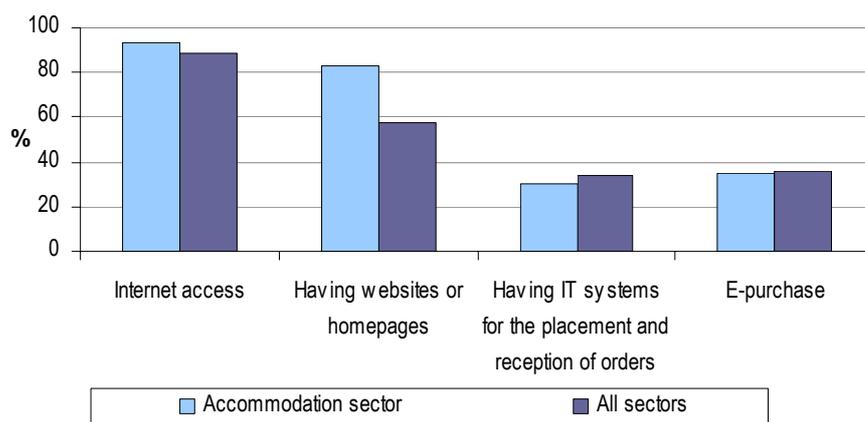


ICT in the tourism sector

Highlights

- Websites or homepages as well as Internet usage are far more widespread in the tourism accommodation sector than in the economy as a whole
- 82% of enterprises in the tourism accommodation sector have a website or a homepage
- 93% of tourism accommodation enterprises are connected to the Internet
- In terms of IT systems for managing the reception or placement of orders and for e-purchase, the tourism accommodation sector lags behind the wider economy
- Market monitoring through the Internet is a very common activity in the tourism accommodation sector
- E-sales are a key characteristic of tourism accommodation e-business
- Use of travel and accommodation services via the Internet by households and individuals increases significantly with the individuals' level of education
- The 25-34 age group are the main users of travel and accommodation e-services

Figure 1: Enterprises using ICT, EU-25, 2004 (%)



Source: Community Survey on ICT usage in enterprises.

Introduction

In the context of the Lisbon strategy, which focuses on improving European competitiveness, it is acknowledged that information and communication technology (ICT) has a profound influence on the potential for economic growth. In the past 30 years, the tourism industry has adopted three major waves of ICT innovations: the Computer Reservation System (CRS) in the '70s, the Global Distribution System (GDS) in the '80s and the Internet from the mid '90s onwards. The e-Economy has thus brought many changes to the structure and to the organisation of tourism markets. A new business profile has emerged, based on increased competition, on new ways of buying and selling and mostly on the opportunity for new means of doing business. Some features of this new business profile of the tourism accommodation sector compared to the wider economy will be illustrated by the following figures.

The implementation of the Lisbon strategy, notably through the "eEurope 2005 Action Plan – an information society for all", encompasses a number of measures designed to facilitate the uptake of ICT for enterprises, to foster the development of e-services and to promote more convenient access to information and communication tools for citizens. This edition of Statistics in Focus introduces some of the main characteristics of ICT usage in the tourism accommodation sector. Data presented in this publication have been collected through the Community survey on ICT usage by households and individuals, and the Community survey on ICT usage by enterprises.

Statistics in focus

INDUSTRY, TRADE AND
SERVICES

POPULATION AND
SOCIAL CONDITIONS

SCIENCE AND
TECHNOLOGY

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Internet access essential for many enterprises

The Internet has become a major tool, and one that is widely used by the tourism accommodation sector. In 2004, 93.2% of accommodation enterprises had access to the Internet compared to 88.9% for the wider economy. The proportion of accommodation enterprises having access to the Internet exceeds that of all sectors in 14 EU countries, among which Slovenia and Finland reported the highest rates in the EU, with 100% of accommodation enterprises using the Internet. Lithuania, with 77.7%, declared the lowest proportion of accommodation enterprises connected to the Internet.

As regards the means used to access the Internet, the eEurope policy promotes the dissemination of broadband technologies which allow more information to be conveyed at a faster speed compared to the traditional dial-up phone connection. However, the adoption of these technologies by the tourism accommodation sector is far from being general, as shown in Table 1. The weak situation of the accommodation sector is illustrated by the fact that more than half of the countries for which comparable data are available have higher shares of broadband connections than in the economy as a whole. Taking the EU-25 average, only 48.3% of tourist accommodation enterprises used broadband technologies compared to 52.1% for the wider economy. Broadband connections accounted for 50% or more of all Internet connections in 11 countries in 2004. The Nordic countries and Spain showed very high rates of broadband connection: Denmark 87.8%, Spain 81.3%, Sweden 76.4% and Finland 74.9%. Slovakia reported the lowest rate of broadband connection in the accommodation sector in the EU, with 13.7%

