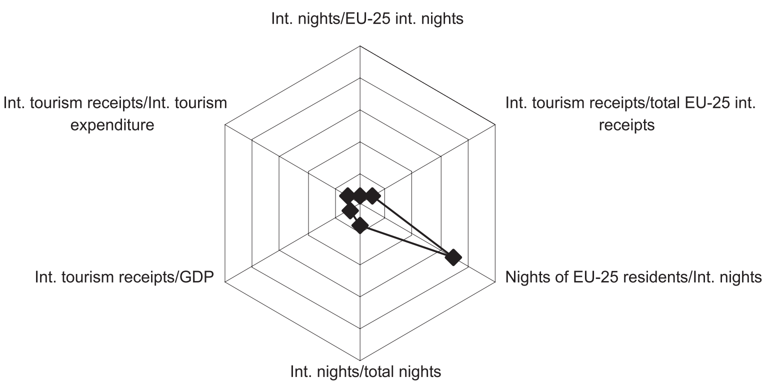


Table 4.2.4.2 - Main tourism markets in Germany - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	NL	10.6
- 2nd market	US	10.6
- 3rd market	UK	9.1
- 4th market	CH	7.2
- 5th market	IT	6.2
- 6th market	AT	4.7

4.2.5 Estonia

Estonia, one of the new Member States, is mainly an emerging destination of tourism in Europe.

Table 4.2.5.1 - Main tourism indicators: Estonia in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	0.3%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	0.3%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	87.1%
- Proportion of international tourism compared with total tourism in the country	72.5%
- Proportion of international tourism receipts in GDP	6.9%
- Ratio of international tourism receipts to expenditure	2.13

Estonia's attractiveness within the EU-25 area is still low. In 2005, the country recorded less than 0.5% for both total international nights and total international tourism receipts within the EU-25 (Table 4.2.5.1).

The weight of international tourism is very strong. The share of foreign nights as a proportion of total tourism nights in the country amounted to about 72.5%. Tourists coming from the EU-25 area, in particular from neighbouring countries, spent more than 85% of these nights. Finland is the main market of origin, accounting for almost 55% of total tourism nights. Sweden ranked second (8.0%), followed by Germany (7.0%), the United Kingdom (5.3%), Norway (3.6%) and Latvia (2.0%). Overall, these markets cover more than 80% of total international tourism nights (Table 4.2.5.2).

Tourism contributes substantially to the local economy. In 2005, international tourism receipts accounted for about 7% of total GDP and represented about twice the amount of tourism expenditure. This indicates that inbound tourism is much higher than outbound tourism.

The following spider plot summarises the overall tourism performance of Estonia and compares it with the average performance of the EU-25 area as a whole.

Figure 4.2.5 - Situation of tourism in Estonia in 2005

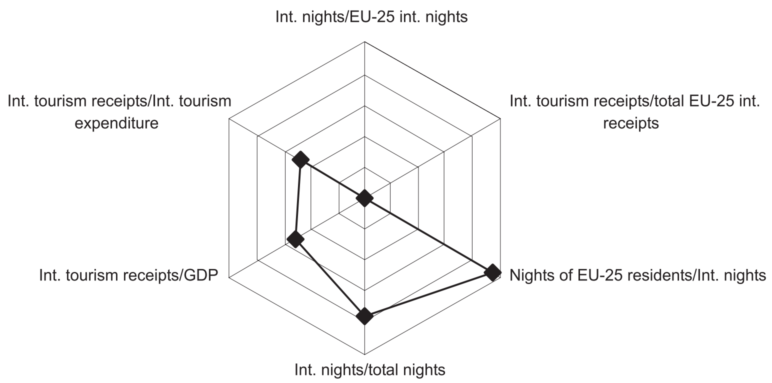


Table 4.2.5.2 - Main tourism markets in Estonia - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	FI	54.9
- 2nd market	SE	8.0
- 3rd market	DE	7.0
- 4th market	UK	5.3
- 5th market	NO	3.6
- 6th market	LV	2.0

4.2.6 Greece

Greece is one of the most popular tourism destinations in Europe, especially for beach tourism.

Table 4.2.6.1 - Main tourism indicators: Greece in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	4.6%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	4.7%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	82.7%
- Proportion of international tourism compared with total tourism in the country	73.7%
- Proportion of international tourism receipts in GDP	6.1%
- Ratio of international tourism receipts to expenditure	4.51

The country absorbs a lot of international tourism. The share of nights spent by international tourists in Greece as a proportion of total international nights within the EU-25 area amounted to 4.6%. Similarly, the share of international tourism receipts was about 4.7% (Table 4.2.6.1).

International tourism is prevalent. Non-resident tourists generated almost three quarters of total tourism nights and tourists coming from the EU-25 area spent 83% of them. Germany, as the primary market of origin, accounted for about 23% of total nights. The United Kingdom ranked second (19.0%), followed by Italy (7.3%), France (6.7%), the Netherlands (5.1%) and Austria (3.6%) (Table 4.2.6.2).

Like in Estonia, tourism contributes significantly to the local economy. In 2005, international tourism receipts accounted for about 6% of total GDP and represented about four times the amount of tourism expenditure. This means that expenditure by non-resident tourists in the country was well above expenditure by Greek tourists abroad.

The following spider plot summarises the overall tourism performance of Greece and compares it with the average performance of the EU-25 area as a whole.

Figure 4.2.6 - Situation of tourism in Greece in 2005

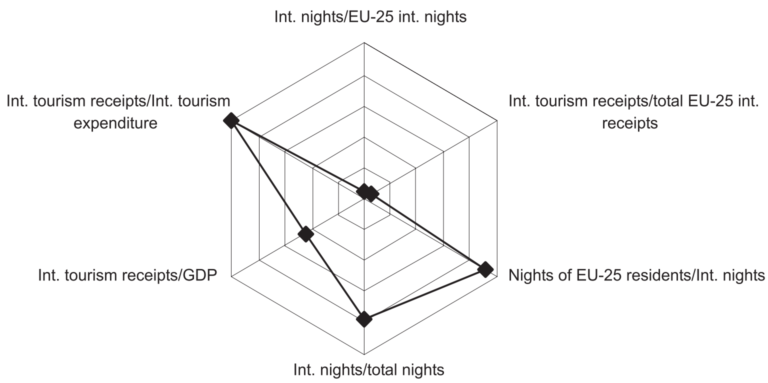


Table 4.2.6.2 - Main tourism markets in Greece - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	DE	22.7
- 2nd market	UK	19.0
- 3rd market	IT	7.3
- 4th market	FR	6.7
- 5th market	NL	5.1
- 6th market	AT	3.6

4.2.7 Spain

Spain is one of the main tourist destinations in the world and is the best performer within the EU-25. It is also growing as a country of origin for international tourism. Outbound tourism flows show an interesting trend, resulting from the country's economic prosperity.

Table 4.2.7.1 - Main tourism indicators: Spain in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	23.6%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	16.6%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	89.7%
- Proportion of international tourism compared with total tourism in the country	59.3%
- Proportion of international tourism receipts in GDP	4.3%
- Ratio of international tourism receipts to expenditure	3.17

In 2005, the country accounted for almost a quarter of total international nights spent within the EU-25 area and about 16.6% of international tourism receipts. This results in a relatively low average receipt per night in comparison to other EU-25 countries, i.e. the profit margin on incoming tourism is lower than the volume of incoming tourism (Table 4.2.7.1).

Non-resident tourists spent about 59% of total nights. Almost 90% of these nights were recorded for tourists coming from EU-25 countries. This highlights a strong dependence on intra-area tourism. The United Kingdom and Germany are the main markets of origin, accounting for about 60% of total international nights (Table 4.2.7.2). France ranked third with 6.4%, followed by Italy (5.4%), the Netherlands (3.6%) and Belgium (3.4%). These countries together represented about 79% of total international nights spent in Spain.

