

Statistics

in focus

INDUSTRY, TRADE AND SERVICES

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Contents

2
More holidays in the EU2
Intra-European tourism flows: local tourism and the attraction of the major destinations3
Short breaks4
The dominance of the private car5
Holidaymakers prefer private accommodation5
Holiday organisation6



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More holidaymakers and more holidays

Hans-Werner Schmidt

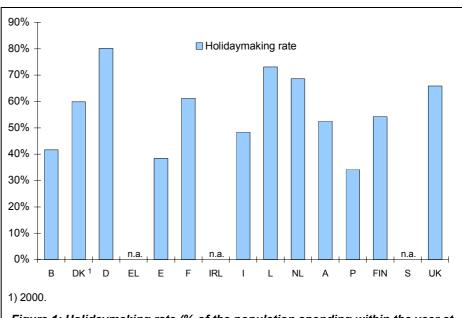


Figure 1: Holidaymaking rate (% of the population spending within the year at least one trip of four nights or more away from the usual residence), 2001

More holidaymakers and more holidays were the dominant trends in European tourism in 2001. The number of European holidaymakers was up by $1.7\%^1$ on the 2000 figure and holidays by $1.8\%^2$.

• Holidaymaking rates varied between 34% and 80%

With slightly more than four out of five people going on holiday in 2001, German residents showed the highest holidaymaking rate in the European Union, while Portugal showed the lowest rate, at slightly more than one trip for every three residents.

Holidays in the EU

The EU was the top destination of holidaymakers in 2001. Holidaymakers from Spain, France, Italy, Portugal and Finland preferred to take their holidays in their own countries. Spain, France and Italy were the leading destinations for European tourists going abroad.

Short stays

In 2001, more than 47%³ of trips lasted for four to seven nights.

¹ Excluding: B, DK, EL, IRL, S

² Excluding: DK, EL, IRL, S

³ Excluding: DK, EL, F, IRL, S

Wide variations in holiday rates

Holidaymaking rates amongst Europeans in 2001 varied widely. German residents recorded the highest EU holiday rates, at 80%, and Portuguese residents the lowest, at 34%. This wide variability in the holidaymaking rates of Europeans is probably influenced to varying degrees by income, culture, climate, country of origin, preferred destination and so forth.

At 2.7, French residents recorded the highest average number of trips per holidaymaker in 2001, and Italian and Portuguese residents the lowest, at 1.5. The fact that some holidaymakers go on holiday more often than others is due in part to the same factors that influence national holidaymaking rates. Moreover, the average length of stay, the length and spread of school vacations and the statutory duration of paid leave also affect the frequency of holidays taken by Europeans.

%	Holidaymakers	rate*	Average number of stays pe	er holidaymaker
	2000	2001	2000	2001
В	40.9	41.6	:	1.6
DK	59.9	:	1.7	:
D	77.9	80.2	2.0	1.9
EL	:	:	:	:
E	37.6	38.5	2.2	2.2
F	61.8	61.2	2.7	2.7
IRL	:	:	:	:
1	46.8	48.4	1.6	1.5
L	74.6	73.1	2.2	2.2
NL	68.8	68.6	1.8	1.8
Α	54.8	52.6	1.6	1.6
P	31.7	34.2	1.4	1.5
FIN	52.4	54.2	2.4	2.6
S	:	:	:	:
UK	67.2	65.9	2.4	2.5

^{*: %} of the population aged over 14 spending at least four nights away from the main residence.

Table 1 : Holidaymaking rates of Europeans and average number of stays per holidaymaker, 2000 and 2001

More holidays in the EU

In 2001, the European Union was the number one destination of European holidaymakers. Table 2 shows that Spanish, French, Italian, Portuguese and Finnish residents preferred domestic holidays, while Belgian, German, Luxembourgish and Dutch residents stayed more often in a different EU Member State than in their own in 2001. Why do some holidaymakers prefer to stay in their country of residence while others prefer to travel abroad? The choice of destination rests on a great many factors, both general and specific to the tourism industry.

General factors such as economic conditions (above all price, exchange rate and cost of living) and political factors (international affairs), the wealth of the cultural heritage and the geographical positions of countries all affect holiday destinations. The diversity of what is on offer to tourists (services, the quality and variety of sites and attractions, accommodation and transport) and marketing of destinations by tour operators may or may not persuade holidaymakers to stay in their own country or to travel abroad.