Table 1: Proportion of enterprises with access to the Internet, 2004 (%)

| (%) | Accommodation sector | | All sectors | |
|-------------------------|----------------------|----------------------|-------------|----------------------|
| | Internet | Broadband connection | Internet | Broadband connection |
| EU-25 | 93.2 | 48.3 | 88.9 | 52.1 |
| Eurozone | 93.5 | 48.4 | 90.3 | 55.9 |
| BE | 96.4 | 73.6 | 96.0 | 69.9 |
| CZ | 93.5 | 35.5 | 90.1 | 38.0 |
| DK | 97.1 | 87.8 | 97.4 | 79.8 |
| DE | 93.5 | 37.3 | 94.1 | 53.6 |
| EE | 88.6 | 69.0 | 90.0 | 67.7 |
| EL | 83.5 | 18.7 | 87.4 | 20.6 |
| ES | 93.0 | 81.3 | 87.4 | 71.6 |
| FR⁽¹⁾ | 82.6 | 32.0 | 82.9 | 49.1 |
| IE | 86.4 | 24.6 | 91.8 | 31.5 |
| IT | 95.3 | 58.2 | 87.4 | 51.3 |
| CY | 90.8 | 40.5 | 82.3 | 35.4 |
| LV | 82.8 | 42.3 | 74.1 | 44.8 |
| LT | 77.7 | 54.4 | 80.7 | 50.1 |
| LU | 80.5 | 46.8 | 89.8 | 48.0 |
| HU | 94.3 | : | 77.5 | : |
| MT | : | : | : | : |
| NL | 95.0 | 52.9 | 88.5 | 53.7 |
| AT | 96.4 | 50.3 | 93.7 | 54.8 |
| PL | 83.2 | 25.8 | 85.0 | 27.8 |
| PT | 95.3 | 57.5 | 77.3 | 48.6 |
| SI | 100.0 | : | 93.1 | 61.8 |
| SK | 84.3 | 13.7 | 71.3 | 24.8 |
| FI | 100.0 | 74.9 | 97.1 | 70.9 |
| SE | 98.2 | 76.4 | 95.9 | 74.7 |
| UK | : | : | 86.6 | 44.1 |
| IS⁽¹⁾ | 100.0 | 15.4 | 97.4 | 19.9 |
| NO | 98.0 | : | 85.5 | 60.3 |
| BG | 73.1 | 29.8 | 61.8 | 28.4 |
| RO | 69.3 | 6.7 | 52.2 | 7.0 |

⁽¹⁾ 2003.

Note: Data for LI, CH, HR and TR are not available.

Source: Community Survey on ICT usage in enterprises.

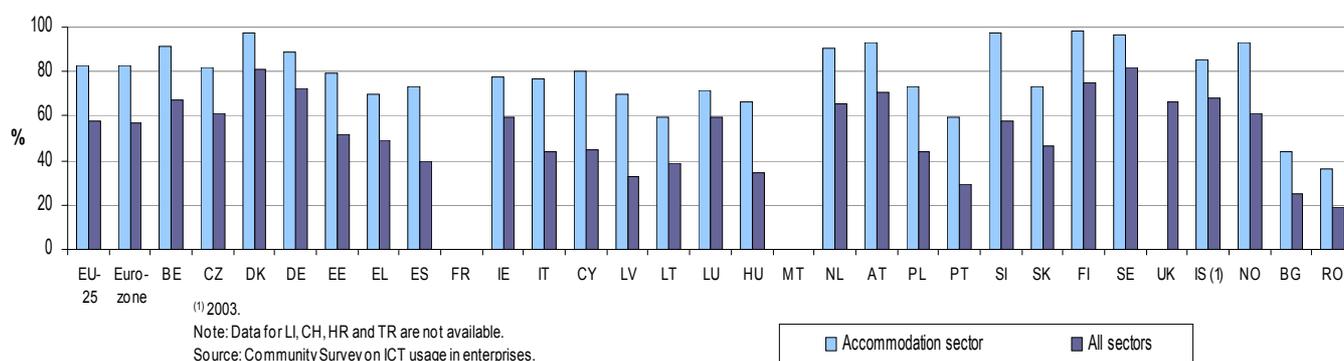
More than 82% of enterprises have a website or a homepage

Websites or homepages are the starting point for e-Business. E-Business leads to changes in the competitive behaviour in the tourism sector by instantly providing detailed information to all potential users and thus easily overcoming distances.

As a consequence, with 82.3% of enterprises having a website or a homepage, the EU-25 average in the

accommodation sector is much higher than the figure for all sectors (57.7%). All countries for which data are available show the same situation. The highest percentages were registered in Finland (98.6%), Denmark (97.1%), Slovenia (97.1%), Sweden (96.5%), Austria (93.5%) and Belgium (91.2%). The lowest percentages were recorded by Lithuania (59.2%) and Portugal (59.4%):

Figure 2: Proportion of enterprises with a website or homepage, 2004 (%)



Less than one third of enterprises have an IT system to manage the reception and placement of orders

IT systems are of different types and have varying levels of sophistication and complexity. They range from simple systems managing the reception and placement of orders to total integration of sales, invoicing, accounting and stock management systems. The level of sophistication adopted is usually determined by the features of the sector (e.g. the kind of goods or services produced, the characteristics of the production chain, the structure of demand, etc.) and by the related investment and maintenance costs. In sectors such as manufacturing, the focus is usually on the supply chain, while in the tourism sector IT systems design is aimed at developing new channels for marketing and sales.