The contribution of international tourism receipts to the country's GDP is quite high (4.3%) compared to other EU countries. Looking at the ratio of international tourism receipts to expenditure, in 2005 it was 3.2, meaning that the gains from inbound tourism exceeded by far the expenditure generated by Spanish tourists abroad.

The following spider plot summarises the overall tourism performance of Spain and compares it with the average performance of the EU-25 area as a whole.

Figure 4.2.7 - Situation of tourism in Spain in 2005

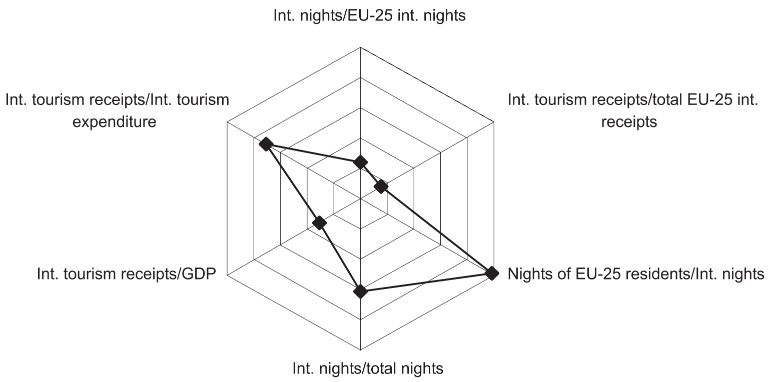


Table 4.2.7.2 - Main tourism markets in Spain - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	UK	31.0
- 2nd market	DE	28.8
- 3rd market	FR	6.4
- 4th market	IT	5.4
- 5th market	NL	3.6
- 6th market	BE	3.4

4.2.8 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, primarily within the country itself but also abroad.

Table 4.2.8.1 - Main tourism indicators: France in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	12.2%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	14.6%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	73.9%
- Proportion of international tourism compared with total tourism in the country	36.5%
- Proportion of international tourism receipts in GDP	2.0%
- Ratio of international tourism receipts to expenditure	1.36

In 2005, the country accounted for about 12% of total international tourism nights spent within the EU-25 area and almost 15% of total international receipts in the same area (Table 4.2.8.1).

Although France is the most popular destination in the world, the share of international tourism nights as a proportion of total tourism nights in the country (36.5%) is low compared to Greece and Spain, because of the high proportion of domestic tourism. However, the share of nights spent by tourists, who are residents in the EU-25 area was about 74%. This confirms the strong dependence on tourism from the EU-25 area. The United Kingdom, as the main country of origin, accounted for almost 22% of total international nights (Table 4.2.8.2). The United States, Germany and Italy followed, with a share of 9-10% each. Spain and Belgium ranked fifth, with 6.8% each. In all, these countries cover about 64% of total international nights in France.

The contribution of international tourism receipts to the country's GDP is low in comparison to Spain and Greece (2%). The ratio of international tourism receipts to expenditure (1.36) also shows a lower value than in Spain and Greece. The last figure confirms that France is not only the most important tourism destination but is also growing as one of the main countries of origin of international tourism.

The following spider plot summarises the overall tourism performance of France and compares it with the average performance of the EU-25 area as a whole.

Figure 4.2.8 - Situation of tourism in France in 2005

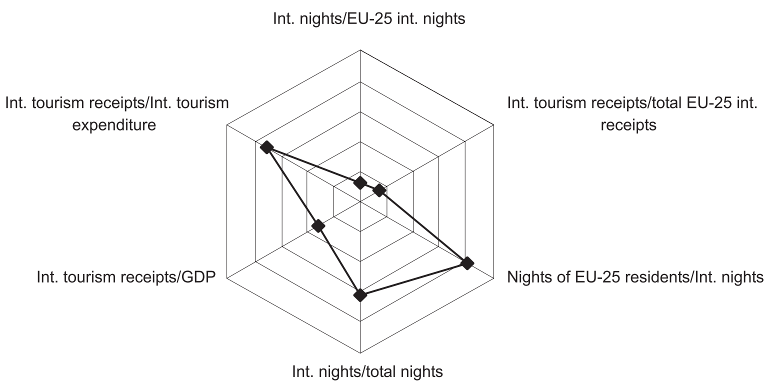


Table 4.2.8.2 - Main tourism markets in France - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	UK	21.9
- 2nd market	US	9.9
- 3rd market	DE	9.6
- 4th market	IT	9.4
- 5th market	ES	6.8
- 6th market	BE	6.8

4.2.9 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 values, outbound tourism has grown faster than inbound tourism in recent years, stimulated by both the improvement in the economy and the increase in low-cost flights.

Table 4.2.9.1 - Main tourism indicators: Ireland in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	2.2%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	1.6%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	:
- Proportion of international tourism compared with total tourism in the country	66.7%
- Proportion of international tourism receipts in GDP	2.4%
- Ratio of international tourism receipts to expenditure	0.78

Like the Czech Republic, in 2005 the country accounted for more than 2% of total international nights spent in the EU-25 area and about 1.6% of international tourism receipts (Table 4.2.9.1). International tourists spent more than 66% of total tourism nights.

The contribution of international tourism receipts to the country's GDP was 2.4% and receipts amounted to 78% of expenditure, meaning that expenditure by Irish tourists abroad exceeded the gains from inbound tourism significantly.

The following spider plot summarises the overall tourism performance of Ireland and compares it with the average performance of the EU-25 area as a whole.

4

Figure 4.2.9 - Situation of tourism in Ireland in 2005

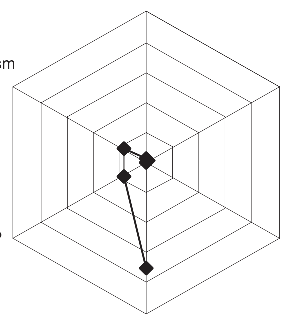


Table 4.2.9.2 - Main tourism markets in Ireland - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	:	:
- 2nd market	:	:
- 3rd market	:	:
- 4th market	:	:
- 5th market	:	:
- 6th market	:	:

4.2.10 Italy

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

Table 4.2.10.1 - Main tourism indicators: Italy in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	16.7%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	12.2%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	71.4%
- Proportion of international tourism compared with total tourism in the country	41.8%
- Proportion of international tourism receipts in GDP	2.0%
- Ratio of international tourism receipts to expenditure	1.58

In 2005, the country accounted for almost 17% of total international nights spent within the EU-25 area and about 12% of international tourism receipts. This results in a rather low average receipt per night in comparison to other EU-25 destinations and shows that the profit margin on incoming tourism was lower than the volume of incoming tourism (Table 4.2.10.1).

Non-resident tourists spent about 42% of total tourism nights in the country. More than 70% of these nights were recorded for tourists from the EU-25 area. Germany, as the main country of origin, accounted for more than a quarter of total international nights (Table 4.2.10.2). The United Kingdom followed in second place (10.4%), ahead of the United States (9.6%), France (7.0%), Switzerland (4.7%) and Austria (4.5%). In all, these countries cover about 63% of total international nights in Italy.

Like for France, the contribution of international tourism receipts to the country's GDP is low (2.0%) in comparison to Spain and Greece. This is also the case for the ratio of international tourism receipts to expenditure (1.58). The last figure confirms that Italy is not only one of the most important tourism destinations but is also growing as one of the main countries of origin of international tourism.

The following spider plot summarises the overall tourism performance of Italy and compares it with the average performance of the EU-25 area as a whole.