		2000			2001	
%	Domestic	Other EU countries	Non-EU	Domestic	Other EU countries	Non-EU
В	17.9	60.8	21.3	20.3	60.7	19.0
DK	30.9	47.1	22.0	:	:	:
D	34.0	43.7	22.3	32.9	50.6	16.5
EL	:	:	:	:	:	:
E	89.7	6.1	4.2	91.0	5.2	3.8
F	83.2	7.8	9.0	84.2	7.4	8.4
IRL	39.9	47.8	12.3	:	:	:
I	77.2	12.6	10.2	76.1	14.6	9.3
L	0.4	79.5	20.2	0.4	81.0	18.6
NL	37.0	47.0	16.0	38.1	45.6	16.3
Α	31.8	36.8	31.4	35.1	32.6	32.3
Р	82.0	13.4	4.6	84.2	10.4	5.4
FIN	71.4	17.4	11.2	70.6	16.9	12.5
S	:	:	:	:	:	:
UK	49.6	29.8	20.6	47.2	30.3	22.5

Table 2: Breakdown of holidays by destination, 2000 and 2001

The various elements of the demand side – the purpose of the holiday (leisure, visits to family members or friends) – complete the set of factors explaining holidaymakers' choices of destination.

The most striking change from 2000 was the drop in the number of domestic holidays taken in the United Kingdom. In 1996, 62.1% of holidays taken by British residents were in their own country. By 1999 the figure had fallen to 55%, then to 49.6% in 2000 and finally to 47.2% in 2001.

In 2001, all European holidaymakers except the French favoured other EU Member States for their holidays abroad. Luxembourg residents (81%) once again showed the highest rate of holidaymaking in other EU countries. Austrian (32.3%) and UK (22.5%) residents showed the highest rates of holidays spent outside the EU.

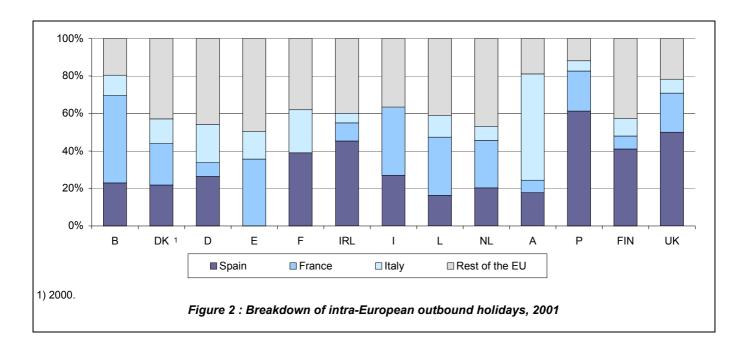
Intra-European tourism flows: local tourism and the attraction of the major destinations

In 2001, intra-European tourism flows showed two major trends: the importance of tourism to neighbouring countries and the continuing attraction of the major tourist destinations of Spain, France and Italy.

Tourism to neighbouring countries represented a significant share of the outbound tourism of the Member States in 2001, often accounting for stays by European holidaymakers, for example: Belgian residents in France, German residents in Austria, Spanish residents in Portugal and Portuguese residents in Spain.

Another feature of outbound tourism was its concentration around a few major destinations — Spain, France and Italy — in 2001. These three countries accounted for between 48% and 86% of holidays abroad taken by EU residents, as shown in Figure 2.





Short breaks

One of the dominant characteristics of European holidays is the significance of short breaks (over 47% of all holidays were short stays). In 2001, stays of 4-7 nights were most frequent for most holidaymakers and accounted for more than half of all holidays taken in 2001 by Austrian, Finnish and UK residents.

German and Belgian holidaymakers were the only ones taking more holidays of 8-14 nights. The length of stay is linked to the main destination of the traveller. Stays of 8-14 nights accounted for at least 30% of all holidays taken by Europeans preferring to travel abroad (Belgian, German, Luxembourgish and Netherlands residents), as shown in Table 3.

%		2000		2001				
	4-7 nights	8-14 nights	15 or more nights	4-7 nights	8-14 nights	15 or more nights		
В	41.4	36.0	22.6	39.0	39.4	21.6		
DK	64.0	25.6	10.4	:	:	:		
D	41.1	42.6	16.3	36.2	48.1	15.7		
EL	:	:	:	:	:	:		
E	48.3	25.9	25.8	47.4	25.5	27.1		
F	53.9	29.6	16.5	:	:	:		
IRL	:	:	:	:	:	:		
1	49.6	28.5	21.9	49.6	28.4	22.0		
L	48.2	33.2	18.4	49.6	33.6	16.8		
NL	44.4	30.5	25.1	44.6	32.9	22.5		
Α	56.2	31.2	12.6	57.2	30.2	12.6		
Р	47.6	31.1	21.3	49.8	27.9	22.3		
FIN	76.1	17.2	6.7	75.6	17.5	6.9		
s	:	:	:	:	:	:		
UK	59.7	31.0	9.3	60.2	30.1	9.7		

Table 3: Breakdown of holidays by duration, 2000 and 2001



⁴ Excluding DK, EL, F, IRL, S.