From the data available for EU-25, 30.3% of tourism accommodation enterprises had an IT system to manage the reception and placement of orders in 2004. This figure is below the average for the wider economy (33.8%). It is interesting to note that Estonia, Latvia, Lithuania, Hungary,

Slovakia and Finland are in the opposite situation; there, the proportion of enterprises in the accommodation sector is greater than in the economy as a whole. Finland (66.1%) leads the EU, while Slovenia (10.3%) and Spain (10.4%) declared the lowest shares.

Among the accommodation enterprises with an IT system to manage the reception and placement of orders, 73.2% have designed an invoicing and payment system. This figure is still below the figure of 76.1% recorded in the wider economy. However, in Belgium, Germany, Spain, Cyprus, Latvia, Lithuania, Slovenia and Slovakia the proportion in the accommodation sector is above that for the economy as a whole. Two countries, Slovenia and Slovakia, rank top in the EU with 100% of their tourism accommodation enterprises having this kind of IT system. Ireland had the lowest percentage in the EU with 51.7%.

Table 2: Enterprises with IT systems to manage the reception and placement of orders, 2004 (%)

| (%) | EU-25 | Euro-zone | BE | CZ | DK | DE | EE | EL | ES | FR | IE | IT | CY | LV | LT | LU | HU |
|------------------------------------------------------------------|-------|-----------|------|----|------|------|------|------|------|----|------|------|------|------|------|------|------|
| Enterprises with IT systems | | | | | | | | | | | | | | | | | |
| Accommodation sector | 30.3 | 30.5 | 22.3 | : | : | 34.1 | 45.7 | 25.7 | 10.4 | : | 29.6 | 31.8 | 26.7 | 30.3 | 25.2 | 32.5 | 49.3 |
| All sectors | 33.8 | 39.9 | 55.3 | : | 40.1 | 47.4 | 30.9 | 39.1 | 13.5 | : | 40.4 | 38.7 | 34.8 | 15.9 | 20.8 | 42.2 | 35.4 |
| Of which Enterprises with Invoicing & payment systems | | | | | | | | | | | | | | | | | |
| Accommodation sector | 73.2 | 75.1 | 82.5 | : | : | 72.7 | 79.6 | 68.4 | 96.1 | : | 51.7 | 87.8 | 96.2 | 94.9 | 84.6 | 56.0 | : |
| All sectors | 76.1 | 80.0 | 78.0 | : | 76.9 | 71.6 | 78.7 | 87.1 | 86.3 | : | 59.7 | 93.1 | 92.8 | 81.5 | 77.8 | 68.1 | 3.8 |

| (%) | MT | NL | AT | PL | PT | SI | SK | FI | SE | UK | IS | NO | BG | RO |
|------------------------------------------------------------------|----|------|------|------|------|-------|-------|------|------|------|----------------------|------|------|------|
| Enterprises with IT systems | | | | | | | | | | | | | | |
| Accommodation sector | : | 53.0 | 30.3 | 19.8 | 28.6 | 10.3 | 32.6 | 66.1 | 23.3 | : | 23.1 ⁽¹⁾ | 42.8 | 4.3 | 66.7 |
| All sectors | : | 64.2 | 41.0 | 20.1 | 35.3 | 24.2 | 22.6 | 65.4 | 29.3 | 14.6 | : | 35.1 | 6.6 | 57.0 |
| Of which Enterprises with Invoicing & payment systems | | | | | | | | | | | | | | |
| Accommodation sector | : | 79.1 | 55.6 | 61.0 | 65.9 | 100.0 | 100.0 | 79.5 | 54.5 | : | 100.0 ⁽¹⁾ | 43.3 | 61.5 | 65.9 |
| All sectors | : | 85.0 | 67.2 | 70.6 | 90.5 | 74.0 | 86.9 | 87.2 | 75.8 | 54.6 | : | 72.1 | 69.7 | 82.0 |

⁽¹⁾ 2003.

Note: Data for LI, CH, HR and TR are not available.

Source: Community Survey on ICT usage in enterprises.

Market monitoring: A prominent feature of the tourism e-business

In tourism, the customers largely drive the market. The Internet has become an essential channel of communication and transaction for this industry. The Internet is used in the pre-sale stage (for providing and obtaining information) as well as to order online (e.g. booking hotel rooms).

Market monitoring is a very important feature of the tourism e-business. Market monitoring via the Internet in all countries (except France) for which data are available was carried out by a larger proportion of enterprises in the accommodation sector than in the wider economy. However, the difference in percentage points ranged from 0.2 in Greece to 27.6 in Lithuania. The highest percentages were reported by Hungary (85.1%), Czech Republic (85.3%, 2003 data), Cyprus (81.9%) and Lithuania (80.0%), while Italy (with 45%) declared the lowest (2003 data).

The tourism industry is still in the early stages of its supply chain integration. This is likely to change owing to the increasing weight of the different intermediaries, such as tour operators or online intermediaries, which may raise the level of Business to Business activity. But this process will certainly not reach the level of integration attained in sectors such as manufacturing, where the cost-saving potential is greater. A low level of e-purchase is thus another feature of the tourism e-business, as can be seen in Table 3. As far as the enterprises with access to the Internet in the EU25 are concerned, 34.7% of accommodation enterprises made online purchases in 2004 compared to 35.5% in the wider economy. In 13 out of 21 reporting countries, e-purchasing is used more in the economy as a whole than in the tourism accommodation sector. By far the highest proportion of enterprises making purchases via the Internet was recorded in Sweden (73.9%) and Finland (73.8%), followed some way behind

by Austria (53.0%), Ireland (51.3%) and Germany (49.7%). These countries were the only ones which declared that at least half of the enterprises in the accommodation sector that used the Internet were buying goods and services via the Internet. Slovenia (6.0%), Poland (6.0%) and Latvia (5.2%) reported the lowest ratios of all EU-countries for which data are available.