Figure 4.2.10 - Situation of tourism in Italy in 2005

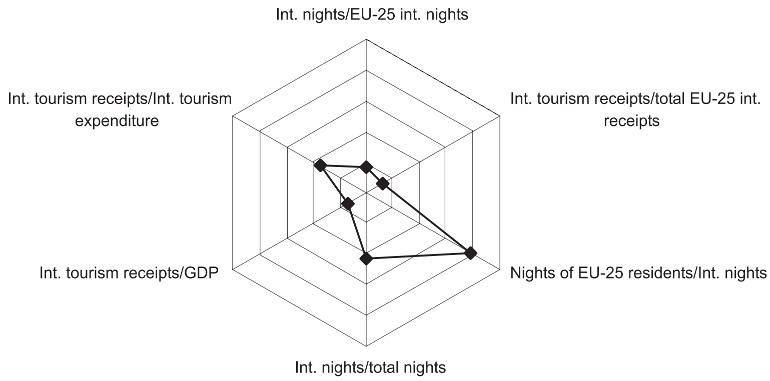


Table 4.2.10.2 - Main tourism markets in Italy - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	DE	26.5
- 2nd market	UK	10.4
- 3rd market	US	9.6
- 4th market	FR	7.0
- 5th market	CH	4.7
- 6th market	AT	4.5

4.2.11 Cyprus

Due to its geographical location and characteristics, Cyprus is mainly a destination for international tourism.

Table 4.2.11.1 - Main tourism indicators: Cyprus in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	1.6%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	0.8%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	85.7%
- Proportion of international tourism compared with total tourism in the country	93.0%
- Proportion of international tourism receipts in GDP	13.8%
- Ratio of international tourism receipts to expenditure	2.50

In 2005, the island accounted for less than 2% of international tourism nights spent in the EU-25 and less than 1% of international tourism receipts (Table 4.2.11.1).

The local tourism market is dominated by international tourism. Nights spent by non-residents amounted to 93% of total nights in the country. 86% of these nights were recorded for tourists coming from the EU-25 area. This creates a high dependence on intra-area tourism demand. Tourists from the United Kingdom represented the primary market, covering more than half of the total international tourism nights spent on the island (Table 4.2.11.2). Germany ranked second (10.5%), followed by Sweden (4.9%), Norway (3.0%), France (2.4%) and Switzerland (2.1%).

International tourism makes an important contribution to the local economy. In 2005, international tourism receipts accounted for about 14% of total GDP and represented more than twice the amount of tourism expenditure. This means that inbound tourism was much higher than outbound tourism.

The following spider plot summarises the overall tourism performance of Cyprus and compares it with the average performance of the EU-25 area as a whole.

4

Figure 4.2.11 - Situation of tourism in Cyprus in 2005

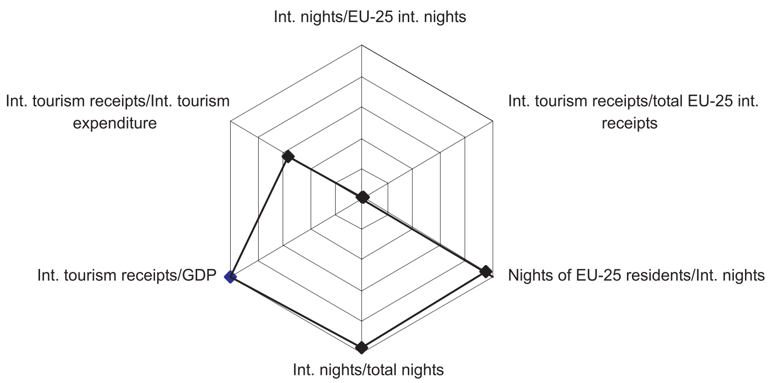


Table 4.2.11.2 - Main tourism markets in Cyprus - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	UK	55.6
- 2nd market	DE	10.5
- 3rd market	SE	4.9
- 4th market	NO	3.0
- 5th market	FR	2.4
- 6th market	CH	2.1

4.2.12 Latvia

Along with Estonia and Lithuania, Latvia is one of the new Member States which are emerging origins/destinations of international tourism in Europe.

Table 4.2.12.1 - Main tourism indicators: Latvia in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	0.2%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	0.1%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	71.9%
- Proportion of international tourism compared with total tourism in the country	61.2%
- Proportion of international tourism receipts in GDP	2.2%
- Ratio of international tourism receipts to expenditure	0.58

Like Estonia, Latvia's attractiveness within the EU-25 area is still low. In 2005, the country recorded less than 0.5% for both total international nights and total international tourism receipts within the EU-25 (Table 4.2.12.1).

However, the impact of international tourism is lower than that in Estonia. The share of foreign nights as a proportion of total tourism nights in the country amounted to about 61%, with tourists coming from the EU-25 area, in particular from neighbouring countries accounting for almost 72% of these nights. Germany, as the main market of origin, accounted for almost 16% of total tourism nights. Finland ranked second (11.3%), followed by the United Kingdom (8.2%), Estonia (5.9%), Lithuania and Sweden (5.8% each). In total, these markets covered more than 50% of total international tourism nights (Table 4.2.12.2).

In contrast to Estonia, however, international tourism contributes little to the local economy in comparison to other economic sectors. In 2005, international tourism receipts accounted for about 2% of total GDP and represented about 58% of tourism expenditure. This means that expenditure by Latvian tourists abroad was higher than expenditure by non-resident tourists in Latvia.

The following spider plot summarises the overall tourism performance of Latvia and compares it with the average performance of the EU-25 area as a whole.

Figure 4.2.12 - Situation of tourism in Latvia in 2005

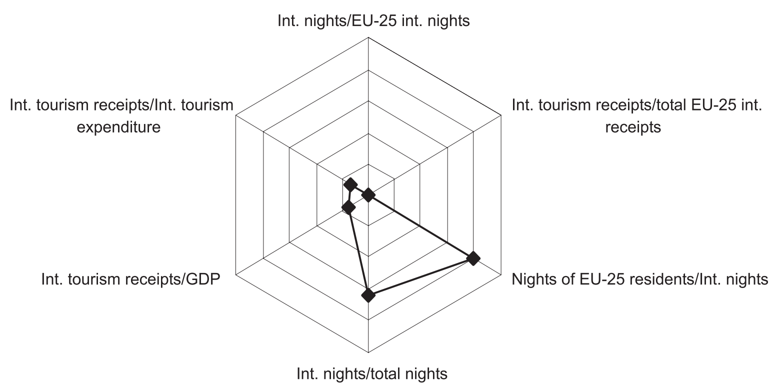


Table 4.2.12.2 - Main tourism markets in Latvia - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	DE	15.8
- 2nd market	FI	11.3
- 3rd market	UK	8.2
- 4th market	EE	5.9
- 5th market	LT	5.8
- 6th market	SE	5.8

4.2.13 Lithuania

Lithuania, like the other Baltic countries, is an emerging tourism market in Europe.

Table 4.2.13.1 - Main tourism indicators: Lithuania in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	0.2%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	0.3%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	70.7%
- Proportion of international tourism compared with total tourism in the country	53.4%
- Proportion of international tourism receipts in GDP	3.6%
- Ratio of international tourism receipts to expenditure	1.24

In 2005, the country recorded less than 0.5% for both total international nights and total international tourism receipts within the EU-25 (Table 4.2.13.1).

In Lithuania, domestic tourism was more prevalent in comparison to Estonia and Latvia. Non-resident tourists spent only about 50% of the country's total tourism nights. However, about 71% of these tourists came from EU-25 countries. Like in Latvia, Germany was the main market of origin, accounting for almost 19% of total tourism nights. Poland ranked second (12.7%), followed by the United Kingdom (5.9%), Latvia (4.6%), Finland (4.5%) and Italy (4.1%). In all, these markets covered more than 50% of total international tourism nights (Table 4.2.13.2).

International tourism contributed less to the local economy than in Estonia. In 2005, international tourism receipts accounted for about 3.6% of total GDP, but represented only 1.2 times the amount of tourism expenditure. This means that expenditure by non-resident tourists in the country was well above that of Lithuanian tourists abroad.

The following spider plot summarises the overall tourism performance of Lithuania and compares it with the average performance of the EU-25 area as a whole.