The dominance of the private car

Transport is a very important variable in holiday organisation, influencing and being influenced by the holidaymaker profile and by the chosen destination. In 2001, the private car was still the dominant mode of transport for all European holidaymakers except the British. Table 4 shows that the private car was used for more than 70% of holidays taken by French, Spanish and Portuguese residents. A common trait amongst holidaymakers from these countries is that they tended to take more domestic than foreign holidays in 2001.

In 2001, UK holidaymakers were the only EU residents to prefer travel by air, the United Kingdom's island status being an obvious choice factor.

The decreasing use of the private car is a growing phenomenon for UK holidaymakers. In 1997, 50.3% of holiday travel was by private car, but only 40.4% in 2001. The fall-off is in favour of air travel, which showed the opposite trend: 33.9% of holidays in 1997 and 44.5% in 2001. Air transport remained popular in 2001 for residents of Belgium, Germany, Luxembourg, the Netherlands, Austria and Finland. All of these except the Finns spent more holidays abroad in 2001compared to 2000.

%	Private v	ehicle	Air		Ra	nil	Coa	ıch	Waterv	vay
	1997	2001	1997	2001	1997	2001	1997	2001	1997	2001
В	:	57.9	:	28.9	:	5.5	:	7.0	:	0.6
DK ¹	42.5	45.0	34.5	35.7	7.8	5.6	10.6	10.3	3.7	3.2
D	55.3	51.9	27.4	29.8	6.5	6.9	9.0	10.7	:	:
EL	55.1	:	6.9	:	2.2	:	13.5	:	22.0	:
E	72.6	70.7	10.8	11.0	4.7	5.5	10.4	10.9	1.2	1.5
F	70.7	72.1	11.3	11.4	12.6	12.7	3.8	2.7	0.8	0.9
IRL	:	:	:	:	:	:	:	:	:	:
I	62.7	63.3	16.1	17.3	10.9	9.7	4.7	4.9	4.6	4.8
L	50.0	47.7	34.9	37.9	6.4	5.3	7.3	5.1	0.7	0.5
NL	:	64.3	:	22.9	:	3.6	:	7.1	:	1.8
Α	:	54.9	:	28.5	:	5.2	:	9.6	:	0.5
Р	64.2	70.5	15.5	14.3	4.8	3.3	13.8	10.0	0.9	1.8
FIN	56.0	53.7	22.6	22.5	9.0	10.7	7.9	7.2	3.6	5.0
S	61.1	:	22.2	:	7.6	:	6.5	:	2.4	:
UK	50.3	40.4	33.9	44.5	4.8	5.9	8.3	6.6	2.0	1.9

^{1) 2000} instead of 2001.

Table 4: Breakdown of holidays by mode of transport used, 1997 and 2001

Holidaymakers prefer private accommodation

The holiday accommodation market is shared between three main groups: hotels and similar, other collective accommodation establishments and private accommodation.

Table 5 shows that, in 2001, private accommodation was favoured by Spanish (68.9% of stays), French (67.5%), Italian (52.7%), Portuguese (73.4%) and Finnish (67.3%) holidaymakers. A common characteristic of this type of holidaymaker is that they

took more domestic than foreign holidays in 2001. The accommodation of European holidaymakers is linked to the type of destination chosen. Private accommodation for Spanish holidaymakers in 2001 was 3 percentage points up on the 2000 figure.

In 2001, German (50.4%), Luxembourgish (50.7%) and Austrian residents (53.2%) stayed most often in hotels and similar establishments, and also spent more holidays abroad than in their own countries.



Hotel and similar accommodation figures were down in 2001 for Spanish residents (by over 5 percentage points) and Portuguese residents (by roughly 2 percentage points).

As in 2000, Netherlands holidaymakers were the only ones who made more use of other types of collective

accommodation in 2001. This group includes holiday homes, camp sites, marinas and youth hostels. We have included specialised establishments to this group. This type of establishment was around 2 percentage points up on its 2000 figures for French and Spanish holidaymakers in 2001.