The importance of e-sales is a prominent feature of tourism e-business. Regarding enterprises with access to the Internet, those in the tourism accommodation business show much higher percentages of e-sales compared to enterprises from the wider

economy in all reporting countries. The sales figures in all countries are on average three times higher for the accommodation sector. In the Euro-zone, for instance, 44.1% of tourism accommodation enterprises with access to the Internet sold services through the Internet in 2004 compared to 12.7% for all sectors. The highest percentages of enterprises using e-sales were recorded in Denmark (81.4%), Ireland (72.4%), Finland (66.6%), the Netherlands (63.9%), Sweden (59.3%) and Austria (50.9%). The EU countries reporting the lowest proportion were Latvia (8.7%) and Poland (10.0%)

Table 3: Enterprises with access to the Internet: Proportion using the Internet for their market activities by type of operation, 2004 (%)

| (%) | EU-25 | Euro-zone | BE | CZ | DK | DE | EE | EL | ES | FR | IE | IT | CY | LV | LT | LU | HU |
|--------------------------|-------|---------------------|------|---------------------|------|------|------|------|------|---------------------|---------------------|---------------------|------|------|------|------|------|
| Market monitoring | | | | | | | | | | | | | | | | | |
| Accommodation sector | : | 56.1 ⁽¹⁾ | 65.6 | 85.3 ⁽¹⁾ | : | 66.9 | : | 59.6 | 61.8 | 47.0 ⁽¹⁾ | 54.5 | 45.3 ⁽¹⁾ | 81.9 | 70.7 | 80.0 | 64.5 | 85.1 |
| All sectors | : | 46.2 ⁽¹⁾ | 56.9 | 83.4 ⁽¹⁾ | 37.5 | 64.6 | : | 59.4 | 43.1 | 55.4 ⁽¹⁾ | 35.2 | 27.3 ⁽¹⁾ | 70.0 | 62.7 | 52.4 | 40.7 | 72.5 |
| Purchase | | | | | | | | | | | | | | | | | |
| Accommodation sector | 34.7 | 35.2 | 47.2 | 31.1 | : | 49.7 | 33.8 | 17.3 | 7.9 | : | 51.3 | 15.0 | 26.0 | 5.2 | 26.3 | 41.9 | 6.1 |
| All sectors | 35.5 | 34.1 | 40.4 | 34.7 | 59.3 | 53.8 | 34.4 | 15.3 | 10.2 | : | 52.6 | 16.9 | 32.4 | 9.0 | 16.0 | 36.6 | 17.9 |
| Sales | | | | | | | | | | | | | | | | | |
| Accommodation sector | : | 44.1 | 42.9 | 42.4 | 81.4 | 47.0 | 31.8 | 43.3 | 17.3 | : | 72.4 | 27.0 ⁽¹⁾ | 45.8 | 8.7 | 32.5 | 37.1 | 14.9 |
| All sectors | 12.5 | 12.7 | 15.4 | 14.6 | 27.3 | 17.3 | 9.7 | 6.1 | 1.9 | 0.0 | 30.6 | 9.5 ⁽¹⁾ | 8.6 | 1.7 | 6.0 | 12.1 | 7.4 |
| (%) | MT | NL | AT | PL | PT | SI | SK | FI | SE | UK | IS | NO | BG | RO | | | |
| Market monitoring | | | | | | | | | | | | | | | | | |
| Accommodation sector | : | 79.0 | 61.7 | 57.2 | 73.0 | : | 69.1 | : | 62.2 | : | 53.9 ⁽¹⁾ | 48.8 | 67.3 | 58.8 | | | |
| All sectors | : | 75.3 | 49.3 | 51.4 | 43.3 | : | 67.7 | : | 48.1 | : | 59.6 ⁽¹⁾ | 40.4 | 61.6 | : | | | |
| Purchase | | | | | | | | | | | | | | | | | |
| Accommodation sector | : | 38.7 | 53.0 | 6.0 | 8.7 | 6.0 | 16.9 | 73.8 | 73.9 | : | : | 52.4 | 2.7 | 4.3 | | | |
| All sectors | : | 32.4 | 40.9 | 11.4 | 20.8 | 27.4 | 22.9 | 72.9 | 71.3 | 48.5 | : | 55.3 | 11.8 | 3.7 | | | |
| Sales | | | | | | | | | | | | | | | | | |
| Accommodation sector | : | 63.9 | 50.9 | 10.0 | 46.0 | : | 66.6 | 59.3 | : | : | 46.2 ⁽¹⁾ | 66.2 | 5.8 | 15.5 | | | |
| All sectors | 0.0 | 21.1 | 15.5 | 4.4 | 7.8 | 11.5 | 9.1 | 19.9 | 20.2 | 13.4 | 6.1 ⁽¹⁾ | 23.4 | 4.4 | 4.2 | | | |

⁽¹⁾ 2003.