4

Figure 4.2.13 - Situation of tourism in Lithuania in 2005

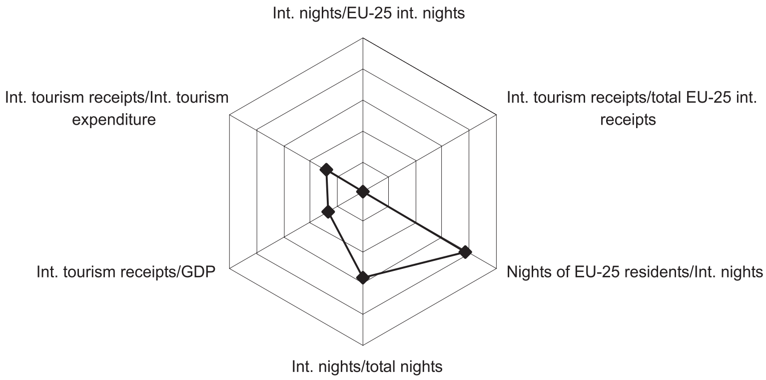


Table 4.2.13.2 - Main tourism markets in Lithuania - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	DE	18.6
- 2nd market	PL	12.7
- 3rd market	UK	5.9
- 4th market	LV	4.6
- 5th market	FI	4.5
- 6th market	IT	4.1

4.2.14 Luxembourg

Like Belgium, Luxembourg is an important destination for business tourism and a generator of international tourism.

Table 4.2.14.1 - Main tourism indicators: Luxembourg in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	0.3%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	1.2%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	91.1%
- Proportion of international tourism compared with total tourism in the country	91.3%
- Proportion of international tourism receipts in GDP	9.9%
- Ratio of international tourism receipts to expenditure	1.21

The prevalence of short-stay business tourism explains why the capacity of the country to accommodate international tourists is lower than its tourism gains within the EU-25 area. In 2005, Luxembourg recorded only 0.3% of total international nights spent in the EU-25 and little more than 1% of international tourism receipts (Table 4.2.14.1). This means that the profit margin on incoming tourism was higher than the volume of incoming tourism.

Foreign tourists spent almost all tourism nights in the country (91.1%). Residents of the EU-25 area generated 91.3% of this amount. Looking at the six main markets of origin, Belgium ranked first, accounting for about 22% of total international tourism nights. The Netherlands was second (14.8%), followed by Germany (14.1%), France (11.5%), the United Kingdom (7.3%) and the United States (3.7%). In all, tourists coming from these countries accounted for about 74% of total international nights in Luxembourg (Table 4.2.14.2).

Business tourism made an important contribution to the local economy. The proportion of international tourism receipts in the country's GDP amounted to 9.9% in 2005 and the ratio of receipts to expenditure, which measures the tourism balance, was 121%. This means that expenditure by foreign tourists in the country greatly exceeded expenditure by domestic tourists abroad.

The following spider plot summarises the overall tourism performance of Luxembourg and compares it with the average performance of the EU-25 area as a whole.

Figure 4.2.14 - Situation of tourism in Luxembourg in 2005

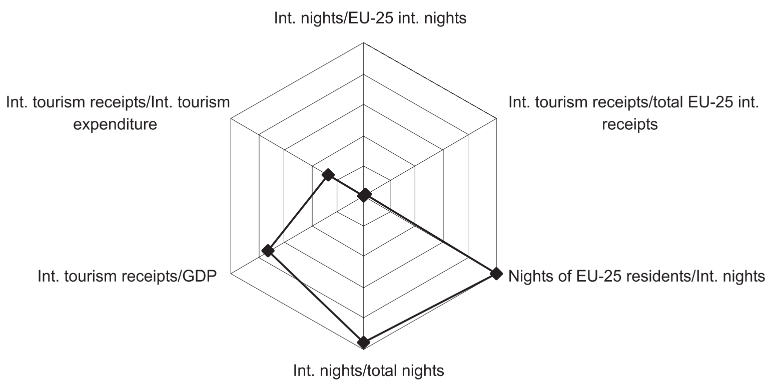


Table 4.2.14.2 - Main tourism markets in Luxembourg - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	BE	22.5
- 2nd market	NL	14.8
- 3rd market	DE	14.1
- 4th market	FR	11.5
- 5th market	UK	7.3
- 6th market	US	3.7

4.2.15 Hungary

Hungary is mainly a destination for resident and non-resident tourists.

Table 4.2.15.1 - Main tourism indicators: Hungary in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	1.2%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	1.5%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	75.1%
- Proportion of international tourism compared with total tourism in the country	54.6%
- Proportion of international tourism receipts in GDP	3.9%
- Ratio of international tourism receipts to expenditure	1.46

In 2005, the country accounted for 1.2% of total international nights spent in the EU-25 area and 1.5% of international tourism receipts. This means that the profit margin on incoming tourism was little higher than the volume of incoming tourism (Table 4.2.15.1).

About 55% of total nights were spent by international tourists. Three quarters of these international nights were spent by tourists coming from the EU-25 countries. Looking at the six main markets of origin, Germany ranked first (28.1%), followed by the United Kingdom (8.8%), Austria (6.4%), Italy (6.3%), the United States (5.5%) and Spain (3.8%). Altogether, these countries accounted for about 59% of total international tourism nights in Hungary (Table 4.2.15.2).

The contribution of international tourism receipts to the country's GDP amounted to 3.9% in 2005, while receipts exceeded expenditure by 1.5 times. This indicates that expenditure by foreign tourists in the country was well above expenditure by Hungarian tourists abroad.

The following spider plot summarises the overall tourism performance of Hungary and compares it with the average performance of the EU-25 area as a whole.

4

Figure 4.2.15 - Situation of tourism in Hungary in 2005

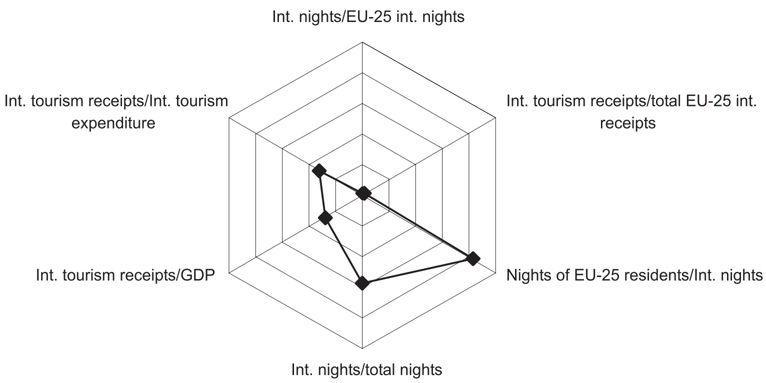


Table 4.2.15.2 - Main tourism markets in Hungary - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	DE	28.1
- 2nd market	UK	8.8
- 3rd market	AT	6.4
- 4th market	IT	6.3
- 5th market	US	5.5
- 6th market	ES	3.8

4.2.16 Malta

Like Cyprus, the island of Malta is mainly a destination of international tourism.

Table 4.2.16.1 - Main tourism indicators: Malta in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	0.8%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	0.3%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	87.9%
- Proportion of international tourism compared with total tourism in the country	96.3%
- Proportion of international tourism receipts in GDP	13.5%
- Ratio of international tourism receipts to expenditure	2.81

In 2005, less than 1% of total international tourism nights in the EU-25 area were spent on the island and the corresponding receipts amounted to only 0.3% of the EU-25 total (Table 4.2.16.1).

Tourism demand is almost entirely generated by non-resident tourists (96.3% of total nights in the country), in particular those coming from EU-25 countries (87.9% of international nights). This means that Malta is strongly dependent on intra-area tourism. The United Kingdom, as the main market of origin, accounted for about 46% of international tourism nights. Germany ranked second with 11.9%, followed by France with 6.3%, Italy with 5.4%, the Netherlands with 3.2% and Belgium with 2.5% (Table 4.2.16.2).

As in the case for Cyprus, international tourism contributes significantly to the local economy. In 2005, international tourism receipts accounted for about 13.5% of total GDP and represented almost three times the amount of tourism expenditure. This means that expenditure by foreign tourists in the country greatly exceeded expenditure by domestic tourists abroad.