%	Hotels and similar esta	blishments	Other collective accor	mmodation *	Private accommodation		
	2000	2001	2000	2001	2000	2001	
В	39.8	37.5	20.3	24.1	39.9	38.4	
DK	42.0	:	21.2	:	36.8	:	
D	51.9	50.4	10.5	11.2	37.5	38.4	
EL	:	:	:	:	:	:	
E	25.1	20.1	9.1	11.6	65.2	70.2	
F	18.7	17.4	13.2	15.1	66.1	67.5	
IRL	:	:	:	:	:	:	
I	34.6	35.5	11.4	11.9	54.0	52.7	
L	51.4	50.2	8.4	9.2	39.5	39.5	
NL	26.2	26.7	57.4	56.2	16.4	17.1	
Α	54.1	53.2	19.9	19.5	25.7	27.3	
Р	22.5	20.6	5.3	6.0	72.2	73.4	
FIN	26.1	25.3	9.6	7.4	64.4	67.3	
S	:	:	:	:	:	:	
UK	38.0	38.1	:	:	:	:	

^{*:} including specialised establishments.

Table 5: Breakdown of holidays by accommodation used, 2000 and 2001

Holiday organisation

In 2001, Belgian (62.8%), German (54.6%), French (60.7%) and Austrian (62.1%) holidaymakers tended to organise their holidays by booking directly, as shown in Table 6. The type of transport (the private car) preferred by these groups helps to explain the dominance of direct booking. Italian (+10.5%) and Portuguese (+11.6%)holidaymakers booked substantially more holidays directly in 2001 than in 2000, but Belgian, German, Spanish and Austrian residents made fewer direct bookings. Luxembourg, Netherlands and UK residents tended to book through travel agents, in line with their sustained use of air travel (already shown in Table 4 on page 5). German (+6.3%) Dutch (+7.5%) and Finnish (+8.3%) residents

booked more holidays through travel agents in 2001. With a few exceptions (Spanish, Luxembourgish and Portuguese holidaymakers), the package tour is the main reason for using a travel agent. In 2001 this was true of 92.9% of holidays taken by Belgians, 85.0% by Germans and 84.4% by Austrians, to quote only the highest figures.

The percentage of stays without a specific type of organisation was particularly high (64.4%) for Spanish holidaymakers. This is certainly due to the high rate of domestic holidays, the type of accommodation preferred (private) and a heavy dependence on the private car.



	Direct	Direct booking Travel agent/tour operator		No specified type of organisation		Mode not specified				
%			T	otal	Of wh	ich:				
	2001	2001/2000 variation	2001	2001/2000 variation	Package	Other	2001	2001/2000 variation	2001	2001/2000 variation
В	62.8	-10.6	31.6	-11.6	92.9	7.1	0.0	:	5.7	-5.0
DK 1	54.2	:	45.8	:	67.7	32.3	0.0	:	0.0	:
D	54.6	-1.9	45.4	6.3	85.0	15.0	0.0	:	0.0	:
EL	:	:	:	:	:	43.8	:	:	:	:
E	13.5	-23.0	21.4	-1.5	49.9	50.1	64.4	17.8	1.0	-56.8
F	60.7	:	39.3	:	58.5	41.5	0.0	•	0.0	:
IRL	:	:	:	:	:	:	:	:	:	:
I	34.4	10.5	22.8	-0.7	60.2	39.8	42.4	-8.6	0.4	-22.3
L	31.4	2.3	43.1	-3.2	42.4	57.6	23.4	-3.6	2.1	:
NL	36.9	0.7	39.0	7.5	62.3	37.7	23.4	0.1	0.7	94.8
Α	62.1	-9.1	30.2	-18.7	84.4	15.6	:	:	:	:
Р	44.3	11.6	11.1	-14.9	40.2	59.8	44.6	27.3	0.0	:
FIN	15.9	1.2	23.5	8.3	74.5	25.5	5.6	23.5	54.9	13.7
S	:	:	:	:	:	:	:	:	:	:
UK	25.5	9.4	32.7	-1.2	63.0	37.0	:	:	:	:

1) 2000.

Table 6: Breakdown of holidays by type of organisation, 2001

ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

DEFINITIONS:

Tourism is a subset of travel. TOURISM comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.

The data on tourism demand collected under Directive 95/57/EC cover national tourism, which comprises "domestic tourism" and "outbound tourism":

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

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

Information on tourism demand covers trips motivated primarily by holidays, recreation and leisure purposes and which involve stays of at least four consecutive nights outside the usual place of residence.

Tourist: A visitor who stays at least one night in collective or private accommodation in the place/country visited.

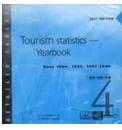
Further details of the definitions can be found in Commission Decision 1999/35/EC of 9 December 1998 (OJ L9, 15 January 1999).

Recent publications:

For a summary of trends in tourism activity in the European Union Member States, the countries of central Europe and the Mediterranean countries, we recommend the following publications:

- Tourism Europe, central European countries, Mediterranean countries for an analysis of recent trends (2000 and 2001 available only in English);
- *Tourism Statistics Yearbook* for data on 1990, 1995 and 1997-2000 (in three languages: French, English, German).







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