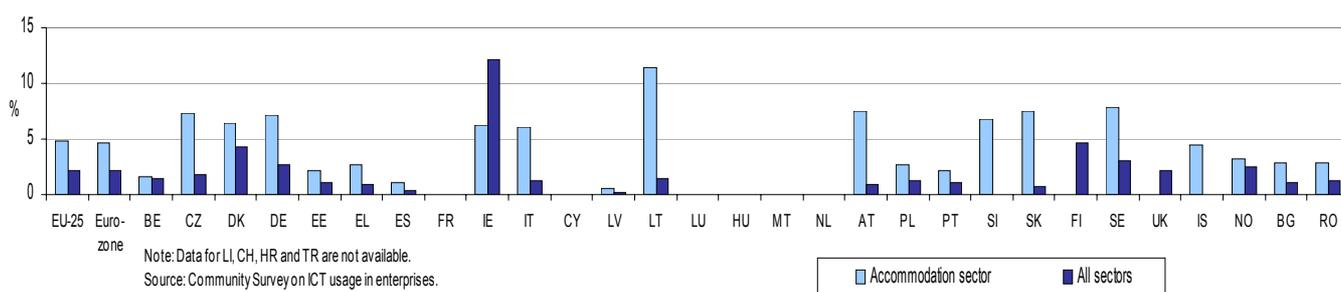
Note: Data for LI, CH, HR and TR are not available.

Source: Community Survey on ICT usage in enterprises.

As a direct consequence of the importance of e-sales in tourism e-business, the percentage of Internet sales as a share of total turnover of this sector exceeds that of the wider economy. Nevertheless, the share of e-sales in total turnover has still to develop. The real impact of Internet in sales is far from being totally reflected by e-sale figures, since the pre-sale stage is not taken into consideration. In 2004, the percentage of e-sales in total turnover of tourism accommodation enterprises for the EU-25 reached 4.8%

compared to 2.1% for the wider economy. Except for Ireland, the figures recorded by the accommodation sector exceed those declared for all sectors in all reporting countries. In Italy, Lithuania, Austria and Slovakia, the figures for the accommodation sector are at least five times those registered by the wider economy, while Lithuania (11.5%), Slovakia (7.5%) and Sweden (7.8%) declared the highest proportion of Internet sales in the EU. By contrast, Spain (1.2%) and Latvia (0.6%) showed the lowest proportion.

Figure 3: Internet sales as a percentage of total turnover, excluding VAT, 2003 (%)



Note: Data for LI, CH, HR and TR are not available.
Source: Community Survey on ICT usage in enterprises.

Travel and accommodation services attract 23% of Internet users

Internet users have been put at the heart of the eEurope action plans. An approach has been developed to provide citizens with more convenient access to information and e-services. Promoting new ways to buy and sell leads to further customisation of products and services and is an essential component of the new business model generated by the e-economy.

Regarding the tourism industry, some of the new e-services such as those offered by online intermediaries, tour operators or an individual enterprise through its website are very important for travel and accommodation. These new services can be used by households or individuals either to order

online or at least to meet their need for information (pre-order stage). The following information comes from the Community ICT survey on households and individuals.

As illustrated in table 4, in 2004 nearly half (49.3%) of the EU population used the Internet (for all types of reasons) in the 12 months prior to the survey, 23.2% used the Internet for tourism (travel and accommodation) purposes during the last three months prior to the survey. The UK (42.8%), Luxembourg (42.9%) and Finland (42.3%) declared the highest percentages of persons using the Internet for travel and accommodation in 2004. Lithuania (5.2%) reported the lowest percentage in the same period.

Table 4: Percentage of persons who used the Internet for travel and accommodation services compared to all Internet users, 2004 (%)

| (%) | EU-25 | Euro-zone | BE | CZ | DK | DE | EE | EL | ES | FR | IE | IT | CY | LV | LT | LU | HU |
|--------------------------------------------------------------|-------|-----------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| For travel and accommodation (over the last 3 months) | 23.2 | : | : | 10.9 | 32.4 | 31.6 | : | 10.3 | 9.8 | : | 17.9 | : | 11.4 | 9.4 | 5.2 | 43.0 | 11.8 |
| All Internet users (over the last 12 months) | 49.3 | 48.0 | : | 35.5 | 80.9 | 64.7 | 53.2 | 21.4 | 44.0 | : | 37.0 | 33.2 | 33.8 | 38.6 | 31.2 | 65.9 | 29.1 |
| (%) | MT | NL | AT | PL | PT | SI | SK | FI | SE | UK | IS | NO | BG | RO | | | |
| For travel and accommodation (over the last 3 months) | : | : | 14.5 | 7.5 | 9.1 | 16.0 | 15.9 | 42.3 | 28.6 | 42.8 | 51.1 | 39.9 | 2.4 | 0.9 | | | |
| All Internet users (over the last 12 months) | : | : | 54.3 | 32.5 | 31.8 | 40.8 | 52.9 | 72.4 | 83.9 | 65.6 | 83.9 | 77.7 | 18.1 | 14.5 | | | |

Note: Data for LI, CH, HR and TR are not available.

Source: Community Survey on ICT usage in households.