The following spider plot summarises the overall tourism performance of Malta and compares it with the average performance of the EU-25 area as a whole.

Figure 4.2.16 - Situation of tourism in Malta in 2005

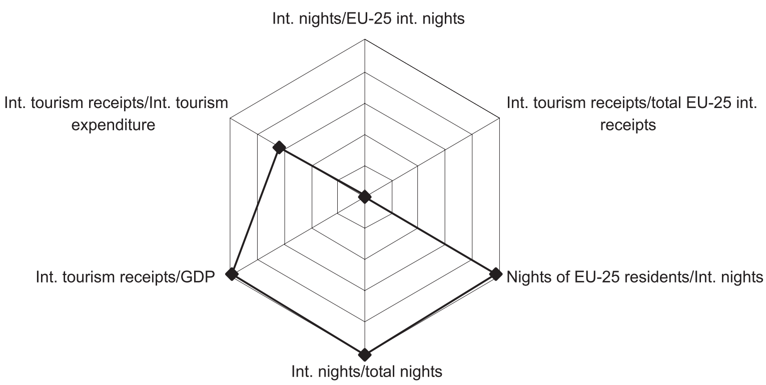


Table 4.2.16.2 - Main tourism markets in Malta - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	UK	45.7
- 2nd market	DE	11.9
- 3rd market	FR	6.3
- 4th market	IT	5.4
- 5th market	NL	3.2
- 6th market	BE	2.5

4.2.17 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, which has grown constantly in recent years.

Table 4.2.17.1 - Main tourism indicators: The Netherlands in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	2.8%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	3.6%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	79.9%
- Proportion of international tourism compared with total tourism in the country	31.4%
- Proportion of international tourism receipts in GDP	1.7%
- Ratio of international tourism receipts to expenditure	0.65

In 2005, the country recorded about 2.8% of total international tourism nights spent in the EU-25 and 3.6% of total international tourism receipts in the area. This means that the profit margin on incoming tourism was higher than the volume of incoming tourism (Table 4.2.17.1).

The market is dominated by domestic tourism. International tourism nights accounted only for about 31% of total nights in the country. Tourists resident in EU-25 countries spent almost 80% of those nights. Tourists from the United Kingdom were the primary market (21.1% of total nights spent by non-residents), followed by Germany with 18.7%, the United States with 11.0%, Belgium with 6.3%, France with 5.4%, and Italy with 4.5% (Table 4.2.17.2). In all, tourists coming from those countries accounted for 67.0% of total international nights spent in the Netherlands.

The contribution of international tourism to the country's GDP was low in comparison to other economic sectors (1.7%). The ratio of international tourism receipts to expenditure, which measures the tourism balance, was 0.65 in 2005. This means that expenditure by Dutch tourists abroad was much higher than expenditure by non-resident tourists in the country.

The following spider plot summarises the overall tourism performance of the Netherlands and compares it with the average performance of the EU-25 area as a whole.

4

Figure 4.2.17 - Situation of tourism in the Netherlands in 2005

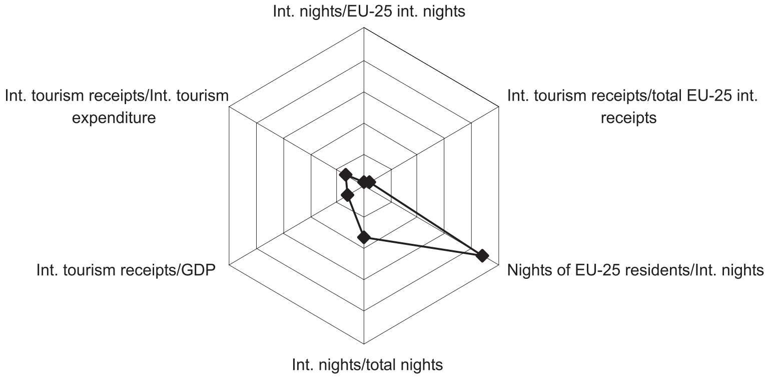


Table 4.2.17.2 - Main tourism markets in the Netherlands - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	UK	21.1
- 2nd market	DE	18.7
- 3rd market	US	11.0
- 4th market	BE	6.3
- 5th market	FR	5.4
- 6th market	IT	4.5

4.2.18 Austria

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

Table 4.2.18.1 - Main tourism indicators: Austria in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	7.9%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	5.3%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	87.0%
- Proportion of international tourism compared with total tourism in the country	71.9%
- Proportion of international tourism receipts in GDP	5.1%
- Ratio of international tourism receipts to expenditure	1.40

In 2005, about 8% of total international tourism nights in the EU-25 were spent in Austria, which collected only 5.3% of the corresponding receipts. This means that the profit margin on incoming tourism was lower than the volume of incoming tourism (Table 4.2.18.1).

Non-resident tourists accounted for more than 70% of total nights. Tourists coming from the EU-25 area spent 87.0% of these international nights. This indicates a high dependence on intra-area tourism. Among the six main markets of origin, Germany ranked first with more than half of the total international tourism nights. The other five countries accounted for about another 25% of total nights. The Netherlands held the second position with 7.3%, followed by the United Kingdom with 5.4%, Switzerland with 5.1%, Italy with 4.4% and Belgium with 3.1% (Table 4.2.18.2).

International tourism contributed substantially to the country's economy. The proportion of international tourism receipts in total GDP was 5.1% in 2005 and receipts were 1.4 times expenditure, meaning that the gains from incoming tourism were higher than the expenditure of outbound tourists.

The following spider plot summarises the overall tourism performance of Austria and compares it with the average performance of the EU-25 area as a whole.

Figure 4.2.18 - Situation of tourism in Austria in 2005

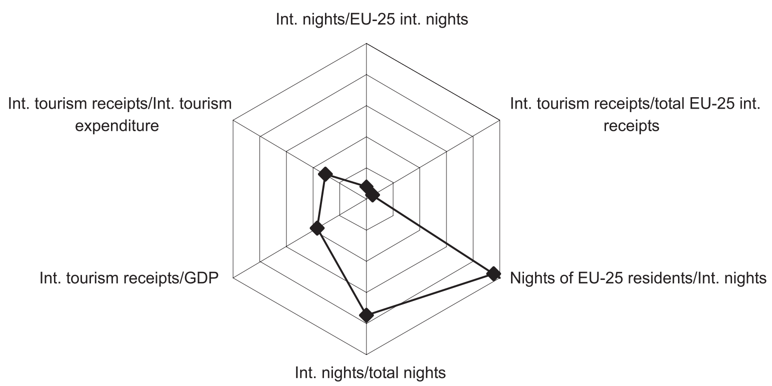


Table 4.2.18.2 - Main tourism markets in Austria - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	DE	54.4
- 2nd market	NL	7.3
- 3rd market	UK	5.4
- 4th market	CH	5.1
- 5th market	IT	4.4
- 6th market	BE	3.1

4.2.19 Poland

Like other eastern European countries, Poland is an emerging tourism market in Europe. Although tourism flows in the country were generated mostly by domestic tourism, international tourism has been growing in recent years.

Table 4.2.19.1 - Main tourism indicators: Poland in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	1.2%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	2.2%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	77.3%
- Proportion of international tourism compared with total tourism in the country	21.7%
- Proportion of international tourism receipts in GDP	2.1%
- Ratio of international tourism receipts to expenditure	1.44

In 2005, Poland accounted for about 1.2% of total international tourism nights spent in the EU-25 and just over 2% of international tourism receipts in the same area. This means that the profit margin on incoming tourism was higher than the volume of incoming tourism (Table 4.2.19.1).

Domestic tourists spent the largest share of tourism nights in all accommodation establishments. Nights spent by non-residents amounted only to about 22% of total nights. Tourists coming from the EU-25 area accounted for about three quarters of these nights. As with other eastern European destinations, Germany was the primary market of origin, accounting for more than a third of total international tourism nights spent in the country. The United Kingdom was in second place with 7.4%, followed by the United States with 5.4%, Italy with 5.2%, France with 4.4% and Denmark with 2.8% (Table 4.2.19.2).