The proportion of Internet users increases with the level of education

The use of e-services seems to correlate closely to the level of education. The use of the Internet becomes proportionally greater as the level of education attained increases: from 26.8% for those with a low level of education to 79.5% for those with the highest level.

This general trend is also observed and reinforced among Internet users who used the Internet for travel and accommodation services. The rates ranged from 8.3% for those with a low level of education to 43.5% for the highest level. Nevertheless, the percentages for travel and accommodation services declared by Internet users with a low level of education seem to be particularly small. This is the case, in particular, for

the new Member States and for Mediterranean countries. In Greece, for instance, the proportion of well educated persons having used the Internet for travel and accommodation services is 17 times that of those with a low level of education. Finland (24.1%) recorded the highest percentage of persons with a low level of education using the Internet for travel and accommodation. Luxembourg (51.8%) and the UK (67.6%) reported the highest percentages respectively for persons with medium and high levels of education. Lithuania declared the lowest rates of Internet usage in the EU for all three levels of education: 1.3% for the low level, 3.7% for the medium level and 9.7% for the tertiary level.

Table 5: Percentage of persons by level of education who used the Internet for travel and accommodation services compared to all Internet users, 2004 (%)

| (%) | EU-25 | Euro-zone | BE | CZ | DK | DE | EE | EL | ES | FR | IE | IT | CY | LV | LT | LU | HU |
|--------------------------------------------------------------|-------|-----------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| For travel and accommodation (over the last 3 months) | | | | | | | | | | | | | | | | | |
| Low | 8.3 | : | : | 3.3 | 21.2 | 19.0 | : | 1.6 | 1.8 | : | 4.6 | : | 2.4 | 2.7 | 1.3 | 18.6 | 2.6 |
| Medium | 25.7 | : | : | 10.1 | 33.4 | 32.1 | : | 14.2 | 13.9 | : | 19.6 | : | 9.1 | 7.3 | 3.7 | 51.8 | 20.9 |
| High | 43.5 | : | : | 33.0 | 46.0 | 48.0 | : | 27.2 | 23.8 | : | 40.1 | : | 28.0 | 25.6 | 9.7 | 66.7 | 39.7 |
| All internet users (over the last 12 months) | | | | | | | | | | | | | | | | | |
| Low | 26.8 | 25.2 | : | 26.2 | 69.7 | 0.0 | 45.2 | 4.3 | 18.6 | : | 19.0 | 13.7 | 14.1 | 23.2 | 28.6 | 42.0 | 13.5 |
| Medium | 56.2 | 60.7 | : | 32.5 | 81.6 | 65.0 | 48.2 | 30.5 | 67.1 | : | 42.1 | 54.2 | 32.5 | 35.4 | 22.6 | 75.7 | 47.2 |
| High | 79.5 | 77.6 | : | 77.6 | 94.3 | 78.7 | 70.5 | 51.7 | 80.7 | : | 62.9 | 73.3 | 64.5 | 69.2 | 40.9 | 87.8 | 69.7 |
| (%) | MT | NL | AT | PL | PT | SI | SK | FI | SE | UK | IS | NO | BG | RO | | | |
| For travel and accommodation (over the last 3 months) | | | | | | | | | | | | | | | | | |
| Low | : | : | 4.2 | 3.3 | 2.9 | : | 3.9 | 24.1 | 13.3 | 12.9 | 40.2 | 18.2 | 0.5 | : | | | |
| Medium | : | : | 15.5 | 5.6 | 24.7 | 14.7 | 17.6 | 43.5 | 27.0 | 46.4 | 52.2 | 36.5 | 1.6 | : | | | |
| High | : | : | 28.9 | 28.1 | 34.8 | 50.7 | 36.0 | 63.2 | 41.9 | 67.6 | 69.8 | 58.5 | 7.7 | : | | | |
| All internet users (over the last 12 months) | | | | | | | | | | | | | | | | | |
| Low | : | : | 34.4 | 30.3 | 16.6 | 19.5 | 27.0 | 55.9 | 71.9 | 30.7 | 76.3 | 47.0 | 7.6 | : | | | |
| Medium | : | : | 57.0 | 26.4 | 76.3 | 40.5 | 58.9 | 74.3 | 82.0 | 72.8 | 85.5 | 77.7 | 16.0 | 12.4 | | | |
| High | : | : | 79.3 | 72.5 | 87.2 | 88.3 | 82.5 | 90.3 | 95.2 | 88.1 | 96.7 | 92.3 | 41.0 | 54.3 | | | |

Note: Data for LI, CH, HR and TR are not available.

Source: Community Survey on ICT usage in households.

25-34 age group among the biggest users of travel and accommodation e-services

Broken down by age groups, the figures for Internet users show a relatively homogeneous picture among the reporting countries. Younger people are avid Internet users, with the percentage of 16-24 year olds using the Internet showing the highest rates in all the EU reporting countries. However, the

figures recorded for the use of travel and accommodation services present a more contrasting picture. In 15 out of 20 reporting countries, the 25-34 age group recorded the highest percentages.

Table 6: Percentage of persons by age who used the Internet for travel and accommodation services compared to all Internet users, 2004 (%)

| (%) | For travel and accommodation (over the last 3 months) | | | | | | All internet users (over the last 12 months) | | | | | |
|----------|----------------------------------------------------------|-------|-------|-------|-------|-------|-------------------------------------------------|-------|-------|-------|-------|-------|
| | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65-74 | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65-74 |
| EU-25 | 25.9 | 32.4 | 28.9 | 23.0 | 15.4 | 6.7 | 78.5 | 65.0 | 56.6 | 45.0 | 28.0 | 10.8 |
| Eurozone | : | : | : | : | : | : | 77.6 | 65.2 | 56.9 | 44.8 | 25.3 | 9.8 |
| BE | : | : | : | : | : | : | : | : | : | : | : | : |
| CZ | 15.4 | 15.7 | 15.1 | 11.4 | 6.3 | 0.8 | 71.2 | 46.3 | 43.3 | 32.6 | 16.2 | 2.0 |
| DK | 28.0 | 35.1 | 39.0 | 37.2 | 32.4 | 10.9 | 96.4 | 92.7 | 89.6 | 82.8 | 70.3 | 36.4 |
| DE | 35.6 | 48.7 | 38.0 | 33.6 | 20.0 | 10.0 | : | : | 79.0 | 65.7 | : | : |
| EE | : | : | : | : | : | : | 84.1 | 68.6 | 62.3 | 44.1 | 28.3 | 11.6 |
| EL | 19.7 | 15.5 | 13.6 | 6.5 | 1.2 | 0.8 | 44.9 | 30.8 | 27.1 | 12.4 | 3.0 | 1.2 |
| ES | 13.3 | 15.5 | 12.1 | 7.9 | 3.1 | 0.7 | 81.6 | 62.9 | 47.5 | 32.9 | 15.1 | 3.5 |
| FR | : | : | : | : | : | : | : | : | : | : | : | : |
| IE | 15.7 | 26.1 | 24.2 | 17.0 | 9.6 | 1.8 | 48.9 | 47.3 | 43.5 | 31.5 | 17.0 | 6.3 |
| IT | : | : | : | : | : | : | 61.4 | 48.8 | 39.0 | 29.2 | 13.2 | 3.2 |
| CY | 13.9 | 20.1 | 13.4 | 7.5 | 3.9 | 2.3 | 67.4 | 48.1 | 33.1 | 19.5 | 10.2 | 4.2 |
| LV | 14.8 | 17.8 | 11.1 | 6.6 | 1.6 | 0.5 | 78.3 | 55.6 | 40.8 | 27.9 | 11.0 | 1.9 |
| LT | 7.7 | 8.0 | 6.4 | 3.9 | 2.0 | 0.6 | 75.3 | 38.1 | 28.0 | 19.9 | 8.3 | 2.1 |
| LU | 35.0 | 51.9 | 55.2 | 49.1 | 36.3 | 8.4 | 89.0 | 75.7 | 75.3 | 68.4 | 48.9 | 15.3 |
| HU | 24.4 | 17.5 | 11.2 | 9.7 | : | : | 69.7 | 37.7 | 27.9 | 21.2 | 9.2 | 1.9 |
| MT | : | : | : | : | : | : | : | : | : | : | : | : |
| NL | : | : | : | : | : | : | : | : | : | : | : | : |
| AT | 12.2 | 21.6 | 20.3 | 14.1 | 8.0 | 3.3 | 81.2 | 75.6 | 62.0 | 49.4 | 28.9 | 10.3 |
| PL | 11.3 | 13.5 | 7.0 | 5.3 | 3.8 | 1.1 | 71.7 | 42.5 | 26.4 | 20.9 | 12.7 | 3.1 |
| PT | 13.1 | 17.1 | 10.2 | 6.3 | 2.5 | 0.0 | 68.7 | 45.8 | 31.5 | 22.4 | 0.0 | 0.0 |
| SI | 23.9 | 30.2 | 15.0 | 0.0 | 0.0 | 0.0 | 79.5 | 63.2 | 41.1 | 32.1 | 0.0 | 0.0 |
| SK | 20.6 | 21.0 | 21.3 | 15.3 | 4.0 | 0.7 | 79.5 | 63.9 | 59.0 | 53.3 | 17.3 | 6.3 |
| FI | 44.6 | 58.1 | 57.9 | 43.0 | 31.9 | 7.4 | 97.5 | 95.6 | 86.8 | 71.3 | 55.3 | 13.5 |
| SE | 21.9 | 35.2 | 33.5 | 31.5 | 24.0 | 21.5 | 98.9 | 95.4 | 91.5 | 85.5 | 72.4 | 0.0 |
| UK | 46.9 | 56.2 | 51.4 | 44.9 | 31.0 | 13.8 | 86.4 | 83.1 | 73.0 | 66.7 | 45.2 | 23.8 |
| IS | 54.4 | 55.8 | 59.0 | 50.6 | 41.2 | 22.0 | 97.8 | 94.9 | 89.7 | 82.9 | 63.1 | 33.7 |
| NO | 48.6 | 48.7 | 46.6 | 43.3 | 27.5 | 10.0 | 98.4 | 92.1 | 88.6 | 80.7 | 57.9 | 22.2 |
| BG | 4.9 | 4.6 | 1.9 | 1.8 | 0.4 | 0.1 | 44.4 | 27.1 | 17.1 | 11.9 | 3.7 | 0.9 |
| RO | 1.1 | 1.4 | 1.2 | 0.6 | 0.4 | 0.1 | 33.2 | 18.0 | 13.7 | 9.9 | 3.4 | 0.6 |

Note: Data for LI, CH, HR and TR are not available.