The contribution of international tourism receipts to the country's GDP is low in comparison to other countries of the same area (2.1%). However, the tourism balance is positive. The ratio of international tourism receipts to expenditure amounted to 1.44 in 2005, meaning that expenditure by foreign tourists in the country was much higher than expenditure by Polish tourists abroad.

The following spider plot summarises the overall tourism performance of Poland and compares it with the average performance of the EU-25 area as a whole.

Figure 4.2.19 - Situation of tourism in Poland in 2005

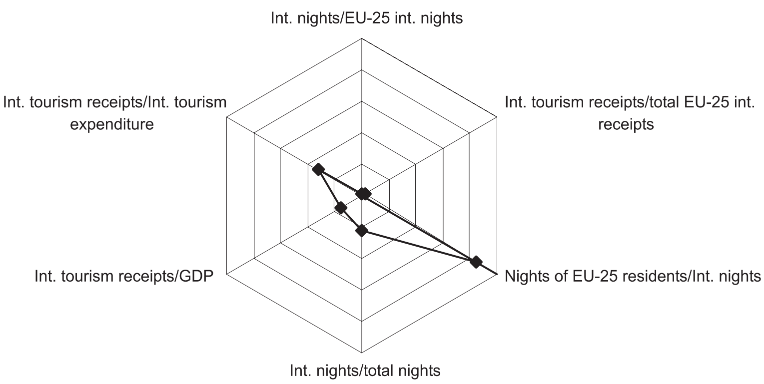


Table 4.2.19.2 - Main tourism markets in Poland - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	DE	36.6
- 2nd market	UK	7.4
- 3rd market	US	5.4
- 4th market	IT	5.2
- 5th market	FR	4.4
- 6th market	DK	2.8

4

4.2.20 Portugal

Like Greece, Portugal is mainly an international tourism destination and has strengthened this position during the last few years.

Table 4.2.20.1 - Main tourism indicators: Portugal in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25[1]	2.8%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	2.7%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country[1]	87.1%
- Proportion of international tourism compared with total tourism in the country[1]	59.0%
- Proportion of international tourism receipts in GDP	4.3%
- Ratio of international tourism receipts to expenditure	2.58

1) 2004 data.

In 2004, Portugal accounted for almost 3% of total international tourism nights spent in the EU-25. As for tourism receipts, the share was 2.7% in 2005 (Table 4.2.20.1).

International tourism nights accounted for about 60% of total nights in the country. 87.1% of those were spent by tourists resident in EU-25 Member States. This indicates that Portugal is highly dependent on intra-area tourism. As with Spain, the United Kingdom ranked first among the six main markets of origin (30.8% of total international nights), followed by Germany with 16.4%, Spain with 10.4%, the Netherlands with 6.5%, France with 4.8% and Ireland with 4.1% (Table 4.2.20.2).

The contribution of international tourism receipts to the country's GDP was relatively high and equal to that of Spain (4.3%), while Portugal's ratio of tourism receipts to expenditure did not reach the same level. This means that expenditure by foreign tourists in the country was much higher than expenditure by Portuguese tourists abroad.

The following spider plot summarises the overall tourism performance of Portugal and compares it with the average performance of the EU-25 area as a whole.

Figure 4.2.20 - Situation of tourism in Portugal in 2005

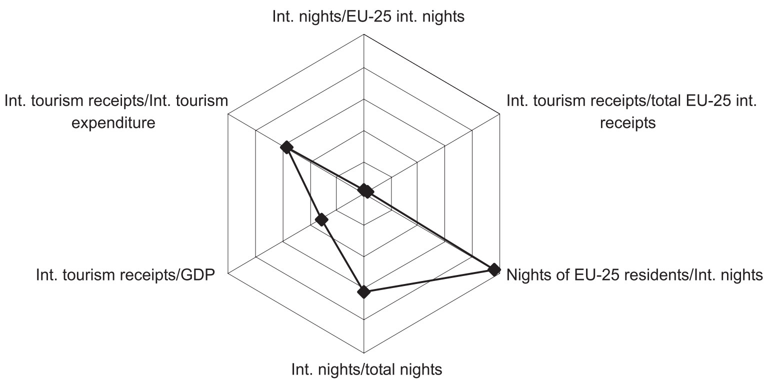


Table 4.2.20.2 - Main tourism markets in Portugal - nights spent by non-residents (as % of total nights), 2005

Markets[1]	Country	%
- 1st market	UK	30.8
- 2nd market	DE	16.4
- 3rd market	ES	10.4
- 4th market	NL	6.5
- 5th market	FR	4.8
- 6th market	IE	4.1

1) 2004 data.

4.2.21 Slovenia

Slovenia is one of the most important tourism destinations of central Europe and its role has been strengthening in recent years.

Table 4.2.21.1 - Main tourism indicators: Slovenia in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	0.5%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	0.6%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	77.4%
- Proportion of international tourism compared with total tourism in the country	58.2%
- Proportion of international tourism receipts in GDP	5.2%
- Ratio of international tourism receipts to expenditure	1.88

In 2005, Slovenia's impact within the EU-25 area was still low. The country recorded less than 1% for both total international tourism nights and tourism receipts (Table 4.2.21.1).

International tourism generated more than half of the total tourism nights, of which more than three quarters were spent by tourists resident in EU-25 countries. Italy, as the most important among the six main markets of origin, accounted for about 22% of total international tourism nights in 2005. Austria ranked second with 16.1%, followed by Germany with 13.9%, the United Kingdom with 7.8%, and the United States and France with 2.3% each (Table 4.2.21.2).

International tourism contributed substantially to the country's economy. In 2005, international tourism receipts amounted to about 5% of GDP and the tourism balance was positive. Receipts exceeded expenditure about twofold, meaning that the gains from inbound tourism were much higher than the expenditure for outbound tourism.

The following spider plot summarises the overall tourism performance of Slovenia and compares it with the average performance of the EU-25 area as a whole.

Figure 4.2.21 - Situation of tourism in Slovenia in 2005

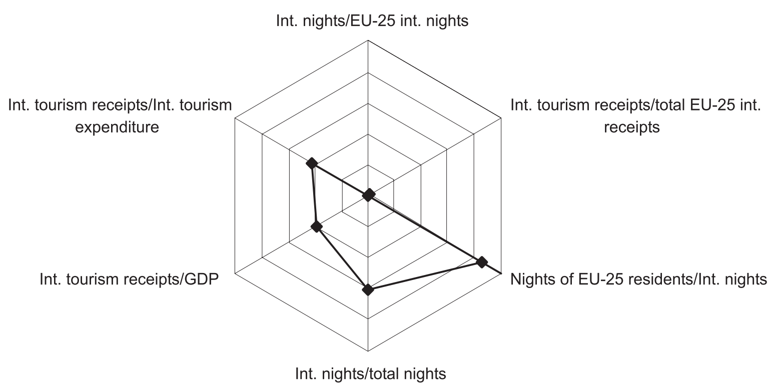


Table 4.2.21.2 - Main tourism markets in Slovenia - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	IT	22.4
- 2nd market	AT	16.1
- 3rd market	DE	13.9
- 4th market	UK	7.8
- 5th market	US	2.3
- 6th market	FR	2.3

4.2.22 Slovakia

Like other central European countries, Slovakia is an emerging origin/destination on the European tourism market.

Table 4.2.22.1 - Main tourism indicators: Slovakia in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	0.5%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	0.4%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	85.0%
- Proportion of international tourism compared with total tourism in the country	45.2%
- Proportion of international tourism receipts in GDP	2.7%
- Ratio of international tourism receipts to expenditure	1.38

Mirroring Slovenia's situation, Slovakia's impact within the EU-25 area was still low in 2005. The country recorded far less than 1% for both total international tourism nights and tourism receipts (Table 4.2.22.1).

International tourism generated about 45% of total tourism nights. 85.0% of these nights were spent by tourists living in an EU-25 country. This indicates a rather high dependence on intra-area tourism.