Source: Community Survey on ICT usage in households.

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

BE (Belgium), CZ (Czech Republic), DK (Denmark), DE (Germany), EE (Estonia), EL (Greece), ES (Spain), FR (France), IE (Ireland), IT (Italy), CY (Cyprus), LV (Latvia), LT (Lithuania), LU (Luxembourg), HU (Hungary), MT (Malta), NL (Netherlands), AT (Austria), PL (Poland), PT (Portugal), SI (Slovenia), SK (Slovakia), FI (Finland), SE (Sweden), UK (United Kingdom), IS (Iceland), LI (Liechtenstein), NO (Norway), CH (Switzerland), (BG) Bulgaria, HR (Croatia), RO (Romania), TR (Turkey)

Symbols:

“.” Data not available or confidential

Data sources:

Survey on ICT usage in enterprises and households 2004

Community survey on ICT usage in enterprises:

Survey period: First quarter 2005

Reference period: Year 2004 for the percentages of sales/orders data and /or the year 2003.

Weighting of results: Results in this edition have been weighted by the number of enterprises

Aggregation of results: An EU-25 is computed when 60% of the population and 55% of the countries are available, both in EU-15 and new Member States.

No estimations are made.

Activity coverage

- **Tourism accommodation sector:** This includes NaceRev.1 55.1 Hotels and similar establishments and 55.2 Camping sites and other provision of short-stay accommodation.
- **The wider economy (all sectors of the economy):** Covers 7 categories of NACE Rev. 1.: Section D (manufacturing), section F (construction), section G (distributive trade), section H (hotels and restaurants but only NACE 55.1 and 55.2), section I (transport, storage and communication), section K (real estate, renting and business activities) and section O (motion picture, video, radio and television activities but only NACE 92.1 and 92.2)

Size coverage: Enterprises with 10 or more persons employed.

For a full overview of the NACE classification, please refer to RAMON, Eurostat's classification server:

<http://www.europa.eu.int/comm/eurostat/ramon>

Community survey on ICT usage in households and by individuals

Sampling units: Households and individuals

Survey period: April/May 2004

Reference period: Three months prior to the survey for the persons who used the Internet for travel and accommodation services. Twelve months prior to the survey for the persons who used the Internet for all types of motivation.

Lower age limit for survey of individuals: 16 years

Upper age limit for survey of individuals: 74 years

Weighting of results: results have been weighted by the number of households and the number of individuals

Aggregation of results: An EU-25 aggregate is computed when 60% of the population and 55% of the countries are available, both in EU-15 and in the new Member States.

Educational attainment levels: The International Standard Classification of Education (ISCED), as revised in 1997, is the reference of educational attainment levels. Education is divided into seven main levels that have been grouped into three levels for the purpose of this survey:

- Low: defined as ISCED levels 1 and 2, primary, and lower secondary education. These two levels normally represent compulsory education;
- Medium: defined as ISCED levels 3 and 4, upper secondary and post-secondary non-tertiary education. This level generally starts at the end of compulsory education;
- High: defined as ISCED levels 5 and 6, first stage and second stage of tertiary education.

Definitions

IT system: Information technology system for internal use.

Internet sales over total turnover: Total Internet sales included sales <1% of turnover and sales >=1% of turnover. Only sales >= 1% have been considered for BE, BG, DK, EL, ES, LT, NO, FI, PT, RO, SE, SI and SK.

Broadband: A service or connection allowing a considerable amount of information to be conveyed, such as television pictures, generally defined as a bandwidth greater than 2Mbps.

Business to Business: Commerce conducted between businesses over an Intranet, Extranet or Internet. This trade may be conducted between a business and its supply chain as well as between a business and other business end-consumer. It may be conducted directly between buyer and seller or through a third party known as an online intermediary.

Date of data extraction: 5th September 2005

This publication has been produced in collaboration with Mathieu Mballa (comments) and Christiane Gengler (tables, figures and layout).

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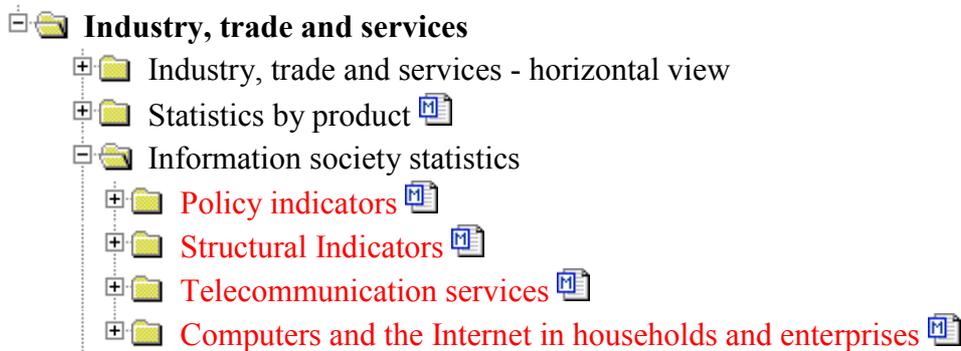
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