However, unlike other eastern European countries, the bulk of international tourism nights was spent by tourists coming from eastern Europe and particularly from neighbouring countries. Among the six main markets of origin, the Czech Republic, Poland and Hungary accounted for about 41% of total international tourism nights in 2005. Other important markets were Germany with 23.1%, Austria with 3.4% and the United Kingdom with 3.2% (Table 4.2.22.2).

The contribution of international tourism receipts to the country's GDP is low in comparison to other countries of the same area (2.7%). This is probably due to the prevalence of proximity tourism. International tourism receipts were 1.4 times the value of expenditure, indicating that expenditure by non-resident tourists was much higher than expenditure by Slovakian tourists abroad.

The following spider plot summarises the overall tourism performance of Slovakia and compares it with the average performance of the EU-25 area as a whole.

Figure 4.2.22 - Situation of tourism in Slovakia in 2005

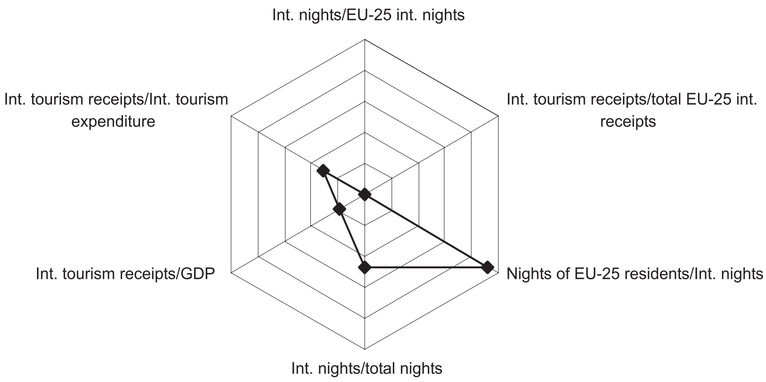


Table 4.2.22.2 - Main tourism markets in Slovakia - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	CZ	24.7
- 2nd market	DE	23.1
- 3rd market	PL	10.0
- 4th market	HU	6.0
- 5th market	AT	3.4
- 6th market	UK	3.2

4.2.23 Finland

Finland is mainly a generator of tourism, in the country and abroad.

Table 4.2.23.1 - Main tourism indicators: Finland in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	0.5%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	0.8%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	62.9%
- Proportion of international tourism compared with total tourism in the country	26.1%
- Proportion of international tourism receipts in GDP	1.1%
- Ratio of international tourism receipts to expenditure	0.71

In 2005, about 0.5% of total international tourism nights in the EU-25 were spent in Finland and the country also took in less than 1% of total international tourism receipts from the same area (Table 4.2.23.1).

Tourism movement was generated mostly by domestic tourists. Only about a quarter of total tourism nights were spent by non-resident tourists, about 63% of whom were from EU-25 Member States. Among the six main markets of origin, Sweden ranked first, accounting for about 11.6% of total tourism nights, closely followed by Germany with 11.3% (Table 4.2.23.2). The United Kingdom ranked third (9.9%), ahead of the United States (5.3%), France (5.2%) and the Netherlands (4.2%).

Along with Germany, the United Kingdom and Denmark, the contribution of international tourism receipts to the country's GDP in comparison to other economic sectors, is one of the lowest in the EU-25 (1.1%). International tourism receipts represented about 70% of expenditure, meaning than the gains from incoming tourism were lower than the expenditure for outbound tourism.

The following spider plot summarises the overall tourism performance of Finland and compares it with the average performance of the EU-25 area as a whole.

Figure 4.2.23 - Situation of tourism in Finland in 2005

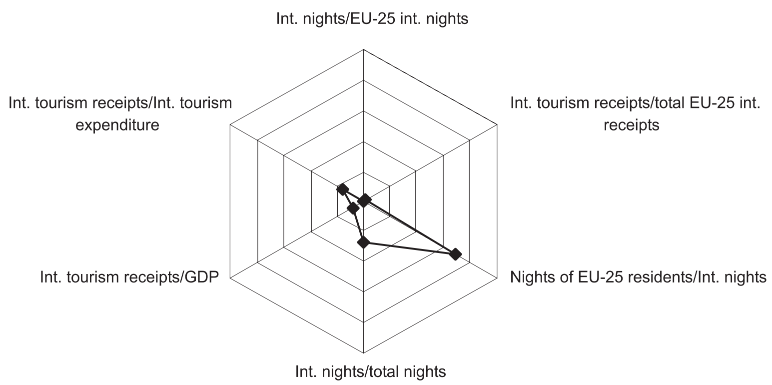


Table 4.2.23.2 - Main tourism markets in Finland - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	SE	11.6
- 2nd market	DE	11.3
- 3rd market	UK	9.9
- 4th market	US	5.3
- 5th market	FR	5.2
- 6th market	NL	4.2

4.2.24 Sweden

Like Finland, Sweden is basically more a generator of tourism, in the country and abroad, than an international tourism destination.

Table 4.2.24.1 - Main tourism indicators: Sweden in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25	1.1%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	2.6%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	55.1%
- Proportion of international tourism compared with total tourism in the country	22.4%
- Proportion of international tourism receipts in GDP	2.1%
- Ratio of international tourism receipts to expenditure	0.69

In 2005, the country accounted for about 1% of total international tourism nights spent in the EU-25 and almost 3% of international tourism receipts in the same area (Table 4.2.24.1). This means that the profit margin on incoming tourism was much higher than the volume of incoming tourism.

However, international tourism has a low market share in comparison to domestic tourism. Only 22% of total nights were spent by non-resident tourists. About 55% of these nights were recorded for tourists coming from EU-25 countries. This indicates a very low dependence on intra-area tourism in comparison to other EU-25 Member States. As far as the six main markets of origin are concerned, the neighbouring countries accounted for the largest number of nights spent by foreign tourists. For Norway, Denmark and Finland together, more than 28% of total international nights were recorded. Regarding the other countries, Germany ranked second after Norway, with 13.1%, followed by the United Kingdom with 10.4% and the United States with 7.5% (Table 4.2.24.2).

The contribution of international tourism receipts to the country's GDP (2.2%), in comparison to other economic sectors, is higher than in Finland. International tourism receipts represented about 69% of expenditure, meaning that expenditure by Swedish tourists abroad was higher than expenditure by non-resident tourists in the country.

The following spider plot summarises the overall tourism performance of Sweden and compares it with the average performance of the EU-25 area as a whole.

Figure 4.2.24 - Situation of tourism in Sweden in 2005

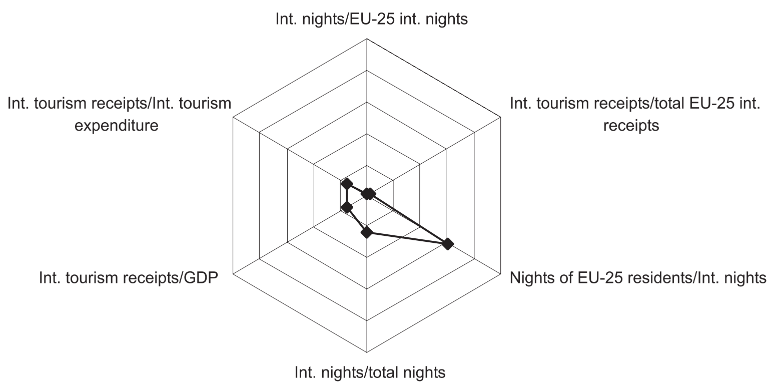


Table 4.2.24.2 - Main tourism markets in Sweden - nights spent by non-residents (as % of total nights), 2005

Markets	Country	%
- 1st market	NO	15.6
- 2nd market	DE	13.1
- 3rd market	UK	10.4
- 4th market	US	7.5
- 5th market	DK	7.2
- 6th market	FI	5.6

4.2.25 The United Kingdom

The United Kingdom is one of the most important countries of origin for tourism and also one of the main destinations in Europe for specific market segments (e.g. urban tourism, business tourism, language tours).

Table 4.2.25.1 - Main tourism indicators: United Kingdom in 2005

Indicators	2005
- Share of international nights in the country as a proportion of total international nights in the EU-25[1]	8.3%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	10.6%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country[1]	46.7%
- Proportion of international tourism compared with total tourism in the country[1]	31.9%
- Proportion of international tourism receipts in GDP	1.4%
- Ratio of international tourism receipts to expenditure	0.51

1) 2004 data.

In 2004, about 8% of total international tourism nights in the EU-25 were spent in the United Kingdom, while the share of tourism receipts was 10.6% in 2005 (Table 4.2.25.1).

Almost a third of total nights were spent by non-resident tourists. Tourists coming from the EU-25 only accounted for about 47% of total international nights. This means a low dependence on intra-area tourism in comparison to other EU-25 countries. Among the six main markets of origin, the United States ranked first, recording with about 22% of total tourism nights more than twice the German share of 9.3% (Table 4.2.25.2) representing the second position. France held third place with 5.8%, closely followed by Spain, Austria and Italy with a share of 4.9% each.

Along with Germany, Denmark and Finland, the contribution of international tourism receipts to the country's GDP (1.4%), in comparison to other economic sectors, is one of the lowest among the EU-25 countries. International tourism receipts represented about 50% of expenditure, meaning that expenditure by residents abroad was much higher than expenditure by non-resident tourists in the country.

The following spider plot summarises the overall tourism performance of the United Kingdom and compares it with the average performance of the EU-25 area as a whole.

Figure 4.2.25 - Situation of tourism in the United Kingdom in 2005

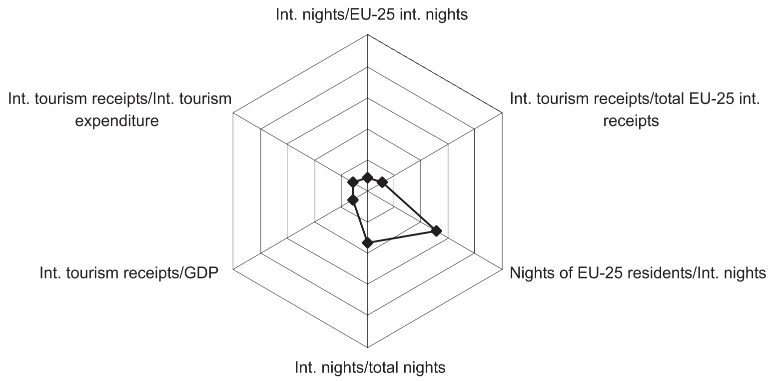


Table 4.2.25.2 - Main tourism markets in the United Kingdom - nights spent by non-residents (as % of total nights), 2005

Markets[1]	Country	%
- 1st market	US	22.2
- 2nd market	DE	9.3
- 3rd market	FR	5.8
- 4th market	ES	4.9
- 5th market	AT	4.9
- 6th market	IT	4.9

1) 2004 data.

CHAPTER 5 - TECHNICAL NOTES

5. Technical notes

5.1 General information

Information on definitions, classifications and concepts concerning tourism are available from:

http/www.europa.eu./comm/eurostat

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

The country totals in Tables 3.7 to 3.9 do not match the totals for the variable "4 nights and more" in Tables 3.1 and 3.2 due to methodological problems with data collection.

5.2 Additional terms and definitions

General terms and definitions

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

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 1.1.2 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 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, where or from where an 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 fits the definition of a local unit as the production unit. This is irrespective of whether 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 majority of their turnover comes 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 GDR. 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 GDR.

Growth rate: Growth rates are rates of total changes over a specified 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 (leaves) at a collective accommodation establishment or private tourist accommodation and checks in (out). However, in the context of this publication, arrivals relate only to arrivals in collective accommodation establishments as collection of data on private accommodation is not covered by the EU Directive on tourism statistics. 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. Arrivals of non-tourists (e.g. refugees) should be excluded if possible. Arrivals of same-day visitors spending only a few hours during the day at the establishment (no overnight stay, the date of arrival and departure being the same) are not included in accommodation statistics.

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

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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 for which a person travels, but for professional purposes.

Collective tourist accommodation establishment: An accommodation establishment that provides overnight lodging for travellers 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. Includes 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 against other collective accommodation) or, within the same type, between different categories (e.g. in hotels by 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 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:

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

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 for which a person travels for leisure purposes.

Hotels and similar establishments: Establishments that have more than a specified minimum number of rooms, come under common management, provide certain services, including room service, daily bed-making and cleaning of sanitary facilities, are grouped in classes and categories, depending on the facilities and services provided, and do not fall into 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 capacity: Measures the intensity, or density, of the accommodation capacity in a given country, region, etc. in order to compare it with that of other tourist destinations; used to interpret the absolute indicators of tourism capacity (e.g. number of bed places), taking into account the characteristics of the territory under consideration (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:

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

This indicator can also be used as a proxy for the potential tourism pressure in an area (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: Comprises 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.

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 (but not necessarily physically present) in a collective accommodation establishment or in private tourist accommodation. However, in the context of this publication, nights relate only 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. Overnight stays by 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 set up at the customer's request. The term "bed place" means a single bed; 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 be counted as 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 their country and outside their usual environment.

Tourist nights/resident ratio: This indicator compares the number of tourists (in terms of overnight stays) with the number of residents at a destination over the same period (e.g. day, month or year). It measures the intensity of tourism demand over that period and is one of the indicators used to measure the capacity of a tourist destination. It shows 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 for international tourism the difference is usually positive (i.e. receipts exceed expenditure). This means that the economy gains from tourism. By 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 by international tourists in the country.

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

Tourism pressure: Analysing the pressure which tourism exerts on an area is important in order to measure the capacity of a tourism destination and 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 total number of visitors (tourists plus day-trippers) at a destination at any one time by 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 (e.g. country, region, etc.) or micro (resort) level. Considering overnight tourists only, this indicator can be replaced by the intensity of tourism capacity (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
bn	billion
mio	million

Country abbreviations

EU-25	European Union of 25 countries (as of 1 May 2004)
EU-15	European Union of 15 countries (up to 30 April 2004)
NMS	"New" Member States (as of 1 July 2004) - Czech Republic, Estonia, Cyprus, Latvia, Lithuania, Hungary, Malta, Poland, Slovenia, and Slovakia
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

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

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
UNWTO	World Tourism Organisation

5.4 Data sources

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://ec.europa.eu/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	Nationaal 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 Estadistica (INE)
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.statec.lu	Service Central de la Statistique et des Etudes Economiques
Hungary	http://www.ksh.hu	Központi Statisztikai 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 (GUS)
Portugal	http://www.ine.pt	Instituto Nacional de Estatistica (INE)
Slovenia	http://www.stat.si	Statistical Office of the Republic of Slovenia
Slovakia	http://www.statistics.sk	Statisticky urad Slovenske republiky (Statistical Office of the Slovak Republic)
Finland	http://www.stat.fi	Tilastokeskus (Statistics Finland)
Sweden	http://www.scb.se	Statistika centralbyran (Statistics Sweden)
United Kingdom	http://www.statistics.gov.uk	Office for National Statistics
Bulgaria	http://www.nsi.bg	National Statistical Institute
Croatia	http://www.dzs.hr	Croatian Bureau of Statistics (CROSTAT)
Romania	http://www.insse.ro	Institutul National de Statistica (National Institute of Statistics)
Turkey	http://www.die.gov.tr	Turkish Statistical Institute
Iceland	http://www.statice.is	Hagstofa Islands (Statistics Iceland)
Liechtenstein	http://www.llv.li/amtsstellen/llv-avw-statistik.htm	Office of Economic Affairs – Bureau of Statistics
Norway	http://www.ssb.no	Statistisk sentralbyra (Statistics Norway)
Switzerland	http://www.statistik.admin.ch	Bundesamt für Statistik

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